

PTW Safety Checklist **No. 22**

OPERATION OF FORKLIFTS, TELE-HANDLERS, POWER OPERATED ELEVATING WORK PLATFORMS (EWPs), JLGs OR EXCAVATORS

| | | |
|--|------------------------|--------------------|
| Other Checklists that may be relevant: | | 57 |
| Permit Number: | | Date: |
| Rev 4.6 | Issue Date: 21/06/2025 | Authorised By: PSM |

NOTE:

- 1 Checklist 24 and 88 not required if using this checklist for equipment listed above.
- 2 Checklist 24 would still be required for any vehicle not included in list.

PRIOR TO PERMIT ISSUE:

| | Y | N | N/A |
|--|--------------------------|--------------------------|--------------------------|
| 3 A plan of work has been provided which includes the location of barriers, safety equipment, warning signs? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 Inspect area where equipment is to be used to ensure suitable ground conditions are present for the intended weight and movement. | <input type="checkbox"/> | | |
| 5 Appoint a competent person to observe (who must be capable of operating the machinery from the ground) and spot for any machine operation within 2 metres of process pipework or equipment. Name: _____ | <input type="checkbox"/> | | <input type="checkbox"/> |
| 6 Radio communication required between machine operator and competent person if machine platform is greater than 3 metres above ground level. | <input type="checkbox"/> | | <input type="checkbox"/> |
| 7 All vehicle movements onsite require a competent person to be conducting gas testing in front of the moving vehicle and recorded in the associated permit. | <input type="checkbox"/> | | |

PREPARATION:

| | | | |
|---|--------------------------|--|--------------------------|
| 8 Vehicle is in sound condition and has current WOF/COF or test certificate | <input type="checkbox"/> | | |
| 9 Check that vehicle can lift the planned load within 90% of its rated capacity | <input type="checkbox"/> | | |
| 10 Ensure vehicle has a fully functioning fire extinguisher fitted. | <input type="checkbox"/> | | |
| 11 Wearing of harness connected to a certified e anchor point is mandatory for all lift type cages such as cherry pickers and scissor lifts. | <input type="checkbox"/> | | <input type="checkbox"/> |
| 12 Four-wheel drive elevated work platforms (e.g.: JLG) shall not be driven with the boom up or with more than one person in the work platform. | <input type="checkbox"/> | | <input type="checkbox"/> |
| 13 Machine must not be left unattended whilst the engine is running. | <input type="checkbox"/> | | |
| 14 Tools and other equipment shall have a lanyard attached. | <input type="checkbox"/> | | <input type="checkbox"/> |
| 15 Drop zone established and barricaded off or actively managed by observer. | <input type="checkbox"/> | | <input type="checkbox"/> |

16 Forklift driver has completed training within the last 3 years and has been authorised to drive a Forklift on this plant in CMS.

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Y N N/A

17 Lifting Equipment Daily Checklist (Page 4) has been completed prior to use of the equipment.

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18 Operators of this equipment must hold the required competencies as listed below:

| Position/Role | Required Competencies and Qualifications (Unit Standards) | Competency held by: |
|---------------------------------|---|---------------------|
| Access Platform Operator | <p>Must have passed an access platform operator training course from an approved training facility appropriate for the equipment to be used and must hold the following NZQA Unit Standard:</p> <ul style="list-style-type: none"> 23966 – Describe types of elevating work platforms (EWP's), and legislative requirements for their use. <p>AND</p> <p>Must hold <u>at least one</u> of the following NZQA Unit Standards as appropriate to the equipment being operated:</p> <ul style="list-style-type: none"> 23960 – Assess the worksite, prepare, and operate a scissor lift elevating work platform (EWP) 23961 - Assess the worksite, prepare, and operate a truck mounted elevating work platform (EWP) 23962 - Assess the worksite, prepare, and operate a self-propelled boom lift elevating work platform (EWP) 23963 - Assess the worksite, prepare, and operate a trailer mounted elevating work platform (EWP) 23964 - Assess the worksite, prepare, and operate a vertical lift elevating work platform (EWP) <p>AND</p> <p>All people wearing fall protection shall hold or be supervised by a person holding <u>at least one of the below</u> NZQA unit standards.</p> <ul style="list-style-type: none"> 15757 - Use, install and disestablish temporary proprietary height safety systems when working at height 23229 - Use safety harness system when working at height 25045 - Employ height safety equipment in the workplace <p>OR a NZ Scaffolding Qualification.</p> | |
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| Forklift or Telehandler Operator | <p>Must have passed a forklift or telehandler operator training course appropriate for the equipment to be used.</p> <p>AND</p> <p>Must hold <u>at least one of</u> the following Nationally recognised competencies:</p> <ul style="list-style-type: none"> • WorkSafe Forklift Operator Certificate (Safe use of) • 10851 – Operate a powered industrial lift truck fitted with forks (forklift) or OSH forklift certificate • 10852 - Operate a powered industrial lift truck (PILT) fitted with attachments on a worksite • 18409 – Use a forklift mounted safety platform in the workplace (if used for personnel lifting) • 23637 – Operate a telehandler <p>ADDITIONALLY: if the equipment is to be operated on a NZ public roadway, then –</p> <p>US18496 – Demonstrate knowledge and skills for driving a forklift on a public road / Holding a 'F' driver's license endorsement is required.</p> | |
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| Excavator Operator | <p>Must currently hold the appropriate class of Heavy Vehicle Driver License for the type of machine being operated. IE Rollers, Tracks or Wheels endorsed.</p> <p>Must be competent in the operation of the excavator and fully understand both its capabilities and limitations.</p> | |

