Unit Title:

Preparing and Operating Telescopic Handlers to Lift and Transfer Loads in the Workplace

Level: 2

Credit value: 25

Guided learning hours: 83

Unit expiry date: 31/10/2014

Unit purpose and aim

The aim of this unit is to illustrate the skills, knowledge and understanding required to confirm competence in preparing and operating telescopic handlers to lift and transfer loads in the workplace within the relevant sector of industry.

Learning Outcomes	**Assessment Criteria**	**Knowledge, understanding and skills**
1 Interpret the given information relating to the use of telescopic handlers to lift, transfer and place loads.	1.1 Interpret and extract information from drawings, specifications, schedules and manufacturers' information.	Extracted information could come from (for example): • safe working load plate • inspection and maintenance records • manufacturers instructions • work schedules • plans • technical drawings • sketches, Learners will be familiar with the terms hazard and risk and be able to interpret risk assessments, safe systems of work, method statements etc. Organisational procedures could include (for example): • verbal reports • red tagging unsafe/unusable plant or equipment • removal of unsafe plant or equipment Sources of information could include (for example): • report logs
	1.2 Comply with information and/or instructions derived from risk assessments and method statements.	
	1.3 State the organisational procedures developed to report and rectify inappropriate information and unsuitable resources and how they are implemented.	
	1.4 Describe different types of information, their source and how they are interpreted in relation to: – drawings, specifications, schedules, manufacturers' information, method statements and regulations and guidance applicable to telescopic handler operations.	

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		• notices • red tags • maintenance records • anecdotal information • notes etc relating to (for example): o outstanding work o changes in work schedules o new instructions
2 Organise with others the sequence and operation in which telescopic handlers operations are to be carried out.	2.1 Organise the work according to given information or instructions.	Learners will have some degree of autonomy and have decision making responsibility relating to the order in which tasks are carried out. Communicating ideas could involve (for example): • drawings • sketches • demonstrations • explanations • suggestions • suggestion boxes • team meetings • tool box talks • emails • social network sites Associated occupations could include: • contractors • maintenance engineers • visitors • management • suppliers • subordinates etc. Resources could include: • manpower • personal protective
	2.2 Describe how to communicate ideas between team members.	
	2.3 Organise and communicate with team members and other associated occupations.	
	2.4 State how to organise resources prior to and during telescopic handler operations.	

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		equipment (PPE) • 2-way radio • Strapping • Pallets • Padding • protective covers Methods of organisation could include checklists, reference to safe systems of work (SSW) reference to method statements, operating procedures, team talks.
3 Know how to comply with relevant legislation and official guidance when lifting and Transferring loads.	3.1 Describe their responsibilities under current legislation and official guidance whilst working: – in the workplace, below ground level, at height, in confined spaces, with tools and equipment, with materials and substances, with movement/storage of materials and by manual handling and mechanical lifting.	Learners will have an outline knowledge of the following: • Health and Safety at Work Act (HASAWA) • Personal Protective Equipment (PPE) Regulations • Provision and Use of Work Equipment Regulations (PUWER) • Lifting Operations and Lifting Equipment Regulations (LOLER) Security measures could include (for example): • personal lockers • security guards • closed circuit television • restricted access • access by swipe card or key code • personal search • methods identified by Business Improvement Techniques (BIT) Learners will name and identify first aiders and state the location of the accident book and the accident/emergency reporting procedure
	3.2 Describe the organisational security procedures for tools, equipment and personal belongings in relation to site, workplace, company and operative.	
	3.3 State what the accident reporting procedures are and who is responsible for making reports.	
4 Maintain safe working	4.1 Use personal protective	Personal Protective Equipment

practices when preparing for and carrying out telescopic handler operations.	equipment (PPE) to safely carry out the activity in accordance with legislation and organisational requirements during telescopic handler operations.	(PPE) could include (for example): • hard hats • ear defenders • ear plugs (learners should be able to differentiate between the two) • different types of gloves • hi-viz clothing • safety footwear • eye protection • harnesses Learners will be familiar with current legislation and own company procedures regarding own personal requirements, storage and replacement requirements. Learners will know safe evacuation routes, location of assembly points, assembly procedures. Personal skills could include (for example): • fire marshal or first aid training • responsibility for isolating unsafe areas • directing others • contacting emergency services Learners will know the 'chain of command' When it is safe to re-enter a building and who gives permission for re-entry
	4.2 Explain why and when personal protective equipment (PPE) should be used, relating to telescopic handler use, and the types, purpose and limitations of each type.	
	4.3 State how emergencies should be responded to in accordance with organisational authorisation and personal skills when involved with fires, spillages, injuries and other task-related hazards.	
5 Request and select the required quantity and quality of resources to prepare for and carry out telescopic handler operations.	5.1 Describe the characteristics, quality, uses, limitations and defects associated with the resources, and how they should be used correctly, relating to:	Learners may have referred to manufacturers instructions/guidance, operating procedures, risk assessment etc. Learners may also have

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	– consumables, lubricants and fuels – attachments and lifting aids – hand tools, ancillary equipment and/or accessories.	referred to safe systems of work, method statements, use of PPE etc. Defects could include (for example): • cracked/damaged ancillary equipment • worn parts (e.g. holding bolts) • worn chain links • worn or loose connections • missing parts etc. Resources could include (for example): • PPE • permits to work • slings • straps • protective materials for load, etc. Problems could include (for example): • lack of availability • poor or unsafe conditions Reports could be: • verbal • notes • notice boards • red tagging • record books • handover documents Correct use could be: • workplace procedures • instructions • work programmes • safe systems of work • method statements • manufacturers instructions. Learners should have fundamental knowledge of formulae and be able to carry
	5.2 Request and select resources associated with telescopic handlers in relation to consumables, materials, attachments, tools, accessories and/or ancillary equipment.	
	5.3 State how the resources should be used correctly, how problems associated with the resources are reported and how the organisational procedures are used.	
	5.4 Outline potential hazards associated with the resources and method of work.	
	5.5 Describe how to calculate weight, length and area associated with the method/procedures to lift and transfer loads using telescopic handlers.	

