

## Great Western Painting

### Forklifts & Industrial Trucks

29 CFR 1910.178, Powered Industrial Trucks

## FORKLIFTS & INDUSTRIAL TRUCKS

### OVERVIEW

This program has been developed to make our truck operators aware of the hazards associated with motorized truck use as well as to provide guidance for safe truck operations.

Persons will be authorized to operate our forklifts only after they have successfully demonstrated their understanding of proper procedures for truck inspection, use, and refueling/recharging. Operators will demonstrate their truck knowledge and abilities by passing a written test and performing designated truck maneuvers. All truck operators will be evaluated by the Forklift Program Administrator or a designated competent person.

Because of their power; weight; size; restricted visibility; and, often, high center of gravity, operation of industrial trucks takes skill and attention to detail. One moment of inattention can lead to a major mishap in an instant. Additionally, the load presents potential hazards if not properly secured, balanced, and/or properly placed on the truck.

In accordance with paragraph (b)12, 29 CFR 1910.178, Powered Industrial Trucks, the Program Administrator or other competent person will determine whether the atmosphere or location in which our industrial trucks will operate is hazardous or non-hazardous and, after further assessing our needs, will determine which types of trucks are appropriate and allowed for our specific operations.

In the unlikely event that unsafe industrial motor truck operations are observed, retraining will be given with emphasis on correcting the improper behavior. To prevent the possibility of severe injury to the operator (or a bystander), our forklifts must be operated in a professional manner and anything less will not be tolerated.

All truck operators will have ready access to this program, appropriate OSHA standards, and the truck owner/operator manuals.

### FORKLIFTS

Forklifts are designed to move items quickly, safely, and cleanly. Forklift training would also apply to numerous types of powered industrial trucks such as: tractors; platform lift trucks; motorized hand trucks; and other specialized industrial trucks powered by electric motors or internal combustion engines.

There is a general agreement among safety professionals, as well as OSHA, that requiring training for all persons (including part-time, seasonal, and temporary employees) who operate forklifts will significantly reduce the above accident and injury rate.

## GENERAL REQUIREMENTS

All truck operators must be thoroughly familiar with the truck, itself. This includes knowing:

- a. instinctively what each and every control does.
- b. how to perform a truck safety check.
- c. the truck's limitations such as maximum load, height and width, visibility, stability, and surface requirements.
- d. the truck's stopping and turning ability and its effect on loads.

The below safety rules and guidelines to which one must adhere while operating a forklift have been established. These rules are designed to protect the operator and/or persons adjacent to truck operations.

Specifically:

1. Only trained and certified operators are allowed to operate our forklifts and powered industrial trucks. Training and certification is required for each type of equipment, see paragraph b, below.
  - a. Prior to authorization, the operator will have read this program, received training, passed a quiz on truck operations, and been evaluated on operational skills.
  - b. Authorization to operate one type of truck does not automatically authorize a person to operate all trucks. Different power sources, visibility restrictions, controls, and capacities may dictate, in the judgment of the Program Administrator, that a separate certification process may be required for a different type of truck. There may be instances where a new vehicle does not necessitate new training and a demonstration of proficiency. A newer model of a currently used truck may be identical to the truck the operator is qualified on as far as safety and operations are concerned. As a general rule, each **type** of truck has its own characteristics, limitations, and idiosyncrasies -- each **model** of a type of truck may or may not be unique.

2. No riders are allowed on our forklift unless:
  - a. the truck is specifically designed for such use.
  - b. the rider is authorized by the Program Administrator.

NOTE: Forklifts are generally designed to move product, supplies and equipment, not personnel.

3. The Program Administrator will revoke the authority to operate a truck if unsafe acts are observed or it is apparent that the operator has not retained the knowledge and job skills necessary to safely perform truck operations.
  - a. an operator who has lost his authorization to operate a truck will be retrained, reevaluated, and, if appropriate, re-certified.
4. Daily, at the beginning of each shift, the operator will inspect the truck using our Forklift Daily Checklist.

**Note: Trucks used round the clock will be inspected after each shift.**

- a. If deficiencies relating to safety are found, the deficiencies will be noted on the Checklist and immediately reported to the Program Administrator or other designated person and corrected. The vehicle will not be used until safety defects are repaired.
- b. If cosmetic damage is discovered during the daily check, it will be noted on the Checklist, however, the truck will be used. Cosmetic faults will not delay our operations.

## **HAZARDS**

The major personal safety hazards involved in truck operation include:

- a. physically hitting a person/object with the truck or load.
- b. having a load fall and hit the operator or other person.
- c. having the truck tip and crush the operator or other person.
- d. fire or explosion during refueling/recharging.

Below are rules and guidelines to control the hazards identified and reduce the likelihood of accident/injury. While some of the procedures may seem too obvious to mention or just plain common sense, remember this — serious, even fatal, accidents have occurred because for one split second an operator forgot or ignored a basic safety rule.

