

Technical Evaluation Record

V4 Sept25



QUALIFICATION:	Forklift Truck Operations	Qualification Code:	0014-33					
		Units/Endorsements: (Please circle)	226 (End. 901 – RT Telescopic) 226 (End. 902 – RT Masted) 227 Counterbalance 228 RT Materials Handling					
Assessor Name:		Technical Verifier Name:						
Assessor BP No: NEW? DOB:		Technical Verifier BP No:						
Assessor Email:		Start Time:						
Invoice To: (Include Centre name if applicable)		End Time:						
CRITERIA: (To be used in conjunction with current Qualification Guidance)		PERFORMANCE EVALUATION (Circle):					JUSTIFICATION:	
1. Knowledge of H&S regulations. Safe Stop explained, Carry out SSRA		1	2	3	4	5		
2. Knowledge of operator protection and PPE standards		1	2	3	4	5		
3. Knowledge of legal and safety requirements when operating on a public highway		1	2	3	4	5		
4. Explain the all instruments, controls and decals as fitted to the forklift truck being used		1	2	3	4	5		
5. Carry out pre-use checks as stated in operators manual		1	2	3	4	5		
6. Knowledge of hazards when maneuvering a forklift and how to minimise risk		1	2	3	4	5		
7. Knowledge of possible causes of instability and how each cause is minimised		1	2	3	4	5		
8. Knowledge of factors affecting safe loading, fork markings, load centres, rating/de-rating		1	2	3	4	5		
9. Prepare and operate the forklift truck		1	2	3	4	5		
10. Carry out post use checks and explain reasons for, and methods of cleaning the forklift		1	2	3	4	5		
11. Assessment techniques <i>(new assessors only)</i>		1	2	3	4	5		
PERFORMANCE EVALUATION COLUMN TOTALS:							= TOTAL SCORE:	
Result of Technical Evaluation (tick):	MET	TOTAL SCORE REQUIRED TO ACHIEVE ASSESSOR STATUS: (NB. ACHIEVED IN PERFORMANCE EVALUATION COLUMNS 4 & 5 ONLY) <i>If an existing Assessor then please adjust total score required to 40</i>					44	
	NOT MET							
ACTION PLAN FOR ASSESSOR:								
<i>Please continue on reverse if necessary</i>								
ASSESSOR COMMENTS:								
<i>Please continue on reverse if necessary</i>								
TECHNICAL VERIFIER SIGNATURE:						COST: £200 Half Day £300 Full Day	DATE:	
ASSESSOR SIGNATURE:								

TECHNICAL EVALUATION RECORD

0014-33 Level 2 Certificate of Competence in Forklift Truck Operations

1. Knowledge of H&S regulations

Key principles and practical relevance:

- ☐ Health and Safety at Work etc. Act 1974 (HASAWA)
- ☐ Management of Health and Safety at Work Regulations 1999 (MHSWR)
- ☐ Provision and Use of Work Equipment Regulations 1998 (PUWER)
- ☐ Personal Protective Equipment at Work Regulations 1992 (PPE regs)
- ☐ Control Of Substances Hazardous to Health Regulations (COSHH)
- ☐ The Health and Safety (First Aid) Regulations 1992
- ☐ Reporting of Injuries Diseases Dangerous Occurrence Regulations (RIDDOR)
- ☐ Manual Handling Operations Regulations 1994
- ☐ The Control of Noise Regulations 2005
- ☐ Lifting Operations and Lifting Equipment Regulations 1998
 - o Knowledge of restraint system
 - o Capacity Plate (SWL)
 - o Record of 'Thorough Examination'
 - o Safe Load Indicator
- ☐ Risk assessments
- ☐ Condition and guarding of equipment (statutory guarding to be explained)
- ☐ Operators manuals
- ☐ Approved Code of Practice - Rider-operated lift trucks
- ☐ HSE guidance PM28-non-integrated platforms

Safe Stop explained

- ☐ HSE sequence explained

Carry out SSRA

- ☐ Assessor to complete a Site Specific Risk Assessment, using provided template.
- ☐ Header and footer.
- ☐ Hazards and controls relative to site, task and equipment.

2. Knowledge of operator protection and PPE standards

- ☐ CE and EN markings-relevance
- ☐ PPE types and reasons for use

3. Knowledge of legal and safety requirements when operating on a public highway

- ☐ Be road legal
- ☐ Vehicle tax/exemption
- ☐ Insurance
- ☐ Valid/suitable driving licence
- ☐ Uses of orange flashing beacon
- ☐ Speed limits
- ☐ Four-wheel drive/diff lock/steering mode
- ☐ Position/removal of forks

4. Explain the all instruments, controls and decals as fitted to the forklift truck being used

- ☐ Internal
- ☐ External

5. Carry out pre-use checks as stated in operators manual

- ☐ Suitable PPE used
- ☐ Engine/transmission
- ☐ Wheels and tyres
- ☐ Lights/horn
- ☐ Cab/windows/mirrors
- ☐ Operator seat/seat belt
- ☐ Boom/mast, hydraulic rams/pipes, chains/rollers, wear pads
- ☐ Brake operation and efficiency
- ☐ Hydraulic functions

6. Knowledge of hazards when maneuvering a forklift and how to minimize risk.

- ☐ Driving at speed
- ☐ Turning
- ☐ Up and down slopes
- ☐ Across slopes
- ☐ Turning on slopes
- ☐ Rough ground

7. Knowledge of possible causes of instability and how each cause is minimized

- ☐ Sideways (lateral) **six required**
- ☐ Fore and aft (longitudinal) **five required**

8. Knowledge of factors affecting safe loading, fork markings, load centres, rating/de-rating

- ☐ Factors affecting safe loading **six required**
- ☐ Load charts explained
- ☐ Load centre identified and the term explained
- ☐ Fork markings identified
- ☐ De-rating explained

9. Prepare and operate the forklift truck

- ☐ Suitable PPE used
- ☐ Forks set to suitable width
- ☐ Load inspected
- ☐ Loads to be picked up and placed at the following locations
 - o Ground level
 - o Eye level
 - o 50% of maximum height
 - o Undercutting to be demonstrated
- ☐ Change attachment and carry out materials handling (unit 208 only)
- ☐ Park and secure machine

10. Carry out post use checks and explain reasons for, and methods of cleaning the forklift

- ☐ Suitable PPE used
- ☐ Reasons for cleaning
- ☐ Methods of cleaning described
- ☐ Suitability of site/disposal of waste
- ☐ Inspect for wear and damage
- ☐ Reporting process explained

11. Assessment techniques

- ☐ Clear and concise questions/instructions
- ☐ Question/instruction relative to unit

(Please note: this section only needs to be completed by new assessors).

Total score required (on front sheet) can be adjusted to 40 if an existing assessor.