Maintenance

When it comes to industrial trucks, transport managers may need some guidance on their obligations and best practice. Brian Tinham reports

For fleet managers with responsibilities that extend far beyond the major items of trucks and vans, and into industrial trucks, such as forklifts, there have always been slight concerns – not only about these vehicles' detailed maintenance needs, but also the competence of mechanics trained in transport engineering to carry out the work. What are the requirements? Where is the guidance? And who should they turn to for help?

Bob Hine, technical consultant at BITA (British Industrial Truck Association), says that there are several places for people to go for information, starting with his own organisation, but also FLTA (Fork Lift Truck Association), their joint company CFTS (Consolidated Fork Truck Services) – and, of course, the truck manufacturers themselves.

"Transport engineers and mechanics are likely to have a good understanding of relevant engineering, but it's essential that they can approach industrial trucks with confidence and know what they're looking for," advises Hine. Lift truck providers are usually very keen to organise general familiarisation, he says, even if you're not buying new trucks. It's all about customer service and raising awareness of lifting industry standards. "Members of BITA, for example, are very keen to do that, so they should be your first port of call," he says.

Bob Hine, technical consultant at BITA (British Industrial Truck Association)

Then there's training. "Commercial vehicle engineers won't normally need much more than a couple of hours, because they live and breathe moving equipment. Mostly, they will just need some extra pointers," opines Hine. "One issue for me, however, is that, while they may be competent to drive a van or truck, I doubt many know how to drive a forklift. I'm not saying they should go through a full course – they won't be handling loads anyway. But, if they are expected to look over a truck, they would be well advised to go on a basic driving course. That way, they can justifiably jump on and, by seeing how it behaves, get a feel for what might need doing."

Charles Day, technical manager at CFTS, agrees, but adds: "If your engineers are competent on hydraulics, pneumatics, electrics and fabrication, then they should be competent to maintain any truck. But the question you must ask yourself is: would they be able to strip down a forklift, diagnose problems, and repair it correctly, competently and safely?"

Life-saving training

CFTS, he says, approves one- and two-day courses that run at Hinckley College – a centre of excellence for the FLTA. "So, if you want a mechanic trained up, you would do well to send him or her on one of those courses. Our own procedural code says that, if you don't go that route, then anyone who wants to become competent [to perform thorough examinations] would need to prove their technical background and work alongside an experienced engineer," warns Day.

Why the caution? Hine explains that there are

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clear physical differences with industrial trucks that have to do not only with their construction, but also their operation. He cites overhead guard damage. “This is the principal safety equipment for the driver and it can get damaged, particularly on high activity sites, such as retail distribution warehouses and at docks. And the problem is that it’s too easy for maintenance engineers to say, ‘We’ll just repair that’, without understanding that there are limits. But what’s important here is to ensure the strength and integrity of that structure, because it is safety critical.”

It’s a good example and Hine is quick to point to BITA’s guidance publications – in this case, GN65. “There are 25 of these documents and they’re available to BITA members free. But they’re not expensive for non-members – typically £10–25.”

Maintenance engineers would probably only need five or six of them. For example, GN62 deals with ‘Maintenance, inspection and repair of fork arms and attachments’, which clearly covers a lot of the ground. Beyond these, lifting gear maintenance is about aspects, such as the chains, making sure they are lubricated and checking that they are within the bounds of accepted stretch.

PAS 90:2006

Until relatively recently, there was no standard safety guidance for maintenance engineers carrying out on-site work on industrial trucks. PAS 90:2006, however, changed all that.

Written and published by BITA (British Industrial Truck Association), in conjunction with its members and partner organisations, FLTA (Fork Lift Truck Association), HSE and BSI British Standards, it covers everything you need to know – including minimum safety requirements and best practice for onsite maintenance (applicable to service engineers and their employers).

The standard covers: public and employers’ liability insurance; driver licensing; health and safety, and training; environmental awareness; handling lubrication, fuel and battery fluids; waste disposal and incident reporting; vehicle and equipment maintenance and calibration; safe manual handling; and record-keeping.

