Practical assessment guide: Pedestrian-Operated Forklift (POF)

This practical assessment guide is based on the Approved Code of Practice for Training Operators and Instructors of Powered Industrial Lift Trucks (ACOP). The ACOP is a set of best practices for how forklift operators should use powered lift trucks. It establishes some guidelines about training delivery, topics to be covered and practical requirements. While the ACOP does not specifically include pedestrian operated forklifts (POFs), much of the code is applicable.

PRINT THIS DOCUMENT AND KEEP IT WITH YOUR RECORDS FOR AT LEAST 3 YEARS

Operator’s name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Capacity | KG | Load Centre | Height |  |
| Forklift make | Type of Load: |

# Options for practical assessment

The practical assessment takes around 10 minutes. You will need a functioning POF, pallets, cones and enough space to conduct the assessment. If assessing an operator on a POF with high reach masts, you will also need some racks. You can add or delete items to make this as relevant as possible for what your operators do in the workplace.

## 1: External assessor

This is one option for assessing your POF operator as the assessor can make additional suggestions. However, it is optional. The assessor will issue a certificate to accompany the certificate you get for this course.

## 2: Internal suggestion following the practical assessment guidelines below

## If you have a suitably experienced POF operator or manager in your company, they may be able to conduct the practical assessment by following the instructions below. It is strongly advised that any internal company assessor has also completed all the modules in this course and therefore understands safe POF operation.

# Instructions for using this practical assessment guide

1. Print out the checklist – one copy for each operator you are assessing.
2. Outline to the operator (or group) what is required in the practical assessment before they start each checklist task. If it helps, allow them to read the checklist and ask any questions first.
3. Follow each operator’s progress marking the checklist at they go with a pass or fail.
4. If a person fails a task, ask them to repeat it to your satisfaction. If you consider they are not yet competent or unsuitable due to attitude, you should fail their practical assessment and advise the employer they need further training with an accredited training provider.

# How to conduct the practical assessment internally

## General reasons for failure

|  |  |
| --- | --- |
| **Error** | **Pass/fail** |
| Fails to look before and when travelling |  |
| Excessive manoeuvring |  |
| Loses or damages load |  |
| Contact with rack or other obstacles |  |
| Uses body to stop |  |

The operator completes all the following (relevant to your specific POF make and model) using a paper checklist or a pre-start app on a mobile device.

## Pre-start check

|  |  |
| --- | --- |
| **Pre-start check - Manual POF** | **Pass/fail or N/A** |
| Forks - no cracks and damage. Located in place with the correct working width set. Test raising, lowering and tilting of forks, if applicable |  |
| Safety signs - warning labels, the data plate, and weight limit are in good condition and legible |  |
| Steering and brakes - handle snaps back to vertical when pulled down and released. No binding or looseness in the steering arm |  |
| Brake works when the steering arm is raised and lowered |  |
| Wheels (both sets) – no cracks or damage. Wheels turn freely when the POF is moved. Free from packing binding |  |
| Hydraulic controls – good lift operation to the maximum positions. No leaks. Chains and cables aren’t loose, frayed or damaged (if applicable) |  |
| **Pre-start check - Electric POF – key off** | **Pass/fail or N/A** |
| Forks - no cracks and damage. Located in place with the correct working width set |  |
| Safety signs - warning labels, nameplate, data plate, are in good condition and legible |  |
| Brake works when the steering arm is raised and lowered |  |
| Wheels - no cracks or damage. Wheels turn freely when the POF is moved. Free from packing binding |  |
| Hydraulic controls – good lift operation to the maximum positions. No leaks. Chains and cables aren’t loose, frayed or damaged (if applicable) |  |
| Battery disconnect switch - battery can be disconnected and reconnected. No connector damage |  |
| Battery plates - in place and secured |  |
| Battery charge - battery indicator is working; battery is properly charged and in good condition |  |

|  |  |
| --- | --- |
| **Pre-start check - Electric POF - Key on** | **Pass/fail or N/A** |
| Horn – works when tested |  |
| Forks - raising, lowering and tilting working |  |
| Lights & alarms - working properly |  |
| Travel controls - speed controls on the control head operate in all speed ranges in forward and reverse and all switches function |  |
| Power or emergency disconnect – working properly |  |
| Safety reversing mechanism - operating correctly |  |

## Operating the POF

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Adopts the best operating position - close enough for control but not too close to risk running into your feet or legs |  |
| Moves by pushing manual POF or walking beside electric POF |  |
| Steers correctly using smooth non-jerky movements |  |
| Checks for hazards, clearance, load swing |  |

