

## Operating Requirements for Boom Lifts and Scissor Lifts

---

Originally Issued: 11-Aug-06  
Revised/Reviewed:

HSSE Interim Directive  
Page 1 of 8

---

### I. CONTEXT

To move forward on our journey towards a safe, simplified facility that delivers consistent and dependable business results it is necessary to institutionalize the following interim directive for Operating Requirements for Boom Lifts and Scissor Lifts. These changes are necessary to ensure that we have appropriate levels of assurance and accountability to facilitate an accident and injury free operation of our site. Final recommendations will be issued after the accident investigation.

### II. DIRECTIVE

#### A. Operating Requirements for Boom Lifts and Scissor Lifts

1. Procurement and Job Reps to communicate the requirements to all contractor companies
2. BP Operations Supts/Maintenance Supts/TAR Supts to communicate the requirements to all BP personnel
3. BP employees
  - a) BP line management will verify that BP employees who operate the equipment are currently qualified
  - b) BP L&D will provide and maintain a list of current qualified BP equipment operators
  - c) BP L&D will provide equipment operator training to BP personnel which meets or exceeds OSHA, ANSI and BP standards
    - (1) A recommended source is the manufacturer's training program
    - (2) Incorporate Golden Rules - Lifting Operations recommendations
    - (3) The training must be equipment specific and must cover the intended uses of the equipment
    - (4) Training must include the reporting and investigation of incidents, including improper use
    - (5) Periodic refresher training will be provided in accordance with the training matrix at a maximum of two years

- d) Each BP employee must complete a Boom Lift and Scissor Lift pre-use inspection record. (3 operators = 3 pre-use inspection records)

4. Contractors

- a) BP Procurement will include in contracts the requirement that contractors provide assurance they are meeting the Operating Requirements for Boom Lifts and Scissor Lifts
- b) Contractors will ensure that their employees who operate Boom Lift and Scissor Lift equipment are currently qualified
- c) Contractors will ensure their Boom Lift and Scissor Lift operator training meets or exceeds OSHA, ANSI and BP standards
  - (1) A recommended source is the manufacturer's training program
  - (2) Incorporate Golden Rules - Lifting Operations recommendations
  - (3) The training must be equipment specific and must cover the intended uses of the equipment
  - (4) Training must include the reporting and investigation of incidents, including improper use
  - (5) Periodic refresher training will be provided at a maximum of two years
  - (6) Documentation of training must be readily available.
- d) Each contractor Boom Lift and Scissor operator must complete a BP pre-use inspection record as a minimum. (3 operators = 3 pre-use inspection records)

B. **Mechanical Integrity**

- 1. The equipment supplier will have a process to confirm that the equipment is functional at the time it is received at the jobsite
  - 2. The equipment supplier will have a preventative maintenance/repair program which meets or exceeds manufacturer's recommendations
    - a) The program will include a process for records management
    - b) A reminder system to ensure timely repairs
    - c) The equipment provided must have a sticker or posting indicating when next preventive maintenance is due. This must include all manufacturer required inspections
  - 3. Equipment operators shall discontinue use of and tag any equipment which cannot be operated safely. This includes taking out of service equipment in which the safety mechanisms are not properly functioning or is past the next indicated preventive maintenance date
-

4.     Equipment operators are responsible to communicate equipment damage or malfunctions so that equipment can be repaired or removed

**C.     Hazard Assessment**

1.     The Hazard Assessment process must be used in planning the work to determine if a Boom Lift or Scissor Lift is an acceptable tool for the job and to determine acceptable sizes of the Boom Lift or Scissor Lift
  - a)     Contractors will use their own Hazard Assessment process to determine if the equipment meets their specifications to accomplish the work. The outcome of the Hazard Assessment must be as rigorous as the BP Hazard Assessment
2.     The Hazard Assessment should be used to evaluate if a spotter is needed
3.     The hazard assessment will be signed by the supervisor and the BP job rep

**D.     Assurance Audits**

1.     HSSE will provide the following assurance audit reviews:
  - a)     Initial review of L&D program to confirm equipment operator training meets or exceeds OSHA, ANSI and BP standards
  - b)     Spot check, (200 cases) within the next 90 days, to verify that
    - (1)     Qualified equipment operators are being used
    - (2)     Equipment checkout sheets are being used
    - (3)     Hazard Assessments are being used
    - (4)     The preventive maintenance sticker is being used
  - c)     Annual audit of maintenance records

**E.     BP Golden Rules for Lifting Operations**

1.     Lifts utilizing cranes, hoists or other mechanical lifting devices will not commence unless:
    - a)     an assessment of the lift has been completed and the lift method and equipment has been determined by a competent person(s)
    - b)     operators of powered lifting devices are trained and certified for that equipment
    - c)     rigging of the load is carried out by a competent person(s)
      - (1)     Loads should never be rigged onto the boom or scissor lift
    - d)     lifting devices and equipment have been certified for use within the last 12 months (at a minimum)
-

- e) load does not exceed dynamic and/or static capacities of the lifting equipment
- f) all safety devices installed on lifting equipment are operational
- g) all lifting devices and equipment have been visually examined before each lift by a competent person(s)

