



Powered Industrial Truck Program

I. PURPOSE

To establish uniform practices for operation of Powered Industrial Trucks (PITs) at Cal State University of Fullerton (CSUF).

II. SCOPE

The Powered Industrial Trucks (i.e., forklifts) program establishes procedures and guidelines for CSUF employees who operate PITs and personnel who oversee persons operating PITs, for any portion or aspect of their work.

This program does not apply to equipment designed to lift people to create an elevated work area. Equipment that lifts personnel to work on platforms and/or at height are known as *Aerial Lifts* or *Elevated Work Platforms* and are discussed in a separate program.

III. RESPONSIBILITIES AND COMPLIANCE

A. Environmental Health and Safety Department - Administrator

CSUF's Environmental Health and Safety Department is the owner of the Powered Industrial Trucks Program. The responsibilities of the Environmental Health and Safety Department are to:

- a. Monitor and maintain the PITs program.
- b. Evaluate the PITs program every 3 years.
- c. Ensure compliance with this written program.
- d. Ensure all forklift operators are trained per the training requirements stated in this program.
- e. Ensure communication is in a form readily understandable and accessible to all employees under the scope of this program on matters pertaining to forklifts.
- f. Ensure required accident reporting and investigation takes place regarding forklift incidents.
- g. Maintain records of compliance issues, training, communication, accident reports and investigations, hazard corrective actions taken, and periodic program evaluation.
- h. Participate with Department Supervisors in developing job hazard analyses, prior to conducting operations involving forklift usage.

B. Supervisor Responsibilities

The Supervisor of the department is responsible for forklift equipment, inspection records, and their employees who operate forklifts. Supervisors are also to:

- a. Adhere to all operating rules (see Section IV) of this PIT program.

Ensure unsafe work conditions, practices, or procedures involving forklifts are corrected in a timely manner.

- b. Participate with the Environmental Health & Safety in developing job hazard analyses, prior to conducting operations involving forklift usage.
- c. Use required personal protective equipment (PPE) based upon job hazard analysis.
- d. Participate and receive training per the requirements stated in this program.
- e. Receive and understand communication on matters pertaining to forklift hazards.
- f. Participate with the Environmental Health and Safety Department in required accident reporting and investigations involving forklifts.
- g. Report unsafe work conditions, practices, or procedures to the Environmental Health & Safety.
- h. Perform weekly forklift inspection audit using the checklist located in Appendix A.

C. Operators' Responsibilities

- i. Adhere to all operating rules (see Section IV) of this PIT program.
- j. Participate with the Environmental Health & Safety in developing job hazard analyses, prior to conducting operations involving forklift usage.
- k. Use required personal protective equipment (PPE) based upon job hazard analysis.
- l. Participate and receive training per the requirements stated in this program.
- m. Receive and understand communication on matters pertaining to forklift hazards.
- n. Participate with the Environmental Health and Safety Department in required accident reporting and investigations involving forklifts.
- o. Report unsafe work conditions, practices, or procedures to your Supervisor and Environmental Health & Safety.
- p. Perform daily forklift inspections using the checklist located in Appendix A.

IV. OPERATING RULES

A. General Operating Rules

- a. Only certified operators trained in the safe operations of forklifts are permitted to operate such vehicles.
- b. The certified operator shall examine the vehicle thoroughly at the start of each shift to ensure that the operator has complied with Cal/OSHA requiring said examination, and to verify that the equipment is in the proper condition to be operated as intended. Operators shall inspect the forklift as required (see inspection checklist in Appendix A). Items to be checked shall include tires, horn, lights, battery, controller, brakes, steering, and the hydraulic system of forklifts (forks, chains, cable, and limit switches). If found to be unsafe or defective, the operator shall report the condition immediately to supervision. The forklift shall be taken out of service until repaired.
- c. A weekly audit will be conducted by the Supervisor to ensure that the daily inspection checklists are being completed.
- d. Forklift operators are encouraged to ask a spotter for assistance when operating a forklift under the following conditions or circumstances:

- the view of the driver is obstructed (i.e., blind spots).
- the pathway of the forklift is not straight forward (i.e., curves).
- there are obstacles along the intended pathway of the forklift; or
- there is a tight fit for the forklift.

