



Forklifts

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This publication provides practical loss control and safety information to assist you in making your workplace safer. It is not legal advice. SAIF Corporation has made every effort to bring significant Oregon Occupational Safety and Health Administration (OR-OSHA) regulations to your attention. Nonetheless, compliance with OR-OSHA remains your responsibility. You should read and understand all relevant OR-OSHA regulations that apply to your job site(s). You may want to consult with your own attorney regarding aspects of OR-OSHA that may affect you.

Note: The information in this publication is time sensitive. Do not rely upon this document if its publication date is more than three years old. Please check the Employer Guide "Safety" section of our web site at www.saif.com/employer for a more recent, printable copy. You'll also find a variety of other valuable safety information designed to help your business prevent injuries and control costs.

Forklifts and powered pallet jacks are one of the most widely used means of loading, unloading and transferring materials. They are a very useful piece of equipment but can also be very hazardous if proper training and maintenance are not performed. If your operations utilize forklifts you should provide annual operator training (at a minimum), perform daily inspections and periodic maintenance and develop written rules for forklift use.

Operator Training

There are four primary reasons to train operators in the care and use of industrial trucks:

1. Prevent injury to the operator, other employees or customers.
2. Prevent damage to equipment and product/merchandise.
3. Prevent equipment failure which results in downtime.
4. OR-OSHA requires operator training.

Each of these reasons can easily create costs much greater than the investment in training. Of course it is often difficult to determine the ultimate cost of injuries to employees and customers.

When determining which individuals should be trained to operate a forklift, consider the following standards: (Bureau of Labor law should always be considered whenever hiring new employees or providing the opportunity to place tenured employees in new positions.

- Good driving record
- Mentally capable
- Good vision
- Responsible
- Good coordination
- Mechanically inclined (not necessary, but often helpful)
- Physically capable
- Emotional stable
- Good judge of distance/height

Cover the following topics in a forklift training program:

- Characteristics of the machine
- Overview of use
- Size and cost
- Carrying capacity (versatility)
- Fuel & associated hazards
- Safety equipment
- Operating procedures
- Preventative maintenance (daily checklist and periodic maintenance list)
- Hazards (within the work environment)
- OR-OSHA code requirements

It is important to identify the hazards associated with each activity/characteristic and then review the hazards as they relate to the overall operation of the equipment in the specific work environment.

Nearly every manufacturer provides general information (and sometimes specific) related to the training topics. Whenever possible, the manufacturer's guidelines should be obtained.

It is always recommended that you obtain and understand the current rules from OR-OSHA regarding powered industrial trucks (Division 2, Subdivision N - Materials Handling & Storage) and include these rules in the training program.

Forklift Checklist

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Are only qualified, trained workers allowed to operate a forklift? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the forklift have the rated load capacity in plain view of the operator and are other important warnings and operating instructions legibly posted? |
| <input type="checkbox"/> | <input type="checkbox"/> | If forklifts are provided with seat belts, are they worn by the driver at all times? Do you conduct periodic spot checks to ensure compliance? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are all forklifts inspected before each shift for deficiencies, and are identified deficiencies repaired before operation? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the forklift have an operable horn that can be heard above work area noise? |

If the forklift is used for lifting personnel:

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Is the work platform provided with standard guardrails? |
| <input type="checkbox"/> | <input type="checkbox"/> | Is the platform secured to the forks of the forklift? |
| <input type="checkbox"/> | <input type="checkbox"/> | Is guarding provided between the work platform and the mast? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does the operator attend the vehicle when workers are in the work platform? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are employees prohibited from traveling with the forks elevated more than four feet? |
| <input type="checkbox"/> | <input type="checkbox"/> | When forklifts are left unattended, are they parked with the forks lowered and the brakes set? |

Operator Training Drive Test Checklist

Employer: _____

Employee: _____ Department: _____

Operator Training - Driving Test: _____ Date: _____

Driving Requirements	Course		
	Excellent	Good	Fair
1. Seat belt fastened			
2. Look in direction of travel (forward)			
3. Load carried against fork face			
4. Look in direction of travel (reverse)			
5. Load distance above floor			
6. Driving - placing load			
7. Driving - removing load			
8. Truck in position before raising load			
9. Load lowered before driving			
10. Driving - forward			
11. Driving - reverse			

Comments:

Optional: You may choose to add a sketch of the driving course you will be using.

Sample Forklift Safety Rules

Forklift Operators

No (Company Name) employees are allowed to operate a forklift without proper training and authorization by the appropriate supervisors. Authorized forklift operators will be familiar with the manufacturers operating manual and characteristics of the particular equipment to be operated. All authorized employees will be on a master list of equipment operators, located in the main office.

The following forklift operator rules will be followed at all times. Deviations from these rules may result in disciplinary actions up to and including termination.

1. Do not drive forklift trucks up to anyone standing in front of a fixed object.
2. Do not allow anyone to stand or pass under the elevated portion of any loaded or empty truck.
3. There are to be no unauthorized riders. Allow only as many riders as there are safe riding places. (Seats)
4. Operators are not to extend arms or legs between the uprights of the mast or outside the running lines of the truck.
5. When left unattended, fully lower forks, place controls in neutral, turn the power off and set the brake. Wheels should be blocked if on an incline. (Unattended is defined as being more than 25 feet away or at any distance out of view)
6. When dismounted, in view and less than 25 feet away, the forks must be fully lowered, controls placed in neutral and brakes set to prevent movement.
7. Maintain a safe distance from the edge of ramps or platforms while on elevated docks, or platforms of freight cars. Do not use the forklift for opening or closing freight doors.
8. Check the flooring for breaks or weakness; do not drive the forklift onto inadequate flooring.
9. Make sure there is sufficient headroom under overhead installations, such as, lights, pipes, sprinkler systems, etc.
10. Always use the man-lift cage when lifting personnel with the forklift. Pin the cage to the forks to prevent sliding movement. The vehicle should travel at creep speed. Remain in the seat while employees are in the man-lift cage.
11. Complete the proper operating check sheet before beginning your shift.

12. Observe all traffic regulations.
13. Yield to emergency vehicles.
14. Do not pass another vehicle traveling in the same direction at intersections, blind spots or other dangerous locations.
15. Slow down and sound horn at cross aisles and areas of obstructed view.
16. Travel only in the direction with view. If the load is too large to have clear vision when traveling forward, travel in reverse. The only exception is to travel at creep speed with a spotter or having someone direct travel.
17. Cross railroad tracks diagonally when possible.
18. When ascending or descending grades in excess of 10 percent, drive loaded trucks with load upgrade.
19. Tilt loads back if applicable and raised only as far as necessary to clear road surface.
20. Always travel at safe operating and stopping speeds.
21. Do not engage in horseplay.
22. Slow down when floors are slick.
23. Do not attempt to drive over floor obstructions.
24. When mounting and dismounting, use the three-point method at all times.
25. Only handle loads that are within the rated capacity.
26. Correct any unsafe condition before placing the truck in service.
27. Turn the engine off when fueling gas or LP fuel tanks.
28. Carefully clean up fuel or oil spills and replace the fuel cap prior to starting engine.
29. Always wear proper personal protective equipment when potential for head or eye injury exists.

Resources:

For additional resource information on Forklift Safety:

- SAIF Complete Forklift Safety Guide S-868:
<http://www.saif.com/files/SafetyHealthGuides/s-868.pdf>
- OR-OSHA publication on Industrial Truck Operator Training Guide:
<http://www.cbs.state.or.us/external/osha/pdf/pubs/forklift.pdf>