WHS DOCUMENTS & TEMPLATES

DOC-BHL-PACK · Backhoe Loader Safety & Competency Pack

# Product Overview

For: Businesses whose workers operate backhoe loaders: owners, supervisors, WHS advisers and workplace assessors

Version 1.0 · 9 November 2026

**Editable backhoe loader safety documents that work together: a safe work instruction, a pre-start checklist, a VOC and a supervisor's field verification.**

Backhoe loaders strike people with the boom and bucket, hit underground and overhead services, and tip on slopes and edges. A card does not show that an operator sets up, digs near services and changes ends safely on your machine. A verification of competency is how a business checks that, and keeps a record of it.

This pack answers three questions. The safe work instruction tells the operator what to do and when to stop. The VOC checks they can do it. The field verification checks the controls are working on site. A pre-start checklist is the link used every time.

Under the WHS Regulations, and in Victoria the OHS Regulations, operating a backhoe loader is not high risk work that needs a licence. The business must still make sure each operator is competent, trained and supervised for the work. Some sites and principal contractors ask for more, such as a unit of competency or a site authorisation, and anyone doing construction work needs general construction induction training (the white card). Driving on a public road needs the right driver licence. Lifting suspended loads with a backhoe has its own requirements: check them before it is done. A VOC is the business's own check that an operator can work safely on its equipment, at its site: it is not a licence and it is not a nationally recognised qualification.

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# Backhoe Loader Safe Work Instruction

How to work safely with [Make and model] at [Site name]

| | | | |
|---|---|---|---|
| **Document number** | | **Version** | |
| **Site** | | **Work area** | |
| **Approved by** | | **Review date** | |

## 1 Purpose and scope

This instruction sets out how to operate **[Make and model]** safely at **[Site name]**: the checks before use, services, set-up, digging, loading, travel and the points where the operator must stop.

It applies to every operator at the site, including contractors and hire users. It does not replace the manufacturer's operating instructions. Where they differ, follow the manufacturer and tell your supervisor, so this instruction can be corrected.

## 2 Who may do the work

- Has a current VOC for this work, and any licence or training the work needs
- Has been authorised by **[Supervisor name]** to do the work at this site
- Is fit for work, and has read this instruction and signed the acknowledgement at the end

**Licence**

Under the WHS Regulations, and in Victoria the OHS Regulations, operating a backhoe loader is not high risk work that needs a licence. The business must still make sure each operator is competent, trained and supervised for the work. Some sites and principal contractors ask for more, such as a unit of competency or a site authorisation, and anyone doing construction work needs general construction induction training (the white card). Driving on a public road needs the right driver licence. Lifting suspended loads with a backhoe has its own requirements: check them before it is done. A VOC is the business's own check that an operator can work safely on its equipment, at its site: it is not a licence and it is not a nationally recognised qualification.

## 3 The equipment

*Fill in one copy for each item of equipment, or list each one this instruction covers.*

| | |
|---|---|
| **Make and model: [Make and model]** | |
| **Equipment ID: [Equipment ID]** | |
| **Attachments or accessories used** | |
| **Manufacturer's operating instructions kept at: [Operator's manual location]** | |


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# Backhoe Loader VOC Assessment Tool

Verification of competency for one operator, on the backhoe loader in scope, at [Site name]

| | |
|---|---|
| **Purpose** | To check, and record, that a worker can operate safely on your backhoe loader, at your site, following your procedures. |
| **When to use it** | Before a new worker does the work unsupervised at the site; when they start on a new type of machine, attachment or task; at the re-verification interval your business sets; and after any of the review triggers in Part K. |
| **Who completes it** | An assessor your business has chosen as competent to assess (see Part B). The candidate completes the knowledge questions and signs Part J. |
| **What goes with it** | The Knowledge Questions (Candidate) for the candidate to answer, the Marking Guide (Assessor) with the model answers, and the VOC Register to track who is verified and when they are due. |

## Before you start

- Agree the scope (Part C) with the candidate's supervisor: what the candidate will do, on what, and where.
- Do the pre-assessment checks (Part D) before anything else. If one fails, do not start.
- The candidate answers the knowledge questions. Mark them with the Marking Guide and record the result in Part E.
- Observe the practical work (Part F) in the real work area, during normal work where it is safe, with other people kept clear.
- Watch for the safety-critical fail criteria (Part G) the whole time. Any one stops the assessment.
- Record the evidence, the outcome and the re-assessment plan (Parts H and I), give feedback, and sign off with the candidate (Part J).

