WHS DOCUMENTS & TEMPLATES

DOC-EXC-SWI · Excavator Safe Work Instruction Template

Product Overview

For: Businesses that operate excavators: owners, project and operations managers, supervisors, WHS advisers and workplace assessors

Version 1.0 · 9 November 2026

SAMPLE

An editable excavator safe work instruction: what the worker does, step by step, the hazards and controls, and the points where the work stops.

The safe work instruction sets out the purpose and scope, who may do the work, the equipment, the hazards and their controls (most effective first), PPE, the steps with clear stop points, the stop-work points, emergencies, consultation and approval, and a signed acknowledgement.

It is the same safe work instruction as in the Excavator Safety & Competency Pack (DOC-EXC-PACK), word for word. The Excavator VOC Assessment Template (DOC-EXC-VOC) and the Excavator Field Verification Checklist (DOC-EXC-FV) are also sold on their own. The Excavator Safety & Competency Pack (DOC-EXC-PACK) contains them all: the safe work instruction, the excavator pre-start checklist, the VOC and the field verification, with a setup guide.

Under the WHS Regulations, and in Victoria the OHS Regulations, operating an excavator 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, principal contractors and industries ask for more, such as a unit of competency from the Resources and Infrastructure Industry (RII) training package or a site authorisation, and anyone doing construction work needs general construction induction training (the white card). Mining has its own rules. A VOC is the business's own check that an operator can work safely on its machine, at its site: it is not a licence and it is not a nationally recognised qualification. Lifting suspended loads with an excavator has its own requirements: check them before it is done.

These documents support your business to manage risk and meet its WHS or OHS duties. They do not do that on their own. They are general templates: adapt them to your equipment, your site and your people, consult your workers, and check that the controls they describe are in place and working.

What is included

Item	File
Excavator safe work instruction: step by step, hazards, controls and stop-work points, with places for the make, model and manufacturer's instructions	02_SAFE_WORK_INSTRUCTION/Excavator Safe Work Instruction.docx and .pdf
Setup note: what to adapt before use, and every placeholder	01_START_HERE/Setup Note.pdf
Start here: Read Me First, Product Overview, Permitted Use Terms, Version Information	01_START_HERE/ (four PDFs)

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YOUR LOGO
Right-click > Change Picture

[Company name]

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Excavator Safe Work Instruction

How to operate [Excavator make and model] safely at [Site name]

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

1 Purpose and scope

This instruction sets out how to operate **[Excavator make and model]** safely at **[Site name]**: the checks before use, the hazards and controls, the steps for each part of the work, and the points where the operator must stop.

It applies to every person who operates the excavator at the site, including contractors and labour hire workers. Where the work is high risk construction work, it is used with the safe work method statement (SWMS) for the task. 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 operate

- Has a current verification of competency (VOC) for this class of excavator and each attachment and task they do
- Holds any training or authorisation **[Company name]** or the site requires, and the white card for construction work
- Has completed the site induction and been authorised by **[Supervisor name]** to operate at this site
- Is fit for work: not affected by fatigue, alcohol, drugs or medicines
- Has read this instruction, or had it explained, and signed the acknowledgement at the end

Licences and training

Under the WHS Regulations, and in Victoria the OHS Regulations, operating an excavator 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, principal contractors and industries ask for more, such as a unit of competency from the Resources and Infrastructure Industry (RII) training package or a site authorisation, and anyone doing construction work needs general construction induction training (the white card). Mining has its own rules. A VOC is the business's own check that an operator can work safely on its machine, at its site: it is not a licence and it is not a nationally recognised qualification. Lifting suspended loads with an excavator has its own requirements: check them before it is done.

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Excavator Safe Work Instruction Template

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. An editable excavator safe work instruction: what the worker does, step by step, the hazards and controls, and the points where the work stops.

What the full product contains

- **Excavator safe work instruction: step by step, hazards, controls and stop-work points, with places for the make, model and manufacturer's instructions**
  02_SAFE_WORK_INSTRUCTION/Excavator Safe Work Instruction.docx and .pdf
- **Setup note: what to adapt before use, and every placeholder**
  01_START_HERE/Setup Note.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
- PDF copy of the Word document, for printing blank
- Delivered as a single ZIP download

Get the full editable documents

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