### **HITTING A PERSON/OBJECT**

- a. Never drive up to a person standing in front of a fixed object.
- b. When possible, stay within delineated travel lanes or aisles.
- c. Be seen and/or heard.

- d. Ensure that adequate lighting is available.
- e. Maintain a clear view of travel. If the load blocks or restricts the view, the operator will drive with the load trailing (backwards).
- f. Slow down, sound horn, and do not pass where vision is restricted.
- g. Operate the truck at speeds that will allow it and the load to be stopped in a safe, smooth, manner.
- h. Be aware of floor conditions. Remove loose objects that have found their way to the truck travel lanes. Operate the truck at slower speeds on wet or slippery floors.
- i. Of course, stunt or reckless driving is prohibited.
- j. Be aware of the height of the truck and, if equipped, its mast and load. Carelessness can damage ceiling, lights, pipes, etc..
- k. Never allow anyone to stand or pass under an elevated portion of any truck at any time.

### **FALLING LOADS**

- a. Know your load -- do not "overstack". Because practically all loads lifted or hauled by a forklift are not secured to the truck, ensure the load is properly stacked. Cartons generally should be interlaced or banded.
- b. If lifting a load or pallet, get the forks (or other engaging means) as far under the load as possible.
- c. Travel with the load in the lowest position for stability as well as prevention of hitting objects overhead. If using forks, tilt the load backward for stabilization.
- d. Do not exceed the truck's rated capacity or stack loads too high.
- e. Do not make "jerky" movements such as slamming the brakes or high speed turns.
- f. A load backrest extension will reduce the possibility of part of the load falling rearward.
- g. When using a fork lift, the forks may be tilted forward only for picking up or setting down a load.

### **TIPPING**

Forklifts are, by design, narrow allowing them greater access within the work setting. Unfortunately, a narrow track offers less stability. Tipping or falling off an edge (or dock) is a preventable accident by following the

guidelines below. If your truck tips, keep your body and limbs within the safety of the cage. Wear a seat belt if the truck is so equipped.

- a. stay within travel lanes.
- b. if entering a trailer, ensure:
  1. the trailer brakes are engaged.
  2. the trailer is secured from movement by means of chocks and/or a locking mechanism.
  3. the tractor is either shut off or removed from the trailer.
  4. the trailer is squared up with the dock opening and dock plates are secure.
  5. the trailer floor is capable of supporting the forklift and its load.
  6. the lighting within the trailer is adequate.

NOTE: Falling off a dock edge because a trailer has moved is invariably a serious accident. Do not count on the tractor-trailer driver to lock his brakes or even trust that his brakes work. Physically check and ensure that the trailer into which you are taking your forklift is flush against the dock. If possible, the trailer should be actually attached to the dock, but in all cases, it should be chocked.

- c. travel with the load in the lowest possible position and avoid sharp turns at higher speeds as well as abrupt truck movements.
- d. be aware of the surface on which you are traveling -- its traction, ability to hold weight, slope, and surface.

### **FIRE/EXPLOSION DURING REFUELING/RECHARGING**

Refueling accidents are not common experiences, however should they occur, they would be sudden and possibly catastrophic. Follow the manufacturer's owner's manual and local fire laws.

- a. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
- b. At least an 8B:C rated fire extinguisher, 29 CFR 1910.g(14), must be readily available when refueling propane. Facilities for quick drenching of the eyes and body must be readily available.

### **OTHER CONCERNS**

The program deals primarily with the personal safety of our forklift operators. However, when discussing truck operations, we would be remiss if it were not pointed out that improper truck operations could also result in physical damage to products, trucks, and/or facilities. Proper truck

operation will reduce personal injury accidents, and, as an added benefit, prevent general damage.

## **OPERATOR PROTECTION**

A hazard assessment of forklift operations will be conducted by the Program Administrator. Particular attention will be given to hand, head, eye, and foot protection as well as environmental conditions such as atmospheres, heat or cold. If the truck is equipped with a seat belt, it must be worn when the truck is moving.

Keep your limbs within the running lines of the truck and keep your hands and fingers away from moving parts -- particularly the mast on a fork lift truck.

The Program Administrator will perform a hazard assessment of our truck operations and determine what, if any, personal protective equipment (PPE) requirements are appropriate. If PPE (examples: steel toed boots, leather gloves, hard hat, eye protection, etc.) is required, it must be worn.