A spotter can be selected by the forklift operator, or a spotter will be provided per department that submits tasks in which a forklift will be needed.

- Operators shall not exceed a speed greater than a fast walk.
- Operators shall maintain a safe distance from other vehicles, always keeping the forklift under positive control. For forklifts traveling in the same direction, the safe distance is approximately three truck lengths, or, preferably, a gap of three seconds passing the same fixed point.
- Stunt driving and horseplay are forbidden.
- Loaded vehicles shall be moved only after the driver has made the load safe and secure.
- Forklifts must not be driven up to anyone standing in front of a fixed object large enough that the person could be caught between the forklift and the object.
- Operators shall face the direction of travel and shall not move a forklift until they are certain that the path of travel is clear of pedestrians and obstructions.
- Forklifts shall be operated only on floors, sidewalks, platforms, and surfaces, that will safety support the loaded vehicle.
- Forklifts shall be operated to suit conditions and consideration shall be given to the condition of the aisle way, roadway, etc.
- Employees are prohibited from riding the forks of lift trucks.
- Forks must always be carried as low as possible, only high enough to clear any obstructions in the floor (approximately 4" to 6") when driving with or without a load.
- Drivers must always keep all parts of their body inside the cage, and avoid placing head or limbs between the masts, or other parts of the truck, where shear or crushing hazards exist.
- Employees shall not be allowed to stand, pass, or work under the elevated forks of a forklift, loaded or empty.
- Passing other forklifts traveling in the same direction is prohibited.
- Operators shall isolate working areas when loading or unloading from high top racks.
- Operators shall slow down and sound the horn at intersections, blind corners, and other locations where vision is obstructed (use overhead mirrors). If the load being carried obstructs forward view, the driver shall turn their head and upper torso and drive in reverse.
- Operators shall not drive a forklift loaded more than its rated capacity.
- Use caution when tilting loads.
- Tilting forward with the forks raised is prohibited except when picking up a load. Raised loads must not be tilted forward, except when the load is being placed in a storage rack or stack. When stacking or tiering, backward tilt must be limited to stabilizing the load.

- w. Forks shall be placed completely under the load with the load resting against the backrest to support the load.
- x. Forklifts shall not be used to nudge or push anything.
- y. A hazardous area shall not be entered unless the operator is sure the truck has been approved for it.
- z. Gasoline-powered forklifts shall not be driven in an enclosed area unless the area is well-ventilated. Exhaust gases from gasoline powered forklifts can be lethal.

B. Lifting A Load

- a. Forks shall be placed completely under the load with the load resting against the backrest to support the load.
- b. The load shall be lifted with the heaviest part positioned as close as possible to the carriage or backrest.
- c. The load shall be lifted with its weight centered on the forks.
- d. The operator must be sure the load is centered on the truck before traveling with it.
- e. Any load that may not be stable shall be tied or banded together.

C. Parking The Forklift

- a. The operator shall park the forklift on a flat surface.
- b. If the operator must park on an incline, the wheels shall be blocked so the truck will not roll.
- c. The carriage shall be lowered all the way with forks placed flat on the ground.
- d. The hand brake shall always be set, even on level ground and the forklift will be placed in the neutral position.
- e. The power shall be shut off if the operator will be out of sight of the truck, or more than 25 feet (7.5 meters) from it.

D. Ramps

- a. Ramps must be traveled slowly.
- b. When ascending or descending ramps in excess of a 10% angle, loaded forklifts shall be driven with the load upgrade.
- c. On all ramps, the load and forks shall be tilted back and carried low (only high enough to clear any obstructions in the surface, approximately 4" to 6").
- d. No turning of forklifts on ramps is permitted.

