



NORTH CAROLINA Office of
State Human Resources

OFFICE OF STATE HUMAN RESOURCES

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SUBJECT: Powered Industrial Trucks (Forklift) Program

Effective Date:

Revision Date:

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RELATED LEGISLATION:

This program outlines safety procedures for employees who operate powered industrial trucks (PITs) as part of their job duties. These requirements have also been established under OSHA Powered Industrial Trucks, 29 CFR 1910.178 with additional information found under the National Fire Protection Association (NFPA) 505, Fire Safety Standard for Powered Industrial Trucks Including Type Designations, Areas of Use, Conversions, Maintenance and Operations, 2011 Edition, and the American National Standards Institute (ANSI) B56.1, 1975, Sections 5, 6 and 7.

I. Purpose

It is the responsibility of [Agency/University] to protect employees, patients, clients, residents, and any other individuals from hazards associated with forklift and powered burden carrier operations, to train and evaluate the performance of operators, and to comply with all regulatory requirements for the safe operation such equipment.

II. Definitions

Fork Truck - Also called forklift truck, a fork truck is a small vehicle with two power-operated prongs at the front that can be slid under heavy loads and then raised for moving and stacking. Fork trucks can be powered by electricity, compressed natural gas, liquid petroleum gas, diesel fuel, or gasoline.

Powered Industrial Truck - Any mobile power-propelled truck used to carry, push, pull, lift, stack or tier materials. Powered industrial trucks can be ridden or controlled by a walking operator.

III. Roles and Responsibilities

Safety Director

The Safety Director ensures that a written program is in place for the safe operation of powered industrial trucks. The program is reviewed periodically to ensure compliance with this program. The Safety Director is responsible for coordinating training for applicable employees on PIT safety and ensuring the training documentation is maintained.

Manager/Supervisor

The manager/supervisor ensures that only authorized and trained employees operate PITs, and that operators comply with the procedures in this program. The manager/supervisor ensures that designated employees successfully complete the qualification procedures outlined in this program prior to operating any equipment.

Employees

Employees who operate PITs are responsible for complying with this program. Staff are also responsible for reporting equipment defects and discontinuing PIT operations when unsafe conditions exist.

IV. Implementation

PIT Operator Qualifications

Operators must demonstrate their driving competence by passing a written test and completing a practical driving test for forklifts. Operators must demonstrate acceptable competence and knowledge in performing each task.

- An evaluation of each Staff operator's performance shall be conducted by a qualified staff member at least every 3 years. (Attachment A)
- Refresher training shall be required if:
 - 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 operate a different vehicle or a condition in the workplace changes in a manner that could affect safe operation.

General Safety Procedures

- Operators conduct a **daily** inspection of industrial trucks prior to operation. The vehicle shall not be placed in service if the inspection shows any condition that adversely affects the safety of the vehicle. Inspection checklists are retained for 30 days by the department the vehicle is assigned to. (Attachments B and C)
- Vehicles are operated at a safe speed. Speeds are adjusted to compensate for surface conditions, visibility, load weight, vehicle or pedestrian traffic or any other circumstances affecting safe operation.
- Only trained individuals are allowed to operate industrial trucks.
- Accidents are reported immediately to the Supervisor and Safety Department.
- Maintenance or repair activities are to be performed by a qualified service technician. Maintenance shall be conducted according to the manufactures recommendations. Each vehicle is placed in the preventive maintenance checks and services program.
- Riders are prohibited on forklifts and in cargo areas of other industrial trucks.
- Persons may not be lifted with forklifts unless a lift cage is used.
- Persons are not be allowed to pass under raised forks.
- Horseplay or unsafe driving is not tolerated.

- Operators do not place any part of their body between the mast and fork back support at any time.
- Only attachments approved and listed by the manufacturer may be used.

Standard Safety Equipment/Precautions

- Seatbelts are installed and utilized on each forklift.
- Forklifts must have a functional horn, strobe light, and backup alarm.
- Forklifts have a nameplate listing lift category, load rating, and load center prominently affixed.
- Forklifts have a driver cage installed to protect the operator from falling materials.

