



## **SECTION 11–POWERED INDUSTRIAL TRUCKS**

**11.1 Powered Industrial Truck Procedure**

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**11.3 Operator Performance Evaluation Checklist**

Revised: May 2009  
Updated: November 2017  
Reviewed: October 2008  
Revised: August 2002  
Date Accepted: April 2002  
Draft Date: December 2001



## 11.1 POWERED INDUSTRIAL TRUCKS

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### A. Objective

To establish guidelines in the operation and maintenance of powered industrial trucks to reduce the potential for employee injury and to comply with all applicable standards and regulations.

### B. Scope

All operators of forklifts, tractors, platforms lift trucks, motorized hand trucks, and other specialized industrial trucks powered by electric motors or internal combustion engines. This program does not apply to compressed air or nonflammable compressed gas-operated industrial trucks, nor farm vehicles, or to vehicles intended primarily for earth moving or over-the-road hauling.

Program components will include:

- Training
- Inspection
- Maintenance
- Safety Rules

### C. References

Department of Labor, Occupational Health and Safety Administration (OSHA) 29 Code of Federal Regulations 1910.178, Illinois Department of Labor 820 ILCS 225 Health and Safety Act.

### D. Procedure

Employees whose job requires them to operate a powered forklift or powered industrial truck must comply with the guidelines stated in the following sections. Once an employee has complied with the guidelines and received the required training they will be listed on the *"Approved Forklift Operator List"*. ONLY individuals on the *"Approved Forklift Operator List"* may operate a powered forklift or powered industrial truck.

To obtain keys to the forklift during normal business hours see the Warehouse person in charge. After normal business hours see Harper Police.

### E. Training

No person shall operate a powered forklift or powered industrial truck until they have been trained and certified. Training is required prior to permitting an employee to operate a powered industrial truck (except for training purposes). Training shall consist of a combination of formal instruction, practical training and evaluation of the operator's performance in the workplace.

#### I. Training Components:

- Rules of powered industrial truck operation and why these rules exist.
- Special emphasis on loading and unloading, center of gravity, stability, and mechanical limitations.
- Supervised practice on an operating course that simulates actual conditions, e.g., stacking, loading trucks and unloading.
- Refueling and recharging.
- The types of trucks used in various hazardous locations and environments.
- A combination of oral, written, and operational performance test.
- Frequent refresher training.



## II. Operator Performance Evaluation

- Adequate completion of skills tests
- Demonstrates that the operator knows and understands the unit's functional features.
- Demonstrates that the operator is familiar with all safety rules.
- Can identify specific safety factors at a dock and battery recharge station.
- Demonstrates overall driving skills.

## F. Refresher Training and Evaluation

Refresher training shall be conducted when any of the following occur:

- The operator has been observed to operate the vehicle in an unsafe manner.
- The operator has been involved in an accident or near-miss incident.
- The operator has received an evaluation that reveals that the operator is not operating the truck safely.
- The operator is assigned to a different type of truck; or
- A condition in the workplace changes in a manner that could affect safe operation of the truck.

An evaluation of each powered industrial truck operator's performance shall be conducted at least once every three (3) years. See *"Operator Performance Evaluation Checklist"*.

## G. Inspection

The Warehouse Driver or a designated representative will inspect the forklifts each morning and will complete *"11.2 Forklift Inspection"* form weekly. The campus mechanic will inspect all mechanical aspects of the forklift monthly. All forklift operators must check the vehicle they are using before they use the forklift. If the vehicle is found to be unsafe, it must be reported to the Warehouse Driver immediately. No forklift will be operated in an unsafe condition.

