

Safe coupling and uncoupling

GUIDE



Foreword

I am pleased to be able to introduce this new publication on the safe coupling and uncoupling and parking of commercial vehicles and trailers. These actions are an integral part of the daily duties for many professional drivers. Tragically, each year there are a number of fatalities or serious injuries due to vehicle runaways or trailer rollaways. The cause is often because the individual in charge mistakenly believes that all brakes are engaged when they are not. This should not happen if simple procedures are followed.

This guidance has been produced by a working group made up of members of the Transportation and Logistics Forum, which is Chaired by the Health & Safety Executive. It represents industry best practice and is a must-read for drivers, users of large goods vehicles, managers, self-employed drivers and driver training bodies to check and, if necessary, improve their knowledge of the safe procedures.



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Introduction

Every year people are killed or seriously injured and property is damaged as a result of vehicle runaway or trailer rollaway situations. These are often the result of drivers not following safe procedures and those in control of sites not having suitable monitoring arrangements in place to ensure safe procedures are followed. Research conducted by the Health and Safety Laboratory (HSL) suggests many of these events go unreported.

Under health and safety legislation employers have a responsibility to provide and maintain safe systems of work to ensure the health and safety of both those at work and those who may be affected by their activities such as members of the public. They should ensure there are safe systems of work for coupling and uncoupling vehicle combinations and these are understood by those carrying out the activity. There should also be effective arrangements in place to ensure these systems are being followed. Drivers, including the self-employed, have a responsibility for both their own health and safety and that of other people who could be affected by their actions.

This publication is intended to be a guide to assist employers, those who control sites where coupling and uncoupling is undertaken by users of large goods vehicles, managers, self-employed drivers and driver training bodies. It has been developed by industry as a good practice guide with the aim of reducing the likelihood of a runaway or rollaway incident.

For the purposes of this guide the tractor unit/prime mover is referred to as a truck and the trailer unit is referred to as a trailer. In addition, a runaway is defined as a situation where a truck or truck and trailer combination moves in an uncontrolled manner during coupling/uncoupling. A rollaway is defined as a situation where a trailer moves in an uncontrolled manner independent of the truck.

The guide focuses on the procedures for the safe coupling and uncoupling and parking of standard semi-trailers but there is also information on procedures for close coupled semi-trailers, centre axle and turntable drawbar trailers. These are detailed in the appendices.

In addition to these procedures, the guide also contains supplementary safety guidance and advice that should be observed and a section concerning good parking practice.

2.0 The problem

Fatal and serious accidents to drivers and damage to property occur when trucks and their trailers runaway when the correct coupling procedures are not followed. When a runaway starts the driver will be in a position such as on the catwalk of the truck or at ground level on the nearside of the truck. In these positions it is very difficult for the driver to regain control of their vehicle without putting themselves at risk of serious injury.



Fatal and serious accidents to drivers and damage to property can also occur as a result of a trailer rollaway. This is usually the result of poor practice by the driver who left the trailer without applying the trailer parking brake, and the subsequent driver who couples the truck to the trailer without checking that the trailer parking brake has been applied.

Incidents can also occur when the trailer unexpectedly separates from the truck, because they have not been coupled correctly. These can occur when the truck and trailer combination are moving or after they have been parked.

In most cases incidents are the result of failing to follow a simple procedure – always applying the truck and trailer parking brakes. It is very rare that such incidents are the result of driver inexperience.

3.0 Truck and trailer braking systems explained

Truck and trailer braking systems are complex. In order to avoid problems during coupling and uncoupling a basic understanding of how the various components operate is important.

It is important that drivers understand how to operate the trailer parking brake correctly.

This section explains how a typical braking system operates on a truck and trailer. It should be noted, however, that due to the variety of vehicle systems and specifications other systems may operate differently.

3.1 Air and electrical connections between truck and trailer

Modern trucks have two air lines which supply the trailer with air. The first is the supply air line (red) and the second is the service air line (yellow).



The service air line (yellow) and supply air line (red) operate in conjunction with one another and provide additional safety functions, one of which is to ensure controlled trailer braking should the service air line fail.

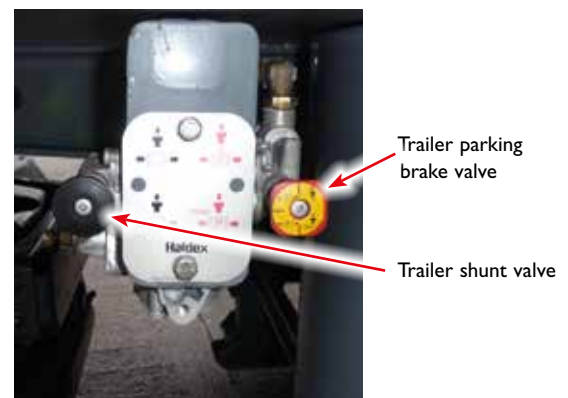
The supply air line (red) has two functions. The first is to supply air to the trailer air tanks. The second is to control the emergency trailer brakes. In the event of a loss of air pressure, for example if the trailer becomes detached or the supply air line is broken, the trailer emergency brakes will activate.

When the driver applies the vehicle brakes during normal driving conditions, air is supplied to the trailer through the service air line (yellow) and the trailer brakes are applied.

3.2 Trailer parking brake valve

The parking brake fitted to a trailer typically features a valve with a push/pull button. Pulling the button *out* applies the trailer parking brakes; pushing the button *in* releases the parking brakes.

The trailer parking brake valve must be applied at all times when a trailer is uncoupled from the truck.



Example of typical parking brake/shunt valve

3.3 Trailer shunt valve

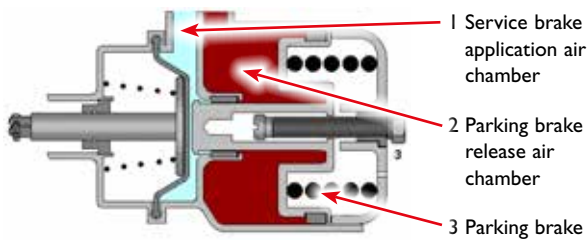
The disconnection of the supply air line (red) triggers the automatic braking system. Where fitted, the trailer shunt valve can cancel the automatic emergency braking system by pushing the button in on the valve.

With the trailer parking brake valve button pushed *in* (the release position), and the shunt valve button pushed *in*, the service braking system and spring parking braking system are released. This function allows maintenance and manoeuvring to be undertaken.

