

Loading and Unloading Check

A loading and unloading readiness record covering vehicle position, segregation, load information, equipment, communication and controlled departure.

1. Record details and scope

Project

Filled in from the project in SiteSurvey.

Site or premises address

Client or organisation

Record date *

Person completing the record *

This is a task readiness check, not a lift plan, dangerous-goods declaration, load-restraint design or automatic permission to move a vehicle.

HSE guidance covers segregation, stable vehicles, suitable load distribution, equipment and preventing premature movement during loading or unloading. Assess the actual load, site and people involved.

2. Task and responsibilities

Load, vehicle/trailer and bay reference *

Driver, loading lead and equipment operators *

Risk assessment and agreed loading method *

Load mass, dimensions and handling information *

3. Before movement

Area segregated and uninvolved people clear * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Ground, bay and vehicle deck condition checked * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Vehicle brakes, stabilisers and movement prevention arranged * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Handling equipment and load compatibility confirmed * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Driver waiting place and communication agreed * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

Loading sequence and safe unloading considered * (choose one)

☐ Acceptable ☐ Action needed ☐ Not checked ☐ Not applicable

Action, limitation or reason not applicable * (if applicable)

4. Completion and release

Separate load security check reference

Damage, instability or other concerns

Describe a change or exception from the agreed plan and the resulting hold or review. Keep the observation separate from departure authority.

Departure status * (choose one)

☐ Held ☐ Ready for authorised departure review

Hold reason and responsible person * (if applicable)

Departure authority, person and time

Load and area evidence (photos: attach, or note the file names)

5. Actions and review

Are further actions required? * (choose one)

☐ Yes ☐ No

Further action (copy this block for each one; if applicable)

Action and evidence reference *

Person responsible *

Target date

Action status * (choose one)

☐ Open ☐ In progress ☐ Completed

Completion evidence * (if applicable)

Outstanding limitations and information to pass on

Record status * (choose one)

☐ Ready for review ☐ Further work needed ☐ Work or use stopped

Reviewed by

Review date

Author signature *

Signing records the information entered. It does not itself certify legal compliance, remove a limitation or authorise unsafe work.