WHS DOCUMENTS & TEMPLATES

DOC-TLH-PACK · Telehandler Safety & Competency Pack

Product Overview

For: Businesses that operate telehandlers: owners, supervisors, WHS advisers and workplace assessors

Version 1.0 · 9 November 2026

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

Telehandlers tip when the boom is extended with a heavy load, and kill people when used as a crane or work platform without the right set-up. A training card does not show that the load chart is read, the load management system works and the exclusion zone holds today.

This pack answers all 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. The pre-start checklist links them every shift.

Used with forks or a bucket, a telehandler generally needs no high risk work licence, but the operator must be trained and competent. Used as a crane, lifting freely suspended loads with a jib or hook, it may need a crane licence depending on its capacity and configuration: for example, a non-slewing mobile crane licence (class CN) for a telehandler with a capacity of more than 3 tonnes, or a slewing mobile crane class for a slewing telehandler. With a work platform fitted, check whether a boom-type EWP licence (class WP) applies. Confirm with your regulator which licence each telehandler and task needs. A VOC supports the business's own check that an operator can work safely on its telehandler, at its site. It does not replace a high risk work licence, and it is not a nationally recognised qualification.

SAMPLE

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Telehandler Safe Work Instruction

How to operate [Telehandler 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 **[Telehandler make and model]** at **[Site name]**: the checks before use, the hazards and controls, the steps, and the points where the operator must stop.

It applies to every operator, including contractors and hire users. It does not replace the manufacturer's operating instructions or the load charts. Where they differ, follow the manufacturer and tell your supervisor.

2 Who may operate

- Has telehandler training and a current VOC for this telehandler and the attachments used
- Holds any high risk work licence the task needs (for example, for lifting suspended loads or using a work platform)
- Has been authorised by **[Supervisor name]** to operate at this site
- Is fit for work, and has read this instruction and signed the acknowledgement at the end

Licence

Used with forks or a bucket, a telehandler generally needs no high risk work licence, but the operator must be trained and competent. Used as a crane, lifting freely suspended loads with a jib or hook, it may need a crane licence depending on its capacity and configuration: for example, a non-slewing mobile crane licence (class CN) for a telehandler with a capacity of more than 3 tonnes, or a slewing mobile crane class for a slewing telehandler. With a work platform fitted, check whether a boom-type EWP licence (class WP) applies. Confirm with your regulator which licence each telehandler and task needs. A VOC supports the business's own check that an operator can work safely on its telehandler, at its site. It does not replace a high risk work licence, and it is not a nationally recognised qualification.

3 The equipment

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

Make and model: [Telehandler make and model]	
Plant ID: [Plant ID]	
Attachments and load charts in the cab	
Maximum lift height and reach	
Load management system type	
Manufacturer's operating instructions kept at: [Operator's manual location]	

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Telehandler VOC Assessment Tool

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

Purpose	To check, and record, that a worker can operate safely on your telehandler, 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

Used with forks or a bucket, a telehandler generally needs no high risk work licence, but the operator must be trained and competent. Used as a crane, lifting freely suspended loads with a jib or hook, it may need a crane licence depending on its capacity and configuration: for example, a non-slewing mobile crane licence (class CN) for a telehandler with a capacity of more than 3 tonnes, or a slewing mobile crane class for a slewing telehandler. With a work platform fitted, check whether a boom-type EWP licence (class WP) applies. Confirm with your regulator which licence each telehandler and task needs. A VOC supports the business's own check that an operator can work safely on its telehandler, at its site. It does not replace a high risk work licence, and it is not a nationally recognised qualification.

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Supervisor Field Verification Checklist

Telehandlers: load charts, load management, set-up, exclusion zones, pedestrian separation and powerlines

Site		**Areas checked**	
Date and time		**Shift**	
Verified by		**Telehandlers checked (plant IDs)**	

How to verify

- Visit the area while telehandler 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 telehandler 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 telehandler tip, strike a person or drop a load. Delete checks that do not apply, and add your own.

No.	Look for (★ critical control)	Pass	Not met	N/A	What you saw (evidence)
Load charts and load management					
1	The load chart for the fitted attachment is in the cab ★	☐	☐	☐	
2	The load management system is working and not bypassed ★	☐	☐	☐	
3	Lifts observed are within the chart ★	☐	☐	☐	
Set-up and attachments					
4	Frame levelled and stabilisers deployed as the chart requires; ground checked ★	☐	☐	☐	
5	Attachments locked on ★	☐	☐	☐	
Exclusion zones and pedestrian separation					
6	An exclusion zone is kept; nobody under a raised load ★	☐	☐	☐	

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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 telehandler 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

- **Telehandler safe work instruction: step by step, hazards, controls and stop-work points**
  02_SAFE_WORK_INSTRUCTION/Telehandler Safe Work Instruction.docx and .pdf
- **Telehandler pre-start checklist: daily checks, defect report and out-of-service process, with printable tags**
  03_PRESTART_CHECKS/Telehandler Pre-start Checklist.docx and .pdf
- **Supervisor field verification checklist: load charts, load management, set-up, exclusion zones, pedestrian separation and powerlines**
  05_FIELD_VERIFICATION/Supervisor Field Verification Checklist.docx and .pdf
- **VOC assessment tool, the same as DOC-TLH-VOC**
  04_VOC_ASSESSMENT/Telehandler VOC Assessment Tool.docx and .pdf
- **VOC knowledge questions (candidate) and marking guide (assessor)**
  04_VOC_ASSESSMENT/Telehandler VOC Knowledge Questions (Candidate) and Telehandler VOC Marking Guide (Assessor), .docx and .pdf
- **Excel VOC register**
  04_VOC_ASSESSMENT/Telehandler 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

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- Excel (.xlsx), editable, with dropdowns and formulas
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