

Workplace Transport Safety Pack

Implementation guide — read this first · PHW Services

This pack gives a yard everything it needs to show that vehicle movements are being managed properly: the risk assessment, the traffic plan, the safe working procedures, the training matrix and the records. It is written for haulage yards, warehouses, manufacturing sites and small engineering works where lorries come in, things get loaded and unloaded, and people walk about.

Scope and limitations — read before use

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1. Why this matters

Fact	Source
24 workers were killed after being struck by a moving vehicle in 2025/26 — the second highest cause of work-related death in Great Britain, behind falls from height.	HSE fatal injury statistics 2025/26 (provisional, published July 2026)
A business turning over under £2 million faces a £250,000 starting point for a serious health and safety offence, in a range of £150,000 to £450,000. Fines are set from turnover bands, so being a small firm is not protection.	Sentencing Council definitive guideline, in force since 2016
In nearly every prosecution the pattern is identical: a vehicle reversing or manoeuvring, a person on foot in the same space, and no plan, no marshal and no records.	HSE published prosecutions

Having something in place, properly written down and actually followed, is what separates a manageable incident from a prosecution. An inspector's first question after an accident is always the same: show me your risk assessment, your safe system of work, and your training records.

2. What is in the pack

Ref	Document	What you do with it
WTS-00	Implementation guide	This document. The order of work.
WTS-02	Workplace transport risk assessment	Complete it for your site. The foundation everything else rests on.
WTS-03	Site traffic management plan	Draw your yard, set the routes and rules, issue it.

WTS-04	Safe loading and unloading procedure	Adopt and brief. Covers the highest-risk task.
WTS-05	Vehicle marshal (banksman) procedure	Adopt, train your marshals, record it.
WTS-06	Visiting driver site rules	Hand to every driver who arrives. Get the signature.
WTS-07	Training matrix and competence records	The living record of who may operate what.
WTS-08	Yard inspection and monitoring	Weekly and quarterly checks so it does not decay.
WTS-09	Toolbox talks	Six short briefings, one per topic, with attendance sheets.
WTS-10	Forms pack	Every blank form in one place for printing.

3. The order of work — about a week of effort spread over a month

Step	Do this	Document	Who	Time
1	Walk the yard with fresh eyes at the busiest time of day. Photograph everything. Watch where people actually walk, not where you think they walk.	WTS-02	Owner or manager	2 hrs
2	Complete the risk assessment honestly. If a control is not there, write that it is not there.	WTS-02	Owner or manager	2 hrs
3	Sketch the yard and set routes, one-way flow, pedestrian walkways, loading areas and reversing controls.	WTS-03	Owner or manager	2 hrs
4	Order and put up the signage and floor markings from your plan.	WTS-03 schedule	Whoever does maintenance	1 day + lead time
5	Adopt the loading, marshalling and visiting driver procedures. Change the wording to match how your site actually works.	WTS-04, 05, 06	Owner or manager	2 hrs
6	Build the training matrix. List every person and every machine. Be honest about the gaps.	WTS-07	Owner or manager	1 hr
7	Close the training gaps. Get people properly trained on what they operate, then authorise them in writing.	WTS-07	Training provider	varies
8	Brief everybody using the toolbox talks. Get the attendance sheets signed.	WTS-09	Supervisor	30 min each

9	Start the weekly and quarterly inspections and keep doing them.	WTS-08	Supervisor	15 min weekly
10	Diary a review date. Review after any incident, any change of layout, and at least annually.	WTS-02	Owner or manager	annual

4. The three-stage rule that catches most people out

A training certificate on its own does not make somebody competent to operate on your site. HSE's approved code of practice for lift trucks (L117) sets out three stages, and the employer must complete the last two:

Stage	What it is	Whose job
1. Basic training	Off-the-job training and testing on the machine type, by a competent instructor. This produces the certificate.	Training provider
2. Specific job training	Your machine, your attachments, your site layout, your tasks, your risk assessments.	YOU, the employer
3. Familiarisation	Supervised operation under normal working conditions until they are fluent.	YOU, the employer
Then: written authorisation	You formally authorise the named person, for the named machines and tasks. Competence is only complete here.	YOU, the employer

Most yards have stage 1 and nothing else. That gap is exactly what an inspector finds. WTS-07 gives you the forms for stages 2, 3 and the authorisation.

5. Keeping it alive

A pack in a drawer is worth nothing. Three things keep it real:

- The weekly walk round (WTS-08). Five minutes. Are the markings still visible, is the walkway clear, are people using it.
- The training matrix (WTS-07). Authorisations and refreshers expire. Diary them.
- Review after every near miss. A near miss is free information about the accident you have not had yet.

Reportable incidents. Some injuries and dangerous occurrences must be reported to HSE under RIDDOR 2013 — including any injury where a worker is unable to do their normal work for more than seven consecutive days, specified injuries such as fractures other than to fingers or toes, and certain dangerous occurrences involving vehicles and lifting equipment. Check the current RIDDOR guidance on the HSE website, because the categories matter and get misjudged.