

# LOAD AND UNLOAD – BEST PRACTICE GUIDANCE

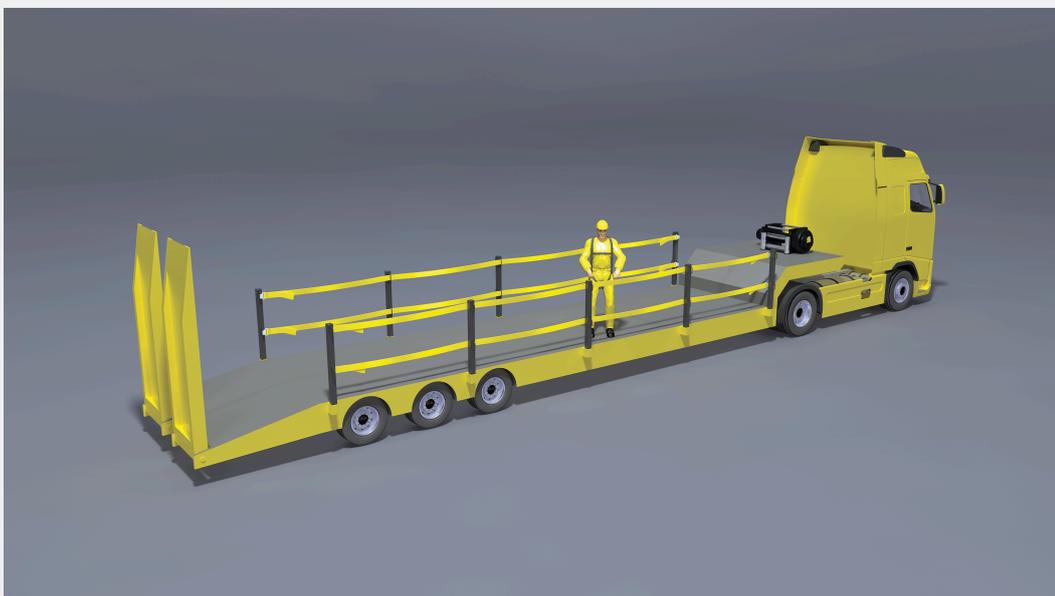


The loading and unloading of mobile elevating work platforms (MEWPs) is potentially a high risk activity, as findings from the IPAF accident reporting database ([www.ipaf.org/accident](http://www.ipaf.org/accident)) show. About a third of the accidents recorded by rental companies take place during the delivery and collection process. This document outlines the importance of planning and managing the delivery and collection operations. It sets out responsibilities of different parties to communicate and co-operate to ensure the work is done safely. Guidance on all other aspects of MEWP management, maintenance and use can be found at [www.ipaf.org](http://www.ipaf.org).

The following table identifies the key duty holders, their individual and collective responsibilities, and the interaction they should have with persons to ensure the delivery and collection of MEWPs is undertaken and completed safely without incident.

Note that the term “contractor” is used in the broadest of terms and refers to and includes any individual, company or organisation who enters into an agreement with a rental company to hire a MEWP.

This document is written for application in the UK, within the UK legislative jurisdiction, but the safety principles may be beneficial to other countries in helping to reduce accidents.



HIRE / DELIVERY PROCESS			
CONTRACTOR	RENTAL COMPANY	TRANSPORTER	DRIVER
1.1 Identify the need for a MEWP			
1.2 Discuss requirements with rental company	1.2 Discuss requirements with contractor		
1.3 Confirm MEWP order	1.3 Confirm MEWP order		
	1.4 Identify MEWP and prepare to hire		
	1.5 Order transport	1.5 Confirm transport order	
		1.6 Identify vehicle and driver	
		1.7 Send vehicle to load MEWP	1.7 Vehicle sent to load MEWP
	1.8 Provide safe load area		1.8 Risk assess loading area
	1.9 Oversee loading activities		1.9 Safely load machine(s)
	1.10 Documentation		1.10 Documentation
			1.11 Delivery of MEWP to site
1.12 Prepare unloading area			1.12 Risk assess unloading area
1.13 Oversee off-loading			1.13 Off-load MEWP
1.14 Handover of MEWP			1.14 Handover of MEWP