It is important to remember that the trailer is not 'braked' when manoeuvring with the shunt button pushed in and the shunt valve and trailer parking brake valve buttons must be pulled out again when the manoeuvring process is complete.

3.4 Trailer spring brake assemblies

A typical air brake assembly fitted to a trailer consists of two sections. One section provides the actuation of the service brakes when supplied with air under braking (and also the emergency braking function which is explained further below), and the other is the parking brake section which houses a large mechanical spring assembly.



Under normal driving conditions, the supply air line (red) supplies air to the spring brake section of the brake actuator assembly and compresses the parking brake spring holding off the parking brake. When the driver applies the service brake, air enters the service brake chamber (item 1 in the above diagram) and applies the service brake.

During the uncoupling process, when the supply air line (red) is disconnected, the emergency function of the trailer braking system applies air into the service brake chamber (item 1 in the above diagram) and applies the service brake under the emergency trailer braking function. This results in the application of the trailer brakes. However, the parking brake chamber remains charged with air and the parking brake mechanical spring remains compressed. Under this condition, the parking brake function is not activated. Only when the trailer parking brake valve button is pulled out into the park position and the air, which is holding off the mechanical spring brake is exhausted, will the trailer parking brake be applied correctly.

On most standard trailers, disconnecting the supply air line alone will result in the trailer brakes being applied but not the trailer parking brake.

Where fitted, trailer parking brakes must be used unless there are circumstances where the application of the brake may increase the risk of injury to those involved in coupling and uncoupling.

Although the emergency function applying the service brake will apply the trailer brakes when uncoupled, the trailer brakes will be released when the trailer is recoupled.

If the truck and trailer have not coupled correctly or the handbrake on the truck has not been applied, this will result in the uncontrolled movement (a runaway) of the truck and trailer combination when the supply air line (red) is connected.

3.6

Trailer electrical connections

The electrical connections used between trucks and trailers may include the following combinations.

- 24N (ISO 1185) is the **Normal** lighting connector
- 24S (ISO 3731) is the **Supplementary** lighting connector
- ISO 7638 – 7 pin connection for braking systems – ABS/EBS
- ISO 12098 – 15 pin lighting connector



24N and 24S connectors



ISO 7638 ABS/EBS connector

Trucks first used on or after 1 May 2002 must be fitted with ISO 7638 connections. If a truck is fitted with an Electronic Braking System (EBS) and is towing a trailer fitted with EBS then a 7 core cable must be used.

Whenever an ISO 7638 connector is fitted to both the truck and trailer the appropriate connecting cable must be used.

If a truck is equipped with EBS it is possible, under certain conditions, that disconnecting the supply air line (red) will NOT activate the fail-safe brakes on the trailer:

All airlines and electrical cables must be correctly connected before moving a truck and trailer combination.

3.5

Truck and trailer parking brakes

Parking brakes on trucks and trailers work independently of one another. It is important, therefore, that both parking brakes are applied during coupling and uncoupling.

Summary of key points

- Trucks and trailers have separate parking brakes
- Identify the location of the trailer parking brake valve and ensure it is applied before commencing the coupling procedure
- Both the truck and trailer parking brake must be applied correctly
- The trailer parking brake valve must always be applied to uncoupled trailers
- Disconnecting the supply air line (red) alone will NOT activate the trailer parking brake
- If the shunt valve is used for manoeuvring purposes extreme care must be taken during any manoeuvring. The shunt valve and trailer parking brake valve must be pulled out again when the manoeuvring process is complete
- All air lines and electrical cables must be correctly connected before moving a truck and trailer combination

Managing health and safety

Employers have a legal duty under the Management of Health and Safety at Work Regulations 1999 to put in place suitable arrangements to manage health and safety risks. As a minimum this should include the following.

- A written health and safety policy (if you employ five or more people)
- Assessments of the risks to employees, contractors, customers, partners, and any other people who could be affected by your activities – and record the significant findings in writing (if you employ five or more people). Any risk assessment must be 'suitable and sufficient'
- Arrangements for the effective planning, organisation, control, monitoring and review of the preventive and protective measures that come from risk assessment
- Access to competent health and safety advice (www.hse.gov.uk/competence)
- Provide employees with information about the risks in your workplace and how they are protected
- Instruct and training for employees in how to deal with the risks
- Ensure there is adequate and appropriate supervision in place
- Consult with employees about their risks at work and current preventive and protective measures

In order to deliver effective health and safety arrangements the Health and Safety Executive (HSE) advocate a **Plan, Do, Check, Act** approach.

- | | |
|--------------|---|
| Plan | Describe how you manage health and safety in your business (your legally required policy) and plan to make it happen in practice. |
| Do | Prioritise and control your risks – consult your employees and provide training and information. |
| Check | Measure how you are doing and investigate the causes of any accidents, incidents or near-misses. |
| Act | Learn from your experience and take action on lessons learned. |

Further information can be found on the HSE website (www.hse.gov.uk/managing)

Responsibilities for health and safety management should be clearly allocated before any work starts so that everyone (employees, contractors, visiting drivers, shunter drivers and maintenance staff) understand what they need to do to maintain a safe workplace.

It is important to have strong lines of communication to ensure any changes can be quickly put into practice. As part of the communication process employers should consult with those carrying out the work before making any health and safety decisions. A clear and simple incident reporting procedure, which includes near misses, can help to identify problems early, prevent serious incidents and highlight the effectiveness of control measures.

Supervision is an essential part of monitoring safe working. The level of supervision should reflect the level of risk and the abilities of those carrying out the work. However, even where risks are low there will still need to be some supervision to make sure safety standards are being maintained. Monitoring how work is undertaken is also important as it will help to identify if safe systems of work are being followed and whether they are effective or need to be revised.

Carrying out a suitable and sufficient risk assessment is a key part of managing health and safety. When conducting a risk assessment in relation to coupling and uncoupling consider the following three areas: site (design and activity), vehicle and driver:

4.1 Site

4.1.1 Design

Every workplace must be safe for the people and vehicles using it. A well-designed workplace that ensures vehicles and pedestrians are segregated will make transport related accidents less likely. Areas which should be considered include (but are not limited to) the following.

