JOB AID TO FILL IN BY HAND · BASED ON NOM-036-1-STPS-2018

NOM-036 manual handling risk assessment template

One template per stacking task: chapter 7 data, Table 1 limits, Appendix I and II scoring for each activity, control measures and signatures.

Job aid by Target Robotics based on NOM-036-1-STPS-2018, Mexico's federal standard on manual handling. The official text, with its appendices and assessment methods, is the one published in the Diario Oficial de la Federación (DOF) on November 23, 2018. Review it with your health and safety lead.

WHAT IT COVERS	SINCE WHEN	WHO PREPARES IT
Loads of 3 kg or more handled more than once a day (sections 2 and 4.14).	Chapter 7, Table 1 and sections 5.1, 8.4 and 8.5 since March 31, 2024 (DOF, Sep 23, 2022); the rest since January 2, 2020.	A person whose full name and professional license number (cédula profesional) go in the report (7.4, item f).

1 Workplace and job (7.2 and 7.4)

Legal name of the workplace _____

Address _____

Main activity of the workplace _____

Area or line _____

Job or task assessed _____

Assessment date _____

Task description what is picked, from where, to where and how

_____

Shifts per day _____

Hours per shift _____

Time on the task per shift and breaks _____

Days per week _____

Men 18 to 45 per shift _____

Women 18 to 45 per shift _____

Men over 45 per shift _____

Women over 45 per shift _____

Under 18 per shift _____

Pregnant or postpartum per shift _____

2 The load and the activities

UNIT ☐ Case ☐ Bag or sack ☐ Pail, tub or jug ☐ Other _____

GRIP ☐ Handles or firm cutouts ☐ Rigid unit without handles

☐ Non-rigid bag (sand, cement): poor grip in Appendix I

ACTIVITIES ☐ Lifting or lowering (AI.2) ☐ Carrying (AI.3) ☐ Team lifting (AI.4)

☐ Rolling, pivoting or dragging without equipment (AII.3) ☐ With pallet jack, hand truck or cart (AII.5)

Weight per unit, kg _____

Dimensions, cm (L x W x H) _____

Units per minute _____

Units per shift _____

Pick height, cm _____

Lowest and highest layer, cm _____

Hands to lower back, cm _____

Carrying distance, m _____

3 Mass limits (Table 1 and section 8.3)

Who handles the load	Maximum	Exceeds
Men aged 18 to 45	25 kg	☐
Women aged 18 to 45	20 kg	☐
Men over 45 (*)	20 kg	☐
Women over 45 (*)	15 kg	☐
Workers under 18	7 kg	☐
Pregnancy and up to 10 weeks after giving birth (†)	10 kg plus other rules	☐

Source: Table 1 (8.3, item b, sub-item 2). The maximum is adjusted downward for frequency, distance, load position, grip and cumulative mass. (*) With a medical fitness assessment; if the physician approves, they may reach the 18 to 45 maximum.

Cumulative mass per workday

Cap on cumulative mass of manual transport: **10,000 kg** per 8-hour workday for distances under 10 m, and **6,000 kg** for distances up to 20 m (8.3, item b, sub-item 5).

Weight per unit _____ kg

× units in the workday _____

= cumulative mass _____ kg

☐ Over 10,000 kg ☐ Over 6,000 kg

☐ Within the cap

The standard leaves open whether it is counted per person or per crew: write down the criterion set by your health and safety team.

(†) Pregnancy and up to 10 weeks after giving birth (8.3, item b, sub-item 1): manual handling with loads over 10 kg, forced postures or repetitive movements over prolonged periods that require abdominal or lower-limb effort is prohibited. A physician sets the maximum mass based on her health, frequency, distance, load position, grip and cumulative mass.

4 Scoring by activity (Appendix I: lifting, lowering and carrying)

Each activity you checked on sheet 1 is scored separately (AI.1 and AI.5): color and value of each factor in its column; gray cells do not apply.