## Licences, training and the VOC

Under the WHS Regulations, and in Victoria the OHS Regulations, operating a backhoe loader is not high risk work that needs a licence. The business must still make sure each operator is competent, trained and supervised for the work. Some sites and principal contractors ask for more, such as a unit of competency or a site authorisation, and anyone doing construction work needs general construction induction training (the white card). Driving on a public road needs the right driver licence. Lifting suspended loads with a backhoe has its own requirements: check them before it is done. A VOC is the business's own check that an operator can work safely on its equipment, at its site: it is not a licence and it is not a nationally recognised qualification.

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# Supervisor Field Verification Checklist

Backhoe loaders: exclusion zones, services, stabilisers, attachments and travel

| | | | |
|---|---|---|---|
| **Site** | | **Areas checked** | |
| **Date and time** | | **Shift** | |
| **Verified by** | | **Equipment checked (IDs)** | |

### How to verify

- Visit the area while backhoe work is under way. Look at each control working, not at its paperwork.
- Mark each check Pass, Not met or N/A. Pass means you saw the control in place and working. If you did not see it, it is not a Pass.
- Write what you saw in the evidence column: a location, a photo reference, a record you sampled.
- Talk to the people doing the work, using the questions after the checks. They know where the near misses are.
- Record every Not met in the actions table, with an owner and a due date. Fix what you can on the spot, and record that too.

### Escalate now

If a ★ critical control is Not met, act before you leave the area. Stop or restrict the backhoe work there until it is fixed or another control is in place, and tell **[Escalation contact]** the same shift. A failed critical control is a high potential incident: report it as one.

## Checks

*★ marks a critical control: one whose failure could let the machine strike a person, contact a service or tip over. Delete checks that do not apply, and add your own.*

| No. | Look for (★ critical control) | Pass | Not met | N/A | What you saw (evidence) |
|---|---|---|---|---|---|
| **Exclusion zones** | | | | | |
| 1 | An exclusion zone is set up and kept ★ | ☐ | ☐ | ☐ | |
| **Underground services** | | | | | |
| 2 | BYDA plans are on site and services are located and marked ★ | ☐ | ☐ | ☐ | |
| 3 | Services near the dig are exposed before digging ★ | ☐ | ☐ | ☐ | |
| **Overhead powerlines** | | | | | |
| 4 | Powerlines are identified and approach distances kept ★ | ☐ | ☐ | ☐ | |
| **Set-up and attachments** | | | | | |
| 5 | Stabilisers down for backhoe work ★ | ☐ | ☐ | ☐ | |
| 6 | Attachments locked on ★ | ☐ | ☐ | ☐ | |


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# Backhoe Loader Safety & Competency Pack

**END OF THE FREE SAMPLE**

This sample shows a few pages, so you can judge the layout and the quality. Editable backhoe loader safety documents that work together: a safe work instruction, a pre-start checklist, a VOC and a supervisor's field verification.

## What the full product contains

- **Backhoe loader safe work instruction: services, stabilisers, slewing, loading and travel; stop-work points**
  02_SAFE_WORK_INSTRUCTION/Backhoe Loader Safe Work Instruction.docx and .pdf
- **Backhoe loader pre-start checklist, defect report and out-of-service tags**
  03_PRESTART_CHECKS/Backhoe Loader Pre-start Checklist.docx and .pdf
- **Supervisor field verification checklist: exclusion zones, underground and overhead services, set-up and attachments**
  05_FIELD_VERIFICATION/Supervisor Field Verification Checklist.docx and .pdf
- **VOC assessment tool, the same as DOC-BHL-VOC**
  04_VOC_ASSESSMENT/Backhoe Loader VOC Assessment Tool.docx and .pdf
- **VOC knowledge questions (candidate) and marking guide (assessor)**
  04_VOC_ASSESSMENT/Backhoe Loader VOC Knowledge Questions (Candidate) and Backhoe Loader VOC Marking Guide (Assessor), .docx and .pdf
- **Excel VOC register**
  04_VOC_ASSESSMENT/Backhoe Loader VOC Register.xlsx
- **How the documents work together: one page**
  01_START_HERE/How the Documents Work Together.docx and .pdf
- **Setup guide: what to adapt before use**
  01_START_HERE/Setup Guide.docx and .pdf
- **Start here: Read Me First, Product Overview, Permitted Use Terms, Version Information**
  01_START_HERE/ (four PDFs)

## Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas
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