- Lighting
- Ground conditions
- Signage and layout
- Parking areas

4.1.1.1 Lighting

Suitable and sufficient lighting on site is especially important where there is insufficient natural daylight as drivers need plenty of light to check that locking pins and safety clips are in place, and cables and hoses have

been properly attached. It will also assist the driver in locating the trailer parking brake and, if unable to carry out the operations from the ground, access the area at the rear of the truck.

4.1.1.2 Ground conditions

During uncoupling the trailer will become unsupported by the truck as a result of which the full weight of the trailer will be transferred to the ground. It is important, therefore, that the ground conditions are assessed before use and, if necessary, reinforced as this will help to prevent the trailer legs sinking and the trailer tipping over.

It is important to remember that most yard areas are designed and constructed with a slight incline. This will result in either the truck and/or the trailer moving if they have not been properly secured. Where it is possible, particularly where the ground is on a slight incline, parking the trailer against a solid object which will act as a chock will also reduce the risk of a runaway/rollway occurring.

4.1.1.3 Signage

Signs inform drivers and pedestrians about potential hazards and what they should do. They need to be easy to understand, clean and positioned so that drivers and pedestrians have time to see them and take action before they reach the hazard.

4.1.1.4 Parking areas

Wherever possible, coupling and uncoupling should be undertaken in designated areas which should be clearly marked. The area allocated should be of a sufficient size to ensure those carrying out the task can do so safely.

When considering the use of hard standings to help prevent a trailer rollaway, ensure they have been designed to withstand the combined load of the truck, trailer and the load being carried.

It is important to remember that although most parking areas appear flat they may actually be on an incline.

4.1.2 Activity (coupling and uncoupling)

There are several coupling combinations and coupling methods but the most common is the standard truck and semi-trailer combination. This section looks specifically at this type of combination; there are less common combinations which are covered in the appendices.



The procedure described below in section 4.1.2.1 applies whenever there is adequate space between the rear of the truck and the front of the trailer for the driver to work in safety. Where there is insufficient space then alternative procedures, referred to in the appendices, should be considered. Drivers should have received training in these alternative procedures if they are to be undertaken safely.

It should be noted that some applications, such as dual or multi position sliding fifth wheels and dual height raising fifth wheels, are not covered by the following procedures. With these applications and the use of non-standard trailers, it will be necessary to develop application specific operating instructions based on risk assessment and manufacturer's instructions.

It should never be taken for granted that a truck and trailer are compatible as there are numerous variables. Examples include: is the trailer fifth wheel position suitable for the kingpin position on the semi-trailer to be coupled, does the drawbar hitch position and pin size suit the towing eye and drawbar trailer towing beam geometry, when turning will the semi-trailer landing legs clear the rear of the truck and are the air and electrical services compatible?

When considering using the split coupling method to couple or uncouple a semi-trailer it is important to ensure the braking system fitted to the trailer is suitable to ensure the procedure can be undertaken safely. Different specifications of trailer braking systems and their operation may prevent the creation of a safe system of work.

If the driver does not follow the prescribed procedure and the trailer is not secured in the coupling, the trailer could move when the supply air line (red) is connected. If the driver releases the air connection, the reaction time may be such that the trailer does not stop immediately resulting in the driver being trapped and others injured.

4.1.2.1 Coupling



1



2



3

- Slowly reverse the truck in a straight line towards the front of the trailer. Stop when the bottom of the fifth wheel ramps are level with the front of the trailer (1). **Apply the truck parking brake (2)**, stop the engine and remove the keys (3)



4



5



6

- **Check the parking brake on the trailer is applied (4).** Do not walk under the trailer
- Inspect the fifth wheel and locking devices on the truck (5), the kingpin and rubbing plate on the trailer for any signs of damage (6). Assuming everything is in order move to the next stage. Should any damage be apparent do not continue but seek assistance



7



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- Check and, if necessary, adjust the trailer coupling height relative to the fifth wheel (7), which is normally designed to accept the kingpin just below its parallel height. Refer to the manufacturer's instructions for the correct procedure. Height adjustment may be achieved by extending or retracting the trailer landing legs (8). Changing the truck height, if it is equipped with air suspension, is an alternative solution (9). If this

process is not carried out correctly the kingpin can pass over the fifth wheel into a dangerous position behind the cab or rest on top of the fifth wheel (10)



10

- Slowly reverse the truck under the trailer (11) until the fifth wheel jaws engage (12). At this point there are two further checks which are required to be undertaken to ensure that the fifth wheel jaws have correctly engaged



11



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- The first check is to select a low forward gear and, with the trailer parking brake still applied, slowly pull forward and perform a 'snatch test' (13). Repeat the snatch test to confirm the jaws have locked. **Apply the truck parking brake**, stop the engine and remove the keys
- The second check is to carry out a visual inspection to verify that the kingpin is correctly located in the jaws and that the fifth wheel release handle is in the correct locked position. Fit the security device often referred to as the 'dog clip' and/or any other safety device provided (14)
- *If the security device does not fully engage, pull the release handle to disengage the jaws and slowly move truck away from the trailer then repeat the fifth wheel coupling procedure*



14



15



16

- Connect the service air line (yellow) and electrical connections (15)
- Connect the supply air line (red) and wait for a few seconds in case of any unexpected movement (16)

If the trailer moves, immediately disconnect the supply air line (red) and check that the parking brake on the truck and trailer have been applied.

- Wind up the landing legs and stow the handle (17). Attach the rear number plate (18) and ensure that any air suspension control is set to the ride position. Release the trailer parking brake (19), wait a few seconds and if the vehicle starts to move immediately pull out the trailer parking brake valve.



17



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- Before use, the driver must carry out a walk around check of the combination to check that everything is in order and roadworthy. It is also the responsibility of the driver to check that the in-cab height indicator is set correctly.