		out straightforward calculations
6 Minimise the risk of damage to the work and surrounding area when lifting and transferring loads.	6.1 Protect the work and its surrounding area from damage.	Surrounding areas could include (for example): • support pillars • other equipment • storage racking Protection could include (for example): • sufficient space • sufficient manpower • protective materials • padded covers • wooden casing • pallets Adverse conditions could include (for example): • high winds • poor visibility • icy surfaces • flooding • exposure to excessive heat of cold Learners will be familiar with recyclable and non-recyclable materials, and be aware of regulations relating to waste disposal of hazardous substances, clinical waste etc
	6.2 Minimise damage and maintain a clean work space.	
	6.3 Describe how to protect work from damage and the purpose of protection in relation to general workplace activities, other occupations and adverse weather conditions.	
	6.4 Dispose of waste in accordance with legislation.	
	6.5 State why the disposal of waste should be carried out safely in relation to the work.	
7 Complete the work within the allocated time when preparing to and lifting and transferring loads.	7.1 Demonstrate completion of the work within the allocated time.	Completion could be demonstrated by (for example): • time sheets • picking notes • work logs • output records materials movement notes
	7.2 Shut down and secure telescopic handlers.	
	7.3 State the purpose of the work programme and describe why deadlines should be kept in relation to:	

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	– types of progress charts, timetables and estimated times – organisational procedures for reporting circumstances which will affect the lifting operation.	• computerised records Work programmes could include (for example): • task logs • job descriptions • written of verbal instructions Failure to meet deadlines could result in (for example): • Production delays • transport and dispatch delays • hold ups in other departments Reporting methods could be written, verbal, down time record etc.
8 Comply with the given contract information to lift, transfer and place loads using telescopic handlers to the required specification.	8.1 Demonstrate the following work skills when preparing for, lifting, transferring and placing loads using telescopic handlers: – fitting, attaching, setting up, securing, adjusting, checking, removing, communicating, operating, manoeuvring, positioning, lifting, transferring and setting down.	Compliance could involve (for example): • completing visual inspection • completing daily checks • following safe systems of work or method statements • company procedure • reporting faults • checking work schedules • following work instructions Different loads could include (for example) those that are: • unstable • volatile • fragile • liquids • hazardous • Those that have an offset centre of gravity • are an unusual shape
	8.2 Prepare, set up and operate telescopic handlers to lift, transfer and place a variety of loads in the workplace, to given working instructions.	
	8.3 Describe how to apply safe work practices, follow procedures, report problems and establish authority needed to rectify, to: – identify the characteristics of the telescopic handler for the lifting operation – carry out performance checks – prepare, set up and adjust for operational requirements – complete functional checks – carry out pre-operational checks for obstructions,	

	stability, safety and security of the work and surrounding area – operate and move the tele-handler – identify characteristics, type, weight and positioning of loads for lifting and transferring – secure and balance loads for lifting – lift, remove and transfer loads – position, place and set down loads – confirm load stability and security – shut down the tele-handler – use hand tools, ancillary equipment and accessories.	Personnel could be: • frail • heavy • have poor mobility • have visual or cognitive impairments Safe working practices could include (for example): • safety checks • planned maintenance • safe systems of work • method statements Tools could be: • hammers • levers • wrenches • slings • harnesses • load protection materials
	8.4 Safely use and store hand tools and ancillary equipment.	
	8.5 State the needs of other occupations and how to communicate within a team when preparing for and lifting and transferring loads.	
	8.6 Describe how to maintain the plant, tools and equipment used to lift and transfer loads.	Needs of others could include (for example): • work schedules • warnings • explanations methods could be: • face to face • electronic • by 2 way radio • signalling Maintenance could be planned maintenance schedules, daily checks and inspections, testing schedules etc

Assessment

This unit must be assessed in a work environment and in accordance with:
– the Additional Requirements for Qualifications using the title NVQ in QCF
– the ConstructionSkills' Consolidated Assessment Strategy for Construction and the Built Environment – Craft, Supervisory, Technical, Managerial and Professional Units and Qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs.

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Assessors for this unit must use a combination of the following assessment methods:
– observation of normal work activities within the workplace that clearly confirms the required skills
– questioning the learner on knowledge criteria that clearly confirms the required understanding
– review other forms of evidence that can clearly confirm industry required skills, knowledge and understanding.

Assessors for this unit must have verifiable, current industry experience and a sufficient depth of occupational expertise and knowledge of preparing and operating telescopic handlers to lift and transfer loads to be effective and reliable when confirming a learner's competence.

Workplace evidence of skills cannot be simulated.

This unit must be assessed against one of the following endorsements:
– Telescopic handlers – industrial telescopic
– Telescopic handlers – up to 9 metres
– Telescopic handlers – all sizes excluding 360 degree
– Telescopic handlers – all sizes including 360 degree

Details of relationship between the unit and national occupational standards

Occupational standards	Unit number	Title
'Prepare Plant or Machinery for Operational Performance'	VR 386	
Operate Plant or Machinery to Lift and Transfer Loads'	VR 387	

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk .