# Safe Lifting & Materials Handling Procedure

SOP · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

A safe lifting and materials handling procedure is the written method for moving loads without injury: how to size up a lift before touching it, the technique for lifting and carrying, when a lift becomes a team lift, and when it becomes a job for a cart, hoist, or lift truck instead of a back. Overexertion from lifting and moving loads is one of the most common — and most preventable — sources of workplace injury.

Back injuries rarely arrive as dramatic accidents; they accumulate through hundreds of awkward lifts that each seemed fine, then announce themselves on an ordinary Tuesday. A written procedure works on both ends: it reduces the daily dose through technique, aids, and task design, and it catches the early aches before they become claims.

This template gives you the full procedure: planning the lift, NIOSH-informed technique, team lifts, mechanical aids, designing handling out of the workflow, and the early-reporting and training routine that holds it together.

## Purpose and scope

This procedure sets out how [Your company] plans and performs manual lifting, carrying, pushing, and pulling at [site(s)], and when mechanical aids or team lifts are required instead. It applies to all employees whose work involves handling loads — receiving, stocking, production, dispatch, and [roles] — and to temporary workers doing the same tasks.

## Responsibilities

- [Name/role]: owns this procedure, keeps the high-risk handling task list current, arranges training, and reviews strain and sprain reports for patterns.
- Supervisors: enforce the aid-first rules in their area, keep aids available and charged, correct risky technique on the spot, and act on early reports of discomfort the same week.
- Employees: plan lifts before making them, use the aids and team lifts this procedure requires, and report discomfort early — a sore back reported on Tuesday is a task fix; reported in month three it is an injury.
- Purchasing/maintenance ([name/role]): keeps carts, dollies, and hoists inspected and in service — a broken wheel is how an aid-first rule quietly dies.

## Before you lift: plan it

- Size up the load: weight (check the label, tilt-test a corner), size, shape, grip points, and whether the contents shift.
- Size up the path: where is it going, is the route clear and dry, are doors propped, is there a place to set it down at the other end?
-

Size up the lift, using the factors NIOSH's research flags: can you hold it close to your body, or is there a reach? Does it start on the floor or end above shoulder height? Will you have to twist? How many times this shift?

- Decide: lift it alone with good technique, split the load, make it a team lift, or get an aid. The aid-first rule: if an aid is available for the task, the aid is the method — [list: carts at receiving, drum dolly, pallet jack, hoist].
- Loads on the [do-not-lift-alone list at location] are never lifted solo, whatever the schedule says.

## Lifting technique

1. Stand close to the load, feet shoulder-width apart, one foot slightly forward for balance.
2. Squat by bending your knees and hips, keeping your back in its natural curve — do not stoop over the load with straight legs.
3. Get a full-palm grip on solid points — not fingertips on a rim — and test the weight with a small tilt before committing.
4. Pull the load close before it leaves the ground; the farther it rides from your body, the heavier it is to your spine.
5. Lift smoothly with your legs, keeping your head up and the load close — no jerking, no snatching.
6. Turn by moving your feet, never by twisting your torso while loaded — twisting under load is where backs go.
7. Carry with the load close and your view clear over or around it; rest on a bench or ledge partway if the carry is long — [rest points].
8. Set down by reversing the lift: knees and hips, back in its curve, and mind your fingers under the load at the landing.
9. Place loads between knee and shoulder height wherever storage allows — the floor and the top shelf are the two worst addresses for anything heavy.
10. If anything about the lift surprises you — heavier than it looked, contents shift, a twinge — set it down safely and re-plan; do not muscle through.

## Team lifts

1. Use a team lift for loads that are too heavy, too long, or too awkward for one person, and for everything on the do-not-lift-alone list.
2. Match partners of broadly similar height where possible, and agree who leads before hands touch the load.
3. Plan the route and the set-down together, including who walks backward and where they will look.
4. Lift on the leader's count — "ready, three, two, one, lift" — and move at the pace of the slower partner.
5. Lower on the leader's count the same way; the lift is not over until both sets of fingers are clear.

## Mechanical aids

- The aids at [site] and their tasks: [hand trucks — boxed stock; platform carts — mixed loads; pallet jack — palletized goods; drum dolly — drums; hoist/vacuum lifter — [tasks]].
- Use aids only if trained on them; powered equipment ([forklift/powered pallet jack]) requires certification per its own procedure.
- Inspect before use — wheels, forks, straps, controls — and tag defective aids out of service and report to [name/role].
- Load aids stable and low, strap what can topple, and push rather than pull where the aid allows: pushing lets your legs and weight do the work.
- Report the missing aid, not just the broken one — if a task keeps getting done by hand because the cart lives two departments away, that is a finding for [name/role].

## Designing handling out

- Order smarter: smaller package sizes or supplier-palletized delivery for the heaviest regular items — [items under review].
- Store smart: heaviest items between knee and shoulder height, rarely-used items up high only if light, nothing heavy on the floor or above shoulders.
- Cut the carry: stage deliveries at the point of use, keep aisles clear, and put set-down surfaces where loads actually travel.
- Rotate high-frequency handling tasks across the team and build micro-breaks into [repetitive tasks] — dose matters as much as weight.
- Feed strain reports and discomfort trends back into this section: every recurring complaint is a task redesign candidate for [name/role]'s list.

## Training, early reporting, and records

Everyone whose role involves handling is trained on this procedure before starting the work — with practice lifts, not just slides — and refreshed [frequency] or after any strain injury in their area. Aches, twinges, and discomfort are reported to the supervisor early and logged at [location/system]; early reports get a task review, not a toughness contest. Strains and sprains that become injuries are handled under the OSHA injury and illness reporting procedure.

Training records, the high-risk task list, aid inspection logs, and the discomfort log live at [system/location]. This procedure is reviewed [frequency], after any handling injury, and when loads, layout, or equipment change. Owner: [name/role]. Next review due: [date].

## How to use this template

1. Walk the workflow and list every regular handling task, flagging the ones with the NIOSH risk factors: floor starts, above-shoulder finishes, long reaches, twisting, and high frequency.
2. Build the do-not-lift-alone list and the aid-for-task list from that walk, and post both where the lifting happens.
3.

Fix the storage layout first — moving the heavy items to waist height eliminates more risk than any amount of technique training.

4. Train with real loads in the real aisle, and have each person demonstrate the technique before sign-off.
5. Stand up the early-reporting habit explicitly: tell the team what happens when they report a twinge, then make that thing actually happen.
6. Use NIOSH's lifting assessment tools on your worst two or three tasks and redesign from the results.

## Official guidance

- OSHA — Ergonomics
- CDC NIOSH — Workplace safety and health
- OSHA — Recommended practices for safety and health programs