

Forms Pack

Every blank form in one place · print what you need

Scope and limitations — read before use

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Form 1 — Forklift / plant pre-use check

Field	Entry
Machine make, model, fleet number	
Operator name	
Date	
Hours / odometer	

#	Check	OK	Defect	#	Check	OK	Defect
1	Tyres and wheels			11	Horn		
2	Forks and carriage			12	Lights and beacon		
3	Mast, chains and rollers			13	Reversing alarm		
4	Hydraulics — leaks or damage			14	Mirrors clean and adjusted		
5	Hoses and rams			15	Seat and seat restraint		
6	Engine oil and coolant			16	Glass and visibility		
7	Fuel or battery charge			17	Data plate and capacity chart present		
8	Brakes — service and park			18	Attachment secure (if fitted)		

WORKPLACE TRANSPORT SAFETY

9	Steering			19	Guards in place		
10	Warning lamps and gauges			20	General condition and cleanliness		

Defects found (describe)	Reported to	Machine taken out of use? Y/ N	Operator signature

A machine with a defect affecting safety must be taken out of use immediately and not returned to service until repaired by a competent person.

Form 2 — Permit to load / unload (higher risk operations)

Use for unusual, heavy, awkward or high-consequence operations, not routine deliveries.

Field	Entry
Date and time	
Vehicle and registration	
Load description and approximate weight	
Machine to be used	
Operator (authorised? Y/N)	
Marshal (if required)	
Exclusion zone established	
Vehicle movement control in place	
Chocks applied / trailer brake	
Overhead hazards checked	
Specific hazards identified	
Additional controls	

Authorised by	Operation complete — signed	Date and time

Form 3 — Contractor and agency operator declaration

For agency or contractor staff who will operate a machine on your site. You must satisfy yourself of their competence — the duty does not transfer to the agency.

Field	Entry
Name	
Agency or employer	
Machines they claim to be competent on	
Certificates seen? (type, provider, date, ref)	
Copies taken? Y/N	
Specific job training given on our machines and site (date)	
Familiarisation completed (date)	
Authorised to operate here? Y/N	
Limits or exclusions	

Operator signature	Authorised by	Date

Form 4 — Yard change record

Any change to the layout, storage, traffic flow or machine fleet means the risk assessment and traffic plan need looking at again. Log it here so it does not get missed.

Date	What changed	Who authorised it	Risk assessment reviewed (date)	Traffic plan updated (date)	People re-briefed (date)

Form 5 — Annual compliance summary

A one-page summary of what you have in place. Useful for insurers, principal contractors and pre-qualification questionnaires.

Item	In place	Date	Reference
Workplace transport risk assessment			
Site traffic management plan and drawing			
Safe loading and unloading procedure			
Vehicle marshal procedure and trained marshals			
Visiting driver site rules and acknowledgement records			
Training matrix current			
All operators hold basic training certificates			
All operators have specific job training recorded			
All operators have written authorisation			
Refresher tracker current, nothing overdue			
Pre-use checks being recorded			
Thorough examination in date for all lifting equipment			
Weekly walk rounds being completed			
Quarterly reviews being completed			
Accident and near miss records maintained			
Toolbox talks delivered in the last 12 months			

Completed by	Position	Signature	Date