4.1.2.2 Uncoupling

- Park the combination in a straight line. **Apply the truck parking brake (20)**, stop the engine and remove the keys (21)
- **Apply the parking brake** on the trailer (22)
- Remove the trailer number plate and place in the stowage position provided or in the cab
- Lower the landing legs until they are in contact with the ground (23)



20



21



22



23

- Disconnect all of the air and electrical connections (24). When disconnecting the air lines, grip the connections firmly as they may kick back when released due to air pressure in the line



24



25

- Ensure connections are placed in the dummy stowage positions provided or secure them on the catwalk in such manner that water and dirt cannot enter the connections
- Remove the security device then pull the release handle to disengage the fifth wheel jaws (25)
- Slowly draw the truck approximately 300mm forward so that the fifth wheel is still under the rubbing plate (26)



26



27



28

- **Apply the truck parking brake**
- Lower the rear axle air suspension to drop the fifth wheel away from the trailer to prevent the truck rising suddenly as the trailer weight is removed from the fifth wheel (27)
- Now pull clear of the trailer and stop and reset the truck air suspension to the ride position (28)
- If the truck has mechanical suspension, stop when the trailer is clear of the fifth wheel
- **Apply the truck parking brake**, stop the engine and remove the keys
- Before leaving the trailer, walk around it and check that it is in a safe condition

4.2

Vehicle

Every employer and self-employed person must make sure that any work equipment used (which includes vehicles) is suitable for its purpose. When buying or hiring a vehicle consider what it is to be used for, who will use it and the environment in which it will operate. Further information on work equipment can be found in HSE's Approved Code of Practice (L22, 4th edition) *Provision and Use of Work Equipment Regulations 1998*.

The following list of vehicle related measures should be considered when developing a safe system of work for coupling and uncoupling.

4.2.1 Cab exit warning devices

An audible and/or a visual alarm installed in the cab of the truck, which is activated each time the driver's door is opened, can help remind the driver to **apply the truck parking brake** before leaving the cab.

When specifying audible/visual alarm systems consider the following.

- To be effective, the alarm should be distinguishable from other information warning sounds in the cab and instantly grab the attention of the driver prompting immediate action
- Activation by the driver and/or passenger door
- Operation of alarm with doors opened or closed

- Minimum sound level – audible inside and outside of the cab
- Radio mute function when the alarm is sounded
- Alarm to continue to sound until the parking brake is applied
- Alarm to operate in any state whether the key is in or out, engine running or switched off

4.2.2 **Position of trailer parking brake valve control**

There is no standard position for a parking brake valve control on a trailer and due to the fundamental differences between semi-trailers and drawbar trailers there is always likely to be more than one position. Research conducted by the Health and Safety Laboratory (HSL) identified that a standard position will encourage drivers to utilise the trailer parking brake. The research also reported that there was a general consensus of opinion amongst fleet operators to fit the trailer parking valve control either at the front of the trailer adjacent to and in front of the landing leg area or at the trailer bulkhead area close to the air line connectors. This prevents drivers being in a position at the rear of the trailer where there is a risk of injury, especially when trailers are closely parked.

Whichever position is adopted the trailer parking brake valve and how to operate it should be clearly marked.

4.2.3 **Truck service connections**

Drivers and others, for example maintenance staff, require access to the air and electrical service connections on a truck. Wherever possible this should be undertaken from the ground but, in most cases, the driver will be required to climb onto and off the chassis behind the cab. To minimise the risk of drivers falling from this area, slip resistant surfaces, access steps with appropriately sized treads and handrails that ensure three points of contact should be available.

The positioning of the air lines needs to be considered to prevent them becoming snagged on the front corners of the trailer while turning or manoeuvring; providing dummy stowage points will help prevent them rubbing or fouling any other equipment when not in use.

4.2.4 **Braking systems**

Braking system designers and vehicle users have worked closely to introduce measures to overcome inappropriate coupling or uncoupling and parking procedures but to date technical solutions to eliminate the problem appears difficult to achieve.

To assist in the reduction of accidents caused by trailer parking brake systems, trailers should always be built to the most effective specification available.

Trailer manufacturers and braking system suppliers have a responsibility to ensure that customers are made aware of developments in braking system technology and are given the best advice available regarding specification and application at the time of purchase. The same goes for trucks, with many safety systems now being available to reduce the risk of vehicle and trailer runaway incidents. Operators should consider what is available and ensure that vehicle and trailer specification is the most effective and suitable solution for their particular operation.

4.2.5 **Close coupled semi-trailers**

Various types of moveable arms (see below) which can swing or slide, and on which the air and electrical services are mounted have been developed. These allow connections to be carried out at ground level. The arms are moveable to make the connections accessible while coupling and uncoupling the trailer without having to access the rear of the cab area.



Some operators have worked with manufacturers and experimented with a specially designed fifth wheel on the truck which allows the truck and trailer to be coupled in stages. This involves a sliding split coupling technique, whereby the coupling and uncoupling procedure is undertaken in two stages by using what is, in effect, a dual position sliding fifth wheel.





The first stage of the procedure involves the connection of the trailer to the fifth wheel while it is located rearward of the normal travelling position. This procedure allows sufficient access space between the truck and trailer to enable the air and electrical services to be connected. The next stage involves reversing the truck closer to the trailer and then engaging the fifth wheel in its normal travelling position.

4.2.6 **Warning stickers**

Warning stickers are a useful inexpensive safety measure which act to remind drivers to ensure the truck and trailer parking brakes have been applied correctly and alert them to any hazards. They can be fitted on cabs, dashboards or cab entry points and adjacent to the trailer air line connection points. Careful consideration should be given to where they should be positioned in order for them to have maximum impact.

4.2.7 **Intervention devices and equipment**

In recent years there has been a significant advance in the development of intervention devices. These devices help to reduce the likelihood of both runaway incidents and the incorrect coupling of trailers. These devices vary considerably in nature (from simple to complex) but they should all be viewed as additional safety features; they are not a substitute for driver training in safe coupling/uncoupling procedures.

Before considering the purchase of such devices employers and operators should discuss their suitability with their vehicle and trailer providers. Some of the devices are listed below.

- Braking valves which can be fitted to trailers which automatically set the trailer parking brake when the supply air line (red) is disconnected
- Braking manufacturer enhanced systems which automatically activate the trailer brakes when the supply air line (red) is disconnected and ensure that trailer parking brakes remain active even if the red

air line is inadvertently connected first instead of the yellow line

- Braking valves which prevent the supply air line (red) air pressure to release trailer brakes unless the driver is in a safe place in the cab and depresses the foot brake pedal

4.2.8 **Maintenance and repair**

Every employer must make sure that work equipment is maintained in an efficient state, in efficient working order and in good repair. This should involve carrying out inspections of vehicles and their associated equipment on a regular basis.

Inspections usually take the form of daily driver checks where the vehicle is inspected before being driven for the first time each day and regular preventive (planned) inspections based on manufacturer's guidelines.