## **FORKLIFT OPERATIONS**

In addition to safety operating practices previously identified in this manual, the following will be considered general operating procedures:

- a. fire aisles, access to stairways, and fire equipment must be kept clear.
- b. operators leaving their trucks must ensure the load is fully lowered, controls neutralized, and brakes set. On an incline, the wheels must be blocked. If the operator is 25 feet or more from the truck or does not have a clear view of the truck, the power to the truck must be shut off.
- c. a safe distance shall be maintained from the edge of ramps or platforms while on any elevated dock, platform or freight car.
- d. trucks shall not be used for opening or closing freight doors.
  1. trucks, like all items of equipment, will be used for the purpose for which they were designed.
- e. be aware that if the operator of a semi-trailer has placed the rear wheels in a far forward position, the trailer may act as a "teeter-totter" when a heavy forklift enters the trailer. When a trailer is not coupled to a tractor, fixed jacks may be necessary to support the semi-trailer during loading or unloading.
- f. be aware that the overhead guard (used as protection against falling objects) is designed to prevent injury from the impact of small

packages, boxes, bagged material, etc. -- it is not necessarily designed to withstand the impact of a falling capacity load.

- g. in the event persons are lifted by a truck, a lifting platform must be securely attached to the lifting mechanism and the persons on the safety platform must have means of shutting off power to the truck.
- h. if more than one truck is operated, they must be separated by a safe distance (at least three truck lengths) and they may not pass each other in intersections, blind spots, or other dangerous locations. The right of way shall be yielded to other trucks in emergency situations.
- i. trucks traveling in the same direction shall not be passed at all.
- j. driving on grades:
  - 1. grades shall be ascended or descended slowly.
  - 2. when ascending or descending grades in excess of 10 percent, loaded trucks shall be driven with the load upgrade.
- k. motorized hand trucks must enter confined areas with the load end forward.

## **MAINTENANCE**

While the operator is responsible for checking the truck before use, actual mechanical maintenance must be performed by an authorized person.

- a. if at any time a forklift is found to be in need of repair, defective, overheating, or in any way unsafe, the truck shall be taken out of service until it has been restored to safe operating condition.
- b. forklifts should be kept reasonably clean and free of excess oil and grease.

## **DUTIES OF THE FORKLIFT ADMINISTRATOR**

The duties of the Forklift Program Administrator include:

- a. operator training and certification.
- b. hazard assessment of our truck operations.
- c. identification of truck operator's who, through their performance have demonstrated a lack of retained knowledge or ability to safely operate a powered truck. These person will receive retraining.
- d. keeping abreast of developments in the materials handling field with an emphasis on safety.

Additionally, the administrator will ensure that all truck operators have ready access to 29 CFR 1910.178, Powered Industrial Trucks, this program, and the individual truck's Operator/Owner Manual.

## TRAINING

The Program Administrator will administer the training portion of this program.

Interactive training will be given by a qualified instructor who has the knowledge and ability to teach and evaluate operators.

Prior to actual truck operation on the job, all truck operators will become familiar with the contents of this program as well as the operator's manual applicable to the specific powered truck they will operate. Each operator will demonstrate an understanding of truck operations and complete a driving test which will include truck inspection, maneuvering, and fueling/charging.

The Program Administrator will ensure that all truck operators have a complete understanding of the below listed topics:

### **TRUCK-RELATED TOPICS:**

- a. operating instructions, warnings, and precautions for the type of truck the operator will be authorized to operate.
- b. differences between the truck and the automobile.
- c. truck controls and instrumentation: where they are located, what they do, and how they work.
- d. engine or motor operation.
- e. steering and maneuvering.
- f. visibility (including restrictions due to loading).
- g. fork and attachment adaptation, operation, and use limitations.
- h. vehicle capacity.
- i. vehicle stability.
- j. any vehicle inspection and maintenance that the operator will be required to perform.
- k. refueling and/or charging and recharging of batteries.
- l. operating limitations.
- m. any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the employee is being trained to operate.
- n. balancer and counterbalances.

## WORKPLACE-RELATED TOPICS:

- a. surface conditions where the vehicle will be operated.
- b. composition of loads to be carried and load stability.
- c. load manipulation, stacking, and unstacking.
- d. pedestrian traffic in areas where the vehicle will be operated.
- e. narrow aisles and other restricted places where the vehicle will be operated.
- f. hazardous (classified) locations where the vehicle will be operated.
- g. ramps and other sloped surfaces that could affect the vehicle's stability.
- h. closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.
- i. other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

New truck operators may operate powered trucks in a training capacity:

- a. when they are under the direct supervision of persons who have the knowledge, training, and experience to train and evaluate their competence.
- b. where such operation do not endanger themselves or others.

The Program Administrator will certify the training/evaluation has been accomplished per the following schedule:

<u>If the employee was hired:</u>	<u>Initial training and evaluation completed:</u>
Before December 1, 1999	By December 1, 1999.
After December 1, 1999	Before the employee is assigned to operate a forklift.

Recertification of power industrial truck training must be accomplished every three years.

Mandatory refresher training will be given:

- a. if unsafe truck operations are observed.
- b. after an accident or near-accident.
- d. if the operator is to be assigned to drive a different type of truck.
- e. if workplace changes could affect safe operation of the truck.