	1.15 Return of documentation to rental company		1.15 Return of documentation to rental company
<b>MEWP ON-HIRE</b>			
<b>OFF-HIRE / COLLECTION PROCESS</b>			
<b>CONTRACTOR</b>	<b>RENTAL COMPANY</b>	<b>TRANSPORTER</b>	<b>DRIVER</b>
2.1 Identify end of MEWP hire	2.1 Identify end of hire MEWP hire		
2.2 Confirm off-hire and collection details	2.2 Confirm off-hire and collection details		
	2.3 Order transport	2.3 Confirm transport order	
		2.4 Identify vehicle and driver	
		2.5 Send vehicle to collect MEWP	2.5 Send vehicle to collect MEWP
2.6 Provide safe loading area			2.6 Risk assess loading area
2.7 Prepare/check machine prior to collection			2.7 Prepare/check machine prior to collection
2.8 Collection documentation			2.8 Collection documentation
2.9 Oversee loading activities			2.9 Load and secure machine
			2.10 Leave site and return to rental company
	2.11 Provide safe unloading area		2.11 Risk assess unloading area
	2.12 Oversee unloading activity		2.12 Unload machine
	2.13 Return of MEWP and documentation		2.13 Return of MEWP and documentation
<b>MEWP OFF-HIRE</b>			

Note: A more detailed explanation of each of the sections above can be found on the following pages.

## **HIRE / DELIVERY PROCESS**

### **1.1 CONTRACTOR:**

IDENTIFY THE NEED FOR A MEWP – Upon identifying that a MEWP is required, the contractor should assess the associated risks, consider controls to be implemented and make contact with a selected rental company. Note: The contractor should consider rental company load/unload policy and procedures as part of any supplier selection process.

### **1.2 CONTRACTOR + RENTAL COMPANY:**

DISCUSS MEWP REQUIREMENTS – All aspects of machine requirements are discussed with the rental company who may, upon request, assist with site surveys. Besides verifying individual machine requirements, consider the following site-specific requirements relating to delivery and collection: access route onto site - any factors which may limit/restrict the delivery vehicle weight, width, length or loaded height (this may limit size of delivery vehicle and therefore limit to delivery of one MEWP at a time in situations where more than one is being delivered); proposed load/unloading area; nominated person for receipt of machine on site; and familiarisation for intended trained operator(s).

### **1.3 CONTRACTOR + RENTAL COMPANY:**

CONFIRM MEWP ORDER – Order placed and documented, agreeing delivery address, delivery date and time, handover process, familiarisation requirements. The contractor should also confirm all site-specific requirements including: contact names and numbers, site induction process, site PPE requirements, safety and fall prevention requirements for the load/unload activity and Fleet Operator Recognition Scheme (FORS) requirements (if applicable). In the event of foreseeable changes affecting either party, e.g. nobody meeting the driver at the arranged time of delivery or the delivery driver being delayed, the contractor and rental company should agree actions to be taken by either party to ensure the security of the MEWP. In the event of nobody meeting the driver on site, clear instructions about if and where to leave the MEWP and what to do with the key will be required.

### **1.4 RENTAL COMPANY:**

IDENTIFY MEWP AND PREPARE FOR HIRE – Identify MEWP(s) required for the hire and ensure that Pre-Delivery Inspection (PDI), service schedule and thorough examination certification are all current and the relevant operator's manual is provided with the MEWP.

### **1.5 RENTAL COMPANY + TRANSPORTER:**

CONFIRM TRANSPORT ORDER – Contact an approved transport company. This may be an internal or external service to the rental company. It is strongly recommended that the rental company takes appropriate measures to ensure it only uses approved transport organisations that can provide appropriate transport vehicles and that are aware of and agree to adhere to defined safety practices and procedures for loading and transporting plant. Having been made aware of all delivery requirements as identified in 1.3, the approved transporter confirms and documents the order to deliver. The rental company should also ensure the transporter is made aware of, or has access to, individual MEWP specification details including: weight, transport height and width, ground clearance and power source. Other requirements to clarify may include the need for a fall protection system to prevent falls from the transport vehicle, adjustable or full width ramps and a serviceable winch equipped with suitable chains to enable a straight in line pull.

