Lift Planning Worksheet

Planning aid · Complete before every non-routine lift

HSE ADVISOR CANADA
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Company: _____ Project / site: _____

Prepared by: _____ Position: _____

Date: _____ Planned lift time: _____

0. DOES THIS LIFT NEED MORE THAN THIS WORKSHEET?

- ☐ Load is at or near the equipment's rated capacity
- ☐ Two or more machines lifting the same load
- ☐ Load is of unknown weight, or the centre of gravity is uncertain
- ☐ Personnel to be lifted or suspended
- ☐ Lifting over occupied areas, live process, public roadway or another trade
- ☐ Blind lift — the operator cannot see the load or the landing area
- ☐ Custom or engineered lifting device, or a load with no designed lifting points

If you ticked any box above, stop. This worksheet is not sufficient. That lift needs a plan prepared by a competent person — and where the load, rigging design or structure demands it, a professional engineer. Use this sheet only as input to that plan.

1. THE LOAD

Description:

_____

Weight (verified how?): _____ Dimensions: _____

Centre of gravity: _____ Designed lifting points: _____

Rigging weight: _____ Total gross load: _____

Weight must be verified, not estimated from memory. Record the source — nameplate, shipping document, drawing or scale. "Looks about a tonne" is how loads get dropped.

2. THE EQUIPMENT

Lifting equipment: _____ Rated capacity at radius: _____

Working radius: _____ Boom length / configuration: _____

Load chart consulted: _____ Percentage of capacity: _____

REQUIREMENT	WHAT GOOD LOOKS LIKE	Y / N / N-A	EVIDENCE OR GAP
Capacity plate legible and current	Rating posted on the machine and matched to the configuration in use.		
Annual and periodic inspection current	Documented and available on site.		
Pre-use inspection completed	This shift, by the operator, recorded.		
Operator competent for this machine	Trained and, where required, certified for this equipment and configuration.		
Load-limiting devices functional	Anti-two-block, load moment indicator or equivalent, tested.		

3. RIGGING

ITEM	SIZE / TYPE	WLL	SLING ANGLE	INSPECTED BY	CONDITION

REQUIREMENT	WHAT GOOD LOOKS LIKE	Y / N / N-A	EVIDENCE OR GAP
Rigging rated for the gross load	Including the effect of sling angle on tension.		
Sling angle accounted for	Tension rises sharply as the angle from horizontal decreases.		
Inspected before this lift	Slings, shackles, hooks and hardware inspected and removed from service if damaged.		
Edge protection fitted	Softeners where slings pass over corners.		
Hooks have functioning latches	And the load is seated in the bowl, not the tip.		
Tag lines fitted	Long enough to control the load without the handler entering the swing zone.		

4. THE SWING ZONE — WHERE PEOPLE GET CRUSHED

REQUIREMENT	WHAT GOOD LOOKS LIKE	Y / N / N-A	EVIDENCE OR GAP
Exclusion zone defined	A marked area covering the full swing radius, not just directly under the load.		
Exclusion zone physically marked	Cones, tape or barriers on the ground, briefed to everyone on site.		
Nobody under the load, ever	No task requires a person beneath a suspended load. If one seems to, redesign the lift.		
Load control method	Tag lines handled from outside the swing zone.		
Pinch points identified	Where the load could trap someone against a structure, vehicle or stack.		
Landing area prepared	Cribbing, dunnage and a stable surface ready before the load leaves the ground.		
Other trades cleared or protected	Adjacent work stopped, diverted or barriered.		

> **A suspended load swings, and it swings further than people expect.** The exclusion zone is the swing radius plus a margin, not the footprint of the load. Wind, a snatched pick or a shifting centre of gravity all widen it.

Exclusion zone dimensions and how it is marked:

5. COMMUNICATION AND ROLES

Operator: _____ Signal person: _____

Rigger: _____ Lift supervisor: _____

Spotter(s): _____ Signal method: _____

- ☐ One designated signal person, agreed before the lift
- ☐ Signal method agreed and understood — hand signals or radio on a confirmed channel
- ☐ Everyone knows that **anyone** may signal stop
- ☐ Radio checked and a backup arranged if the primary fails
- ☐ Line of sight confirmed, or a relay signal person positioned

6. GROUND AND ENVIRONMENT

REQUIREMENT	WHAT GOOD LOOKS LIKE	Y / N / N-A	EVIDENCE OR GAP
Ground bearing adequate	Assessed for the machine and outrigger loads; mats or pads as required.		
Outriggers fully deployed	On firm level ground with pads correctly sized.		
Underground services checked	Utility locate completed where outriggers or tracks bear.		
Overhead powerlines identified	Minimum approach distance established and physically respected.		
Wind within limits	Manufacturer wind limit known, current wind measured, and a stop threshold agreed.		
Weather and light adequate	Visibility, precipitation and temperature considered.		

7. PRE-LIFT BRIEFING AND SIGN-OFF

Everyone involved attends the briefing and signs. Anyone who arrives late is briefed before entering the area.

NAME (PRINT)	ROLE	SIGNATURE	TIME

Stop-work triggers agreed: _____

_____ _____

LIFT SUPERVISOR SIGNATURE DATE / TIME

_____ _____

OPERATOR SIGNATURE DATE / TIME

REFERENCES

Standard: CSA Z150:26, Safety code on mobile cranes (6th edition).
Hoisting and overhead power line clearance (confirm the current text for your work): Ontario, O. Reg. 213/91 (Construction Projects), ss. 149.1–156 (cranes, hoisting and rigging) and s. 188 (overhead electrical conductors); British Columbia, OHS Regulation Part 14 (Cranes and Hoists) and ss. 19.24–19.24.2 (high voltage equipment and conductors, including minimum approach and clearance distances); Alberta, OHS Code Part 6 (Cranes, Hoists and Lifting Devices) and Part 17 (Overhead Power Lines).

Want help applying this?

Our consultants (CRSP Certified · COR & ISO 45001 Lead Auditors) can adapt this to your workplace or review your safety program with you.

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