## H. Forklift Safety Rules

- Only certified drivers authorized by the college and trained in the safe operation of forklift trucks or any powered industrial truck shall be permitted to operate such vehicles. Drivers shall not operate trucks other than those for which they are authorized. Trainees may be authorized to operate trucks provided they are under supervision.
- Drivers shall check the vehicle before using and if it is found to be unsafe, the matter shall be reported immediately to the Warehouse Driver, and the vehicle shall not be put into service again until it has been made safe. Attention shall be given to the proper functioning of tires, horns, lights, battery, controller, brakes, steering mechanism, and the lift system of fork lifts (fork chains, cable, and limit switches).
- Vehicle shall not exceed a safe speed, always maintaining a safe distance from other vehicles, and all established traffic regulations shall be observed. For trucks traveling in the same direction, a safe distance may be considered to be approximately 3 truck lengths or preferably a time lapse of 3 seconds before passing the same point. Exercise extreme care when cornering. Sound horn at blind corners.
- No riders shall be permitted on vehicles.
- Stunt driving and horseplay are prohibited.
- Loaded vehicles shall not be moved until the load is safe and secure.
- When leaving a vehicle unattended, the power shall be shut off, brakes set, the mast brought to the vertical position, and the forks left in the down position. When left on an incline, the wheels shall be locked.



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**NOTE:** A powered forklift truck is unattended when the operator is 25 ft. or more away from the vehicle that remains in his or her view or whenever the operator leaves the vehicle and it is not in his or her view.

- When the operator is dismounted and within 25 feet of the truck still in his or her view, the load engaging means shall be fully lowered, control neutralized, and the brakes set to prevent movement.
- Trucks shall not be driven up to anyone standing in front of a bench or other fixed object of such size that the person could be caught between the truck and the object.
- Operators shall look in the direction of travel and shall not move a vehicle until certain that all persons are in the clear.
- Vehicles shall not be operated on floors, or platforms that will not safely support the vehicle, empty or loaded. Any damage to forklift trucks and/or structures shall be reported immediately to the Warehouse Supervisor and your supervisor.
- Employees shall not ride on the forks of the lift trucks.
- The forks shall always be carried as low as possible, consistent with safe operation.
- Extreme care shall be used when lifting loads.
- Vehicles shall not be driven in and out of highway trucks and trailers at unloading docks until such trucks are securely blocked and brakes set.
- Employees shall not place any part of their body outside the running lines of the forklift truck or between mast uprights or other parts of the truck where shear or crushing hazards exists.
- Employees shall not be allowed to stand, pass, or walk under the elevated portion of any forklift truck loaded or empty.
- The width of one tire on the forklift shall be the minimum distance maintained by the truck from the edge while it is on any elevated dock or platform.
- Trucks shall not be loaded in excess of their rated capacity.
- No truck shall operate with a leak in the fuel system.
- Extreme care should be taken when tilting loads. Elevated loads shall not be tilted forward except for when the load is being deposited onto a storage rack or equivalent. When stacking or steering, backward tilt shall be limited to that necessary to stabilize the load.
- The load-engaging device shall be placed in such a manner that the load will be securely held or supported.
- Special precautions shall be taken in the securing and handling of loads by trucks equipped with attachments, and during the operation of these trucks after the loads have been removed.
- **NO SMOKING WHILE OPERATING OR REFUELING FORKLIFTS**



## 11.2 FORKLIFT INSPECTION

INSPECTOR: \_\_\_\_\_

DATE: \_\_\_\_\_

FORKLIFT ID/MAKE: \_\_\_\_\_

HOUR METER READING: \_\_\_\_\_

	OK	DEFECTIVE	DATE CORRECTED
1. Tires (for cuts, gouges, imbedded objects, and air pressure for pneumatic tires).	_____	_____	_____
2. Steering	_____	_____	_____
3. Foot brake	_____	_____	_____
4. Parking brake	_____	_____	_____
5. Horn	_____	_____	_____
6. Controls	_____	_____	_____
7. Lights	_____	_____	_____
8. Mast, carriage, and attachments (for damaged, loose, missing bolts, or unusual wear on chain guides and insides of mast channels).	_____	_____	_____
9. Forks and fork adjusting slides	_____	_____	_____
10. Name plate, markings, and load limits	_____	_____	_____
11. Operating and warning lights	_____	_____	_____
12. Clutch or creeper control	_____	_____	_____
13. Overhead guard	_____	_____	_____
14. Battery connections and level	_____	_____	_____
15. Fuel line (for leaks and damage)	_____	_____	_____
16. Exhaust system (for sparks, leaks)	_____	_____	_____
17. Directional signals	_____	_____	_____
18. Back up alarm device	_____	_____	_____
19. Dead man brake (seat actuated)	_____	_____	_____
20. Other (loose articles, materials on truck, etc.)	_____	_____	_____