### **1.6 TRANSPORTER:**

**IDENTIFY VEHICLE AND DRIVER** – Based on the information provided by the rental company in 1.5 and the specifications of individual MEWPs to be delivered, singularly or as part of a multiple load, the transporter can determine an appropriate transport vehicle and apply for any necessary permits or authorisation. The same information will also allow the transporter to identify a competent driver who must be suitably trained on how to operate the relevant category of MEWP, and familiarised with, (or arrange for familiarisation with), the specific MEWP(s) to be delivered. If the rental company requires the driver to be able to conduct familiarisation on site, then additional training for the driver may be required (e.g. IPAF Demonstrator course). As the employer, the transporter will ensure the driver is aware of and understands the defined Safe Systems of Work (SSoW) for loading and unloading MEWPs that meet the approval of both the rental company and the contractor/user and delivery site.

### **1.7 TRANSPORTER + DRIVER:**

**SEND VEHICLE TO LOAD MEWP** – The transporter, with the co-operation of the selected competent driver, will ensure the selected transport vehicle is in a roadworthy condition, has sufficient securing equipment including chains, tensioners and straps, and a working serviceable winch for the planned load. Both parties should collaborate to ensure that the driver has all the appropriate PPE necessary to meet the rental company and site safety requirements (check site requirements with the contractor before arrival at the site, including appropriate personal fall protection equipment). The driver should, at all times, carry evidence of relevant operator, demonstrator and load/unload training e.g. IPAF PAL Card or equivalent. It is also good practice for the driver to have available copies of relevant SSoW to refer to or share with interested parties.

### **1.8 RENTAL COMPANY + DRIVER:**

**SAFE LOADING AREA** –The rental company is responsible for providing a designated well-lit area for the loading activity to take place. The designated area should be of sufficient size, on firm and level ground, be segregated from other work activities, free of traffic, pedestrians and members of the public. It should also be clear of overhead and underground hazards. Upon arrival at the rental depot and before starting any load/unload activities, the driver will independently conduct a visual assessment of the designated area to identify any hazards, which may impose significant risk during the load/unload operation. Only drivers who have received suitable and sufficient training will be able to undertake such assessments. Where relevant hazards are identified by the driver, these should be addressed jointly with a representative of the rental company and/or other persons involved in the loading activity, before starting work.

**Note:** Loading and unloading on the public highway should be avoided wherever reasonably practicable. Please refer to IPAF guidance on **LOAD AND UNLOAD ON THE PUBLIC HIGHWAY** if the activity is to be considered.

### **1.9 RENTAL COMPANY + DRIVER:**

LOAD AND SECURE MEWP(s) – Having identified the machine(s) to be loaded, the rental company should have sufficient measures in place to ensure the loading process is undertaken in a safe manner and completed without incident. The driver must adhere to the defined safety practices and procedures for loading and transporting plant as agreed in 1.5. The driver must also ensure sufficient chains/straps are used to secure each MEWP to the vehicle securely, taking into account locking pins/devices, slew lock, machine weight, size and anchor points. The driver should verify the loaded vehicle's maximum height and adjust the height indicator in the vehicle cab accordingly and mark up any MEWP parts which exceed the vehicle dimensions, as per the Department for Transport guidelines.

### **1.10 RENTAL COMPANY + DRIVER:**

DOCUMENTATION – The driver will be provided with delivery details. This may be in paper format or electronically and as a minimum should include: site address contact details, machine details and any specific site requirements as noted in 1.3 including familiarisation documentation where requested.

### **1.11 DRIVER:**

DELIVER MEWP TO SITE - Before starting the journey, the driver will consider the size of the loaded vehicle and plan the intended route to avoid any potential height, width or weight restrictions enroute.