## USE OF FORKLIFTS TO SUPPORT SCAFFOLD PLATFORMS

Per 29 CFR 1926.451(c)(2)(v), if deemed appropriate, forklifts may be used to support scaffold platforms with the following conditions:

- a. The forklift will be designed for such use as indicated either:
  1. in the owner's manual, or
  2. by a letter from the manufacturer allowing such use, or
  3. certification by a registered engineer that the forklift is so designed.
- b. The entire scaffold platform is securely attached to the forks.
- c. The fork lift is not moved horizontally while the platform is occupied.
- d. The platform (and machine) meet the requirements of 1926.451 for capacity, construction, access, use, and fall protection.
  1. if the platform is not designed by the manufacturer of the forklift, it must be designed by a qualified person.
  2. the forklift must be capable of supporting, without failure, its own weight and at least four times the maximum intended load.
- e. The platform for elevating personnel must not extend more than 10 inches beyond the wheelbase of the machine in use.
- f. The employees on the platform must be able to have travel and power controls at the platform level.
  1. this requirement is fulfilled by having the forklift operator remain with the forklift while personnel are on the platform.
- g. The use of a forklift to support a scaffold platform will be used only after a determination that the use of other equipment such as scaffolds, scissor lifts, aerial lifts and ladders is not practical.

# Great Western Painting

## FORKLIFT CHECKLIST

VEHICLE TYPE: \_\_\_\_\_

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

VEHICLE NUMBER: \_\_\_\_\_

OPERATOR NAME: \_\_\_\_\_

VISUAL INSPECTION	Mon	Tues	Wed	Thurs	Fri	Sat.	Sun
Overall vehicle condition							
Operators manual							
Fire extinguisher							
Head lights							
Tail lights							
Signal lights							
Warning lights							
Seat							
Seat belt							
Tires, wheels, rims							
Overhead cage protection							
Forks							
Mast							
Mast chains							
Mast tilt							
Hydraulic lines							
Wires							
Cosmetic Damage: Explain:							
<b>FLUIDS (check leakage &amp; )</b>							
Brake fluid							
Engine oil							
Fuel							
Hydraulic fluid							
Coolant							
<b>VEHICLE OPERATIONS</b>							
Starter							
Gauges: Battery							
Oil pressure							
Temperature							
Hour meter							
Seat safety switch							
Backup warning device							
Warning light							
Parking brake							
Service brake							
Steering							
Transmission							
Mast lift up/down							
Mast tilt							
Mast side/squeeze							
Other:							
Other:							

Code: ✓ = OK    X = Deficiency    NA = Not Applicable

# Forklift Instruction Guide

# FORKLIFT

## INSTRUCTION GUIDE

### PREFACE

This guide has been prepared to ensure that the training requirements contained in 29 CFR 1910.178, *Forklifts*, are met.

Prior to training, the Program Administrator should make a hazard assessment of truck operations and identify real or potential areas of concern such as:

**a. physical layout:**

1. are aisles sufficiently wide?
2. are there “blind” spots?
3. are other personnel kept clear of truck operations?
4. are dock plates & chocks in good repair?
5. are stacked items the proper height?
6. are fuel storage/battery charging areas properly maintained with appropriate fire extinguishers?
7. is the atmosphere in which the truck will operate appropriate?

**b. personal protective equipment (PPE):**

1. are PPE requirements identified?
2. is PPE available and its use enforced?

**c. trucks:**

1. are trucks properly inspected and maintained?
2. are owner’s/operator’s manuals available?

**d. operations:**

1. are vehicles being operated in a safe manner?

The Program Administrator or the designated competent (by training or experience) person who will conduct the training should understand the underlining reason for instruction and evaluation is to provide a safe work environment for the truck operator.

While it is not **legally** necessary to provide re-training on truck and work related topics if an operator has had training in those topics, for ease and consistency, we will provide the same **initial** training for all operators. This would include new, experienced, hires.

Initial training should consist of three distinct phases:

- a. interactive, formal training.
- b. practical training.
  1. This will include demonstrations performed by the trainer and practical exercises performed by the trainee.
- c. evaluation.
  1. This is an actual evaluation of the operator's performance in the workplace conducted by the Program Administrator or a designated competent person.

Forklift training must be certified.

# FORKLIFT TRAINING

## Materials needed:

- a. Our Forklift Program.
- b. 29 CFR 1910.178, *Powered Industrial Trucks*.
- c. The Owner's/Operator's Manual for our truck(s).
- d. Forklift Daily Check List.
- e. Forklift Quiz and Quiz Explanations.
- f. Answer Sheets, paper & pencils.

## Procedure:

- a. Use the following formal training as a guide to ensure all major topics are covered.
  1. The items in *italics* are notes to the instructor.
  2. Prior to teaching, fill in the blanks on pages:
- b. Encourage questions and group discussion. Identify and solve problems with the help of the employees.
- c. Administer the written (multiple-choice) quiz.
- d. Self-grade the quizzes using the Quiz Explanations as a starting point for discussion.

