

# Powered Mobile Equipment Policy



Incidents involving forklifts and other powered mobile equipment (PME) are a leading cause of workplace fatalities and injuries, workers comp claims and OHS penalties. OHS laws require employers to ensure that PME is safely designed, operated, inspected and maintained so as not to endanger workers or others at the work site. Here's a template PME safety policy that you can adapt for your own use depending on the kind of equipment you use and the OHS laws of your jurisdiction.

## 1. PURPOSE

ABC Company has adopted this Policy ensure that power mobile equipment (PME) operators are fully trained and qualified to safely operate mobile equipment to reduce the possibility of personal injury or property damage in accordance with [province name] Occupational Health and Safety Regulations ('OHS Regulations'), the Occupational Health and Safety Act ('Act'), the ABC Company Occupational Health and Safety Program ('OHS Program'), and other applicable requirements and standards.

## 2. DEFINITIONS

For purposes of this Policy:

- **'Competent'** when used to refer to a person, means the person is adequately qualified, suitably trained, and sufficiently experienced to perform work without supervision or a minimal degree of supervision;
- **'Powered mobile equipment' (PME)** means a self-propelled machine or combination of machines, including a prime mover or a vehicle, used to: (a) manipulate or move material; (b) move workers; or (c) provide a powered aerial device for workers, including but not limited to forklifts, industrial lift trucks, tractors, motor graders, prime movers, skidders, tracked dozers or loaders, backhoes, and wheeled dozers or loaders—PME **does not** include a commercial passenger vehicle, all-terrain vehicle, motor assisted cycle, scooter, minibike, skateboard or other miniature vehicle or a machine operated on a fixed pedestal or on rails or fixed tracks as in a runway;
- **'Reasonably practicable'** means a standard used to determine whether a

specific safety measure, device, mechanism or structure is appropriate and viable for use by ABC Company to control a specific hazard at its workplace applied by ABC Company management on a case-by-case basis and which involves determination of: i. 'Reasonableness,' an evaluation that weighs factors such as degree of risk to workers, nature of the hazard, length and frequency of exposure, number of workers exposed, and severity of consequences the hazard can result in; and ii. 'Practicability,' an evaluation of whether a particular method of controlling the hazard is technologically feasible, affordable, cost-effective for the particular hazard, suited to the circumstances of the workplace, or otherwise viable. To be deemed not 'reasonably practicable,' a measure, device, mechanism or structure must be more than simply inconvenient or costly but impossible to adopt or adoptable only by investing time, energy, money, and other resources that are disproportionate to the safety benefits the measure, device, mechanism or structure would provide;

- **'Rollover protective structure' (ROPS)** means a structure designed to reduce the possibility of injury to an operator of powered mobile equipment in the event of a rollover or upset of the equipment.

### **3. POLICY STATEMENT**

Operations at ABC Company work sites that require workers to operate PME expose workers to health and safety hazards. Management recognizes these hazards and has adopted this Policy to ensure that they are properly identified, assessed, and controlled.

### **4. WORKERS THIS POLICY IS INTENDED TO PROTECT**

The intent of this Policy is to ensure that all workers engaged to work at ABC Company work sites who engage in or affected by operations involving the use of PME are properly protected regardless of who pays or employs those workers, including:

- Full- or part-time workers employed by ABC Company;
- Temporary employees placed by an outside agency to work at the site;
- Contract labourers engaged to perform work at the site;
- Volunteers who work at the site for free; and
- Workers employed by constructors, contractors, and subcontractors to perform work at the site under a contract with ABC Company.

### **5. ROLES & RESPONSIBILITIES**

#### **5.1. Employer**

Owners, corporate officers and directors, upper managers, and other representatives of ABC Company who may be defined as an 'employer' under the Act are responsible for overall implementation of this Policy, including:

- Providing where reasonably practicable, appropriate equipment for lifting, lowering, pushing, pulling, carrying, handling or transporting heavy or

awkward loads;

- Ensuring proper selection of PME based on the tasks to be performed;
- Ensuring PME is properly equipped and fitted with ROPS and other required safety devices and features;
- If used equipment is purchased, ensuring it is maintained and meets manufacturer's specifications before it is put into operation.

