



<p><b>“Home Safely, Every Day”</b></p>		<p><b>Safe Operating Procedure</b></p>
		<p><b>Loading and Unloading Trucks in the warehouse</b></p>
		<p>Version 1 // SOP_ _ _  <b>Department:</b> FL-002 WHS/COMPLIANCE  <b>Issued on:</b> 02.05.2026.  <b>Next Review:</b> 02.05.2027  <b>Approved by:</b> Hayden Foley &amp; Alan Guest  <b>Position:</b> Director &amp; Compliance Manager</p>

## Loading / Unloading Trucks in Warehouse Areas

<b>DESCRIPTION OF TASK:</b>	
Use of forklift for loading or unloading non containerised freight in warehouse areas	
<b>RESPONSIBILITIES RELATING TO THIS SAFE OPERATING PROCEDURE (SOP):</b>	
The application of this SOP is only permitted once the reader has been instructed and deemed competent in the content of this SOP.	
Site Manager	<ul style="list-style-type: none"> <li>▪ Ensure the consistent application of this SOP onsite.</li> <li>▪ Investigate all breaches of this SOP and instigate appropriate corrective action to prevent any reoccurrence.</li> </ul>
Operations manager/ Warehouse Foreman/ Area Supervisor	<ul style="list-style-type: none"> <li>▪ Implement employee training and instruction to ensure all relevant parties are competent in the application of this SOP.</li> <li>▪ Provide ongoing supervision of operations to ensure that all aspects of this SOP are complied with.</li> </ul>
Forklift Operator	<ul style="list-style-type: none"> <li>▪ To apply the ‘<b>How To Do The Task Safely</b>’ actions as described in this SOP during forklift operation in warehouse areas.</li> </ul>
<b>MANDATORY PERSONAL PROTECTIVE EQUIPMENT:</b>	
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  </div> <div style="text-align: center;">  </div> </div>	

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**DEFINITIONS:**



**WARNING**  
 Warning highlight and operating or maintenance procedure practice, condition, statement etc. Which if not strictly observed could result in injury to personnel or loss of life.





**CAUTION**  
 Cautions highlight an operating or maintenance procedure, practice, condition, statement, etc., which, if not strictly observed, could result in damage to, or destruction of, equipment, loss of mission effectiveness, or long-term health hazards to personnel.





Note  
 Notes highlight an essential operating or maintenance procedure, condition, or statement.

**SAFE OPERATING PROCEDURE:**

Steps	Hazards/Risks	How To Do The Task Safely
<p>1. Forklift operator receives truck and prepares for load/ unload</p>	<p><b>Truck driver struck by mobile plant (or their load) or vehicle</b></p> <p><b>Vehicle or mobile plant struck by other vehicle/plant</b></p>	<p><i>Forklift operator MUST conduct a Take 3 personal assessment. STOP, THINK, CONTROL!</i></p> <div style="display: flex; align-items: center;">  <p><b>The forklift operator maintains authority over the loading &amp; unloading area whilst the forklift is in operation.</b></p> </div> <p><b>The forklift operator MUST maintain a minimum <u>3 metre exclusion zone</u> at ALL times with any pedestrians, mobile plant and vehicles in area (see Figure 1).</b></p> <ul style="list-style-type: none"> <li>▪ Forklift operator MUST ensure truck is safely parked in designated loading/unloading lane.</li> </ul>
		

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<p><b>3 Metres</b></p> 	<p>▪ BEFORE commencing task, the forklift operator MUST:</p> <ol style="list-style-type: none"> <li>1. Stop forklift in a safe location.</li> <li>2. Remain stationary with handbrake engaged unit out of gear and forklift tynes lowered to ground.</li> <li>3. If required to exit forklift, turn forklift off and use 3 points of contact.</li> <li>4. Make contact with driver and retrieve paperwork. Discuss load (such as freight type, quantities, load/ unload sequence).</li> <li>5. Permit truck driver to prepare trailer.</li> </ol>
<p><b>Figure 1: A 3 metre exclusion zone MUST be maintained by forklift operator</b></p>	