NOTE: How personnel do on the quiz is less important than their understanding of the material after answers are explained and discussed. Satisfy yourself that information pertinent to «Company\_Name» truck operations -- especially safety information -- is retained by the operators.

## INTRODUCTION

We are committed to safety and providing a work environment that is free of recognized hazards. That same commitment is expected of all our employees.

As part of our continuing effort to provide a safer workplace for our employees, we have developed a training program for our forklift operators.

Forklifts are an indispensable asset allowing us to move materials efficiently within our facility. However, because of their size, weight, power, and restricted visibility, these trucks present a potential hazard if improperly used. Only trained and authorized personnel will operate our industrial trucks.

This training will be interactive which means, to the extent possible, a dialogue will be established between all of us present. Not only are questions welcome, but real life examples of difficulties experienced with truck operations are encouraged. All of us will benefit by discussing these problems and finding solutions.

References for this training include:

- a. Our Forklift Program.
- b. 29 CFR 1910.178, Forklifts, upon which our program is based. This will be readily available for our operators to review and they are encouraged to read it.
- c. The Owner and/or Operator Manuals for our trucks.

All of the above references are readily available for review at any time. Just ask.

## **WHY IS TRAINING NEEDED?**

***Ask if anyone can answer that question. Try to get a discussion going to keep up interest and activity in the training.***

Because of their power; weight; size; restricted visibility; and, often, high center of gravity, operation of industrial trucks takes skill and attention to detail. One moment of inattention can lead to a major mishap in an instant. Additionally, the load presents potential hazards if not properly secured, balanced, and/or properly placed on the truck.

***Ask if anyone has heard of a truck accident or mishap (not necessarily at this facility). More than likely, someone would have heard about a truck falling off a dock edge, through a trailer floor, or hitting an object or person. What about falling loads?***

While many safety features are designed into forklifts such as seat belts, lights, fire extinguishers, audible alarms, etc., accidents still happen and they are generally the result of operator error.

There is a general agreement that training for all persons (including part-time, seasonal, and temporary employees) who operate forklifts will significantly reduce the above accident and injury rate.

## **THE TRUCKS**

Forklifts are designed to move items quickly, safely, and cleanly. As a point of interest, forklifts include: fork trucks; tractors; platform lift trucks; motorized hand trucks; and other specialized industrial trucks powered by electric motors or internal combustion engines.

Generally, trucks are powerful and nimble with many safety features built into them. However, each type of truck has its limitations which would include stability, capacity, and visibility --with and without a load.

***Ask if anyone has had a problem with stability, capacity or visibility.***

To get an idea of the value of forklifts, in a typical factory, 40% of all activity involves material handling. In a ware-house operation, material handling approaches 100% of the activity.

***Ask if anyone knows the percentage of truck activity in our facility. The number is approximately: \_\_\_\_\_%.***

## **RULES REGARDING INDUSTRIAL TRUCKS**

1. No person shall operate one of our trucks without written authorization.
2. No riders are allowed unless:
  - a. the truck is specifically designed for such use.
  - b. the rider is authorized for the performance of a job.
3. Unsafe acts will result in the revocation of your authority to operate a truck retraining will be required.
4. At the beginning of each shift, the operator will inspect the truck using our Forklift Daily Check List.

***Go over the Check List and answer all questions related to its use.***

- a. Safety deficiencies will be noted on the Check List and the truck will not be used until they are corrected.
- b. No truck will be operated with safety defects.
- c. If cosmetic damage will not stop operations.

## **METHODS TO AVOID MAJOR INDUSTRIAL TRUCK HAZARDS**

***Ask if anyone can identify a major category of truck accidents which result in injury.***

The major categories are:

- a. physically hitting a person/object with the truck or load.
- b. having a load fall and hit the operator or other person.
- c. having the truck tip and crush the operator or other person.
- d. fire or explosion during refueling/recharging.

***Ask what procedures might prevent these accidents.***

## HITTING A PERSON/OBJECT

- a. Never drive up to a person standing in front of a fixed object.
- b. When possible, stay within delineated travel lanes or aisles.
- c. Be seen and/or heard.
- d. Ensure that adequate lighting is available.
- e. Maintain a clear view of travel. If the load blocks or restricts your view, drive with the load trailing (backwards).
- f. Slow down, sound horn, and do not pass where vision is restricted.
- g. Operate the truck at speeds that will allow it and the load to be stopped in a safe, smooth, manner.
- h. Be aware of floor conditions. Remove loose objects in the travel lanes. Low down on wet or slippery floors.
- i. Of course, stunt or reckless driving is prohibited.
- j. Be aware of the height of the truck and, if equipped, its mast and load. Carelessness can damage ceiling, lights, pipes, etc..
- k. Never allow anyone to stand or pass under an elevated portion of any truck at any time.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## FALLING LOADS

- a. Know your load -- do not "overstack". Because practically all loads lifted or hauled by a forklift are not secured to the truck, ensure the load is properly stacked. Cartons generally should be interlaced or banded.
- b. If lifting a load or pallet, get the forks (or other engaging means) as far under the load as possible.
- c. Travel with the load in the lowest position for stability as well as prevention of hitting objects overhead. If using forks, tilt the load backward for stabilization.
- d. Do not exceed the truck's rated capacity or stack loads too high.
- e. Do not make "jerky" movements such as slamming the brakes or high speed turns.