## **5.2. Safety Coordinator**

The ABC Company safety coordinator, facility manager, or other designated individual(s) in charge of safety at the workplace will:

- Review this Policy at least annually and in response to changes to the Act and corresponding regulations;
- Obtain proof of training certificate from workers involved in the task;
- Review hazard assessment(s) and ensure necessary controls are in place to prevent workers from being harmed by PME;
- Audit that pre-shift inspections are being conducted prior to use and that records are maintained of all inspections;
- Maintain documentation regarding training, equipment maintenance and repairs.

## **5.3. Supervisors**

Supervisors and project leads will:

- Conduct a hazard assessment to ensure that necessary controls are in place to prevent workers from being harmed by PME;
- Ensure that manufacturer's specifications, including forklift operation manuals and maintenance manuals are followed and available to workers;
- Ensure that equipment is maintained as per the manufacturer's specifications;
- Schedule training for worker who may be required to operate PME at ABC Company work sites;
- Ensure that operators of PME are competent and operate vehicles in a safe and responsible manner and take appropriate action if they do not;
- Confirm that pre-shift inspections are being conducted before use and that records are maintained of all inspections;
- Follow up on complaints of unsafe operation of PME.

## **5.4. Workers**

Workers are required to:

- Comply with this Policy;
- Attend and pass an accredited forklift or PME training program before operating the equipment;
- Provide proof of training on demand;
- Operate the PME safely;
- Maintain full control of the PME at all times;
- Use the seat belts, restraining devices and other safety equipment in the PME;
- Report to the supervisor of any conditions affecting the safe operation of the PME;
- Immediately report any incident or property damage that may occur while

operating PME;

- Keep the cab, floor and deck of PME free of materials, tools or other objects that could interfere with the operation of the controls or create a tripping or other hazard to the operator or other occupants of the equipment;
- Conduct a daily pre-shift inspection prior to use of any PME; and
- Conduct a pre-job hazard assessment before performing the task involving use of PME.

## **6. PME HAZARD ASSESSMENT**

ABC Company will ensure that a competent person performs an appropriate hazard assessment of operations involving the use of PME in accordance with the requirements of OHS law and the OHS Program. Copies of all pertinent hazard assessments will be kept on the site and also be available electronically. Hazard assessment will include, without limitation, an assessment of the risks of PME experiencing a rollover while it's being operated by an on-board operator based on the following factors:

- The stability of the PME to be used for the operation, taking into account its design, configuration and any attachments or towed components;
- The PME's rear torque;
- The condition of the PME's suspension system and tires;
- Whether the area in which the PME will be operated contains significant rollover hazards, such as grades exceeding 10% (6°), operating areas with open edges, open ramps, load docks, ditches, uneven or irregular surfaces or other similar hazards that have the potential to cause a rollover;
- The nature and weight of the load to be moved;
- The width of the track;
- The potential presence of wind, rain, snow, ice or other weather conditions that may increase rollover risk; and
- The nature of the activities to be performed using the PME.

## **7. FITTING OF PME WITH ROPS**

### **7.1. PME Requiring a ROPS**

No worker will be required or permitted to use PME unless and until it's fitted with an appropriate ROPS in accordance with this Section. PME will be fitted with a ROPS if either:

- The rollover risk assessment carried out in accordance with Section 6 determines that the PME poses a high risk of rollover; or
- The OHS regulations of *[list your province]* lists the particular type of PME as being automatically required to be fitted with a ROPS and no exception applies, which includes *[use if you're in Alberta]* the following kinds of PME weighing 700 kilograms (1,500 pounds) or more: (a) tracked (crawler) or wheeled bulldozers, loaders, tractors or skidders, other than those operating with side booms; (b) back hoes with a limited horizontal swing of 180 degrees; (c) motor graders; (d) self-propelled wheeled scrapers; (e) industrial, agricultural and horticultural tractors, including ride on lawnmowers; (f) wheeled trenchers; and (g) other PME

where a hazard assessment identifies rollover as a potential hazard.