C. H. Maclean  
Business Unit Leader

**BP Texas City Site  
Boom Lift and Scissor Lifts Operator Pre-Use Inspection Record**

Make: \_\_\_\_\_ Machine Number: \_\_\_\_\_ Serial Number: \_\_\_\_\_

**Items to Be Inspected:**

Placards and control markings are in place and legible?
Fire extinguisher is properly charged?
Engine coolant level is acceptable and the system is not leaking?
Engine oil level is acceptable and the system is not leaking?
Hydraulic level is acceptable and the system is not leaking?
Fuel level is acceptable and the system is not leaking?
Battery indicator shows an acceptable level remaining? (If applicable)
Are there any loose or missing parts? (Bolts, fasteners, braces, brackets, ect.)
Work platform is clean, dry and clear of debris an there is no equipment attached? (Air hoses, welding leads, ect.)
Extension slides move freely with safety locking pins in place to lock setting on Scissor Lifts with extension platforms?
Tires, wheels, and lug nuts are in good condition?
No defects such as cracked welds, damaged control cables, damaged wire harness or other obvious damage.
The manufacturer's operations manual is stored on the lift?
Platform gate and Guardrails are in place and in good working condition?
Other personal protective devices are in good condition? (Fall restraint anchor points)
Check inspection sticker on equipment for validation. All manufacturer required inspections of all hydraulic control relief valves and other manufacturer requirements have been completed within the required time period?
Is the total load within the rated capacity?
Basket stabilizing pivot pins are in good working order? (Boom Lift Only)
Slide pads are not worn down?
Braking devices are operating properly?
Emergency controls are in proper working condition? (Emergency Stop Device, emergency lowering function.)
Safety devices are functional and are not bypassed? (Foot pedal, spring lock, etc.)
All switch and mechanical guards are in good condition and properly installed?
Emergency operating controls are working properly? (Switch allowing control to go from platform to ground, to hydraulics or to battery)
All controls function properly, are clean and clearly labeled? (basket, ground, battery, ect)
All safety indicator lights work properly and motion alarms are functional?
Stabilizers, outriggers and/or extending axles function properly? (If applicable)

**Comments:** \_\_\_\_\_  
\_\_\_\_\_

CAUTION – If the lift is found to be in need of repair or contributes to an unsafe condition, report condition immediately to your supervisor or job representative; the lift shall not be operated until it has been restored to safe operating condition. During operation report any unsafe condition immediately to your supervisor or job representative. DO NOT MAKE REPAIRS OR ADJUSTMENTS UNLESS SPECIFICALLY CERTIFIED TO DO SO. For assistance contact the BP Garage at Ext. 21981 or RSC at 409-933-1538.



## Hazard Assessment for Boom Lifts and Scissors Lifts

Project:	Date:
Equipment Type/No.:	Location:

		Yes/No	Comments
<b>Right tool for the job</b>	Have other alternatives been considered? (scaffolding, ect.)		
	When compared to other alternatives, is this the solution that presents the least risk?		
	Is this the correct size of boom lift or scissors lift required for the job? (bigger is not always better)		
	Is the equipment designed for the job and is it marked accordingly?		
	Has the job been properly planned to provide sufficient time, materials and supervision?		
<b>Operator trained/ certified</b>	Are equipment operators trained and authorized to operate designated equipment?		
	Can training documentation be readily provided?		
	Will the equipment operator review the manufacturer's operating manual and become familiar with the equipment?		
	Has the operator operated designated equipment within the last six months?		
	Have all personnel involved with the lift been fully briefed on the sequence of the planned operation and its limitations (visibility, load capacities, landing area capacity, etc.)?		
<b>Mechanical Integrity</b>	Will a pre-use inspection be completed prior to starting the job?		
<b>Workplace Inspection</b>	Is the area free of drop-offs, holes, or bumps, including those concealed by water, ice, mud, etc.?		
	The aerial platform shall not be operated on grades, side slopes or ramps exceeding the rating given by the manufacturer. Is the aerial work platform on flat stable ground?		
	Is the work area free of debris?		
	Is adequate clearance between overhead obstructions and electrical conductors maintained? (20ft clearance from electrical conductors)		
	Is the area clear of hazardous locations and atmospheres?		
	Is the ground surface and support sufficient to withstand all load forces imposed by the aerial platform in all operating configurations?		
	Are the wind and weather conditions conducive to the operation?		

	Is the affected area barricaded to control unauthorized persons?		
	Have other possible unsafe conditions been considered?		
<b>Personal Protection</b>	Is the guardrail system complete and intact?		
	Do all occupants have proper personal fall protection?		
	Do all occupants know how to properly wear personal fall protection?		
	Are all of the operators aware that standing on midrails, step-stools or anything other than the floor of the aerial lift is prohibited?		
	Does the aerial platform contain only the tools and other loose articles necessary to complete the job? Are the tools stored neatly?		
	If it is necessary to exit the aerial platform while elevated, has proper approval been received and controls put in place?		
<b>Spotter</b>	Is a trained spotter needed to improve operability?		
	If it is determined that a spotter is needed, does the spotter need to be trained on how to operate the equipment?		

**Verify that all items have been marked Yes. If an item has been answered No, sufficient controls must be applied and documented in the comments section prior to approval.**

**Attach the completed Hazard Assessment to the ATW**

Equipment Operator Signature:		Date:	
Print Name:			
Equipment Operator Signature:		Date:	
Print Name:			
Equipment Operator Signature:		Date:	
Print Name:			
Job Rep Signature (if applicable):		Date:	
Print Name:			
Spotter Signature (if applicable):		Date:	
Print Name:			
Equipment Operator's Supervisor Signature:		Date:	
Print Name:			