E. Unattended Vehicles

- a. When a vehicle is unattended, the operator shall shut the power off, set brakes, bring the mast to the vertical position, and lower the forks to the down position. On an incline, the wheels must be blocked.
- b. A forklift is unattended when the operator is 25 feet or more from the forklift, and it remains in their view, or whenever the operator leaves the forklift, and it is not in his/her view.

- c. When the operator leaves the forklift and is within 25 feet of the forklift still in their view, the forks must be fully lowered, controls neutralized, and the brakes set to prevent movement.

V. TRAINING

Only competent personnel may operate forklifts. An individual's competency must be demonstrated by successful completion of the training and evaluation process specified in this program. Personnel who operate equipment, conduct periodic safety inspections and preventive maintenance of the equipment, will adhere to specific safe-work practices whenever using powered industrial equipment.

All CSUF employees operating forklifts will receive certification training. Operators will renew their operating certification within 90-days of the 3-year expiration date.

Each powered industrial trucks operator will demonstrate their competence by successful completion of the training, evaluation, and certification specified in this section.

Training consists of a combination of formal instruction (e.g., lecture, discussion, interactive computer learning, video tape, written material), practical training (demonstrations performed by the trainer and practical exercises performed by the trainee/operator) and evaluation of the operator's performance in the workplace.

Newly certified forklift operators may be accompanied by a knowledgeable forklift operator until it is decided that the new operator is comfortable to operate a forklift on their own. This will fall under the discretion of the department supervisor.

A. *Training Topics*

Powered industrial truck operators will receive training in the following topics:

a. Forklift-related topics:

- Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate.
- Differences between the forklift and the automobile.
- Forklift controls and instrumentation: where they are located, what they do, and how they work.
- Engine and motor operation.
- Steering and maneuvering.
- Visibility (including restrictions due to loading).
- Fork and attachment adaptation, 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, warnings, or precautions listed in the operator's manual for the types of vehicles that the operator is being trained to operate.
- b. 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.
 - Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a build-up of carbon monoxide or diesel exhaust.
 - Hazard identification and assessment.
 - Hazard communication.
 - Hazard correction.
 - Other unique or potentially hazardous conditions in the workplace that could affect safe operation.

B. Operator Certification

CSUF certifies that each forklift operator has been trained and evaluated as required by this program. The certification includes the name of the operator, the date of the training, the date of the evaluation, and the identity of the person(s) performing the training or evaluation.

C. Refresher Training

Refresher training and evaluation of the effectiveness of that training is conducted to ensure that the operator has the knowledge and skills needed to operate the forklift safely when:

- a. the operator has been observed to operate the forklift in an unsafe manner.
- b. the operator has been involved in an accident or near-miss incident.
- c. the operator has received an evaluation that reveals that they are not operating the vehicle safely.
- d. the operator is assigned to drive a different type of forklift.
- e. a condition in the workplace changes in a manner that could affect safe operation of the forklift.

D. Trainees

Trainees may operate a forklift only when:

- a. operator training and evaluation is conducted by persons who have the knowledge, training, and experience to train forklift operators and evaluate their competence.
- b. under the direct supervision of persons who have the knowledge, training, and experience to train operators and evaluate their competence.
- c. such operation does not endanger the trainee or other employees.

VI. INSPECTIONS

The person assigned as primary forklift operator or the person using the forklift at the beginning of each day is responsible for the Forklift Daily Inspection Checklist (Appendix A), which is to be completed at least daily. Where industrial trucks are used on a round-the clock basis, they shall be examined after each shift. Inspections consist of visual checks of forklift components and operational checks as indicated below.