- f. A load backrest extension will reduce the possibility of part of the load falling rearward.
- g. When using a fork lift, the forks may be tilted forward only for picking up or setting down a load.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## **TIPPING**

Tipping or falling off an edge (or dock) is a preventable accident by following the guidelines below. If your truck tips, keep your body and limbs within the safety of the cage. Wear a seat belt if the truck is so equipped.

- a. Stay within travel lanes.
- b. If entering a trailer, ensure:
  - 1. the trailer brakes are engaged.
  - 2. the trailer is secured from movement by means of chocks and/or a locking mechanism.
  - 3. the tractor is either shut off or removed from the trailer.
  - 4. the trailer is squared up with the dock opening and dock plates are secure.
  - 5. the trailer floor is capable of supporting the forklift and its load.
  - 6. the lighting within the trailer is adequate.

**NOTE:** Falling off a dock edge because a trailer has moved is invariably a serious accident. Do not count on the tractor-trailer driver to lock his brakes or even trust that his brakes work. Physically check and ensure the trailer into which you are taking your forklift is securely against the dock. If possible, the trailer should be actually attached to the dock, but in all cases, it should be chocked.

- c. Travel with the load in the lowest possible position and avoid sharp turns at higher speeds as well as abrupt truck movements.
- d. Be aware of the surface on which you are traveling -- its traction, ability to hold weight, slope, and surface.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## **FIRE/EXPLOSION DURING REFUELING/RECHARGING**

Refueling accidents are not common experiences, however should they occur, they would be sudden and possibly catastrophic. Follow the manufacturer's owner's manual and local fire laws.

- a. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
- b. An appropriate (B:C) fire extinguisher must be readily available.

**Ensure that refueling/recharging procedures are clearly understood.**

**Conduct an interactive discussion on the appropriate truck-related and workplace-related topics listed below.**

**For example, you could start each subparagraph below with, "Do you understand ....?"**

### **TRUCK-RELATED TOPICS**

- a. Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate.
- b. Differences between the truck and the automobile.
- c. Truck controls and instrumentation: where they are located, what they do, and how they work.
- d. Engine or motor operation.
- e. Steering and maneuvering.
- f. Visibility (including restrictions due to loading).
- g. Fork and attachment adaptation, operation, and use limitations.
- h. Vehicle capacity.
- i. Vehicle stability.
- j. Any vehicle inspection and maintenance that the operator will be required to perform.
- k. Refueling and/or charging and recharging of batteries.
- l. Operating limitations.
- m. Any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the employee is being trained to operate.

## **WORKPLACE-RELATED TOPICS**

- a. Surface conditions where the vehicle will be operated.
- b. Composition of loads to be carried and load stability.
- c. Load manipulation, stacking, and unstacking.
- d. Pedestrian traffic in areas where the vehicle will be operated.
- e. Narrow aisles and other restricted places where the vehicle will be operated.
- f. Hazardous (classified) locations where the vehicle will be operated.
- g. Ramps and other sloped surfaces that could affect the vehicle's stability.
- h. Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.
- i. Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

Lastly, remind all personnel that the reference materials are readily available for their use and that should a safety concern develop, it will be resolved before proceeding with work.

## **PRACTICAL TRAINING**

### **Materials Needed:**

- a. A “Demonstration of Operational Skills” form for each trainee.
- b. A forklift.
- c. The Forklift Daily Check List.
- d. Typical items to be moved, placed, or lifted.

### **Procedure:**

- a. Establish a protected training area that has been cordoned off to prevent injury to persons not involved with truck training.
- b. Establish stations which are representative of typical operations such as:
  1. lifting, pulling, pushing, stacking materials.
  2. maneuvering in tight spaces, narrow aisles, or blind spots.
  3. entering trailers.

- c. Demonstrate:
  - 1. inspecting the truck.
  - 2. performing the tasks required at each station.
  - 3. fuel/charging the truck.
  - 4. securing the truck as if the shift was completed.
- d. Observe:
  - 1. the trainee performing the above tasks.
  - 2. complete a “Demonstration of Operational Skills” for each trainee.

As with all training, an interactive approach should be taken with the operator being encouraged to ask questions and resolve any safety issues.

