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# ***POWERED INDUSTRIAL TRUCKS***

All PFI Standards and Best Practices are advisory only. There is no agreement to adhere to any PFI Standard or Best Practice and their use by anyone is entirely voluntary.

## ***PFI Powered Industrial Trucks Best Practice***

This best practice establishes guidelines for compliance and the safe operation of power industrial trucks.

### **Responsibilities**

#### **Powered Industrial Truck Operators**

Authorized operators are employees who have satisfactorily completed both classroom and equipment operation training on powered industrial trucks. Generally they are responsible for the following:

- Operating all powered industrial trucks in a safe manner consistent with safe rules of operation.
- Inspecting powered industrial trucks at the beginning of each work shift and completing the appropriate inspection forms.
- Reporting all equipment malfunctions and/or maintenance needs to their supervisors immediately. Park lift in safe place, remove key, tag or note problem.

### **Training Requirements**

All personnel who operate powered industrial trucks and powered hand trucks, are required to have the following training.

Training should consist of a combination of formal instruction (e.g., lecture, discussion, computer-based training, video, written material), practical training (demonstrations performed by the trainer and practical exercises performed by the trainee), and evaluation of the operator's performance in the workplace. Someone who is authorized, qualified, and determined to be competent shall conduct all training.

### **Training Program Topics**

Training shall include providing information on the following topics:

- Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate.
- Truck controls and instrumentation: where they are located, what they do, and how they work.
- Steering and maneuvering.
- Visibility (including restrictions due to loading).
- Fork and attachment adaptation, operation, and use limitations.
- Vehicle capacity and stability.

- Any vehicle inspection and maintenance that the operator will be required to perform.
- Refueling Safety
- Operating limitations.
- Any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicles that the employee is being trained to operate.
- Potential for Carbon Monoxide exposure when using PIT indoors

#### 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.
- Ramps and other sloped surfaces that could affect the vehicle's stability.
- Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust; and
- Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

### **Refresher Training Requirements**

Refresher training, including an evaluation of the effectiveness of that training, shall be conducted to ensure that the operator has the knowledge and skills needed to operate the powered industrial truck safely.

Refresher training will be conducted 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; 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 years.

### **Equipment Inspection and Maintenance**

- Each powered industrial truck will be inspected before each shift.

- A file will be maintained that lists the shift inspections of equipment.
- A maintenance log will be kept that identifies repair needs and corrective actions taken for each powered industrial truck.
- If repairs are needed on a powered industrial truck such that it cannot be safely operated, it will; be taken out of service until the repairs have been made.
- After repairs have been completed, the powered industrial truck will be given a performance test to ensure that the equipment is safe to operate.
- Powered industrial trucks will be kept in clean condition, free of dirt, excess oil and grease.

## **Safe Work Practices**

### General Safe Work Practices

- Only authorized, trained personnel shall operate lift trucks.
- Before start of shift, a visual inspection must be conducted. Employees shall not operate an unsafe forklift at any time.
- Fill fuel tanks out of doors while engine is off.
- Operators shall drive with both hands on the steering wheel. Horseplay is prohibited. Do not drive with wet or greasy hands.
- No person shall ride as a passenger on a forklift or on the load being carried.
- A forklift will not be used to elevate a platform or pallet with persons on it, except work platforms especially designed for this purpose. Work platforms must have standard guard rails and must be securely fastened to the forks.
- No person shall stand or walk under elevated forks. Or under load if load extends past the forks.
- Operators should avoid making jerky starts, quick turns, or sudden stops. The operator will not use reverse as a brake.
- Slow down on wet and slippery surfaces and at cross aisles or locations where vision is obstructed.
- Operators entering a building or nearing a blind corner shall make their approach at reduced speed. Sound horn and proceed carefully.
- Operators shall give pedestrians the right-of-way at all times.
- Operators shall not drive toward any person who is in front of a fixed object or wall.
- Operators shall not overtake and pass another forklift traveling in the same direction, at intersections, blind spots, or hazardous locations.
- Operators should not put their fingers, arms, or legs between the uprights of the mast, or beyond the contour of the forklift.
- Forks should always be placed under the load as far as possible. Do not lift a load with one fork.
- No load should be moved unless it is absolutely safe and secure.

- Use extra care when handling long lengths of bar stock, pipe, or other materials.
- Avoid sharp or fast end-swing.
- Compressed gas cylinders shall be moved only in special pallets designed for this purpose.
- When unloading trucks or trailers, the brakes on the vehicle will be set (locked) and the wheels chocked.
- Forklifts must be safely parked when not in use. The controls shall be neutralized, power shut off, brakes set, key removed, and the forks left in a down position flat on the surface, and not obstructing walkways or aisles.
- A forklift shall not be left on an incline unless it is safely parked, and the wheels blocked.
- Only stable and safely arranged loads will be handled.
- Only loads within the rated capacity of the powered industrial truck will be handled.

