WHS DOCUMENTS & TEMPLATES

DOC-FLT-PACK · Forklift Safety & Competency Pack

Product Overview

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

Version 1.0 · 9 November 2026

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

Most forklift paperwork answers one question. A procedure says how the work should be done. A licence says a person was assessed somewhere, once. Neither shows that the operator can do the work on your forklift, at your site, or that the barriers, crossings and speed limits are working today.

This pack answers all three. 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. The pre-start checklist links them every shift, and the setup guide shows what to adapt before you use them.

A verification of competency (VOC) supports your business's own check that a worker can do the work safely, on your equipment, at your site. It does not replace a high risk work licence. Where the work needs a high risk work licence, the operator must hold the licence of the right class before they operate, and before any VOC.

SAMPLE

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[Company name]

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Forklift Safe Work Instruction

How to operate [Forklift 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 **[Forklift 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 forklift at the site, including contractors and labour hire workers. 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

- Holds a high risk work licence of the right class, where the forklift needs one, and has it with them or on file as **[Company name]** requires
- Has a current verification of competency (VOC) for this forklift type and each attachment they use
- 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 in section 10

Licence

A verification of competency (VOC) supports your business's own check that a worker can do the work safely, on your equipment, at your site. It does not replace a high risk work licence. Where the work needs a high risk work licence, the operator must hold the licence of the right class before they operate, and before any VOC.

3 The equipment

Fill in one copy for each forklift, or list each forklift this instruction covers.

Make and model: [Forklift make and model]	
Forklift ID: [Forklift ID]	
Rated capacity (from the data plate): [Rated capacity]	
Fuel or power type (LPG, diesel, petrol, electric)	
Attachments fitted: [Attachments fitted]	
Manufacturer's operating instructions kept at: [Operator's manual location]	

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Forklift VOC Assessment Tool

Verification of competency for one operator, on one type of forklift, at [Site name]

Purpose	To check, and record, that an operator can use a forklift safely on your equipment, at your site, following your procedures.
When to use it	Before a new operator works unsupervised at the site; when an operator starts on a new type of forklift or attachment; 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: the forklift type, attachments and work areas the operator will use.
- 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 operations where it is safe, with pedestrians managed.
- 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).

A VOC is not a licence

A verification of competency (VOC) supports your business's own check that a worker can do the work safely, on your equipment, at your site. It does not replace a high risk work licence. Where the work needs a high risk work licence, the operator must hold the licence of the right class before they operate, and before any VOC.

Part A Candidate details

Name		**Position or role**	
Employer (if a contractor or labour hire)		**Employee or worker ID**	
High risk work licence class (where required)		**Licence number and expiry**	
Experience on this forklift type		**Last VOC or training on this type (date)**	

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Supervisor Field Verification Checklist

Forklift and pedestrian separation: check the controls are working on site

Site		**Areas checked**	
Date and time		**Shift**	
Verified by		**Traffic management plan version**	

How to verify

- Walk the area while forklifts are working. 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 operators and pedestrians, 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 forklift 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 a forklift strike a person. Delete checks that do not apply to your site, and add your own from the traffic management plan.

No.	Look for (★ critical control)	Pass	Not met	N/A	What you saw (evidence)
Traffic management plan					
1	A current traffic management plan covers this area and matches the layout as it is today	☐	☐	☐	
2	Operators and pedestrians in the area can say where the forklift routes, walkways and crossings are	☐	☐	☐	
3	Changes since the last check (new racking, doors, deliveries, temporary works) are reflected in the plan and the controls	☐	☐	☐	
Exclusion zones					
4	Exclusion zones around working forklifts are defined, and marked or signed as the plan requires ★	☐	☐	☐	
5	Pedestrians stay out of exclusion zones; operators stop when a person enters ★	☐	☐	☐	

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Editable forklift 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

- **Forklift 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/Forklift Safe Work Instruction.docx and .pdf
- **Forklift pre-start checklist: daily checks, defect report and out-of-service process, with printable tags**
  03_PRESTART_CHECKS/Forklift Pre-start Checklist.docx and .pdf
- **Forklift VOC assessment tool, the same as DOC-FLT-VOC**
  04_VOC_ASSESSMENT/Forklift VOC Assessment Tool.docx and .pdf
- **VOC knowledge questions (candidate) and marking guide (assessor)**
  04_VOC_ASSESSMENT/Forklift VOC Knowledge Questions (Candidate) and Forklift VOC Marking Guide (Assessor), .docx and .pdf
- **Excel VOC register**
  04_VOC_ASSESSMENT/Forklift VOC Register.xlsx
- **Supervisor field verification checklist: forklift and pedestrian separation, with Pass, Not met, actions, escalation and evidence**
  05_FIELD_VERIFICATION/Supervisor Field Verification Checklist.docx and .pdf
- **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)

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