



**Powered Industrial Truck Operator  
Safety Plan**



**Powered Industrial Truck Safety Program**

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Appendix A: Pre-Use Powered Industrial Truck Inspection & Maintenance Record

## **1.0 Overview**

Material handling is a significant safety concern. During the movement of products and materials, there are numerous opportunities for injuries and property damage. Powered industrial trucks, better known as forklifts, pallet jacks and stand-up riding reach trucks are essential tools in handling materials. This document has been created to minimize the risk of injury to operators, bystanders, and to avoid damaging university property. Departments assigned this equipment will utilize this program to increase operator awareness of recognized safety standards. Qualified trainers will be used to provide all training activities. Written records will be kept in the respective departments and by Occupational Health and Safety to document all training. Specific responsibilities for monitoring the effectiveness of this program are assigned to departments, supervisors, operators, and Occupational Health and Safety. This document, will be reviewed annually by Occupational Health and Safety, and those departments affected by its requirements. The annual review will assess the current level of program compliance, the program's effectiveness in reducing injuries and property damage, and address program improvements.

## **2.0 Policy**

Departments assigned powered industrial trucks must ensure that supervisors and operators comply with all aspects of this safety program. All university employees must successfully complete this training program, and receive certification prior to the operation of any powered industrial truck. Contractors operating powered industrial trucks on university projects are expected to meet or exceed the requirements found in this program, and comply with all applicable statues and regulations governing the use of powered industrial trucks as listed in Section 3.0 of this document.

## **3.0 Requirements**

- OSHA Standard 29CFR 1910.178 (Powered Industrial Trucks)
- ANSI/ISTDF B56.1 – 2009 (Safety Standard for Low Lift and High Lift Trucks)
- Valid driver's license and a good driving record

## **4.0 Purpose**

This program has been developed to reduce the risk of physical injury or property damage in areas where powered industrial trucks are in operation. It also brings the university into compliance with federal, state, and local law.

## 5.0 Scope

This program applies to the operation of all powered industrial trucks, forklifts, tractors, platform lift trucks, motorized hand trucks, and other specialized industrial trucks powered by electric motors or internal combustion engines by university employees and contractors, engaged in university projects.

## 6.0 Forklift Procedures

### 6.1 Pre-Use Inspection

- Prior to the operation of any powered industrial truck the Pre-Use Inspection Checklist found in Appendix A must be completed. This applies at the beginning of every work period, and whenever a new equipment operator takes control of the powered industrial truck.
- Any safety defects (such as hydraulic fluid leaks; defective brakes, steering, lights, or horn; and/or missing fire extinguisher, lights, seat belt, or back-up alarm) must be reported for immediate repair. They must also be locked and tagged, and taken out of service.

### 6.2 Operation

- Operators must wear seat belts at all times.
- Operators must sound the horn and use extreme caution when meeting pedestrians making turns, and cornering.
- Passengers are not allowed to ride on an industrial truck, unless the truck has an extra seat that allows the passenger to buckle-up while riding.
- Arms or legs may not be placed between the uprights of the mast or outside the running lines of the truck.
- Persons are not allowed to stand or pass under any elevated portion of a truck.
- Travel-ways must be maintained free from obstructions, aisles must be marked, and wide enough (six-foot minimum) for vehicle operation.
- Maintain sufficient headroom under overhead installations such as: lights, pipes, sprinkler systems, etc.
- An overhead guard must be used as protection against falling objects.
- Lift capacity must be marked on all powered industrial trucks. Operators must assure the load does not exceed rated weight limits.
- When a powered industrial truck is left unattended (more than 25ft. away or out of sight), load engaging means must be fully lowered, controls neutralized, power shut off, and brakes set. Wheels must be blocked if the truck is parked on an incline.
- All modifications must be approved by the manufacturer, and new rated load capacities determined and posted on the truck. Written approval is require.

- Operators must report all accidents, regardless of fault and severity, to their Supervisor.

### 6.3 Loading

- Only handle loads within the rated capacity of the truck.
- Loads should be safely arranged, stable, and centered – always use caution when handling loads. Adjust long or high (including multiple-tiered) loads that may affect capacity.
- Trucks equipped with attachments must be operated as partially loaded trucks even when not handling a load.
- A load engaging means must be placed under the load as far as possible. The mast must be carefully tilted backward to stabilize the load.
- Use extreme care when tilting the load forward or backward, particularly when high tiering. Tilting forward with load engaging means elevated is prohibited except to pick up a load. An elevated load may not be tilted forward except when the load is in a deposit position. When stacking or tiering, use only enough backward tilt to stabilize the load.

### 6.4 Traveling

- The driver must slow down and sound the horn at cross aisles and other locations where vision is obstructed.
- If the load being carried obstructs forward view, the driver must travel with the load trailing.
- Loads must be tilted back and carried no more than four inches above the ground.
- The driver must look in the direction of and keep a clear view of the path of travel.
- Grades must be ascended and descended slowly. Position the load uphill relative to the operator when ascending or descending grades.
- Stunt driving and horseplay are prohibited.
- While negotiating turns, reduce speed and turn the hand steering wheel in a smooth, sweeping motion.

### 6.5 Fueling

- Fuel tanks may not be filled while the engine is running. Avoid spillage.
- Spillage of oil or fuel must be absorbed using oil dry or vermiculite, the affected area carefully washed, and the fuel tank cap replaced before restarting engine.
- Any spill clean-up debris must be taken to the Environmental Quality Management Center (EQMC) for proper disposal.
- No truck can be operated with a leak in the fuel system.