<b>SAFE OPERATING PROCEDURE:</b>		
Steps	Hazards/Risks	How To Do The Task Safely
<p>Driver Safe Zone</p>		<div style="display: flex; align-items: center;">  <p style="color: red; margin: 0;"><b>Provide instruction to the truck driver (see Figure 2):</b></p> <ol style="list-style-type: none"> <li>1. Location of Driver Safe Zone</li> <li>2. Requirement to remain in Driver Safe Zone until directed to exit.</li> <li>3. Use Driver Safe Zone on same side as operating forklift – “Can’t See, Cant Load”</li> </ol> </div>

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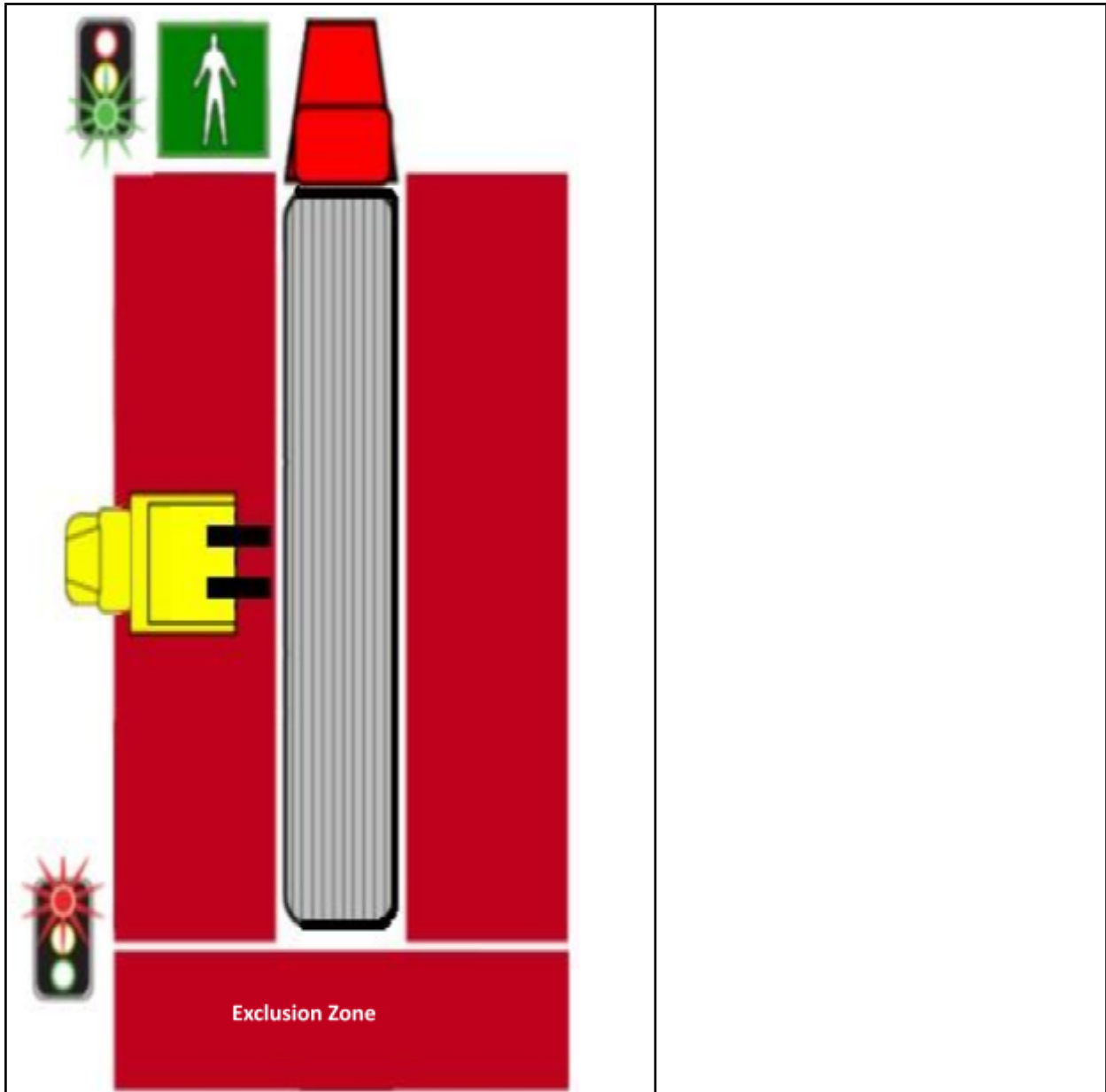