A. Visual Checks

These inspections take place with the motor or engine off. Look at your forklift before using it at the start of every workday. Walk around the machine and inspect the vehicle for anything that seems out of the ordinary. Check the condition of the following items:

a. Tires and Wheels

- i. Check to make sure all bolts and nuts holding wheels on or together are in place.
- ii. Tires should be free of grease and oil.
- iii. If the truck has solid tires, there must not be any large chunks gouged out of them.
- iv. The tire material on solid tires must be firmly bonded to the circumference of the steel rim.
- v. The rim of solid tires must be tight and in place on the wheel. It should not have shifted to one side.
- vi. The rubber and thread of pneumatic tires must be in good condition, with no serious cuts, loose rubber pieces, or exposed cord.
- vii. Periodically, a gauge should be used to check air pressure on pneumatic tires.
- viii. Split-rim tires can be dangerous. If split rims are defective, or assembled incorrectly, the pieces of the rim can blow apart. Air pressure should be checked facing the tread, not from the side.

b. Load Handling Equipment

- i. Forks, or other load-handling attachments, must not be cracked or bent.
- ii. Nothing should be bent or broken where the forks are attached to the carriage.
- iii. It should be possible to adjust the sideways position of the forks on the carriage, but the forks should not slide sideways freely.

- iv. The chains should have about the same amount of tension, and they should not have too much slack when the carriage is fully lowered.
- v. Look at the general condition of the mast, being alert for indications of wear.

NOTE: When inspecting the mast and carriage, keep fingers out of the way of parts that might move, and never stand under raised load-handling equipment.

c. Bolts, Nuts, Pins, and Welds

In addition to wheel bolts, the other connections should be checked periodically.

d. Hydraulic System

- i. Hoses to the hydraulic cylinders must be in good condition.
- ii. The hoses should never have enough slack to be caught in the mast or carriage.
- iii. Look for hydraulic leaks around piston seals and hose connections

e. Leaks

- i. Brake fluid often looks and feels like oil, but it smells different. It is most likely to leak around the braking wheels.
- ii. Transmission or gear oil can leak from any kind of gear case on both engine-powered and electric trucks.
- iii. Radiator water or coolant can leak from the engine, hoses, or radiator.
- iv. Battery electrolyte from both electric and engine-powered trucks looks like water but is a corrosive acid. Leaks should be flushed off with water.
- v. Any leaking diesel fuel, gasoline, or LPG is flammable or explosive. Do not operate a truck that has a fuel-system leak.

f. Fluid Levels

- i. Radiator Coolant
- ii. Engine Oil
- iii. Battery Electrolyte
- iv. Brake Fluid
- v. Hydraulic Fluid
- vi. Transmission Oil

B. Operational Checks

These following checks should be conducted with the engine running:

a. Indicator Lights and Gauges

- i. Fuel Gauge. Gasoline and diesel fuel gauges are usually on the instrument panel. The gauge on LPG tanks is on the tank itself.
- ii. Charge and Oil Pressure Lights (engine-powered trucks). They should come on when the key is turned on and go off after the engine starts. (If there is an amp meter instead of a light, it should show slight discharge when the key is turned on. After the engine starts, it should show a high reading at first, and then drop back down to a slight charge).
- iii. Oil Pressure Gauge

- iv. Temperature Gauge
- b. Engines and Motors.

Engine-powered trucks should start promptly and run smoothly. More than normal exhaust emission or noise is not safe.
- c. Brakes
 - i. There should be an emergency, or parking brake that can hold the truck securely on any grade you are likely to need to drive on.
 - ii. The service brakes should not require excessive force to operate. The pedal must have some reserve travel, and it should not gradually sink down under continued pressure. The brakes should not grab or cause the truck to swerve. Screeching or grinding brakes need attention.
 - iii. Perform a brake check the instant the vehicle moves by pressing the brake pedal and coming to a stop.
- d. Steering

Steering should be smooth with a minimum of free play. Free play in the straight-ahead position should be no more than an inch or two at the steering wheel rim.
- e. Carriage, Forks, and Hydraulic Controls
 - i. Control levers should work smoothly and return to their center position when released. It should be possible to control how fast the mast tilts forward and back, and how fast the carriage goes up and down the mast.
 - ii. The carriage should roll smoothly up and down on the mast and mast sections should extend without jerks or bumps.
 - iii. When the mast is fully extended, the load must not move excessively side-to-side, or front-to-back. The mast should not twist as it is tilted, or as the load goes up. The carriage should not tilt sideways.
 - iv. The hydraulic system must not allow the load to settle.
 - v. When the mast is tilted back, it should stay tilted. It should not creep forward at all, even with a full load.
 - vi. If the hydraulic system becomes noisy when the load is partially raised, and operation becomes erratic, it probably means the hydraulic fluid level is low.

