

Forklift Operator Training; Made Simple

Know This...

For any forklift training to be valid, it must be vehicle and job-site (yard) specific.

The administrative duties for contractors include:

- Identifying all forklift operators;
- Identifying types of Powered Industrial Trucks (forklifts) that will be operated;
- Identify location (address) of where forklifts will be operated;
- Conduct formal instruction on the safe operation of forklifts;
- Conduct practical training, and;
- Evaluate the operator's performance in the workplace.

What You Need To Do...

Two worksheets have been developed to help contractors comply with OSHA's Powered Industrial Truck Training Standard. For each job-site or yard, complete these two worksheets. These worksheets are to be kept on file at the job-site or yard and serve as documentation for proof of operator evaluation and certification.

- (1) *Powered Industrial Truck Operator Evaluation Worksheet*
- (2) *Powered Industrial Truck Operator Training Certification Record*

In addition to these two worksheets, a formal discussion on safe forklift operation must be given to all operators.

*See Powered Industrial Truck Operator Training Certification Record for list of items to discuss during training.

How to use the worksheets...

Powered Industrial Truck Operator Evaluation Worksheet

For each job-site (yard), have a competent forklift operator complete a *Powered Industrial Truck Operator Evaluation Worksheet* for each operator for all forklifts that the employee will be expected to operate. For example, three employees will potentially operate two different types for forklifts; then six *Worksheets* will be completed for that job. Keep these *Worksheets* in the employee's files.

Powered Industrial Truck Operator Training Certification Record

This is the certification form that is to be made available upon request. This *Powered Industrial Truck Operator Training Certification* should be kept with job-site or contractor information. This record describes the job-site (yard), identifies the makes & models of vehicles that are to be operated and the names of all the employees who are to be the operators.

Certification Expiration...

Make sure that who ever is the competent person doing the training and evaluation sign and date the forms. These certifications are good for 3 years or whenever any of the following changes occur:

1. The employee
2. The type of powered industrial truck (forklift)
3. The job-site

Because of the nature of construction (except when doing training for yard operators), certification usually expires when the job ends, and so certification must be constantly renewed and reflect new job-site locations, equipment, etc. Often in yard operation, new hires need updated certification as well.

The forms are designed to adapt to the dynamics of contractor work.

Additional Help & Training...

For more information and/or free consultation on forklift operator training please contact:

Paul A. Satti
Technical Director
Construction Safety Council
4100 Madison Street
Hillside, IL 60162
708-544-2082 x 213
psatti@buildsafe.org

To set up a forklift operator-training program or train-the-trainer course, please contact:

Callie Caballero
Training Manager
Construction Safety Council
4100 Madison Street
Hillside, IL 60162
708-544-2082 x 214
ccaballero@buildsafe.org

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Powered Industrial Truck Operator Evaluation Worksheet
(Separate Sheet to be completed for Each Employee and Make/Model of Vehicle)

EMPLOYEE _____ DATE _____

MAKE/MODEL OF VEHICLE: _____

To Instructor: Check the box for each item only after trainee has shown that skill or knowledge has been learned; repeat lesson as many times necessary.

-] Able to explain the differences between a powered industrial truck and an automobile.
-] Shows familiarity with all controls and understands the purpose of all instrumentation.
-] Able to explain the type of engine or motor operation for the equipment (i.e. battery, fuel, etc.).
-] Shows proficient use of steering and maneuvering abilities of equipment.
-] Demonstrates proper use of equipment when visibility is obstructed.
-] Able to demonstrate and explain proper fork and/or attachment adaptation, operation, and limitations of their use.
-] Able identify the vehicle capacity plate and load charts (if applicable) and shows proficient use of information.
-] Able to explain how vehicle stability is affected.
-] Able to perform vehicle inspection and maintenance per manufacturers requirements.
-] Demonstrates proper refueling/recharging of machine.
-] Can explain any operating limitations.
-] Has reviewed and can explain other operating instruction, warning, or precaution listed in the operator's manual for the type of vehicle the employee is being trained to operate.
-] Identifies and explains hazards associated with jobsite surface conditions.

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- [] Demonstrates the proper placement of loads on the fork and/or attachment and can explain who load stability is affected.
- [] Shows proper load manipulation, stacking and un-stacking.
- [] Understands special jobsite consideration towards pedestrian traffic.
- [] Can identify narrow aisles and restricted places of operation on jobsite.
- [] Can identify jobsite classified hazardous locations.
- [] Demonstrates proper operation on ramps and other sloped surfaces that would affect the stability of the vehicle.
- [] Shows familiarity with and can explain other unique or potentially hazardous environmental conditions that exist or may exist in the workplace.
- [] Explains how operating the vehicle in closed environments and other areas where insufficient ventilation and/or poor vehicle maintenance could cause a build-up of carbon monoxide or diesel exhaust.
- [] Is able to identify OSHA's Powered Industrial Truck Training Standard, 29 CFR 1926.602(d) and explain the purpose and scope of this standard.

TRAINED BY _____ DATE _____

EVALUATOR _____ DATE _____

Powered Industrial Truck Operator Training Certification



Contractor Information:

Job Site Description:

Purpose & Scope of this Document:

This document is to serve as proof of compliance to the requirements of OSHA's powered industrial truck training standard [29 CFR 1926.602(d)].

[All contractors are required to certify that each operator of a powered industrial truck (forklift) has received training and has been evaluated. This training must consist of a combination of formal and practical instructional experience. A training certification record must be readily available for review and include the names of the operators, the date of the training and evaluation, and the identity of the person(s) performing the training or evaluation.]

This training is *job-site* and *equipment specific* (see *Job Site Description* for the scope in which this document applies).

➤ *Make(s) and Model(s) of Equipment Covered by this Certification:*

Operator List:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

Note: Persons with the necessary knowledge, training, and experience to train powered industrial truck operators and evaluate their competence must conduct all training and evaluation.

Training Program Content:

1. Characteristics of the powered industrial truck(s) the employee will be allowed to operate:
 - (a) Differences from the automobile.
 - (b) Controls and instrumentation: location, what they do, and how they work.
 - (c) Engine or motor operation.
 - (d) Steering and maneuvering.
 - (e) Visibility.
 - (f) Fork and/or attachment adaptation, operation, and limitations of their use.
 - (g) Vehicle capacity.
 - (h) Vehicle stability.
 - (i) Vehicle inspection and maintenance the operator will be required to perform.
 - (j) Refueling or charging and recharging batteries.
 - (k) Operating limitations.
 - (l) Any other operating instruction, warning, or precaution listed in the operator's manual for the type of vehicle the employee is being trained to operate.

2. The operating environment:
 - (a) Floor surfaces and/or ground conditions where the vehicle will be operated.
 - (b) Composition of probable loads and load stability.
 - (c) Load manipulation, stacking, and un-stacking.
 - (d) Pedestrian traffic.
 - (e) Narrow aisle and restricted places of operation.
 - (f) Operating in classified hazardous locations.
 - (g) Operating the truck on ramps and other sloped surfaces that would affect the stability of the vehicle.
 - (h) Other unique or potentially hazardous environmental conditions that exist or may exist in the workplace.
 - (i) Operating the vehicle in closed environments and other areas where insufficient ventilation and/or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.

3. The requirements of OSHA's Powered Industrial Truck Standard.

I hereby certify that the persons named in the "Operator List" have successfully completed the training program described above.

Trained by: _____ (Date) _____

Evaluated by: _____ (Date) _____