Drivers carrying out daily checks should be trained in how to carry out these checks and they should be monitored to ensure the checks are carried out properly. Inspecting the trailer parking brake valve and any devices in the cab of the truck linked to preventing a runaway, for example an audible alarm, should form part of a driver's daily checks and any maintenance programme.

Equally important is the need for a simple reporting system. This will help to ensure any problems identified during the inspections are quickly actioned.

4.3 **Driver**

4.3.1 **Choosing drivers**

All drivers of vehicles (including shunter drivers) in a workplace will often need many more skills than those normally required when driving on a road. Only trained and authorised drivers should be allowed to operate workplace vehicles.

Drivers should:

- be fully able to operate the vehicle and related equipment safely
- receive comprehensive instruction and training so that they can work safely
- have a mature and responsible attitude
- have a reasonable level of both physical and mental fitness

4.3.2 **Training and competence**

The amount of training each driver needs will depend on their previous experience and the type of work they will be doing. Your risk assessment should help

decide the level and amount of training needed. Where appropriate, check that the information they provide about their previous experience is accurate, for example that references to training schemes and other qualifications are supported by certificates.

Even when trainees provide evidence of previous training or related work experience, it is advisable to assess them to ensure they understand the job they have been asked to do and are capable of doing it.

The information, instruction and training provided should cover areas including but not limited to:

- the layout of the workplace routes
- how and where to report faults or hazards
- procedures for reporting accidents
- how to use the vehicle and equipment safely
- information about, for example, particular dangers, speed limits, parking and loading areas, and procedures
- what personal protective equipment they need for the task they are going to do, and how to use it;
- information on the structure and level of supervision that will apply, and the penalties if they fail to follow instructions and safe working practices
- how to follow any emergency procedures

Even experienced people should be monitored to make sure they are working in accordance with both

the training they have received and any safe systems of work.

4.3.3 *Monitoring and refresher training*

People lose skills if they do not use them regularly. An on-going programme of reassessment and refresher training will usually be necessary for all drivers to make sure their skills remain up to date. Even if drivers regularly operate vehicles, regular refresher training or reassessment will help them:

- maintain good driving habits
- learn new skills where appropriate
- reassess their abilities

There is no specific time period after which you need to provide refresher training or formal assessment. However, you may decide that automatic refresher training or a retest after a set period (for example 3–5 years) is the best way to make sure employees remain competent. If you adopt this approach, you will still need to monitor their performance in the interim, in case drivers need extra training before the set period ends. Keeping training records will help you to identify when refresher training might be needed.

If there are changes in the workplace which mean that employees are exposed to different risks, make sure everyone receives suitable safety training before they are exposed to those risks.

Appendix one

Close coupled semi-trailers – split coupling method procedures for coupling and uncoupling

This procedure may be adopted when there is insufficient space between the rear of the truck cab and the front of the semi-trailer; when coupled, for the driver to work safely. The driver must be advised of, and understand, the potential hazards to both themselves and others whenever they deviate from an agreed procedure.

Coupling using the split coupling method

- Slowly reverse the truck in a straight line towards the front of the trailer and stop when the bottom of the fifth wheel ramp is level with the front of the trailer: **Apply the truck parking brake**, stop the engine and remove the keys
- **Check the parking brake on the trailer is applied.** Do not walk under the trailer
- Inspect the truck's fifth wheel, the trailer's locking devices, kingpin and rubbing plate for any signs of damage. If there is any damage seek assistance before proceeding further
- Check and, if necessary, adjust the trailer coupling height relative to the fifth wheel; this is normally designed to accept the kingpin just below its parallel height but refer to the manufacturer's instructions for the correct procedure. Height adjustment may be achieved by extending or retracting the trailer landing legs. Where fitted, this can also be achieved using the truck's air suspension. If the process is not carried out correctly and the trailer is too high, it may be possible to miss the jaws of the fifth wheel completely. In this situation the kingpin passes over the jaws of the fifth wheel coming to rest in a dangerous position either behind the cab or on top of the fifth wheel
- Slowly reverse the truck under the trailer until the front of the trailer is approximately one metre away from the cab; this should facilitate access onto the catwalk behind the cab. **Apply the truck parking brake**, stop the engine and remove the keys
- Connect the service air line (yellow) and electrical connections
- Connect the supply air line (red) and watch for any unexpected movement

If the trailer moves, immediately disconnect the supply air line (red) and check that the parking brake on the truck and trailer have been applied.

- Slowly reverse the truck under the trailer until the fifth wheel jaws engage. **Apply the truck parking brake**, stop the engine and remove the keys
- Check the fifth wheel jaws have correctly engaged, select a low forward gear. Then, with the trailer parking brake still applied, slowly pull forward and perform a 'snatch test'. Repeat the 'snatch test' to confirm the jaws have locked. **Apply the truck parking brake**, stop the engine and remove the keys

Note: If the 'dog clip' does not fully engage, pull the release handle to disengage the jaws and slowly move the truck away from the trailer, then repeat the fifth wheel coupling procedure.

- The second check is to carry out a visual inspection to ensure the kingpin is correctly located in the jaws and that the fifth wheel release handle is in the correct locked position. Fit the security ('dog') clip and/or any other associated safety device
- Wind up the landing legs and stow the handle securely. Attach the rear number plate, ensure that any air suspension control is set to the ride position and release the trailer parking brake
- Test the operation of the lamps
- Before use, the driver must carry out a walk around check of the combination to check that everything is in order and roadworthy

Uncoupling using the split coupling method

- Park the combination in a straight line. **Apply the truck parking brake**, stop the engine and remove the keys
- **Apply the trailer parking brake**
- Remove the trailer number plate and place in the stowage position provided
- Lower the landing legs until they are in contact with the ground. Remove the security dog clip and any other safety device, and then pull the release handle to disengage the jaws of the fifth wheel
- Slowly draw the truck away from the trailer. If the truck has air suspension stop after approximately 300mm and **apply the truck parking brake** whilst the fifth wheel is still under the trailer rubbing plate, then lower the rear axle air suspension to drop the fifth wheel away from the trailer. Lowering the suspension will prevent the rear of the truck

rising suddenly as the weight of the trailer is removed from the fifth wheel. Then, irrespective of whether the truck has air or mechanical suspension, continue to draw the truck forward from under the trailer until the front of the trailer is approximately one metre away from the cab. This should allow access onto the catwalk behind the cab. Do not pull too far forward, as doing so will either strain or damage the air and electrical service lines. **Apply the truck parking brake,** stop the engine and remove the keys

- Disconnect all the air and electrical services. When disconnecting the air lines, grip the connections firmly as they may kick back when released due to air pressure in the system

Note: Do not leave the connections loose; place them in the dummy stowage positions provided or secure them on the catwalk in such manner that water and dirt cannot enter the connections.