### **1.12 CONTRACTOR + DRIVER:**

SITE UNLOADING AREA –The contractor is responsible for providing a designated well-lit area for the unloading activity to take place. The designated area should be of sufficient size, on firm and level ground, be segregated from other work activities, free of traffic, pedestrians and members of the public. It should also be clear of overhead and underground hazards. Loading or unloading off-site or on the public highway does not relinquish the contractor of this responsibility.

Upon arrival at the site, the driver should contact the person who is in-charge of unloading on the site (where applicable) and identify the authorised person who will be required to sign for receipt of the machines once offloaded. When determining the site delivery area, consider the distance from the unloading area to the intended place of work to ensure the MEWP's power source is not depleted before reaching the workplace and that the machine is of the correct type to navigate the ground conditions between vehicle and workplace.

Before starting any load/unload activities, the driver will independently conduct a visual assessment of the designated area to identify any hazards, which may impose significant risk during the load/unload operation. Where relevant hazards are identified, these should be addressed jointly with a representative of the contractor and/or other person involved in the unloading activity before starting work.

**Note: Loading and unloading on the public highway should be avoided wherever reasonably practicable. Please refer to IPAF guidance on LOAD AND UNLOAD ON THE PUBLIC HIGHWAY if the activity is to be considered.**

### **1.13 CONTRACTOR + DRIVER:**

OFF-LOAD MEWP – The contractor should have sufficient measures in place to ensure the off-loading process is undertaken in a safe manner, completed without incident, and where necessary, be able to direct the unloading operation. The driver must adhere to the defined safety practices and procedures for loading and transporting plant as agreed in 1.5. It is essential that any person in the platform of a boom during the offloading process should wear a harness and attach the restraint lanyard in accordance with IPAF guidance H1. The contractor is responsible for identifying a safe location in the proximity of the unload area, where handover and familiarisation can take place. The delivery driver should not be expected to travel the MEWP significant distances or across site to the intended place of work.

### **1.14 CONTRACTOR + DRIVER:**

HANDOVER OF MEWP – Once the MEWP is safely in the handover area - as identified by the contractor, the contractor's authorised/nominated representative should inspect the MEWP(s) to verify the machine specifications, conditions and presence of the manufacturer operator manual and evidence of a current thorough examination, before signing for receipt of the machine(s). If the contractor's representative is not available, the driver should document accordingly and follow relevant company procedures as agreed in 1.3 and 1.5, this may include photographic evidence of machine location. Where familiarisation has been requested, sufficient time should now be allocated for this to be delivered to the designated operator(s) and the details of the familiarisation recorded. Where familiarisation is not completed as requested, the driver must follow relevant company procedures as agreed in 1.3 and 1.5.

### **1.15 RENTAL COMPANY + TRANSPORTER + DRIVER:**

RETURN OF DELIVERY DOCUMENTATION – The transporter, with the co-operation of the driver, should return any delivery documentation to the rental company as soon as is reasonably practicable and within guidelines as agreed between the two parties in 1.5. The returned documentation should be checked by the rental company for any missing signatures or information. Contact the contractor if necessary to complete the required documentation.

## **OFF-HIRE / COLLECTION PROCESS**

### **2.1 CONTRACTOR + RENTAL COMPANY:**

IDENTIFY END OF MEWP HIRE – Where the hire agreement has no identified date for termination of the hire, the contractor will identify a date by which the MEWP will no longer be needed on site. Where the hire is for a fixed, pre-agreed period – identified in the hire contract, it is good practice for the rental company to contact the contractor to determine if the contractor wishes to extend the hire period or terminate the hire at the pre-agreed date.

## **2.2 CONTRACTOR + RENTAL COMPANY:**

**CONFIRM OFF-HIRE AND COLLECTION DETAILS** – The contractor must notify the rental company of the intention to off-hire the MEWP. In doing so, the contractor must confirm the address/location from where the MEWP is to be collected and highlight if this or any other arrangements differ from the original delivery details. The rental company should also be notified of any deterioration in the condition of the MEWP intended for collection, such as damage, flat tyre, loss of power etc. that may affect a driver's ability to load the machine safely or may require an engineer to rectify before transport. In return, the rental company should issue the contractor confirmation of the intention to terminate the hire agreement in the form of an "off-hire number" or similar referenced confirmation. Other details that should be confirmed at this point are: an intended date and approximate time of collection, presence, availability and contact details of a contractor representative on site during the collection process. In the event of nobody meeting the driver on site, clear instructions about the MEWP location and key location will be required.