VII. REFUELING, CHANGING LPG TANKS, AND BATTERY REPLACEMENT

- A. Recharge and refuel is permitted only in designated areas.
- B. Do not use bare metal tools on or around the top of batteries.
- C. On electric trucks, be sure the battery pack is secure. Use water to flush off any spilled or leaked electrolyte.
- D. When changing LPG tanks, relieve pressure in LPG lines before disconnecting them by following the outlined procedure in order:
 - a. Turn off the tank valve and run the engine dry to empty the lines.
 - b. Then turn off the ignition.

- c. Make sure replaced LPG tanks are securely fastened to the truck

VIII. RECORDKEEPING

The following list contains the documentation requirements of this PIT program that shall be maintained for a minimum of 3 years:

- A. Training records are maintained by EHS.
- B. Forklift inspection forms are maintained by the Supervisor.
- C. Forklift maintenance records are maintained by CPM.

IX. PROGRAM EVALUATION

The Environmental Health & Safety Trainer shall evaluate the effectiveness of this program every 3 years. The Program Administrator regularly evaluates the program effectiveness by discussing issues when forklifts with employees whenever they are encountered. Additionally, any time there is a change in workplace exposures, the continued effectiveness of the PIT program is reevaluated, and appropriate training is provided.

APPENDICES

Appendix A – Forklift Daily Inspection Checklist

Appendix B – Forklift Performance Evaluation Form and Checklist

Appendix C – Referenced Material

Appendix A – Forklift Daily Inspection Checklist, Page 1

	Monday	Tuesday	Wednesday	Thursday	Friday
Operator Name					
Hour Meter Reading					
Date (Month/Day/Year)					
Operator's Signature					

Certified Forklift Operator: Complete this form before each use. Check "OK" if the items are in good condition/operation or check the "Repair Required" if the item is not in proper order. *If "Repair Required" notify maintenance and facilities.*

Items marked with ** require the forklift to be Locked Out and Tagged Out if "repair is required".

Note to Supervisor's: It is your responsibility to ensure your operators are continually performing and documenting their pre-use inspections. You are responsible for auditing this checklist weekly.

	Criteria	Monday		Tuesday		Wednesday		Thursday		Friday	
		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
Ground Conditions	Drop-offs, holes, debris, etc.										
Overhead Hazards	Structures, utility pipes, fans, lights, etc.										
Unauthorized Access	People, vehicles, equipment, etc.										
Safety Items	Fire extinguisher, PPE, eye wash, first aid kit, etc.										

Key Off (Visual Check)	Criteria	Monday		Tuesday		Wednesday		Thursday		Friday	
		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
General Overview	Parking brake, fluid leaks on floor, damage, etc.										
Forks/Attachment, Backrest **	Bent, cracked, locking pins, worn, mismatched										
Mast, Lift Chains, Rollers	Broken welds, cracks, bent, greased, rust										
Hydraulic Cylinders/Hoses	Leaks, damaged, bubbles/cuts on hose										
Tires/Wheel – All Tires	Lug nuts, rim damage, sidewall, tread, pressure										
Overhead Guard – All Sides	Broken welds, missing bolts, damaged areas										
Capacity Plate/Safety Decals	Legible, attached to unit										
Seatbelt/Operator Restraint **	Worn, damage, working, locks when attached										
Controls and Pedals **	Hydraulic controls and pedals move freely										
Counterweight **	Bolts, damage, cracks in exhaust/radiator										
Propane Cylinder <input type="checkbox"/> N/A	Mounted properly, damage, leaks, date										
Fluid Checks (All Accessible)	Engine oil/hydraulic/brake/transmission/coolant										
Battery	Secure, cell caps, leaks, corrosion, cables										