## Picking up a pallet

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Inspects the pallet for loose or rotting sections. Ensures pallet is strong enough to safely support the load |  |
| Checks load security |  |
| Comes to a complete stop before lining up the forks with the pallet |  |
| Enters the pallet slightly diagonally so both rollers don’t hit the pallet at the same time |  |
| Straightens up and moves forward to see if the forks will fit underneath the pallet. Checks that the rollers are not on the cross wood of the pallet. Adjusts the forks if necessary |  |
| Positions the forks under the centre of the pallet for good balance and stability |  |
| Lifts the load off the floor |  |
| Moves off keeping the load low to the floor for a low centre of gravity and best stability |  |
| Stops completely before lowering the load |  |
| Checks behind before pulling the POF away from the pallet |  |

During this check, modes for failure include:

|  |  |
| --- | --- |
| **Error** | **Pass/fail** |
| Poor alignment of load on original pallet pick-up position |  |
| Drops load too heavily |  |
| ‘Forks’ pallet on withdrawal |  |
| Scrapes pallet on ground |  |

## Chicane

Set up a figure-8 with cones or other objects. The operator should travel both forwards and backwards through this chicane while carrying a load. The operator must:

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Places the forks at the correct height relevant to the machine |  |
| Check behind in their blind spots before reversing |  |
| Negotiates chicane smoothly without hitting any cones or walls |  |

This next part is only relevant on a masted, high-reaching POF

## Stacking and de-stacking

Ideally the practical assessment should be done in a conventional warehouse with racking. If this is not possible, other options are acceptable if they cover these 3 requirements and follow the stacking a de-stacking steps listed:

1. Low lift – ground level pick up and move pallet or article.
2. Medium lift – pick up and placement to truck tray height.
3. High lift – lift to a mezzanine deck or place the pallet or article on top of a shipping container or high shelf or similar in a workshop or storage area.

## Stacking

When arriving at a stack to place a load operator demonstrates these steps:

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Approach the stack square on (not on an angle) |  |
| Stop before raising the forks |  |
| With the load against the back rest lift the load while close to the pallet rack high enough to clear the stack |  |
| Tilt forward slightly to level the load if the POF has a tilt function |  |
| Manoeuvre the POF forward to drive the forks into the rack |  |
| Place the load |  |
| Lower the forks until they are clear of the pallet |  |
| Check behind before moving away from the pallet |  |
| Lower the forks until ground clearance is reached and move off |  |

## De-stacking

The operator should follow this process for removing items from the stack:

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Approach the stack square on (not on an angle) |  |
| Stop and lay the forks flat on the floor before raising them to the correct height to ensure the forks are level when they reach the pallet |  |
| Raise the forks |  |
| Manoeuvre the POF forward until the load is against the backrest |  |
| Lift the load clear of the stack |  |
| Use back tilt where available to rest the load against the backrest |  |
| Check behind before moving away from the pallet |  |
| Make sure the forks are clear of the stack |  |
| Lower the forks until ground clearance is reached and move off |  |

## Shutdown

Observe proper parking and shut down procedures:

|  |  |
| --- | --- |
| **Task** | **Pass/fail** |
| Stop the POF in a marked area (if appropriate) with the wheels straight |  |
| Apply relevant braking system |  |
| Lower the forks and rest the tips on the ground |  |
| Remove the key where relevant |  |

# After the assessment

The internal assessor signs the operator off as competent **on the day** of the assessment - they carry no on-going personal risk or responsibility for the operator’s subsequent actions or inactions.

The employer can produce an employee’s authorisation to operate a specific POF. Note that training must be given separately on attachments.

The operator can also sign this document to state that they are comfortable with their own skill level in relation to the assessment given. If they are not, more training and practice is required.

If you are taking this course using DT Driver Training’s learning management system ([www.drivingtests.co.nz](http://www.drivingtests.co.nz)) then you will need to complete a course validation statement. This can only be done when the operator has completed all the theory modules.

Keep this checklist with the operator’s certificate as proof that the operator was assessed. You can scan this document and upload it when you do the validation. We recommend you keep a separate copy of the certificate with the module results, the operator’s certificate and this checklist.

**Assessor:** I confirm that the named operator has been deemed competent on the day of assessment using the equipment listed on page 1.

Name of assessor:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assessor’s signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Operator (optional):** I, the operator, confirm that I have been assessed as being competent using the equipment listed on page 1 and I am comfortable and confident in using the equipment in the workplace.

Operator’s signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_