

Sample Forklift Safety and Powered Industrial Trucks Written Program



IMPORTANT NOTICE: This risk control Sample Program provided by PMA Companies is intended to help support your loss prevention efforts. It is not intended to be complete or definitive in discovering or identifying all hazards associated with your business, preventing workplace accidents, or complying with any safety related or other laws or regulations. You are encouraged to address the specific hazards of your business and have your legal counsel review all of your plans and company policies.

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Powered Industrial Truck Safety Written Training Program For

Dealership Name

1. Purpose

The purpose of this program is to train all employees who are using powered industrial trucks how to use them safely. The program will address all parties involved as well as activities that will be done in the program.

This program works within the OSHA compliance guidelines for powered industrial trucks which are found in 29 CFR 1910.178. This program is meant for the use of all employees who are using powered industrial trucks at (Dealership Name)

2. Parties Responsible:

Program Director: _____
Employee name

The director is responsible for:

- Issuing and administering this program and making sure that it is compliant with all current OSHA safety requirements for the operation and use of a powered industrial truck.
- Providing Initial and refresher training to all employees who are able to use the powered industrial truck.
- Conducting powered industrial truck evaluations.
- Maintaining and updating all powered industrial truck certification records for dealership.
- Scheduling all maintenance for powered industrial trucks.
- If maintenance is provided by in-house staff, be sure Lock Out/Tag Out procedures are followed, and be sure all inspection forms are complete.

Managers & Supervisors:

Managers and supervisors are responsible for:

- Making sure all employees that use the powered industrial trucks are receiving the proper training from the program director.
- Monitoring employee usage of the powered industrial trucks and informing the program director when refresher training is needed, or if training is needed for a new operator.

Powered Industrial Truck Maintenance

Maintenance is organized through the program director. See responsibilities noted above.

Powered Industrial Truck Operators

Powered industrial truck operators are responsible for:

- Operating powered industrial trucks within the guidelines and rules of safety established by the dealership.
- Performing daily inspections on all powered industrial trucks before operation.
- Informing all management personnel of safety violations and mechanical repair that need to be made on all powered industrial trucks.

3. Types of Equipment and Usage

The following equipment used at this dealership meets the requirements for powered industrial trucks and therefore must follow the guidelines outlined in this program. Powered industrial trucks are any mobile materials handling equipment that is powered by means of internal combustion engine, compressed gas, electricity, battery, pneumatic or hydraulic fluid.

Equipment Type	Department
_____	_____
_____	_____
_____	_____
_____	_____

4. Program Training & Activities

Training

- Only the program director who is well trained in the use of the power industrial trucks which are used at the dealership can provide employee training on how to use a power industrial truck. EXCEPTION- powered industrial truck vendor will sometimes offer this employee training.
- Only employees who are certified in the equipment being operated will be allowed to use it. (See Appendix A for sample certification form)
- The certification process contains classroom training, practical application through operating the power industrial truck, evaluation/ certification and recertification every 3 years. (See Appendix C for a sample safety training guide)
- The following principles will be taught to employees regarding the use of powered industrial trucks.
 - Differences between the truck and the automobile.
 - Truck controls and instrumentation: where they are located, what they do, and how they work.
 - Engine or motor operation.
 - Steering and maneuvering.
 - Visibility (including restrictions due to loading).
 - Fork and attachment adaptation, operation, and use limitations.
 - Vehicle capacity.
 - Vehicle stability.
 - Any equipment &/or truck inspection and maintenance that the operator will be required to perform.
 - Refueling and/or charging and recharging of batteries.
 - Operating limitations

Workplace-related Topics [[29 CFR 1910.178\(l\)\(3\)\(ii\)](#)]

- [Surface conditions](#) where the vehicle will be operated.
- Composition of loads to be carried and [load stability](#).
- [Load manipulation](#), stacking, and unstacking.
- [Pedestrian traffic](#) in areas where the vehicle will be operated.
- [Narrow aisles](#) and other restricted places where the vehicle will be operated.
- [Hazardous \(classified\) locations](#) where the vehicle will be operated.
- [Ramps and other sloped surfaces](#) that could affect the vehicle's stability.
- Closed environments and other areas where insufficient [ventilation](#) or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.