## **2.3 RENTAL COMPANY + TRANSPORTER:**

**CONFIRM TRANSPORT ORDER** – Contact an approved transport company. This may be an internal or external service to the rental company. It is strongly recommended that the rental company takes appropriate measures to ensure it only uses approved transport organisations that can provide appropriate transport vehicles and are aware of, and agree to adhere to defined safety practices and procedures for loading and transporting plant.

Having been made aware of all collection requirements as identified in 2.2, the approved transporter confirms and documents the order to collect. The rental company should also ensure the transporter is made aware of, or has access to, individual MEWP specification details including: weight, transport height and width, ground clearance and power source. Other requirements to clarify may include the need for a fall protection system to prevent falls from the transport vehicle, adjustable or full width ramps and a serviceable winch equipped with suitable chains to enable a straight in line pull.

## **2.4 TRANSPORTER:**

**IDENTIFY VEHICLE AND DRIVER** – Based on the information provided by the rental company in 2.3 and the specifications of individual MEWPs to be collected singularly or as part of a multiple load, the transporter can determine an appropriate transport vehicle and apply for any necessary permits or authorisation. The same information will also allow the transporter to identify a competent driver who must be suitably trained on how to operate the relevant category of MEWP, and familiarised with, (or arrange for familiarisation with), the specific MEWP(s) to be collected. As the employer, the transporter will ensure the driver is aware of and understands the defined Safe Systems of Work (SSoW) for loading and unloading MEWPs/plant, that meet the approval of both the rental company and the contractor/user.

### **2.5 TRANSPORTER + DRIVER:**

**SEND VEHICLE TO COLLECT MEWP** – The transporter, with the co-operation of the selected competent driver, will ensure the selected transport vehicle is in a roadworthy condition, has sufficient securing equipment including chains, tensioners and straps, and a working serviceable winch for the planned load. Both parties should collaborate to ensure that the driver has all the appropriate PPE necessary to meet the rental company and site safety requirements, including appropriate personal fall protection equipment. The driver should, at all times, carry evidence of relevant operator, demonstrator and load/unload training e.g. IPAF PAL Card or equivalent. It is also good practice for the driver to have available copies of relevant SSoW to refer to or share with interested parties.

### **2.6 CONTRACTOR + DRIVER:**

**SITE LOADING AREA** –The contractor is responsible for providing a designated well-lit area for the loading activity to take place. The designated area should be of sufficient size, on firm and level ground, be segregated from other work activities, free of traffic, pedestrians and members of the public. It should also be clear of overhead and underground hazards. Loading or unloading off-site or on the public highway does not relinquish the contractor of this responsibility.

Upon arrival at the site, the driver should contact the person who is in-charge of unloading on the site (where applicable) and identify the authorised person who will be required to sign for receipt of machine collection before loading.

Before starting any load activities, the driver will independently conduct a visual assessment of the designated area to identify any hazards, which may impose significant risk during the load operation. Where relevant hazards are identified, these should be addressed jointly with a representative of the contractor and/or other person involved in the loading activity before starting work.

**Note: Loading and unloading on the public highway should be avoided wherever reasonably practicable. Please refer to IPAF guidance on LOAD AND UNLOAD ON THE PUBLIC HIGHWAY if the activity is to be considered**

### **2.7 CONTRACTOR + DRIVER:**

**PREPARE/CHECK MACHINE PRIOR TO COLLECTION** –The contractor is responsible for making the MEWP available and accessible in a working condition within reasonably close proximity to the designated loading area on or before the agreed collection date and time. The machine key should be either with the nominated person or in the notified position/location as agreed in 2.2.