	Lifting or lowering (AI.2)		Carrying (AI.3)		Team lifting (AI.4)	
Factor	**Color**	**Value**	**Color**	**Value**	**Color**	**Value**
Load weight and frequency (team lifting: weight and number of people)						
Horizontal distance between hands and lower back						
Vertical lift region						
Torso twisting and sideways bending (carrying: asymmetric load)						
Postural constraints						
Hand to load coupling (grip)						
Floor surface						
Other environmental factors						
Carrying distance						
Obstacles on the route						
Communication, coordination and control						
Activity score						
Risk level (sheet 3, section 6)						

5 Scoring by activity (Appendix II: pushing, pulling or dragging)

One column per activity (AII.3 and AII.5): without equipment, write whether the load rolls, pivots or is dragged; with equipment, whether it is small, medium or large.

	No equipment: _____		No equipment: _____		Equipment: _____	
Factor	**Color**	**Value**	**Color**	**Value**	**Color**	**Value**
Load weight						
Posture						
Hand grip (with equipment: hand to load coupling)						
Work pattern						
Distance per trip						
Condition of the handling equipment						
Floor surface						
Obstacles along the route						
Other factors						
Activity score						
Risk level (section 6)						

If the load exceeds the rated capacity of the pallet jack, hand truck or cart, the task is scored as "Unacceptable" (AII.5). Weigh the full pallet before scoring the pallet jack.

6 Risk level of each activity (AI.5, AII.4 and AII.6)

SCORE	LEVEL	WHAT THE STANDARD REQUIRES
0 to 4	Low, acceptable	Follow up on the most vulnerable groups, such as pregnant women or minors
5 to 12	Medium, possible	Specific assessment, or control measures under an ergonomics program
13 to 20	High, significant	Prompt action: control measures under an ergonomics program
21 to 32	Very high, unacceptable	Stop the activity and apply control measures under an ergonomics program

The same scale applies to each activity in both appendices. If the person does several, address the one with the highest risk level first (AI.1 and AII.1). The specific assessment uses validated methods, such as the NIOSH lifting equation or ISO 11228-2 (4.9).

Specific assessment method (7.1 c) _____

If none was done, why (7.4 c) _____

7 Loads per task and shift

Task	Shift	People	Weight, kg	Units	Mass, kg	Distance, m	Exceeds Table 1?	Exceeds the cap?

8 Control measures (8.3, 8.5, 8.6 and 8.7)

Check the measures for this task, with an owner and a date. The ergonomics program lists jobs, measures, dates no more than one year out, progress tracking, an owner and a follow-up assessment (8.5).

Measure	Type and section	Owner	Date
☐ Team lifting: 2 people handle two thirds of the sum of their capacities; 3 people, half	Prevention, 8.3 b) 3)		
☐ Handling equipment: pallet jack, hand truck or cart	Prevention, 8.3 b) 3)		
☐ Split the load into smaller units	Prevention, 8.3 b) 3)		
☐ Limit time and frequency	Administrative, 8.6		
☐ Schedule rest periods	Administrative, 8.6		
☐ Rotate or diversify activities	Administrative, 8.6		
☐ Change the work procedure	Technical, 8.7 a)		
☐ Rearrange or redistribute the station	Technical, 8.7 c)		
☐ Automate stacking with machinery, such as a robotic palletizer	Technical, 8.3 b) 3) and 8.7 b)		

With men aged 18 to 45, team lifting reaches 33.3 kg with 2 people and 37.5 kg with 3 (Target Robotics calculation with Table 1). The assessment is reviewed when the task conditions change, for example when stacking is automated, and when a health effect or a work-related musculoskeletal disorder is detected (7.6).

Conclusions, recommendations and actions of the assessment (7.4, items d and e)

9 Who prepared it, and signatures

Prepared the assessment (7.4, item f)

Full name

Professional license number (cédula profesional)

Training documents, if there was a specific assessment

Signature

Ergonomics program owner (8.5)

Full name and signature

Job title

For the workplace

Full name and signature

Date

The assessment is available to the workers who take part in or carry out manual handling (7.5) and becomes part of the workplace health and safety diagnosis under NOM-030-STPS-2009 (7.7).

Sources: NOM-036-1-STPS-2018, Diario Oficial de la Federación, November 23, 2018 (dof.gob.mx, in Spanish), sections 2, 4.9, 4.14, 7, 8.3 to 8.7 and Appendices I and II; agreement amending its Second transitory article, DOF, September 23, 2022. Checked November 25, 2026. Job aid by Target Robotics: the binding text is the standard itself; have your legal advisor review your case.

If the assessment points you to automated stacking, send the unit weight, units per minute and the line's shifts.

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