

SAMPLE

**Powered Industrial Truck**

**Safety Packet**

Workplace safety is vital to keeping a workforce healthy. The key to keeping costs at a reasonable level in Washington State is to prevent injuries from occurring in the first place. By implementing the recommendations we have outlined, we are not guaranteeing that injuries will not occur, but we believe that with these items in place, they will give you a better chance at preventing costly claims. ***Our loss prevention service is advisory only and we assume no responsibility for management or control of customer safety activities nor for implementation of recommended corrective measures.*** This report is based on information supplied by the client and/or observations of conditions and practices at the time of the visit. We have not tried to identify all hazards. We do not warrant that requirements of any federal, state or local law, regulation or ordinance have or have not been met.

# Powered Industrial Trucks Q and A:

A powered industrial truck (PIT) is defined as a mobile, powered-driven vehicle used to carry, push, pull, lift, stack, or tier materials. PITs include forklifts, fork trucks, tractors, platform lift trucks, power jacks and other specialized industrial trucks. Below is a list of common questions in regard to forklifts and powered industrial trucks.

## Must Employees be trained?

**YES**. All employees operating a PIT must be trained. The training consists of three elements: formal (discussion, video, classroom type) training, practical (site-specific, hands-on) training and a visual evaluation of the operator’s skills.

## Does an employer have to hire a professional trainer to give the training?

**NO**. Anyone who has the knowledge, training and experience to train and evaluate PIT operators can conduct the training.

## Can an employer develop their own training program?

**YES**. An employer can develop their own program using, for example WISHA Codes, Forklift Safety Guide, videos, an owner’s manual review, or a hands-on training session. Additionally, the trainer would observe the operator and evaluate their ability to safely operate the (PIT). Topics that must be covered during the training and evaluation are listed in this packet.

## Does training have to be documented?

**YES**. The employer must keep a record PIT training and evaluations. The record includes the name of the operator, date of the training, date of evaluation and the name of the person giving the training and evaluation.

## Is a license or certification required to operate a forklift/PIT?

**NO**. There is no license requirement for forklift/PIT operators, but the employer must document that the operator has completed the following training:

* General forklift operation and safety information
* Workplace-specific training, including practice on the type of PIT the operator will be using
* An evaluation of the operator’s skills and ability to operate the PIT safely.

## Are there any sample classroom training programs that employers can use?

**YES**. You can download free [PIT online classroom training from Labor and Industries website.](http://wisha-training.lni.wa.gov/training/articulate/forkliftsafety/story_html5.html)

## Does training from a previous employer count?

**YES and NO**. Training received from a previous employer can meet the general classroom-type training requirement, if such training was appropriate to the truck and working conditions encountered and if the operator was evaluated and found competent to operate the truck safely within three years. However, the current employer is still responsible for site-specific hands-on training for the specific forklift that the employee will be using. Additionally, the current employer is required to observe and evaluate the employee’s ability to safely operate the forklift. Both the training and the evaluation must be documented. (See Sample Below)

*Resources:* [*Forklift Safety Guide*](https://lni.wa.gov/forms-publications/F417-031-000.pdf) *|* [*Forklift Training Video You Tube*](https://www.youtube.com/watch?v=_0vuIPA6bt8) *|* [*Forklift Course Material*](https://lni.wa.gov/safety-health/safety-training-materials/training-kits)

SAMPLE

**These topics MUST be covered when training or evaluating a PIT operator.**

Employers MUST document that employees have been trained and/or evaluated in all the topics listed below WAC 296-863. Use of this checklist for that purpose is optional.

|  |  |
| --- | --- |
| **General Forklift Topics** | **Workplace – Specific Topics** |
|  | Operating instructions, warnings and precautions for types of industrial truck the operator will be authorized to operate.  |  | Surface conditions where vehicle will be operating. Wet, concrete, holes/dip in floor. |
|  | Difference between the forklift and car. |  | Loads to be carried on site. Stacking. |
|  | Vehicle controls and instrumentation location and how they work. |  | Narrow aisles and other restricted places where the PIT will be operated. |
|  | Engine or motor operation. |  | Pedestrian traffic and blind spots. |
|  | Steering and maneuvering. |  | Ramps or slopped surfaces. |
|  | Visibility when carrying loads. |  | Hazardous locations where PIT will operate. |
|  | Forklift attachments and limitations.  |
|  | Load Capacity . |  | Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide. |
|  | Vehicle Stability. |
|  | Inspection and maintenance. |
|  | Refueling and/or charging batteries. |  | Retraining required if changes in workplace conditions cold affect safe operation (such as: new PIT equipment, near misses, accidents). |
|  | Operating limitations. |
|  | Any other warnings from manufacture.  |

I acknowledge that I understand and agree to abide by the Company’s training procedures and requirements relative to the areas addressed within this document. I furthermore acknowledge my understanding that failure to do so may create an unsafe workplace resulting in corrective action.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Name (please print) Store Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Trainer Signature Date