The driver, accompanied by the contractor's representative, will inspect the condition of the machine to determine that it is safe to be loaded onto the transport vehicle and has not been damaged while on hire. Where any damage or missing parts (including the operator manual or key) are identified, and/or the MEWP is unable to be loaded due to its condition, the driver will note the findings on the collection documentation and seek further advice from the rental company as to how to proceed. Photographic evidence of machine condition/damage following a hire is often helpful in the event of damage before loading and no contractor representative being present.

### **2.8 CONTRACTOR + DRIVER:**

**COLLECTION DOCUMENTATION** – Driver to obtain a clear signature with a printed legible name and date from the contractor's appointed person agreeing to the condition of the MEWP upon collection including any damage. In the event of a refusal to sign the documentation listing any damage – the driver should notify the rental company and seek instruction before leaving site. Where there is no contractor representative present on site, this must be recorded on the collection documentation.

### **2.9 CONTRACTOR + DRIVER:**

**LOAD AND SECURE MACHINE** – Having verified the condition of the machine(s) to be loaded, the contractor should have sufficient measures in place to ensure the loading operation is undertaken in a safe manner and completed without incident.

The driver must adhere to the defined safety practices and procedures for loading and transporting plant as agreed in 2.2 and 2.4. The driver must also ensure sufficient chains/straps are used to secure each MEWP to the vehicle securely, taking into account locking pins/devices, slew lock, machine weight, size and anchor points. The driver should verify the load vehicle's maximum height and adjust the height indicator in the vehicle cab accordingly and mark up any MEWP parts which exceed the vehicle dimensions, as per the Department for Transport guidelines.

### **2.10 DRIVER:**

**LEAVE SITE AND RETURN TO RENTAL COMPANY** – Before starting the journey, the driver will consider the size of the loaded vehicle and plan the intended route to avoid any potential height, width or weight restrictions enroute.

### **2.11 RENTAL COMPANY + DRIVER:**

**SAFE UNLOADING AREA** –The rental company is responsible for providing a designated well-lit area for the loading activity to take place. The designated area should be of sufficient size, on firm and level ground, be segregated from other work activities, free of traffic, pedestrians and members of the public. It should also be clear of overhead and underground hazards. Loading or unloading outside the depot or on the public highway does not relinquish the rental company of this responsibility.

Upon arrival at the rental depot and before starting any unload activities, the driver will independently conduct a visual assessment of the designated area to identify any hazards, which may impose significant risk during the load unload operation. Where relevant hazards are identified by the driver, these should be addressed jointly with a representative of the rental company and/or other persons involved in the loading activity, before starting work.

**Note:** Loading and unloading on the public highway should be avoided wherever reasonably practicable. Please refer to IPAF guidance on **LOAD AND UNLOAD ON THE PUBLIC HIGHWAY** if the activity is to be considered.

### **2.12 CONTRACTOR + DRIVER:**

UNLOAD MACHINE – The rental company should have sufficient measures in place to ensure the loading process is undertaken in a safe manner, completed without incident, and where necessary, be able to direct the unloading operation. The driver must adhere to the defined safety practices and procedures for loading and transporting plant as agreed in 2.3. It is essential that any person in the platform of a boom during the offloading process should wear a harness and attach the restraint lanyard in accordance with IPAF guidance H1. The rental company is responsible for identifying a safe location in the proximity of the unload area, where the returned machine can be parked once off-loaded.

### **2.13 RENTAL COMPANY + DRIVER:**

RETURN OF MEWP AND COLLECTION DOCUMENTATION – All collection documentation should be returned to the rental company with any omissions pointed out with the given reason. Rental company to check off-hire documentation with the driver to verify the machine conditions and presence of the key, MEWP manufacturer's manual, noting any damaged or missing parts and signatures. The driver should bring to the attention of the rental company any damage or defects identified during the collection of the machine.

## **REFERENCES**

UK Fleet Operator Recognition Scheme. [www.fors-online.org.uk](http://www.fors-online.org.uk)

UK Department of Transport (2009). Information sheet on overhanging loads: a brief guide. [www.gov.uk/government/publications/overhanging-loads-on-vehicles](http://www.gov.uk/government/publications/overhanging-loads-on-vehicles)

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