## **7.2. ROPS Equipment Standards**

Where PME requires a ROPS, ABC Company will get written certification from the manufacturer or a professional engineer that the ROPS meets or exceeds the standards for the particular kind of ROPS required by the OHS Regulations and that the PME to which the ROPS is fitted is equipped with all seat belts and restraining devices required for that particular kind of PME fitted with that particular kind of ROPS.

## **7.3. ROPS Repairs & Modifications**

Any modifications, alterations and repairs to a ROPS must be certified by the equipment manufacturer, or a professional engineer as meeting the requirements of the OHS Regulations for that particular ROPS for use with that kind of PME before the ROPS is redeployed and restored to service. The following information must be permanently and legibly displayed on a ROPS that has been repaired, altered or modified:

- The modifications, alterations or repairs made;
- The date of recertification; and
- The name and address of the manufacturer or engineer that recertified the modifications, alterations or repairs.

# **8. PRE-OPERATION INSPECTION & MAINTENANCE**

## **8.1. Visual Inspection**

Before operating PME, the operator must complete a visual inspection of the equipment and the surrounding area to ensure that the PME is in safe operating condition and that no worker, including the operator, is endangered when the equipment is started up. If operators discover any concerns, they must immediately notify their supervisor, who will ensure that repairs are completed.

## **8.2. Periodic Maintenance**

Periodic maintenance on PME must be performed by a competent operator, and follow the requirements in the operator's manual.

## **8.3. Function Test for Genie Scissor Lift**

A function test must be performed after repairs are completed and prior to each use. The operator must follow the step-by-step instructions to test all machine functions in the operator's manual.

## **8.4. Tagging & Removal**

Any conditions that could affect the safe operation of the PME must be identified on the inspection checklist and the PME must be removed from service and tagged 'out of service' using a lockout tag, until the proper repairs or concerns are addressed.

## **8.5. Records**

Records of the inspection and maintenance performed on PME must be kept at the work site. These records must be available to the equipment operator so that the operator is aware of the equipment's condition.

## **9. GENERAL EQUIPMENT REQUIREMENTS**

Nameplates and markings on PME must be in place and maintained in a legible condition. Modifications and additions that affect capacity and safe operation without the manufacturer's prior written approval or the approval of a professional engineer are prohibited. Capacity, operation, and maintenance instructions, plates, tags or decals must be modified accordingly.

## **10. UNATTENDED EQUIPMENT**

PME can pose a serious risk of injury to workers and damage to property if it is not properly secured against unexpected movement. Unexpected movement could be caused by any number of factors such as sloping ground, changes in air or hydraulic pressure, slippery ground conditions, equipment parked incorrectly, etc.

Accordingly, operators must not leave the controls of PME unattended unless the equipment is secured against unintentional movement by an effective method of immobilizing the equipment. An example of immobilizing the equipment includes engaging any movement safety device and placing the transmission in 'Park' position. Where necessary, the wheels of the PME should be blocked with wheel chocks.

Operators must not leave the controls of PME unattended unless a suspended or elevated part of the powered mobile equipment is either landed, secured in a safe position, or both.

## **11. PEDESTRIAN TRAFFIC**

The PME operator is responsible for the safety of other workers in the vicinity of the PME. The operator must slow down when taking corners or backing up the PME to avoid running into pedestrians. Workers in the vicinity of PME must be aware of the equipment's path of travel and avoid contact with the PME at all times.

## **12. BATTERY CHARGING & HANDLING**

PME should only be charged at its designated area. The forklift charging area is in [list location]. The scissor lift charging area is in [list location]. When operators encounter a battery problem or a leak, maintenance personnel must be notified and a work request must be submitted.