Figure 2 – Driver Safe Zone and exclusion zones

<p><b>2. Load/ Unload Truck</b></p>	<ul style="list-style-type: none"> <li>▪ <b>Truck driver struck by mobile plant (or their load) or vehicle</b></li> </ul>	 <p><i>If two forklifts are to be used to load/unload truck, refer to Step 5 to establish roles and work area before continuing.</i></p> <p><i>A Job Safety Analysis (JSA) MUST be developed if</i></p>
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	<ul style="list-style-type: none"> <li>▪ <b>Vehicle or mobile plant struck by other vehicle/ plant</b></li> </ul>	<p><i>variation from this SOP is required.</i></p>
		<p> <b>Forklift operator MUST stop, engage handbrake and take unit out of gear IMMEDIATELY (see Figure 3 below):</b></p> <ul style="list-style-type: none"> <li>▪ <b>If truck driver is not positioned in Driver Safe Zone on the same side as operating forklift.</b></li> <li>▪ <b>If truck driver exits Driver Safe Zone at any time without authorization – Can't See, Cant Load.</b></li> <li>▪ <b>If there is any other pedestrians, mobile plant or vehicle access the exclusion zone.</b></li> </ul>

Figure 4 – A 3 metre exclusion zone MUST exist

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**SAFE OPERATING PROCEDURE:**




**STOP DO NOT PROCEED!**



**SAFE TO PROCEED!**






**Figure 3- Confirm truck driver is positioned in the driver safe zone before approaching!**

Steps	Hazards / Risks	How To Do The Task Safely
		<p>Load / unload freight using forklift</p> <ul style="list-style-type: none"> <li>▪ If the truck driver requires access to truck (such as to inspect load, prepare tray or direct load placement) during forklift operation then the following process MUST occur (see Figure 4):               <ol style="list-style-type: none"> <li>1. Truck driver MUST first establish line of sight with forklift operator.</li> <li>2. Forklift operator MUST reverse back, STOP, place the handbrake ON.</li> <li>3. Forklift operator authorises driver to exit Driver safe zone</li> <li>4. A 3 metre exclusion zone MUST exist at all times</li> </ol> </li> </ul>
<b>3. Transporting freight to/from truck</b>	<p><b>Mobile plant (or its load) striking pedestrian, other mobile plant, fixed objects</b>  <b>Mobile plant struck by other mobile plant</b></p>	<p> <b>Forklift operator MUST maintain a minimum 3 metre exclusion zone at ALL times with any pedestrians, mobile plant and vehicles in area. Pedestrians are not permitted to steady loads by breaching exclusion zones.</b></p> <p>Forklift operator MUST slow down and sound forklift horn where (see Figure 5):</p>

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	<p><b>Dropped freight Person crushed by by load</b></p>	<ul style="list-style-type: none"> <li>▪ Visibility is limited (such as blind corners formed by freight)</li> </ul>
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**SAFE OPERTING PROCEDURE:**