- Slowly pull the truck clear of the trailer and stop. Reset the truck air suspension to the ride position. **Apply the truck parking brake,** stop the engine and remove the keys
- Before leaving the trailer walk around it and check that it is in a safe condition, ensuring the trailer parking brake has been applied

Appendix two

Close coupled semi-trailers – cranked coupling method procedures for coupling and uncoupling

This procedure may be adopted whenever there is insufficient room between the rear of the truck and the front of the semi-trailer, when coupled, for the driver to work safely. The driver must be advised of, and understand, the potential hazards to both themselves and others whenever they deviate from an agreed procedure.

Coupling using the cranked coupling method

- Slowly reverse the truck towards the trailer and stop when the underside of the fifth wheel ramp is level with the front of the trailer. **Apply the truck parking brake**, stop the engine and remove the keys
- **Check the parking brake on the trailer is applied.** Do not walk under the trailer
- Inspect the truck's fifth wheel and the trailer locking devices, kingpin and rubbing plate for any signs of damage. If there is any damage seek assistance before proceeding further
- Check and, if necessary, adjust the trailer coupling height relative to the fifth wheel; this is normally designed to accept the kingpin just below its parallel height but refer to the manufacturer's instructions for the correct procedure. Height adjustment may be achieved by extending or retracting the trailer landing legs. Where fitted, this can also be achieved using the truck's air suspension. If the process is not carried out correctly and the trailer is too high, it may be possible to miss the jaws of the fifth wheel completely. In this situation the kingpin passes over the jaws of the fifth wheel coming to rest in a dangerous position either behind the cab or on top of the fifth wheel
- Slowly reverse the truck under the trailer until the fifth wheel jaws engage. **Apply the truck parking brake**, stop the engine and remove the keys
- When using the cranked split coupling method, never connect the services unless the kingpin is fully engaged in the fifth wheel jaw
- To check the fifth wheel jaws have correctly engaged, select a low forward gear and, with the trailer parking brake still applied, slowly pull forward and perform a 'snatch test'. Repeat the 'snatch test' to confirm the jaws of the fifth wheel have locked. **Apply the truck parking brake**, stop the engine and remove the keys

Note: If the security ('dog') clip does not fully engage, pull the release handle to disengage the jaws and slowly move the truck away from the trailer then repeat the fifth wheel coupling procedure.

- The second check is to carry out a visual inspection to verify that the kingpin is correctly located in the jaws and that the fifth wheel release handle is in the correct locked position. Fit the 'dog' clip and/or any other safety device provided
- Wind up the landing legs and stow the handle securely. Where applicable, ensure the air suspension control is set to the 'ride' position and attach the rear number plate. Release the trailer parking brake and operate the shunt valve to allow the trailer to move
- Very slowly pull forward and turn the truck right or left to a position that will give best access to the air and electrical connections between the truck and on the front of the trailer. **Apply the truck parking brake**, stop the engine and remove the keys
- Connect the service air line (yellow) and electrical connections
- Connect the supply air line (red) and watch for any unexpected movement
- Ensure the trailer shunt valve is no longer in the brakes 'released' position
- Test the operation of the lamps
- Before use, the driver must carry out a walk around check of the combination to check that everything is in order and roadworthy

Uncoupling using the cranked coupling method

- Park the truck and trailer combination with the trailer close to the required parking position. Ensure the truck is turned to the right or left; this position will give best access to the air and electrical connections between the back of the truck and on the front of the trailer. **Apply the truck parking brake**, stop the engine and remove the keys
- Disconnect all of the air and electrical connections. When disconnecting the air lines, grip the connections firmly as they may kick back when released due to air pressure in the line

Note: Do not leave the connections loose; place them in the dummy stowage positions provided or secure them on the catwalk in such manner that water and dirt cannot enter the connections.

- Operate the trailer shunt valve to allow the trailer to move
- Remove the trailer number plate and place it in the stowage position provided or in the truck
- Slowly manoeuvre the truck and trailer into a straight line and then reverse the trailer into its final required parking position. **Apply the truck parking brake**, stop the engine and remove the keys
- **Apply the trailer parking brake**
- Ensure that the trailer shunt valve is no longer in the release position
- Lower the landing legs until they are in contact with the ground
- Remove the security ('dog') clip and any other safety devices then pull the release handle to disengage the jaws of the fifth wheel

- Slowly drive the truck away from the trailer. If the truck has air suspension, stop after approximately 300mm and **apply the truck parking brake**. Whilst the fifth wheel is still under the trailer rubbing plate, lower the rear axle air suspension to drop the fifth wheel away from the trailer. Lowering the suspension will prevent the rear of the tractive unit rising suddenly as the weight of the trailer is removed from the fifth wheel. Then pull the truck clear of the trailer and stop. Reset the truck's air suspension to the 'ride' position
- If the truck has mechanical suspension stop when the trailer is clear of the fifth wheel
- **Apply the truck parking brake**, stop the engine and remove the keys
- Before leaving the trailer, walk around and check it has been left in a safe condition

When using the split coupling method, if possible, ensure the trailer landing legs are in contact with the ground while connecting or disconnecting the air and electrical connections.

Appendix three

Centre axle drawbar trailers – coupling and uncoupling procedures

The driver must be advised of, and understand, the potential hazards to both themselves and others whenever they deviate from an agreed procedure.