Money-saving daily checks

Apart from this guidance for mechanics, Hine suggests that fleet managers make sure that procedures are in place and working. He gives the example of drivers’ daily checks and defect reporting processes. “I can recall one cold store site handling pet foods, which had a very greasy loading bay, so there was a lot of damage to freezer doors caused by the forklifts. In the end, they pinned it down to a lack of daily checks and so implemented a strict campaign of change. Maintenance managers had the right to stop any vehicle and look at its log book to see when it was last signed off. That saved them thousands of pounds.”

Tyres are another one: many of these units don’t have suspensions, so the tyres are an important part of ensuring stability, and safe manoeuvring and braking. “But tyres can easily become damaged, due to the high point loadings at floor expansion joints, potholes, etc. So chunks fall off them and that’s easily overlooked – or a commercial view is taken and the manager says they can just carry on.”

Two final points. First, one key differentiator between trucks and forklifts is that, when the latter are purchased they frequently disappear into the ether. There is no mandatory registration process and, especially once a truck has been bought

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Thorough examination of forklift trucks

Operators of forklift trucks – whether they own, lease or hire their vehicles – have a legal duty to ensure that they hold a valid 'report of thorough examination'. Normally, this report has to be updated every 12 months, but, depending on the application and intensity of use, the legislation may specify this timescale to be reduced to every six or even four months. Failing to do so can lead to serious accidents or fatalities, due to undetected faulty equipment – but also prosecution and invalidation of your insurance cover.

Most important, a 'thorough examination' is not part of routine maintenance and must be carried out by an independent competent person, under the Health and Safety at Work etc Act 1974 – and specifically LOLER (Lifting Operations and Lifting Equipment Regulations 1998), which covers the lifting equipment, and PUWER (Provision and Use of Work Equipment Regulations1998), which focuses on other safety-related components, such as brakes, steering and tyres.

BITA (British Industrial Truck Association) Guidance Note GN28 'Thorough Examination and Safety Inspections of Industrial Lift Trucks' explains the details and the relevant standard, BS EN ISO 17020:2004.

CFTS (Consolidated Fork Truck Services), formed in 2002, is a company jointly owned by

BITA and FLTA (Fork Lift Truck Association) that developed and now administers the industrial truck industry's national accreditation scheme for thorough examinations, and operators are recommended to choose a provider accredited by the CFTS scheme.

Companies accredited by CFTS are obliged under its code to provide: a report of thorough examination complying with LOLER 98; a checklist specifying what has been checked and recording comments; a certificate for inclusion with the truck's documentation; and a truck sticker, indicating the month and year when the next thorough examination is due.

second hand, it's entirely possible for it to go unnoticed, unmaintained and unchecked. "That's where the problems start," says Day. "There ought to be a system in place that keeps track of mechanical handling equipment, so that operators could at least be made aware of any issues and requirements. And the real point here is that, although routine maintenance is a legal requirement under PUWER [Provision and Use of Work Equipment Regulations1998] Regulation 5, so are thorough examinations. Without a mechanism to track equipment, though, it's very hard to enforce."

Secondly, although insurance companies may send 'competent persons' to carry out mandatory forklift thorough examinations, CFTS argues that these engineer surveyors are likely to spend only 15 minutes checking, under the LOLER regulations, whereas its trained and certified engineers will take between one and two hours.

Why? "Because insurance companies' engineer surveyors are mostly not skilled specifically in inspecting industrial trucks. I get 15 to 20 calls a week from companies that have had inspections done by insurance firms that have not inspected the right items. CFTS' competent engineers are already forklift service engineers in their own right. So they can go in with all the necessary equipment and follow the engineers' checklist in our GN28 document, 'Thorough examination of and safety inspections of industrial lift trucks'." TE

On-site forklift truck maintenance requires additional engineer training to PAS 90:2006