#### Traveling

- Speed limits will be observed, and under all travel conditions, a powered industrial truck will be operated at speeds that will permit it to be brought to a stop in as safe manner.
- The powered industrial truck will be kept under control at all times.
- When vision is obscured, the operator will slow down and sound the horn.
- If the load blocks the operator's view, the powered industrial truck will be driven in the direction that provides the best visibility.
- The powered industrial truck will cross railroad tracks at a diagonal.
- The powered industrial truck will be parked 8 feet or further from the center line of the railroad tracks.
- The operator will keep a clear view of the path of travel.
- The loaded powered industrial truck will be driven with the load upgrade when driving on ascending or descending grades greater than 10%.
- Dock boards and bridge plates will be properly secured before they are driven over.
- When the forklift is not carrying a load, the operator shall travel with the forks as low as possible (maximum of 3 inches on paved surfaces). When carrying a load, it should be carried as low as possible (consistent with safe operation, 2 to 6 inches above the surface.)
- The forks should not be operated while the forklift is traveling.
- On a downgrade, the load shall be last, and the forks raised only enough to clear the surface.
- On an upgrade, the load shall be first, and the forks raised only enough to clear the surface.

# Forklift Operator Evaluation

Employee Name: \_\_\_\_\_

Trainer Name: \_\_\_\_\_

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

**ONLY AUTHORIZED EMPLOYEES ARE ALLOWED TO EVALUATE EMPLOYEES** - This form can be used to evaluate operator proficiency. This can also be used for periodic evaluation to ensure that operators are continuing to operate forklift properly.

CONTROLS					
Demonstrates proper use of controls:	GOOD	FAIR	POOR	N/A	Comments
Conducted Preoperational Inspection					
Seatbelt					
Parking Brake locations/setting					
Lift/Tilt/Shift controls					
Horn					
Lights					

DRIVING WITH A LOAD					
Demonstrates competency while driving with a load:	GOOD	FAIR	POOR	N/A	Comments
Travels w/ load close to ground					
Uses proper following distances					
Drives in reverse w/ oversized load					
Maintains a safe speed					

PICKING UP A LOAD					
Demonstrates competency in picking up a load:	GOOD	FAIR	POOR	N/A	Comments
Matches load with truck's capacity					
Checks load for stability					

STACKING A LOAD					
Demonstrates competency in stacking a load:	GOOD	FAIR	POOR	N/A	Comments
Approaches the load squarely					
Stacks straight, squarley and not too high					
Deposits load safely					
Does not move until forks are lowered					

**UNATTENDED VEHICLE**

Follows Proper Procedure for "Unattended Vehicle"	GOOD	FAIR	POOR	N/A	Comments
Neutralize controls					
Set brake					
Stop engine					
Exit lift with 3 points of contact					

**OVERALL PERFORMANCE**

	GOOD	FAIR	POOR	N/A	Comments
Overall performance with Forklift					
Operates lift in a safe and effective manner					

**Additional Comments:**

The operator <u>has successfully</u> completed the evaluation and is qualified to operate the Forklift.	<input type="checkbox"/>		
The operator has <u>conditional approval</u> & is qualified to operate the Forklift, but needs more work on items checked Fair or Poor. Must be re-evaluated within two weeks.	<input type="checkbox"/>	<b>Follow up Eval Date:</b>	
The operator <u>has not</u> demonstrated competence operating the Forklift.	<input type="checkbox"/>	<b>Follow up Eval Date:</b>	

**Evaluator Signature** \_\_\_\_\_

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

**Operator Signature** \_\_\_\_\_

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

### *Daily Powered Industrial Truck Pre-use Safety Inspection Checklist*

Before using this equipment, on each work shift this equipment shall be given a complete visual inspection by a responsible person for any equipment defects. Also to be inspected are the areas of planned usage and the location of hazards that could affect the equipment's safe operation and use.

<u>Equipment Type:</u>	<u>Model:</u>	<u>Project:</u>
<u>Manufacturer:</u>	<u>Serial/ID#:</u>	<u>Operator Name:</u>

<b>SHIFT:</b>	<b>Equipment Check: Responsible party to enter S/U in the appropriate box</b> <b>Grades: S = Satisfactory U=Unsatisfactory N/A=not applicable</b>	SUN	MON	TUE	WED	THU	FRI	SAT
		Grade	Grade	Grade	Grade	Grade	Grade	Grade
1.	External lights functional (if applicable)							
2.	Data name plate in place and legible							
3.	Access ladder/grab rails/steps in good condition							
4.	Windows/windshield free of damage/cracks							
5.	Windshield wipers are functional							
6.	Doors/restraints are intact and functional							
7.	Mirrors in good condition and clear							
8.	Fire extinguisher in place and charged/inspected							
9.	Seat belts are in good condition and free of damage							
10.	Parking brake is operational							
11.	Tire air pressure is acceptable for terrain							
12.	Instruments/gauges and controls are functional							
13.	Horn is functional							
14.	Backup alarm is functional							
15.	Operators manual is in cab							
16.	Annual inspection record is available							
17.	Load charts (if applicable) are in place and legible							
18.	Roll over protection installed and in good condition							
19.	Proper PPE is available for operator and other nearby workers							
INITIALS OF PERSON PERFORMING CHECKLIST								

Contact \_\_\_\_\_ to report any UNSATISFACTORY conditions.

WEEK ENDING: \_\_\_\_\_