## **EVALUATION**

### **Materials needed:**

- a. A Certification of Truck Operator Training Form.
- b. Operator’s Licenses.

**NOTE: The trainee may not be authorized as an operator until an evaluation of performance during actual operations is made by the Program Administrator or a designated competent person.**

**Prior to this certification, all truck operations must be under the direct supervision and observation of a competent person.**

### **Procedure:**

- a. Observe the employee performing actual operations safely in accordance with the training received.
- b. Complete our Certification of Truck Operator Training Form.
- c. Provide a completed Operator’s License to the individual.

## Forklift Quiz

# FORKLIFT

## QUIZ

**Circle the correct answer.**

1. To become an authorized forklift operator, one must:
  - a. read and understand all pertinent information in the Owner's Manual.
  - b. understand the hazards associated with truck operations and how to avoid them.
  - c. demonstrate skills in actual truck operation.
  - d. all of the above.
  
2. Who is allowed to operate an industrial truck?
  - a. Anyone over 25 years of age.
  - b. Anyone who can turn it on.
  - c. One who has demonstrated his/her knowledge and ability to safely operate the truck and has authorization to do so.
  
3. A malfunctioning truck may be used:
  - a. with extreme caution.
  - b. only after being properly repaired by authorized personnel.
  - c. by ground controls only.

4. Trucks should be inspected:
  - a. daily.
  - b. weekly.
  - c. monthly.
  
5. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
  - a. True.
  - b. False.
  
6. Rated load capacities are:
  - a. general guidelines established by the manufacturer.
  - b. must never be exceeded.
  - c. are used to determine fluid levels.
  
7. Industrial trucks are so stable they may be driven on any grade.
  - a. True.
  - b. False.
  
8. Because of the driver protection and the rubber tires, there is no danger if overhead electrical lines are hit by a truck component or load.
  - a. True.
  - b. False.

9. Loads should always be carried as close to the ground as possible to lower the center of gravity.
  - a. True.
  - b. False.
  
10. The surface on which a truck travels should be checked for:
  - a. load bearing capacity.
  - b. traction.
  - c. lack of debris.
  - d. all of the above.
  
11. Primary hazards that present themselves during truck operations include:
  - a. hitting a person/object; falling loads; tipping; and fire/explosion during refueling/recharging.
  - b. flat tires; leaking fuel tanks; and excess debris.
  - c. hazardous atmospheres and excessive noise.
  
12. Accidents involving forklifts result in approximately:
  - a. 90,000 injuries and 100 deaths per year.
  - b. 1,000,000 injuries and 350 deaths per year.
  - c. three (3) billion dollars in property damage per year.

## **Forklift Quiz Answer Sheet**

# Great Western Painting

## FORKLIFT QUIZ

### ANSWER SHEET

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Date)

**Circle the correct, or best, answer.**

1. a. b. c. d.
2. a. b. c. d.
3. a. b. c. d.
4. a. b. c. d.
5. a. b. c. d.
6. a. b. c. d.
7. a. b. c. d.
8. a. b. c. d.
9. a. b. c. d.
10. a. b. c. d.
11. a. b. c. d.
12. a. b. c. d.

## Forklift Quiz Scoring Sheet

# Great Western Painting

## FORKLIFT QUIZ

### SCORING SHEET

1. d.
2. c.
3. b.
4. a.
5. a.
6. b.
7. b.
8. b.
9. a.
10. d.
11. a.
12. a.

## **Forklift Quiz Explanations**

## FORKLIFT

### QUIZ EXPLANATIONS

1. To become an authorized forklift operator, one must:
  - a. read and understand all pertinent information in the Owner's Manual.
  - b. understand the hazards associated with truck operations and how to avoid them.
  - c. demonstrate skills in actual truck operation.
  - d. all of the above.**

**The actual standard on which this training is based states, as far as training goes, that a method must be devised to train operators in the safe operation of forklifts. By successfully completing the above tasks, it is our opinion that the goal of zero accidents will be achieved.**

2. Who is allowed to operate an industrial truck?
  - a. Anyone over 25 years of age.
  - b. Anyone who can turn it on.
  - c. One who has demonstrated his/her knowledge and ability to safely operate the truck and has authorization to do so.**

**Improperly used forklifts are potentially very dangerous items of equipment. Therefore, only authorized personnel may operate them. Should an operator be found to be lacking in any of the required skills for safe operation, re-training will be given. Intentional recklessness or disregard of safety guidelines may result the operator's authorization being revoked.**

3. A malfunctioning truck may be used:
  - a. with extreme caution.
  - b. only after being properly repaired by authorized personnel.**
  - c. by ground controls only.