- Open flames are not to be used when checking electrolyte levels in storage batteries, or gasoline levels in fuel tanks.

## 6.6 Changing and Charging Batteries

- Battery charging installations must be located in areas designated for that purpose
- Facilities must be provided for: flushing and neutralizing spilled electrolyte, fire protection, protection of charging apparatus from damage by trucks, adequate ventilation for dispersal of fumes from gassing batteries.
- Precautions must be taken to prevent open flames, sparks, or electric arcs in battery charging areas.
- Employees charging and changing batteries shall be authorized to do the work, trained in the proper handling, and required to wear protective clothing, including face shields, long sleeves, rubber boots, aprons, and gloves.

## 6.7 Maintenance

- Any power-operated industrial truck not in safe operating condition must be removed from service. Authorized personnel must make all repairs.
- Repairs to the fuel and ignition systems of industrial trucks that involve fire hazards must be conducted only in locations designated for such repairs.
- Trucks in need of repairs to the electrical system must have the battery disconnected before such repairs.
- Only use replacement parts that are currently recommended by the manufacturer.

## 7.0 Responsibilities

### 7.1 Departments Utilizing Powered Industrial Trucks

- Must implement and administer the Powered Industrial Truck program.
- Review the Powered Industrial Truck program annually for compliance and effectiveness.
- Verify that all employees who operate or work near powered industrial trucks are properly trained.
- Maintain written records of operator training on each model of a Powered Industrial Truck and the name of the trainer.
- Maintain written records of the frequent and annual inspections performed by the Powered Industrial Truck owner, including the date any problems found, the date when fixed, and the name of the person performing the repairs.

- Maintain written records of the name and purchaser of each Powered Industrial Truck.
- Make recommendations for revisions if necessary.
- Establish expected operating conditions for forklift and send to OHS to review prior to operation

## 7.2 Supervisors

- Coordinate employee training, and certify that all operators receive refresher training every three years.
- Ensure that only trained and qualified individuals use powered industrial trucks.
- Verify employee compliance with the principles and practices outlined in the Forklift Safety Program.
- Provide specific operational training for each powered industrial truck in their department.
- Observe the operation of powered industrial trucks in your department, and correct unsafe practices.
- Remove license of operator who is involved in a PIT incident until refresher training is completed.

## 7.3 Operators

- Complete the Forklift Safety Program.
- Complete the Daily Pre-Use Inspection Checklist before operating any powered industrial truck.
- Attend refresher training every three years.
- Observe the operation of powered industrial trucks in your department, and report unsafe practices to your supervisor.

## 7.4 Occupational Health and Safety Coordinator

- Annually review and update the Forklift Safety Program as necessary.
- Provide orientation and initial training as requested by university departments and/or contractors.
- Provide the general safety training requirements for program.
- Monitor the effectiveness of program by receipt of copies of inspection checklists.
- Evaluate designated areas for forklift use.
- Define appropriate eyewash facilities for battery changing/charging areas.
- Observe the operation of powered industrial trucks, and report unsafe practices to the appropriate supervisor.

## 8.0 Training Requirements

Employees who are authorized to operate powered industrial trucks must receive training prior to engaging in their duties, and at least every three (3) years thereafter. The training is to ensure that the Forklift Safety Program is understood. The supervisor will also ensure that authorized powered industrial truck operators have acquired the necessary practical skills required for safe operation. Training is offered by Occupational Health and Safety, and authorized department trainers.

Department trainers will be selected by their department, and approved by Occupational Health and Safety. Department trainers must be experienced operators who have the knowledge, training, and skills necessary to evaluate the competence of trainees. Operational training will consist of a combination of general safety instruction, practical/operational training (demonstrations performed by the trainer, and practical exercises performed by the trainee), and evaluation of the operator's performance in the workplace. All operational training must be conducted under close supervision.

### 8.1 Initial Training

- Receive instruction on the intended purpose and function of each control.
- Prior to operating any Powered Industrial Truck the trainee will read and understand the manufacturer's operating instruction(s) and user's safety rules, or receive training by a qualified person on the contents of the manufacturer's operating instruction(s) and users safety rules.
- Be informed of the Powered Industrial Truck operating limitations and restrictions as defined by the manufacturer.
- Understand by reading or having a qualified person explain all decals, warnings, and instructions displayed on the Powered Industrial Truck.
- During operational training, trainees may operate a powered industrial truck only under the direct supervision of authorized trainers, and where such operation does not endanger the trainee or other employees.
- All training and evaluation must be completed before an operator is permitted to use a powered industrial truck without continual and close supervision.

### 8.2 Refresher Training

- To be conducted every three years.
- To be conducted after an incident along with removal of operator license.
- Training to include;
  - Review of the Pre-Use Forklift Inspection & Maintenance Record
  - Review of Section 6.0 – Procedures.
  - Updated information on new equipment.
  - Review of university written program.

### 8.3 Training Records

- Each department must maintain a record of all individual training, including:
  - Subject of training.
  - Date of training.
  - Name of individual trained.
  - Name of person providing the training.
  - Training records must be maintained by the department for a minimum of 3 years.
  - Any refresher training conducted.

### 9.0 Program Evaluation

- The forklift program shall be evaluated on an annual basis utilizing the protocols set forth by Occupational Health and Safety. The evaluation team will consist of a department representative and a designee from Occupational Health and Safety. Occupational Health and Safety will define the scope of the evaluation. The final report will be developed by the department representative and OHS utilizing the information received during the evaluation. The deficiencies determined in the report will be documented and corrective action plans will be developed.