Coupling

- Slowly reverse the truck towards the trailer and stop when you estimate that the hitch and towing eye are approximately two metres apart. **Apply the truck parking brake**, stop the engine and remove the keys
- **Check the trailer parking brake is applied**
- Raise the retractable rear under run protector if fitted. On an air-actuated hitch, raise and set the pin as described in the manufacturer's instructions. With a spring loaded hitch, raise the pin manually, after releasing the safety device (if fitted). On a coupling with a simple drop pin, release the locking device and remove the pin
- Before proceeding further, inspect the hitch and the air and electrical service connections on the truck for damage. Then, inspect the trailer towing beam, including the eye and the air and electrical services for damage. If there is any damage seek assistance before proceeding further. If everything is in order move to the next stage
- After checking the relationship between the hitch and eye, slowly reverse the truck towards the trailer
- When coupling to a centre axle trailer, line up the body sides as this will make coupling easier. Stop when you estimate that the hitch and eye are approximately 300-500mm apart. **Apply the truck parking brake**, stop the engine and remove the keys. It is important that drivers do not attempt to couple to the trailer until they have checked their position as this may result in damage
- Check and adjust the height of the towing eye relative to the hitch. This is normally designed to accept the eye either on or slightly below the centre line of the jaw. Refer to the hitch manufacturer's instructions for the correct procedure. Adjustment may be achieved by extending or retracting the trailer front prop leg. The height of the truck can also be changed if it is equipped with air suspension
- If necessary, adjust the position of the truck laterally and be prepared to leave the truck a number of times to ensure a correct and safe connection
- On an air-actuated and spring loaded hitches, the pin will drop automatically when the eye triggers the release catch

Note: Occasionally the pin will drop but fail to engage. If this happens reset the release mechanism after pulling the truck forward and repeat the coupling procedure. Sometimes the eye will fail to trigger the pin; in this instance it may be necessary to adjust the height of the eye.

- With a manual drop pin in position replace the locking device
- Before proceeding further, ensure the pin is fully engaged. See the hitch manufacturer's instructions for the correct procedure. If necessary, start the engine, release the brakes and very slowly rock the combination forwards. **Reapply the truck parking brake**, stop the engine and remove the keys. Re-check that the pin is fully engaged
- Connect the service air line (yellow) and electrical connections
- Connect the supply air line (red) and watch for any unexpected movement

If the trailer moves, immediately disconnect the supply air line (red) and check that the parking brake on the truck and trailer have been applied.

- Raise the front and rear prop legs and stow the handle securely. Attach the rear number plate, ensure that any air suspension control is set to the ride position and release the trailer parking brake
- Before use, the driver must carry out a walk around check of the combination to check that everything is in order and roadworthy

Uncoupling

- Park the combination in a straight line. **Apply the truck parking brake** and remove the keys
- **Apply the trailer parking brake**
- Remove the trailer number plate and place in the stowage position provided or in the truck
- Lower the front landing leg until it is approximately 20mm from the ground
- Lower the rear prop legs to a height just above the ground. If the prop legs are equipped with multi-position spring loaded locking plungers select the position that gives minimum ground clearance

-
- Disconnect all of the air and electrical services. When disconnecting the air lines grip the connections firmly as they may kick back when released due to air pressure in the system

Note: Do not leave the connections on the ground. Place them in the dummy stowage positions provided or drape them over the towing beam so that water and dirt cannot enter the connections.

- Raise the towing pin to release the trailer. If the towing hitch has an air release mechanism or manual lever action refer to the manufacturer's instructions for the correct procedure. If the hitch has a simple drop in, release the locking device and remove the pin by hand. Should the weight of the trailer be bearing on the pin it may be necessary to move the truck slightly to remove the pressure on the pin
- Slowly draw the truck away from the trailer and stop when the vehicle is clear of the towing eye. **Apply the truck parking brake**, stop the engine and remove the keys
- Before leaving the trailer walk around it to ensure that it is in a safe condition. If the truck is equipped with a retractable under run protector set it to the lowered position
- If the towing pin is removable, replace it and secure in position

- Never place fingers into the towing jaw
- Never release the towing pin with the air and electrical services connected
- Never connect the air and electrical services unless the towing pin is fully engaged
- Never attempt to couple a centre axle trailer when the eye is above the centre line of the hitch
- Never attempt to connect a hitch pin to a trailer eye of a different diameter
- Do not attempt to uncouple a centre axle trailer unless it is equipped with prop legs
- Do not uncouple a centre axle trailer with only a front prop leg unless the weight of the load is in front of the axles
- Ensure the truck and the trailer is designed to work in combination
- Be aware that when reversing the combination damage may result if the towing beam makes contact with the side of the hitch or mounting plates
- Never attempt to straighten a bent eye or towing beam by applying pressure in the opposite direction as this is likely to result in catastrophic failure of the equipment

Supplementary safety guidelines for centre axle draw bar trailers

It is important to follow these safety guidelines.

- Never pass, or allow others to pass, between the truck and trailer unless the towing pin is locked into the trailer eye, the combination is stationary, the truck parking brake is applied, the engine has stopped and the keys removed

Appendix four

Turntable drawbar trailers – coupling and uncoupling procedures

The driver must be advised of, and understand, the potential hazards to both themselves and others whenever they deviate from an agreed procedure.

Coupling

- Slowly reverse the truck towards the trailer; stop when you estimate that the hitch and towing eye are about two metres apart. **Apply the truck parking brake**, stop the engine and remove the keys
- **Check the parking brake on the trailer is applied**
- Raise the retractable rear under run protector (if fitted)
- On an air-actuated hitch, raise and set the pin as described in the manufacturer's instructions. With a spring-loaded hitch, raise the pin manually after releasing the safety device (if fitted). On a coupling with a simple drop pin, release the locking device and remove the pin
- Before proceeding further, inspect the hitch and the air and electrical connections on the truck for damage. Then inspect the trailer 'A' frame, including the eye, air and electrical connections for damage. If there is any damage seek assistance before proceeding further. If everything is in order move to the next stage
- After checking the relationship between the hitch and eye, slowly reverse the truck towards the trailer
- On a turntable trailer; if the 'A' frame is pointing directly straight, line up the body sides as this will make coupling easier. However, should the 'A' frame be at an angle to the front of the trailer then line up the side of the truck bodywork to the side of the front axle tyres. When doing this make an allowance for the reduced width over the tyres of the trailer compared to that of the bodywork
- Stop when you estimate that the hitch and eye are 300-500mm apart. **Apply the truck parking brake**, stop the engine and remove the keys. Do not attempt to couple to the trailer without checking your position as this may result in damage
- Check and adjust the height of the towing eye relative to the hitch. This is normally designed to accept the eye either on or slightly below the centre line of the jaw. See the hitch manufacturer's instructions for the correct procedure. Adjustment may be achieved by lifting or lowering the 'A' frame on the spring balance or height adjustable support leg. The height of the truck height can also be adjusted via air suspension (where fitted)

- Where necessary, adjust the position of the truck laterally. This may involve having to leave the cab several times in order to ensure a safe connection
- On an air-actuated and spring-loaded hitch the pin will drop automatically when the eye triggers the release catch

Note: Occasionally the pin will drop but fail to engage. If this happens reset the release mechanism after pulling the truck forward and repeat the coupling procedure. Sometimes the eye will fail to trigger the pin. In this instance it may be necessary to adjust the height of the eye.

