

Backing and Spotter Safety Plan

Commercial Vehicle Safety Resource for Trucking, Moving, and Storage Operations

PURPOSE

Backing is one of the highest-risk vehicle movements in trucking, moving, and storage operations. Drivers often have limited visibility, and workers, pedestrians, equipment, customer vehicles, loading docks, ramps, doors, and fixed objects may be close to the vehicle path.

This template helps employers create a clear procedure for backing commercial vehicles safely. It can be used for terminals, yards, warehouses, loading docks, moving sites, storage facilities, customer locations, and delivery areas.

1. WHEN THIS PLAN SHOULD BE USED

Use this plan when a commercial vehicle is backing in or near:

- A company yard or terminal
- A warehouse or storage facility
- A loading dock
- A customer site
- A residential moving location
- A construction or shared worksite
- A parking area with pedestrians or other vehicles
- Any area where the driver's view is restricted

This plan applies to:

- Tractor-trailers
- Straight trucks
- Cube vans
- Moving trucks
- Delivery vehicles
- Yard trucks
- Vehicles using trailers, ramps, liftgates, or loading equipment

2. MAIN HAZARDS

Before backing, identify hazards that may affect the driver, spotter, workers, customers, or the public.

Hazard	YES	NO	Notes / Controls Needed
Blind spots behind or beside the vehicle	<input type="checkbox"/>	<input type="checkbox"/>	_____
Pedestrians, workers, customers, or bystanders nearby	<input type="checkbox"/>	<input type="checkbox"/>	_____
Forklifts, pallet jacks, dollies, or other mobile equipment nearby	<input type="checkbox"/>	<input type="checkbox"/>	_____
Tight yard, dock, driveway, alley, or customer-site space	<input type="checkbox"/>	<input type="checkbox"/>	_____
Poor lighting or low visibility	<input type="checkbox"/>	<input type="checkbox"/>	_____
Bad weather, snow, rain, fog, or glare	<input type="checkbox"/>	<input type="checkbox"/>	_____
Uneven ground, slope, curb, soft shoulder, or potholes	<input type="checkbox"/>	<input type="checkbox"/>	_____
Overhead hazards, doors, awnings, wires, or building edges	<input type="checkbox"/>	<input type="checkbox"/>	_____
Loading ramp, liftgate, tailgate, or dock plate in use	<input type="checkbox"/>	<input type="checkbox"/>	_____
Noise that may limit communication	<input type="checkbox"/>	<input type="checkbox"/>	_____

3. BACKING SHOULD BE AVOIDED WHEN POSSIBLE

Before backing, consider whether the vehicle can be moved forward instead. Ask:

- Can the route be changed to allow drive-through movement?
- Can the vehicle be parked so it can leave by moving forward?
- Can deliveries or moving jobs be staged to reduce backing?
- Can pedestrian areas be separated from vehicle traffic?
- Can the vehicle be repositioned before workers start loading or unloading?
- If backing is not necessary, do not back up.

4. BEFORE BACKING: DRIVER PROCEDURE

The driver must complete these steps before backing.

- Stop the vehicle and assess the backing area
- Walk around the vehicle when safe to do so
- Check for workers, pedestrians, customers, vehicles, equipment, and fixed objects
- Check for overhead hazards and ground conditions
- Confirm mirrors, windows, and cameras are clean and usable
- Turn on four-way flashers, if appropriate
- Use a spotter when visibility is limited or required by company procedure
- Confirm the backing path and stopping point
- Confirm communication method with the spotter
- Stop immediately if visual contact or communication is lost

5. WHEN A SPOTTER IS REQUIRED

A trained spotter must be used when:

- The driver cannot clearly see the full backing path
- Pedestrians, workers, customers, or the public are nearby
- The vehicle is backing toward a dock, building, doorway, ramp, or fixed object
- The vehicle is backing at a customer site or residential moving location
- The backing area is tight, dark, congested, noisy, or unfamiliar
- Weather or lighting reduces visibility
- Company procedures require a spotter
- If a spotter is needed but not available, the driver must stop and contact a supervisor for direction.

6. SPOTTER PROCEDURE

The spotter's only task during backing is to guide the vehicle safely.