If an operator was previously trained in one of these topics, and the training is appropriate to the truck and working conditions encountered, additional training on that topic is not required provided that the operator has been evaluated and found competent to operate the truck safely. However, these operators will still need their certifications updated every three years.

Trainees may operate a powered industrial truck only:

- Under the direct supervision of persons who have the knowledge, training, and experience to train operators and evaluate their competence.
- Where such operation does not endanger the trainee or other employees.

Note: Only Adults above the age of 18 are allowed to use powered industrial trucks.

Ref: <http://www.osha.gov/dcsp/products/etools/pit/assistance/index.html#training>

5. Inspections and Schedule/Emergency Maintenance

- All powered industrial trucks that are in use will be inspected each morning before use.
- Inspection reports will be completed, signed and dated after each inspection.
- Inspection reports will be filed at the end of each day with the program director. Exception: Inspection reports may be kept on the powered industrial truck for reference, provided that they are reviewed by the program director monthly.
- If repairs are needed on the powered industrial trucks, then the equipment will be taken out of service immediately.
- Before a powered industrial truck can go into regular service after being repaired it must pass an operational test to make sure that it is fit for duty (See Appendix)

6. Operating of the Power Industrial Truck

Safety Rules

- A speed limit should be observed for power industrial trucks in the facility at all times.
- If the operator's vision is disrupted at any time, the power industrial truck should not be used until the disruption is removed.
- Important: To be used effectively (and safely) to lift an employee, a special attachment, designed and approved for such purposes must be used. This attachment is commonly referred to as a basket-lift or man-lift. Never allow an individual to stand on the forks for any reason. The employee must be tied off to the basket/lift using approved safety harness and lanyard, and the basket-lift must be secure to the forks according to manufacturer's specifications. The basket-lift must be equipped with a toe board and the employee workspace must be "gated off".
- Only stable safe loads must be handled by the operator when using the truck. Operators must be trained in determining the safe load capacity of the unit prior to operation.
- Capacity must never be exceeded when using the power industrial truck.
- All loads being transported on an incline must face upwards while traveling on that incline.
- A seatbelt must be worn at all times while operating the powered industrial truck.
- All powered industrial trucks must have a backup alarm or backup lights to warn others of the approaching device. These alarms should be inspected daily to insure they are operating when the forklift is used.

Gasoline

- All internal combustion powered industrial trucks will be refueled in designated safety areas through the facility.
- Before refueling, each truck will be turned off.
- At no time will any employee be allowed to smoke in or near the refueling safe zone. (Enter where the safe refueling zone is located)
- Powered industrial trucks are never to be topped off with fuel. This could cause an explosion hazard.

Liquid Petroleum Gas (LPG)

- LPG trucks shall at no time be refueled in a confined environment.
- LPG trucks shall never be left near heat sources or in places where exit and egress is made more difficult by the truck being present.
- Only a certified, designated employee may replace fuel tanks for the LPG powered industrial trucks. This is generally the program manager.
- All LPG tanks will be stored in accordance with OSHA mandated guidelines.

Battery Driven

All battery driven trucks will be recharged in designated safety areas through out the dealership

29 CFR1910.178(g)(1) clearly states that “Battery charging installations shall be located in areas designated for that purpose.” The standard further states:

- The battery charging station must be located in a well ventilated, open-air environment.
- Smoking is prohibited in and around power industrial trucks at all times.
- There should be no open flames or sparks present in the recharging areas.
- Personal protective equipment should be worn at all times by all employees working on, in or near power industrial trucks. When handling electrolyte solution or inspecting battery fluid levels, appropriate personal protective equipment must be worn. This shall include appropriate chemical resistant gloves, chemical goggles, face shield, apron or other items designed to prevent splashing or spilling chemical from contacting the operator.
- An eye wash and first aid kit should be located in the immediate vicinity of the recharging area.
- A water source must be located in the immediate vicinity of the recharging area to treat exposures to battery acid.

