

# Forklift & Industrial Trucks

University Facilities (UF)  
Internal Procedure: 01.B.17.01  
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Approved by: Bob Wells

## Summary

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This program for the prevention of employee accident/injuries while operating industrial trucks (forklifts) has been adopted by UF from the following OSHA regulations: §1910.178 – Powered Industrial Trucks.

## Purpose & Scope

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UF will ensure that each powered industrial truck operator is competent to operate a powered industrial truck safely, as demonstrated by the successful completion of our training and evaluation as specified below:

1. Only trained and certified operators, including supervisors, are allowed to operate powered industrial trucks (forklifts). UF will certify all authorized employees regarding competency on all types of equipment that may be utilized.
2. UF will ensure that any company administrators for training of forklift operators are knowledgeable, experienced, and capable of operator competency evaluations. The written training program will include lecture, discussion, written material, and hands on training and evaluations.
3. Formal instruction includes lecture, discussion, interactive computer learning, videos, and written materials. Practical training involves instructor demonstrations and trainee exercises. Operator evaluation – critiques will be conducted. Training program content will include, but not be limited to the following prescribed topics:

**Truck-related topics:**

- Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate.
- 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 adaption, operation, and use limitations.
- Vehicle capacity.
- Vehicle stability.
- Any vehicle inspection and maintenance that the operator will be required to perform.
- Refueling and/or charging and recharging of batteries.
- Operating limitations.
- Any other operating instructions, warning, or precautions listed in the operator's manual for the types of vehicles that the employee is being trained to operate.

**Workplace-related topics:**

- 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.

4. Refresher training in relevant topics will be required for operators when:

- 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 drive a different type of truck.
- A condition in the workplace changes in a manner that could affect safe operation of the truck.
- Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.

- Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.
5. Forklift operators at UF are required to be evaluated and recertified every three years.
  6. Forklift operators are required to do an inspections of the equipment to be operated and the condition of the workplace environment in which the forklift will be operated prior to operations of the vehicle.
  7. Operators will verify trailer checks, supports, and dock plates prior to loading or unloading. The condition and securing of dock plates and boarding ramps must be inspected prior to use.
  8. The brakes of highway trucks must be set and wheel chocks placed under the rear wheels by the operator to prevent the trucks from rolling while they are boarded with forklifts.



**Performance Evolution for Forklift Operators**

Employee: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Evaluator: \_\_\_\_\_ Equipment Type: \_\_\_\_\_

Yes No

- Shows familiarity.
- Gave proper signals when turning.
- slowed down at intersections.
- Sounded horn at intersections.
- Obeyed signs.
- kept a clear view of direction travel.
- Turned comers correctly – was aware of rear end swing.
- Yielded to pedestrians.
- Drove under control and within proper traffic aisles.
- Approached load properly.
- Lifted load properly.
- Maneuvered properly.
- Traveled with load at proper height.
- Lowered load smoothly/slowly.
- Stops smoothly/completely.
- Load balanced properly.
- Forks under load all the way.
- Carried parts/stock in approved containers.
- Checked bridge-plates/ramps.
- did place loads within marked areas.
- did stack loads evenly and neatly.
- did drive backward when required.
- did check load weights.
- did place forks on the floor when parked, controls neutralized, brake on set, power off.
- Followed proper instructions for maintenance – checked both at beginning and end.

Comments: \_\_\_\_\_

\_\_\_\_\_

Total Rating:  Excellent  Good  Fair  Poor  Fail

\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date



## **General Daily Forklift Checklist**

### **Overhead Guard**

Yes No

- Are there broken welds, missing bolts, or damaged areas?

### **Hydraulic Cylinders**

Yes No

- is there leakage or damage on the lift, tilt, and attachment functions of the cylinders?

### **Mast Assembly**

Yes No

- Are there broken welds, cracked or bent areas, and worn or missing stops?

### **Lift Chains and Rollers**

Yes No

- is there wear or damage or kinks, signs of rust, or any sign that lubrication is required?
- is there squeaking?

### **Forks**

Yes No

- Are they cracked or bent, worn, or mismatched?
- is there excessive oil or water on the forks?

### **Tires- What do the tires look like?**

Yes No

- Are there large cuts that go around the circumference of the tire?
- Are there large pieces of rubber missing or separated from the rim?
- Are there missing lugs?
- is there bond separation that may cause slippage?

### **Battery Check**

Yes No

- Are the cell caps and terminal covers in place?
- Are the cables missing insulation?
- Hydraulic Fluid – Check level?
- Gauges – Are they all working properly?

### **Steering**

Yes No

- if power steering, is the pump working?
- is there excessive free play?

### **Brakes**

Yes No

- does the pedal go all the way to the floor when you apply the service brake? (This is the first indicator that the brakes are bad; brakes should also work in reverse)
- does the parking brake work? (The truck should not be capable of movement when the parking brake is engaged)
- Lights – If equipped with lights, are they working properly?
- Horn – Does the horn work?
- Safety Seat – If the truck is equipped with safety seat, is it working?



**Load Handling Attachments**

Yes No

- is there hesitation when listing or lowering the forks, when using the forward or backward tilt, or the lateral travel on the side shift?
- is there excessive oil on the cylinders?
- Engine Oil – Check levels.
- Engine Coolant – Visually check the level. (Note: Never remove the radiator cap to check the coolant level when the engine is running or while the engine is hot. Stand to the side and turn your face away. Always use a glove or rag to protect your hand.)
- Transmission Fluid – Check levels?
- Windshield Wipers – Do they work properly?
- Seat Belts – Do they work?
- Control Lever – Does the lever operate properly?