Key On (Oper. Checks)	Criteria	Monday		Tuesday		Wednesday		Thursday		Friday	
		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
Seatbelt **	Seatbelt is engaged prior to any motion										
Gauges **	All warning lights and gauges										
Warning Devices/Lights **	Horn, backup alarm, all lights working										
Parking and Service Brake/Deadman Pedal **	Parking brake holds when in gear, service brakes work travelling forward and reverse, stops unit										
All Hydraulic Operations **	Proper operation and no leak through full range of motion: lift, lower, tilt, side-shift, reach, etc.										
Steering **	No unusual noise, excessive free play										

** must LOTO

Weekly Supervisor Audit				

Use the section below to indicate any items that are not in compliance, need repair or special attention. Lock Out Tag Out of the forklift is required for all items marked with an * in the event they are marked as "Repair Required".

Appendix A - Forklift Daily Inspection Checklist Page 2

			Saturday	Sunday
Operator Name				
Hour Meter Reading				
Date (Month/Day/Year)				
Operator's Signature				

Certified Forklift Operator: Complete this form before each use. Check "OK" if the items are in good condition/operation or check the "Repair Required" if the item is not in proper order. *If "Repair Required" notify maintenance and facilities.*

Items marked with ** require the forklift to be Locked Out and Tagged Out if "repair is required".

Note to Supervisor's: It is your responsibility to ensure your operators are continually performing and documenting their pre-use inspections. You are responsible for auditing this checklist weekly.

						Saturday		Sunday	
		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
Criteria									
Ground Conditions	Drop-offs, holes, debris, etc.								
Overhead Hazards	Structures, utility pipes, fans, lights, etc.								
Unauthorized Access	People, vehicles, equipment, etc.								
Safety Items	Fire extinguisher, PPE, eye wash, first aid kit, etc.								

		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
Key Off (Visual Check)	Criteria										
General Overview	Parking brake, fluid leaks on floor, damage, etc.										
Forks/Attachment, Backrest **	Bent, cracked, locking pins, worn, mismatched										
Mast, Lift Chains, Rollers	Broken welds, cracks, bent, greased, rust										
Hydraulic Cylinders/Hoses	Leaks, damaged, bubbles/cuts on hose										
Tires/Wheel – All Tires	Lug nuts, rim damage, sidewall, tread, pressure										
Overhead Guard – All Sides	Broken welds, missing bolts, damaged areas										
Capacity Plate/Safety Decals	Legible, attached to unit										
Seatbelt/Operator Restraint **	Worn, damage, working, locks when attached										
Controls and Pedals **	Hydraulic controls and pedals move freely										
Counterweight **	Bolts, damage, cracks in exhaust/radiator										
Propane Cylinder <input type="checkbox"/> N/A	Mounted properly, damage, leaks, date										
Fluid Checks (All Accessible)	Engine oil/hydraulic/brake/transmission/coolant										
Battery	Secure, cell caps, leaks, corrosion, cables										

		OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.	OK	Repair Req'd.
Key On (Oper. Checks)	Criteria										
Seatbelt **	Seatbelt is engaged prior to any motion										
Gauges **	All warning lights and gauges										
Warning Devices/Lights **	Horn, backup alarm, all lights working										
Parking and Service Brake/Deadman Pedal **	Parking brake holds when in gear, service brakes work travelling forward and reverse, stops unit										
All Hydraulic Operations **	Proper operation and no leak through full range of motion: lift, lower, tilt, side-shift, reach, etc.										
Steering **	No unusual noise, excessive free play										

** must LOTO

Weekly Supervisor Audit					
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Use the section below to indicate any items that are not in compliance, need repair or special attention. Lock Out Tag Out of the forklift is required for all items marked with an * in the event they are marked as "Repair Required".