Appendix A – Sample Certification Card

This is to certify that

Has Completed the **Powered Industrial Truck
Operator Training Program**

Presented by: (Enter Name of Dealer Here)

Date _____ Expiration Date _____

Instructor _____

Appendix B – Sample Maintenance & Inspection Form

Forklift Operator Checklist

Items that need to be checked daily or before you use the forklift. Check off the items that are ok and list items that need to be repaired at the bottom.

Make _____

ID Number _____

- | | | |
|-----|-----------------------------|-------|
| 1. | Visual check for leaks | _____ |
| 2. | Fuel | _____ |
| 3. | Engine Coolant | _____ |
| 4. | Battery and Cables | _____ |
| 5. | Fire Extinguisher | _____ |
| 6. | Tires for inflation | _____ |
| 7. | Inside cab clean | _____ |
| 8. | Oil Levels | _____ |
| 9. | Grease forks | _____ |
| 10. | Pins on Forks | _____ |
| 11. | Drive Belts | _____ |
| 12. | Lights and Safety Equipment | _____ |
| 13. | Wheel Lugs | _____ |
| 14. | Hoses | _____ |
| 15. | Water in Radiator | _____ |
| 16. | Back-up Alarm/Horn | _____ |
| 17. | Filters Clean if Needed | _____ |
| 18. | Brakes/Clutch/Steering | _____ |
| 19. | Parking Brake | _____ |
| 20. | Seat Belt, if equipped | _____ |
| 21. | Other (A) | _____ |
| 22. | Other (B) | _____ |

After completion send/file (to/at): _____

List maintenance items that need to be corrected by mechanic or vendor:

Signature

Date

Printed Name



Appendix C – Powered Industrial Truck Training Guide

1. Operators shall receive training in the following forklift related topics:
 - a. Operating Instructions
 - b. Truck controls and instrumentation
 - c. Steering and maneuvering
 - d. Stopping
 - e. Visibility (including restrictions due to loading)
 - f. Fork and attachment adaptation, operation, and use limitations
 - g. Vehicle capacity and stability
 - h. Vehicle maintenance and inspection
 - i. Refueling and/or the recharging of batteries

2. Operators shall receive training in the following work related topics:
 - a. Surface conditions where the vehicle will be operated
 - b. Load manipulation, stacking, and unstacking
 - c. How to maneuver narrow aisles, doorways, around corners and restricted areas
 - d. Hazardous locations where the vehicle will be operated
 - e. Ramps and other sloped surfaces that could affect stability
 - f. Other unique or potentially hazardous environmental conditions
 - g. Pedestrian traffic in areas where the vehicle will be operated
 - h. Where to park the forklift
 - i. Weight limits
 - j. Dock (if required): loading and unloading trailers, wheel chocks and dock locks.

3. Operators shall receive refresher training if the following occurs:
 - a. The operator is assigned to operate a different type of vehicle
 - b. A condition in the workplace changes that affects vehicle operation
 - c. An incident or “near-miss” occurs involving personal injury, property/product or equipment damage.

Appendix D – Sample Post-Training Participant Quiz

Forklift Safety Quiz

Dealership Name

Circle T if statement is true or F if statement is false.

- T F 1. Only trained and authorized employees should operate forklifts.**
- T F 2. The overhead guard lists the maximum weight you can carry.**
- T F 3. It's okay to operate a forklift without a seatbelt as long as you're traveling at a low speed.**
- T F 4. Forklifts should always get the right-of-way over pedestrians.**
- T F 5. Always sound the horn when approaching an intersection, blind corner, or person. It's not necessary to sound the horn when backing.**
- T F 6. As you drive the forklift, keep the forks between 6 and 10 inches high.**
- T F 7. When loading more than 1 box, always place the larger and heavier box farthest away from the forklift support.**
- T F 8. There is never an excuse for walking under loaded forks.**
- T F 9. It is okay to run the motor for an extended period while inside a truck trailer.**
- T F 10. When loaded on a slope, keep the load pointed up the slope.**

Name _____

Signature _____

Date _____