19 Operator must complete Lifting Equipment Checks below daily:

- Extend to second checklist at bottom as required for max of 10 issues of permit

This routine Daily Check covers all powered lifting equipment except Cranes operated at Todd Energysites.

Instructions for daily Lifting Equipment Checklist

Daily checks should comprise of the operator walking around the machine looking for possible damage, fluid leaks and loose and broken fittings. The engine cover should be lifted to check operating fluid levels and the general condition of radiator etc. When in the machine the operator should, with the key on, check all warning lights, start the engine, check dash lights again and the gauges are working. Ensure anybrakes, steering and transmission controls are working correctly.

Please sign and date these checks before starting the job with the machine. If the machine is not required for today's work, mark the appropriate day with a 'Not required today' note.

| Mark Boxes accordingly | | Tick ✓ = Good | | X = Needs attention | | N/A = Not applicable | | N/R Not required today | |
|--|---|---------------|---|---------------------|------|----------------------|---|---------------------------|--|
| Machine ID | | | | | Site | | | | |
| Daily Safety Checks (Enter Date Done →) | / | / | / | / | / | / | / | Maintenance Needed | |
| Emergency Stop & Brakes | | | | | | | | | |
| Operation steering, Levers & Controls | | | | | | | | | |
| Foot Controls (if applicable) brakes, park brake, accelerator. | | | | | | | | | |
| Transmission /direction controls | | | | | | | | | |
| Safety Signs & Load Charts/SWL | | | | | | | | | |
| Hydraulic Hoses- No damage/leaks | | | | | | | | | |
| Boom & Forks (Condition/Controls) Vert. Mast Sliding & Rolling Parts /Pivot Points | | | | | | | | | |
| Base Condition (Visual) | | | | | | | | | |
| No Broken, Cracked or Loose Parts | | | | | | | | | |
| Lights / Mirrors | | | | | | | | | |
| Seat Belt & Its Mounts | | | | | | | | | |
| Tyre Condition and/or pressure | | | | | | | | | |
| Back Up Alarm, Horn & Lights | | | | | | | | | |
| Engine Compartment (Visual) | | | | | | | | | |
| Oil Levels | | | | | | | | | |
| Fuel Level / Battery Charge | | | | | | | | | |
| Coolant level | | | | | | | | | |
| Brake fluid level (if applicable) | | | | | | | | | |
| Fire extinguisher in good condition and pressure in green zone. | | | | | | | | | |
| Operator's Signature Here → | | | | | | | | | |
| Any Issues or Comments | | | | | | | | | |

20 Use this copy of checklist as extension for additional issues

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Mark boxes accordingly

Tick ✓ = Good

X = Needs attention

N/A = Not applicable

N/R Not required today

Machine ID

Site

| Daily Safety Checks (Enter Date Done →) | / | / | / | / | / | / | / | Maintenance Needed |
|--|----------|----------|----------|----------|----------|----------|----------|---------------------------|
| Emergency Stop & Brakes | | | | | | | | |
| Operation steering, Levers & Controls | | | | | | | | |
| Foot Controls (if applicable) brakes, park brake, accelerator. | | | | | | | | |
| Transmission /direction controls | | | | | | | | |
| Safety Signs & Load Charts/SWL | | | | | | | | |
| Hydraulic Hoses- No damage/leaks | | | | | | | | |
| Boom & Forks (Condition/Controls) Vert. Mast Sliding & Rolling Parts /Pivot Points | | | | | | | | |
| Base Condition (Visual) | | | | | | | | |
| No Broken, Cracked or Loose Parts | | | | | | | | |
| Lights /Mirrors | | | | | | | | |
| Seat Belt & Its Mounts | | | | | | | | |
| Tyre Condition and/or pressure | | | | | | | | |
| Back Up Alarm, Horn & Lights | | | | | | | | |
| Engine Compartment (Visual) | | | | | | | | |
| Oil Levels | | | | | | | | |
| Fuel Level / Battery Charge | | | | | | | | |
| Coolant level | | | | | | | | |
| Brake fluid level (if applicable) | | | | | | | | |
| Fire extinguisher in good condition and pressure in green zone. | | | | | | | | |
| Operator's Signature Here → | | | | | | | | |
| Any Issues or Comments | | | | | | | | |