## **PROPANE TANK CHANGING & HANDLING**

Gloves must be worn at all times when connecting or disconnecting the gas line to a propane tank. Liquefied propane is extremely cold and frostbite may occur if it comes in contact with skin.

Before disconnecting the gas line to a propane tank, personnel must:

- Shut off the forklift/PME truck engine; and then
- Close the service valve using only slight hand pressure and never overtighten as it may damage the valve.

Disconnecting the gas line from the tank will be done by turning the fitting counter clockwise.

The tank retaining straps and swing straps must be released away from tank.

The empty tank must be exchanged with the full tank in the store with personnel being sure to:

- Always place the tank in an upright position in the vehicle and secure the tank;
- Ensure the valve is closed;
- Refrain from smoking while transporting propane tanks;
- Never leave the propane tank in vehicle unattended.

Connecting the gas line to the tank will be done by lining up the gas line fitting with the service valve outlet and turning clockwise. Hand tightens only.

After having connected the gas line to the tank, the service valve shall be slowly turned to the fully on position.

Leak tests must be performed on the connection. Leak test can be done by applying soap and water on the connection; bubbles will appear on where there is leak. If there is a leak, the service valve must be closed immediately and the connection checked. If the connection is okay, a work request for gas line fitting repair must be made to the maintenance department. The faulty tank must be clearly identified as needing repair.

If the PME will not be used for a certain length of time, (e.g.: over a weekend, overnight etc.), the service valve of the tank must be closed.

## **14. TRAINING**

### **14.1. Competency Training Required to Operate PME**

ABC Company will ensure that workers who are assigned to operate PME are competent and qualified to do so. All workers who are authorized to operate PME must attend and pass an accredited training program. To establish a worker's competency, the worker must:

13. • Be informed of the hazards associated with operating PME in the particular workplace, including the hazards associated with the load, the design of

- the workplace, and the environmental conditions;
- Know how to protect themselves and others from the hazards;
- Demonstrate to a designated skilled and experienced person that the skills and knowledge identified as final outcomes for operator competency have been learned.

#### **14.2. Trainer Requirements**

PME operator training may be conducted by a certified external trainer or delivered in house by an adequately qualified trainer who is current on legislation and any changes to the equipment or the environment.

#### **14.3. Refresher Training**

Refresher PME operator training must be given to operators when:

- The operator is observed operating the PME in an unsafe manner;
- The operator is involved in an incident, including a near miss;
- The operator receives an evaluation that indicates they have operated the PME unsafely;
- The operator is assigned a different type or class of forklift or other type of PME;
- Environmental conditions which may affect the safe operation of the forklift or PME change, e.g., introduction of a flammable environment, physical changes to the workplace, addition of other pieces of mobile equipment, etc.

#### **14.4. Training Records**

All PME training must be documented and maintained in such a manner that records are current and readily accessible.

### **15. CONSTRUCTORS, CONTRACTORS & SUBCONTRACTORS**

When constructors, contractors, or subcontractors are hired to work at an ABC Company work site, before the work begins ABC Company will:

- Notify the constructors, contractors, and subcontractors of the PME hazards posed to their workers;
- Notify those constructors, contractors, and subcontractors about this Policy and the other safety measures in place at the work site to ensure safe operation of the PME;
- Require those constructors, contractors, and subcontractors to comply with this Policy and cooperate with all safety measures.

Constructors, prime contractors and contractors in control of work at an ABC Company site in which PME operations are to be performed will be required to ensure that workers involved in such work are protected from hazards by either:

- Directly applying this Policy and assuming all of the employer obligations this Policy assigns to ABC Company; or
- Establishing and implementing an equivalent policy that meets all regulatory requirements, is suitable for the PME used, and which is coordinated with and provides at least the same level of protection as this



Policy.

## **16. EVALUATION**

This Policy will be reviewed, in consultation with the workplace Joint Health and Safety Committee, Health and Safety Representative, or, where no Committee or Representative exists, directly with workers at the site, at least once a year and more frequently in response to changes and developments affecting workers' health and safety.