***There are two (2) points to this question. One, to emphasis that any truck that is mechanically defective will be taken out of service until repaired, and, two, only authorized maintenance personnel may do the actual repairs. Of course, operators are allowed to replenish fluids as allowed in the Operator's Manual.***

4. Trucks should be inspected:
  - a. daily.**
  - b. weekly.
  - c. monthly.

***There are three (3) main categories of items to inspect on our Forklift Daily Checklist: 1) Visual Overall Truck Condition; 2) Fluids; and 3) Truck Operations. Be sure to check each item indicating that it is O.K., deficient, or not applicable. This inspection checklist is part of our maintenance procedures and will ensure that not only are our trucks safe, they will perform at their expected capacities and lifetimes.***

5. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
  - a. True.**
  - b. False.

***Refueling propane requires at least an 8B:C rated fire extinguisher and recharging batteries requires immediate access to eye flush and body drenching.***

6. Rated load capacities are:
  - a. general guidelines established by the manufacturer.
  - b. must never be exceeded.**
  - c. are used to determine fluid levels.

***Rated capacities must never be exceeded. Remember, you are dealing with powerful, heavy, expensive machinery capable of serious work. At the least, going beyond truck capacities may damage the truck (or load), and, at the most, you may seriously injure yourself or a fellow employee if something gives way.***

7. Industrial trucks are so stable they may be driven on any grade.
  - a. True.
  - b. False.**

***Forklifts are extremely stable when properly driven, loaded, and operated within its stated limits. Exceeding a truck's limit, such as the grade on which it may be driven, is asking for a sudden, possibly violent, certainly tragic accident.***

8. Because of the driver protection and the rubber tires, there is no danger if overhead electrical lines are hit by a truck component or load.
  - a. True.
  - b. False.**

***This is blatantly false. Any reasonable person would know that there is danger in hitting any object. However, remember not only the driver of the truck is put at risk through careless operations, other persons are as well.***

9. Loads should always be carried as close to the ground as possible to lower the center of gravity.

a. True.

b. False.

***Not only does this lower the center of gravity, it greatly reduces the chance of injury should the load fall. If lowering the load blocks your line of sight, travel with the load trailing.***

10. The surface on which a truck travels should be checked for:

a. load bearing capacity.

b. traction.

c. lack of debris.

d. all of the above.

***Not only is the above an OSHA requirement, it makes good sense. Slow down when traction is poor (a wet floor, for example). Serious accidents can occur when trailer floors fail, dock plates slip, or there is some sort of surface collapse.***

11. Primary hazards that present themselves during truck operations include:

a. hitting a person/object; falling loads; tipping; and fire/explosion during refueling/recharging.

b. flat tires; leaking fuel tanks; and excess debris.

c. hazardous atmospheres and excessive noise.

***One of the main purposes of our training has been to point out the primary hazards involved with forklift operations and the methods and procedures to avoid them.***

12. Accidents involving forklifts result in approximately:
- a. **90,000 injuries and 100 deaths per year.**
  - b. 1,000,000 injuries and 350 deaths per year.
  - c. three (3) billion dollars in property damage per year.

***Ninety thousand injuries and 100 deaths per year is a terrible price to pay for disregarding standard safety procedures. Most accidents are preventable. With a concerted effort by all personnel from the highest levels of management to the newest hire, needless accidents and injuries can be eliminated.***

## Demonstration of Operation Skills

# Great Western Painting

## DEMONSTRATION OF OPERATION SKILLS

The truck operator whose signature appears below has demonstrated his/her ability to perform the below listed tasks in a satisfactory manner.

= O.K.

= Not Applicable

A truck walk-around and safety check.

A check of all fluid levels.

A check of horn, lights, brakes, fire extinguisher, etc..

Fueling the truck.

Starting the truck.

Driving around obstacles (such as empty boxes) both in a forward and reverse direction.

Lifting a stack of empty pallets and placing them on another empty pallet.

Securing the truck after use (engaging the parking brake).

Special maneuvers appropriate for job requirements such as ramps, trailer entry, narrow aisles, high reach, etc..

Notes:

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\_\_\_\_\_  
(Operator's Signature)

\_\_\_\_\_  
(Program Administrator's Signature)

\_\_\_\_\_  
(Date)

## **Certification of Forklift Operator Training**

# Great Western Painting

## Certification of Forklift Operator Training

I certify the below listed personnel have received training/refresher training as required by 29 CFR 1910.178, *Powered Industrial Trucks*.

Name(s) of competent persons who performed the training:  
(If other than the Program Administrator)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Date(s) of training:

\_\_\_\_\_  
(From)

\_\_\_\_\_  
(To)

Name of competent trainer evaluator: \_\_\_\_\_

<u>NAME</u>	<u>Initial Training</u>	<u>Refresher Training</u>	<u>Evaluation Date</u>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

\_\_\_\_\_  
Program Administrator's Signature

\_\_\_\_\_  
(Date)

# Forklift Operator Cards

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
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the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
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the below  
Great Western Painting  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)                      Robert Evans  
Safety Program Administrator