# P.I.T. Evaluation Form

**Employee Name:**

**Location: Date:**

**Truck Type:** \_\_\_ Sit Down \_\_\_ Stand Up

**Powered by:** \_\_\_ Electric \_\_\_ Propane \_\_\_Gasoline \_\_\_Other

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Pass** | **Fail** | **N/A** |
| **Forklift Evaluation** |
| Hands on Demonstration |  |  |  |
| Pre-inspection of lift |  |  |  |
| Did operator properly mount |  |  |  |
| Did operator put on seatbelt |  |  |  |
| Did operator look for pedestrians prior to moving |  |  |  |
| Other |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Pass** | **Fail** | **N/A** |
| **Operator Mobility** |  |  |  |
| Did operator pull forward towards the designated area without striking anything? |  |  |  |
| Did operator place forks under load properly? |  |  |  |
| Did operator raise/tilt load properly? |  |  |  |
| Did operator drive at safe speed? |  |  |  |
| Did operator sound horn? |  |  |  |
| Did operator look in direction of travel? |  |  |  |
| Did operator make any unsafe moves? |  |  |  |
| Did operator turn off equipment and dismount properly? |  |  |  |

|  |
| --- |
| **Comments:** |
| **Trainer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_ |

# PIT Training

## What are the dangers?

* Getting caught in their moving parts, such as wheels or lifting mechanisms
* Falling loads because of incorrect operation.
* Collisions with fixed objects, other vehicles or employees.
* Injuring a pedestrian because the operator is riding the hand truck rather than walking alongside.

## What makes them unique?

* One of the unique features of powered pallet jacks and forklifts are the controls of the brakes by raising or lowering the trucks handle as you walk next to it.
* The power controls are also located in the trucks handle.

## Training and Safe Operation:

* Check the mechanical condition of your truck at the start of operation. If you notice any defects, cracks or leaks, notify maintenance as soon as possible.
* Start and stop the truck gradually. Lead the truck from the right or left side of the handle, slightly ahead of it and facing the direction of travel. When the truck must travel close to a wall, down an incline or into a tight space, operate it in reverse and walk behind it, facing the direction of travel.
* Operate and park trucks only in designated areas and never in areas with flammable, combustible or toxic materials.
* Always give pedestrians the right of way. Stop at corners, doorways and aisle intersections and sound the trucks warning device.
* Keep the truck moving no faster than normal walking speed.
* In order to keep a firm grip on the operating handle, keep your hands free of grease and water.
* Never ride the truck, and keep coworkers off it as well.
* Make sure loads are low enough to see over.
* Negotiating turns, speed shall be reduced to a safe level by means to prevent load from shifting.
* Move only those pallets or skids that appear safe and are load correctly.
* Trucks shall not be driven up to anyone standing in front of a bench or other fixed objects.
* Unsafe operation or driving practices must be reported to a supervisor immediately. This includes speeding, stunt driving, and property damage instances.
* Running over loose objects on the roadway surface shall be avoided.
* Only loads with the rating capacity of the truck shall be handled.
* Operators shall always make eye contact with employees when operating.
* Powered industrial trucks must not be used to lift people.

I acknowledge that I understand and agree to abide by the Company’s training procedures and requirements relative to the areas addressed within this document. I furthermore acknowledge my understanding that failure to do so may create an unsafe workplace resulting in corrective action.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Trainer Signature Date

# POWERED INDUSTRIAL TRUCK CHECKLIST

Operator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Month: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Truck #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Shift** | **1st** | **2nd** | **3rd** | **Mark block that needs attention:** |
|  |  |  |  |  |
| **DAY** | **Initials** | **OK** | **Initials** | **OK** | **Initials** | **OK** | **INSPECTION OF:** |
| 1 |  |  |  |  |  |  | Obvious damage or leaks | 🞏 |
| 2 |  |  |  |  |  |  | Steering | 🞏 |
| 3 |  |  |  |  |  |  | Battery connections | 🞏 |
| 4 |  |  |  |  |  |  | Battery Acid Level | 🞏 |
| 5 |  |  |  |  |  |  | Battery Vent Caps in place | 🞏 |
| 6 |  |  |  |  |  |  | Battery discharge indicator | 🞏 |
| 7 |  |  |  |  |  |  |  Load Capacity Plate | 🞏 |
| 8 |  |  |  |  |  |  | Lift Controls | 🞏 |
| 9 |  |  |  |  |  |  | Attachments | 🞏 |
| 10 |  |  |  |  |  |  | LP gas cylinder connections | 🞏 |
| 11 |  |  |  |  |  |  | Backup signal | 🞏 |
| 12 |  |  |  |  |  |  | Tires | 🞏 |
| 13 |  |  |  |  |  |  | Hour meter | 🞏 |
| 14 |  |  |  |  |  |  | Engine oil | 🞏 |
| 15 |  |  |  |  |  |  | Temperature | 🞏 |
| 16 |  |  |  |  |  |  | Fire extinguisher | 🞏 |
| 17 |  |  |  |  |  |  | Forks – Retaining pin, heel condition | 🞏 |
| 18 |  |  |  |  |  |  | Hydraulic system | 🞏 |
| 19 |  |  |  |  |  |  | Horn, Lights | 🞏 |
| 20 |  |  |  |  |  |  | Service brakes | 🞏 |
| 21 |  |  |  |  |  |  | Parking brake | 🞏 |
| 22 |  |  |  |  |  |  | Seat Belt or harness with lanyard | 🞏 |
| 23 |  |  |  |  |  |  | LP gas cylinder connections | 🞏 |
| 24 |  |  |  |  |  |  |  |  |
| 25 |  |  |  |  |  |  |  |  |
| 26 |  |  |  |  |  |  |  |  |
| 27 |  |  |  |  |  |  |  |  |
| 28 |  |  |  |  |  |  |  |  |
| 29 |  |  |  |  |  |  |  |  |
| 30 |  |  |  |  |  |  |  |  |
| 31 |  |  |  |  |  |  |  |  |

\*\*\*REPORT ALL ITEMS IN NEED OF ATTENTION TO SUPERVISOR IMMEDIATELY\*\*\*