The spotter must:

- Wear required high-visibility clothing and PPE
- Stand where the driver can see them at all times
- Stay out of the vehicle's path
- Stay clear of pinch points, walls, docks, ramps, trailers, and fixed objects
- Use agreed hand signals or radio communication
- Watch the backing path, not the load or paperwork
- Stop the driver if any person, object, or equipment enters the backing area
- Stop the driver if the spotter loses sight of the driver
- Never walk behind the vehicle while it is backing
- Never stand between the vehicle and a fixed object

If the driver cannot see the spotter, the driver must stop immediately.

7. DRIVER AND SPOTTER COMMUNICATION

Before backing begins, the driver and spotter must agree on the communication method.

Approved communication method

- Hand signals
- Two-way radio
- Phone or headset, only if permitted by company procedure
- Other: _____

Required stop signal

The stop signal is: _____

The driver must stop immediately when:

- The stop signal is given
- The spotter disappears from view
- Communication is unclear
- A person or object enters the backing area
- The driver is unsure whether it is safe to continue

8. BACKING RULES

During backing, the driver must:

- Back slowly
- Avoid sudden movements
- Keep checking mirrors, windows, cameras, and the spotter
- Stop if unsure
- Stop if visual contact with the spotter is lost
- Stop if another worker, customer, pedestrian, vehicle, or piece of equipment enters the backing area
- Avoid using handheld devices
- Avoid relying only on backup alarms or cameras

During backing, the spotter must:

- Stay visible to the driver
- Stay outside the backing path
- Watch for changing hazards
- Use clear signals
- Stop the vehicle early if there is any doubt

9. LOADING DOCK AND YARD CONTROLS

For yards, docks, terminals, warehouses, and storage facilities, employers should consider these controls.

	YES	NO
Marked vehicle routes	<input type="checkbox"/>	<input type="checkbox"/>
Marked pedestrian walkways	<input type="checkbox"/>	<input type="checkbox"/>
Designated backing areas	<input type="checkbox"/>	<input type="checkbox"/>
Speed limits posted and enforced	<input type="checkbox"/>	<input type="checkbox"/>
Good lighting in backing areas	<input type="checkbox"/>	<input type="checkbox"/>
Mirrors or visibility aids where useful	<input type="checkbox"/>	<input type="checkbox"/>
Dock areas kept clear of clutter	<input type="checkbox"/>	<input type="checkbox"/>
Workers trained to stay clear of backing vehicles	<input type="checkbox"/>	<input type="checkbox"/>
Spotters trained and authorized	<input type="checkbox"/>	<input type="checkbox"/>
Near misses reviewed with workers and supervisors	<input type="checkbox"/>	<input type="checkbox"/>

10. CUSTOMER SITE AND MOVING JOB CONTROLS

For moving, delivery, and customer-site work, complete a quick site assessment before backing.

	YES	NO
Backing area is clear of people and vehicles	<input type="checkbox"/>	<input type="checkbox"/>
Bystanders are kept away from vehicle movement	<input type="checkbox"/>	<input type="checkbox"/>
Driveway, alley, lane, or parking area is wide enough	<input type="checkbox"/>	<input type="checkbox"/>
Ground surface is stable	<input type="checkbox"/>	<input type="checkbox"/>
Overhead clearance is adequate	<input type="checkbox"/>	<input type="checkbox"/>
Ramp, liftgate, or loading area can be used safely	<input type="checkbox"/>	<input type="checkbox"/>
Spotter is available if needed	<input type="checkbox"/>	<input type="checkbox"/>
Driver has a safe exit route after loading or unloading	<input type="checkbox"/>	<input type="checkbox"/>

If the site is not safe, stop work and contact a supervisor.

11. NEAR MISS AND INCIDENT REVIEW

Any backing-related near miss, property damage, injury, or unsafe condition must be reported and reviewed.

	YES	NO	N/A
What happened?			
Where did it happen?			
Was the driver backing?	<input type="checkbox"/>	<input type="checkbox"/>	
Was a spotter used?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Was visual contact maintained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Were pedestrians, workers, customers, or equipment nearby?	<input type="checkbox"/>	<input type="checkbox"/>	
Were lighting, weather, space, or noise factors involved?	<input type="checkbox"/>	<input type="checkbox"/>	
What corrective action is needed?			
Who is responsible for follow-up?			

Date completed:

12. WORKER SIGN-OFF

I understand the company's backing and spotter procedure. I understand that I must stop if I am unsure, if communication is lost, or if someone enters the backing area.

Driver name: _____
Signature: _____
Date: _____

Spotter name: _____
Signature: _____
Date: _____

Supervisor name: _____
Signature: _____
Date: _____