REMARKS: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# 11.3 OPERATOR PERFORMANCE EVALUATION CHECKLIST

Observer's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Operator's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Type of Forklift:     Caterpillar (electric) ☐     Komatsu (propane) ☐     Komatsu (gas) ☐

	<u>Satisfactory</u>	<u>Needs Improvement</u>
<b>1. Follows inspection/ refueling checklist</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2. Demonstrates proper use of controls</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Directional controls – turn signals	<input type="checkbox"/>	<input type="checkbox"/>
• Lights	<input type="checkbox"/>	<input type="checkbox"/>
• Steering mechanism	<input type="checkbox"/>	<input type="checkbox"/>
• Tilt forward/ tilt backward	<input type="checkbox"/>	<input type="checkbox"/>
• Raise / lower	<input type="checkbox"/>	<input type="checkbox"/>
• Special attachments	<input type="checkbox"/>	<input type="checkbox"/>
<b>3. Properly secures "Unattended" vehicle</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>4. Demonstrates competency in basic maneuvering skills</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Starts and stops smoothly	<input type="checkbox"/>	<input type="checkbox"/>
• Maintains proper speed	<input type="checkbox"/>	<input type="checkbox"/>
• Scans effectively	<input type="checkbox"/>	<input type="checkbox"/>
• Uses horn when appropriate	<input type="checkbox"/>	<input type="checkbox"/>
• Keeps body parts within vehicle while in motion	<input type="checkbox"/>	<input type="checkbox"/>
<b>5. Demonstrates competency in picking up a load</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Matches load weight with truck capacity	<input type="checkbox"/>	<input type="checkbox"/>
• Checks load for stability	<input type="checkbox"/>	<input type="checkbox"/>
• Carries load against backrests	<input type="checkbox"/>	<input type="checkbox"/>
• Spaces forks appropriately	<input type="checkbox"/>	<input type="checkbox"/>
<b>6. Demonstrates competency in driving with a load</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Travels with load close to the ground	<input type="checkbox"/>	<input type="checkbox"/>
• Watches for pedestrians	<input type="checkbox"/>	<input type="checkbox"/>
• Drives in reverse with oversized load	<input type="checkbox"/>	<input type="checkbox"/>
• Maintains a safe speed	<input type="checkbox"/>	<input type="checkbox"/>
<b>7. Demonstrates competency in stacking a load</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Approaches the load squarely	<input type="checkbox"/>	<input type="checkbox"/>
• Deposits load safely and squarely	<input type="checkbox"/>	<input type="checkbox"/>
• Withdraws forks without binding	<input type="checkbox"/>	<input type="checkbox"/>
<b>8. Demonstrates Competency in loading/ unloading trailer (only for Cat. truck which operates in warehouse)</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Checks the dock plate	<input type="checkbox"/>	<input type="checkbox"/>
• Checks the condition of the floor	<input type="checkbox"/>	<input type="checkbox"/>
• Checks the trailer chocks, jack stands and brakes	<input type="checkbox"/>	<input type="checkbox"/>
<b>9. For propane truck only: Demonstrates competency in:</b>	<input type="checkbox"/>	<input type="checkbox"/>
• Using seatbelt	<input type="checkbox"/>	<input type="checkbox"/>
• Wearing gloves to change propane tank	<input type="checkbox"/>	<input type="checkbox"/>
• Checking propane gauge	<input type="checkbox"/>	<input type="checkbox"/>