Steps	Hazards/Risks	How To Do The Task Safely
<div style="display: flex; align-items: center;"> <div style="font-size: 2em; color: red; margin-right: 10px;">X</div>  </div> <div style="display: flex; align-items: center;"> <div style="font-size: 2em; color: green; margin-right: 10px;">✓</div>  </div> <p><b>Figure 6 – Transport freight safely and travel in reverse to maximize visibility</b></p>	<ul style="list-style-type: none"> <li>▪ Pedestrian areas (such as walkway cross over points)</li> <li>▪ Entering/exiting warehouse roller doors</li> <li>▪ Approaching an area where other warehouse operations are in progress</li> </ul> <div style="display: flex; align-items: center;">   </div>  <p><b>Figure 5 – Alert others of forklift position</b></p> <p>When transporting freight, forklift operator <b>MUST</b> (see Figure 6):</p> <ul style="list-style-type: none"> <li>▪ Ensure load is balanced and safely transported</li> <li>▪ Maximise visibility, where required, travel in reverse</li> </ul>	

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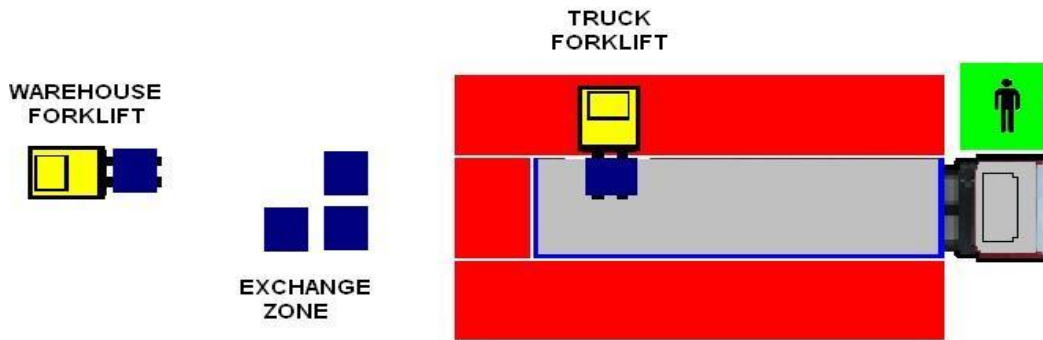
<p><b>4. Forklift operator completes operations</b></p>	<ul style="list-style-type: none"> <li>▪ <b>Mobile plant (or their load) striking pedestrian</b></li> <li>▪ <b>Incorrectly restrained freight resulting in vehicle accident or damage</b></li> <li>▪ <b>Fall from heights</b></li> <li>▪ <b>Incorrect DG segregation</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Once loading/unloading is complete, forklift operator directs truck driver to leave Driver safe zone to secure load.</li> <li>▪ The forklift operator <b>MUST</b> ensure a platform ladder is available to driver to assist with load restraint if required. Three points of contact <b>MUST</b> be maintained when using ladder (see Figure 7).</li> <li>▪ <b>BEFORE</b> allowing truck to leave area, ensure the truck driver:</li> </ul>
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<b>SAFE OPERATING PROCEDURE:</b>		
<b>Steps</b>	<b>Hazards/Risks</b>	<b>How To Do The Task Safely</b>
<div style="text-align: center;">  </div> <p><b>Figure 7 – Use of platform ladder</b></p>		<ul style="list-style-type: none"> <li>▪ Has adequately restrained load and secure gates/curtains etc</li> <li>▪ Has adhered to segregation and labelling regulations for any Dangerous Goods</li> <li>▪ Aware of correct exit route from area to exit gate.</li> <li>▪ Have completed all paperwork and have received delivery instructions.</li> </ul>