- With a manual drop pin in position replace the locking device
- Before proceeding further ensure the pin is fully engaged. Refer to the hitch manufacturer's instructions for the correct procedure. If necessary, start the engine, release the brakes and very slowly move the combination forwards. **Reapply the truck parking brake**, stop the engine and remove the keys then check to see if the pin is fully engaged
- Connect the service air line (yellow) and electrical connections
- Connect the supply air line (red) and watch for any unexpected movement

If the trailer moves, immediately disconnect the supply air line (red) and check that the parking brake on the truck and trailer have been applied.

- Stow any adjustable 'A' frame support leg fitted. Attach the rear number plate, ensure that any air suspension control is set to the ride position and release the trailer parking brake
- Before use, the driver must carry out a walk around check of the combination to check that everything is in order and roadworthy

Uncoupling

- Park the combination in a straight line. **Apply the truck parking brake**, stop the engine and remove the keys
- **Apply the trailer parking brake**
- Remove the trailer number plate and place in the stowage position provided or in the cab
- On trailers with an 'A' frame spring balance proceed to the next stage. However, where fitted, lower the adjustable support leg until it is approximately 20mm from the ground

- Disconnect all of the air and electrical connections. When disconnecting the air lines, grip the connections firmly as they may kick back when released due to air pressure in the system

Note: Do not leave the connections on the ground; place them in the dummy stowage positions provided or drape them over the 'A' frame so that water and dirt cannot enter the connections.

- Raise the towing pin to release the trailer. If the towing hitch has an air release mechanism or manual lever action refer to the manufacturer's instructions for the correct procedure. If the hitch has a simple drop pin, release the locking device and remove the pin by hand. Should the weight of the trailer be bearing on the pin it may be necessary to move the truck slightly to remove pressure on the pin
- Slowly draw the truck away from the trailer and stop when the vehicle is clear of the towing eye. **Apply the truck parking brake**, stop the engine and remove the keys
- Before leaving the trailer, walk around it to ensure that it is in a safe condition
- If the truck is equipped with a retractable under run protector set it to the lowered position
- If the towing pin is removable replace it and secure in position

Supplementary safety guidelines for turntable drawbar trailers

It is important to follow these safety guidelines.

- Never pass, or allow others to pass, between the truck and trailer unless the towing pin is locked into the trailer eye, the combination is stationary, the truck parking brake is applied, the engine stopped and the keys removed

- Never place fingers into the towing jaw
- Never release the towing pin with the air and electrical services connected
- Never connect the air and electrical services unless the towing pin is fully engaged
- Never attempt to move a turntable trailer towing eye to the hitch by releasing the brakes – always take the hitch to the eye
- Never attempt to connect a hitch pin to a trailer eye of a different diameter
- Turntable trailers have an 'A' frame with a spring balance or prop leg to provide height adjustment. If no support method is provided do not uncouple the trailer
- Ensure the truck and the trailer is designed to work in combination
- Be aware that when reversing the combination damage may result if the 'A' frame makes contact with the side of the hitch or mounting plates. Never attempt to straighten a bent eye or 'A' frame by applying pressure in the opposite direction as this may result in a catastrophic failure of the equipment
- Do not park the trailer on soft ground
- Do not leave the trailer on an adverse incline – front, rear or sideways
- Do not create an obstruction or park the trailer so it overhangs any vehicle routes or carriageways
- Do not leave the trailer where coupling may be difficult

Appendix five

Good practice coupling/uncoupling driver checklist

- Do not allow others the opportunity to take control of your vehicle, always **apply the truck parking brake**, stop the engine and remove the keys before leaving the cab
- Never pass, or allow others to pass, under the trailer
- Never place fingers into the fifth wheel jaw
- Wherever possible avoid coupling to a semi-trailer from any position other than straight in line as this can give rise to a situation where excessive force is required, the kingpin may miss the fifth wheel, the trailer may be pushed sideways, and damage could be caused or personal injury could occur
- Always ensure that all safety devices are engaged
- Do not release the fifth wheel with the services connected, unless using the split coupling method described in Appendix I
- Do not connect the services unless the kingpin is fully engaged in the fifth wheel jaws unless using the split coupling method described in Appendix I
- Never attempt to couple to a trailer when the kingpin is above the height of the fifth wheel
- If the trailer is against a loading dock, and the air suspension height is to be adjusted, pull the trailer forwards a short distance and adjust the height before uncoupling
- Do not attempt to uncouple a trailer unless it is equipped with landing legs
- Ensure that the truck and trailer are designed to work as a combination
- Do not attempt to pull away with the low air pressure warning illuminated or sounding. Always allow the system to become fully charged
- Ensure the parking brake on the trailer has been applied when leaving the coupled vehicle for extended periods, eg overnight

Good practice

Good practice means ensuring:

- the ground is firm and level and will support both landing legs
- that, after uncoupling, you check that the landing legs are not sinking into the surface
- you uncouple while in a straight line as this will make coupling easier
- you understand that when in reverse a trailer that is jack-knifed is going nowhere; pull forward and try again
- the trailer will not cause an obstruction or hazard to other traffic
- the trailer will not pose a danger to pedestrians
- the trailer will not contravene any national or local traffic regulations
- you lower the air suspension, if fitted, when the trailer is to be left for extended periods
- **the parking brake on the trailer is always applied before it is uncoupled from the truck**

Things to avoid

- Using the automatic application of the brakes caused by releasing the supply air line (red) as the parking brake. This is not a fail-safe condition
- Parking trailers on soft ground
- Leaving trailers on an adverse incline, front, rear or sideways
- Creating an obstruction or parking the trailer so it overhangs any vehicle routes or carriageways
- Leaving trailers where coupling may be difficult

This guidance has been produced by a working group made up of members of the Transportation and Logistics Forum, which is chaired by the Health & Safety Executive. Contact details for members of the working group are detailed below.



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