Appendix B - Forklift Performance Evaluation Form and Checklist

Forklift Pre-Shift Operational Checklist/Performance Evaluation

Operator's Name _____ Date _____

Make _____ Model _____ Serial No. _____

Hour Meter Reading _____ Capacity _____ Operator Manual Available _____

PRE-SHIFT OPERATIONAL CHECKLIST

Key Off Procedures * (check for the following) Defective OK Defective OK

Obvious damage, leaks, warning labels and decals			Engine oil level		
Hydraulic, transmission, brake fluid levels			Engine coolant level		
Mast assembly, rails, chains, hoses, and fittings			Battery, cables, connections		
Seat belt, operator restraint system			Overhead guard		
Engine compartment, fan belt, hoses, wires			Tires and wheels		
LPG tank, hose, fittings, clamp, locator pin, fuel level			Forks, carriage, load backrest		

Key On Procedures * (check for the following) * Some procedures may not apply depending on type of equipment used

Horn			Tilt control		
Lights, warning devices			Parking brake, service brake		
Hour meter			Forward and reverse control		
Battery monitor			Steering operation		
Instrument indicators			Accelerator, speed control		
Lift and lowering control			Attachment controls		

Report all defective equipment to your supervisor immediately, before operation

PERFORMANCE EVALUATION

- Type:**
- | | |
|---|---|
| <input type="checkbox"/> Class 1 - Electric Sit Down | <input type="checkbox"/> Class 5 - ICE, Pneumatic Tires |
| <input type="checkbox"/> Class 2 - Narrow Aisle Reach | <input type="checkbox"/> Class 6 - Tow Tractor |
| <input type="checkbox"/> Class 3 - Low Lift | <input type="checkbox"/> Class 7 - Rough Terrain |
| <input type="checkbox"/> Class 4 - ICE, Cushion Tires | |

Rating: 1 (Poor) 2 (Fair) 3 (Good) 4 (Excellent)

Operator Skill Level: Beginner Intermediate Experienced

OPERATIONAL AND SAFETY CONTROLS

Control positions: horn, brake, etc.			Lift control		
Instruments: location and use			Tilt Control		
Proper positioning of all controls at start			Use of all attachments smoothly		
Seat belt			Proper positioning of all controls dismounted		

DRIVING SKILLS

Smooth starts and stops			Carries forks as low as possible		
Maneuvering skills forward			Yields to pedestrians		
Maneuvering skills reverse			Authorized or safe speed		
Looks in direction of travel			Sounds horn at blind spots and intersections		
Special attention to rear end swing			Smooth turning and cornering		

LOAD MANIPULATION AND HANDLING

Approaches loads squarely			Proper lift and tilt for level load balance		
Proper load capacity for truck used			Maneuvers with load properly		
Checked load stability safe and secure			Stacks or places loads squarely and evenly		
Forks completely under load			Deposits load safely, no excessive tilting		

Load weight within proper limits			Keeps load low and stable		
Smooth starts and stops			Sounds horn at blind spots and intersections		
Keeps to the right in aisles and driveways			Keeps proper distance while traveling		
Proper speed for conditions			Drives in reverse when required		

Checks dock plates before use			Proper distance from edge on elevated surfaces		
Checks trailers flooring before loading/unloading			Floor load weight limit not exceeded		
Checks trailers for chocks and trailer jacks			Knows and understands drive away procedures		

Additional training should be provided in areas rated fair or below

Operator's Signature _____ Date _____

Instructor's Signature _____ Date _____

Appendix C – References

- §3649. Definitions <https://www.dir.ca.gov/title8/3649.html>
- §3650. Industrial Trucks. General <http://www.dir.ca.gov/Title8/3650.html>
- §3653. Seat Belts <http://www.dir.ca.gov/Title8/3653.html>
- §3655. Overhead Guards <http://www.dir.ca.gov/Title8/3655.html>
- §3668. Powered Industrial Truck Training <http://www.dir.ca.gov/Title8/3668.html>
- <https://www.ehs.berkeley.edu/sites/default/files/lines-of-services/workplace-safety/forkliftprogram.pdf>
- <https://www.osha.gov/SLTC/etools/pit/assistance/index.html>