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<p><b>5. Use of two forklifts for loading/unloading operations</b></p>	<ul style="list-style-type: none"> <li>▪ <b>Mobile plant (or their load) striking other mobile plant</b></li> <li>▪ <b>Mobile plant (or their load) striking pedestrian</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Prior to commencing loading/unloading operations (Steps 2 to 4) using two forklifts, the forklift operators <b>MUST</b> plan the task:           <ol style="list-style-type: none"> <li>1. Discuss loading/unloading sequence and establish a freight exchange zone/staging area clear of other operations (see Figure 8).</li> <li>2. Forklift A: Determine which forklift will load/unload truck. <b>ONLY ONE</b> forklift is permitted to perform this role.</li> <li>3. Forklift B: Assisting forklift may feed/stage freight or retrieve unloaded freight <b>ONLY</b>.</li> <li>4. 3 metre exclusion zone <b>MUST</b> be maintained <b>AT ALL TIMES</b> between both forklifts and truck driver.</li> <li>5. Freight must not be staged within 3 metres of truck to minimize interaction between forklifts.</li> </ol> </li> </ul>
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**Establishment of a freight exchange zone:**

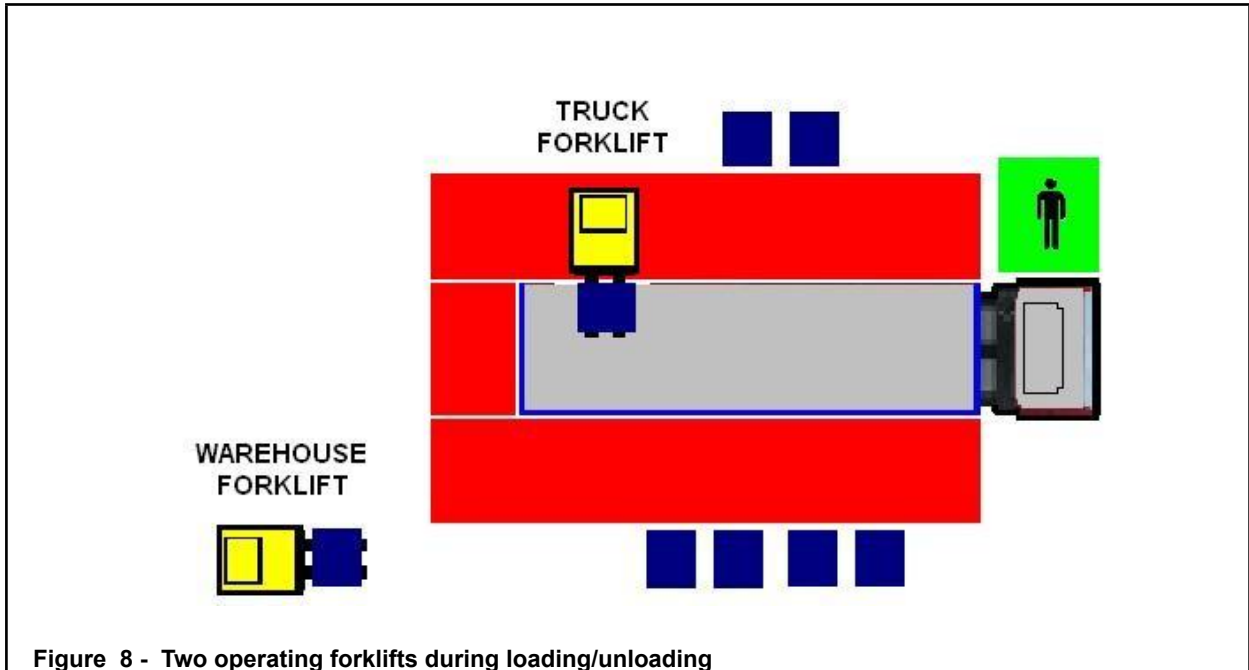


**Alternatively, staging of freight by warehouse forklift:**

**SAFE OPERATING PROCEDURE:**

<b>Steps</b>	<b>Hazards/Risks</b>	<b>How To Do The Task Safely</b>
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**Figure 8 - Two operating forklifts during loading/unloading**