Refueling/Battery Charging

- Smoking, open flames or spark producing activities are prohibited in designated refueling or battery charging areas.
- Forklifts are parked with the engine off, forks lowered and parking brake engaged prior to refueling or battery charging.
- Electric cargo/burden carriers must have the forward-off-reverse switch in the “OFF” position, the power or key switch off and the parking brake set whenever the operator leaves the vehicle.
- Propane tank refilling and replacement is only performed outside.
- Gas tank regulators are closed with the engine running to burn fuel in the lines prior to disconnecting and replacing tanks.
- Battery charging or replacement is not performed in locations that obstruct access to exits.

Loading and Unloading

- Only handle stable and safely arranged loads; secure unstable loads.
- Never lift or carry loads that exceed the rated capacity listed on the nameplate of the vehicle.
- Before entering a trailer with a forklift, ensure that the trailer brakes are locked, the rear wheels are chocked and the deck plate is secure.
- Check the rated capacity of the trailer before entering to ensure that it can support the combined weight of the forklift and load.
- Never carry anything on the overhead guard.
- Never tilt the load forward unless depositing it onto a rack or stack.
- Unsecured items shall not be transported in the cab of the vehicle.

**Powered Industrial Trucks
Operator Evaluation**

Attachment A

This evaluation must be completed for any employee who will be operating a powered industrial truck prior to operation. Evaluation is completed by a designated competent person. This evaluation is maintained by the Safety Office.

Division:	Facility:
Location:	Date:
Operator:	Equipment:

Observable Behaviors	Yes	No	Comments
Completes pre-shift inspection			
Wears seatbelt			
Uses strobe light			
Operates at safe speed for Conditions			
Uses smooth and safe turning technique			
Eyes on work path (Looks before backing up)			
Sounds Horn at Corners, Doors and Blind Spots			
Travels in reverse when load obstructs vision			
Observes safe battery charging, refueling procedures			
Keeps load uphill on ramps/hills			
Observes load handling/stacking rules			
Parks truck properly - brake, power, neutral			

Results		
<input type="checkbox"/> Operator Evaluation Satisfactory	<input type="checkbox"/> Operator Evaluation Satisfactory After review of "At Risk" Items	<input type="checkbox"/> Operator Referred for Refresher Training and Follow-up Evaluation

Evaluator Name:	Title:
Signature:	Date:

Powered Industrial Trucks
Attachment B
CNG/Gas/Diesel Fork Trucks
Operator's Daily Checklist

This checklist must be completed prior to each shift during which a CNG/gas/diesel fork truck will be operated. This checklist is maintained on file by the Safety Office.

Division:	Facility:		
Location:	Date:		
Operator:	Equipment:		
Engine Off Checks	OK	Maintenance	
Leaks – fuel, hydraulic oil, engine oil or radiator coolant			
Tires – condition and pressure			
Forks, top clip retaining pin and heel –check condition			
Load Backrest – securely attached			
Hydraulic hoses, mast chains, cables and stops – Check Visually			
Overhead guard – attached			
Finger guards – attached			
Leaks – fuel, hydraulic oil, engine oil or radiator coolant			
Propane tank (LP gas truck) – rust, corrosion, damage			
Safety warnings – attached (refer to parts manual for location)			
Battery – Check water/electrolyte level and charge			
All engine belts – Check visually			
Hydraulic fluid level – Check level			
Engine oil level – Dipstick			
Transmission fluid level – Dipstick			
Propane tank (LP gas truck) – Rust, corrosion, damage			
Engine air cleaner – Squeeze rubber dirt trap or check restriction alarm (if equipped)			
Fuel Sedimentor (Diesel)			
Radiator Coolant – Check Level			
Operator's Manual – In Container			
Nameplate attached and information matches model, serial number and attachments			
Seat Belt – Functioning Smoothly			
Hood Latch – Adjusted and securely fastened			
Brake Fluid – Check level			
Engine On Checks – Unusual noises must be investigated immediately			
Accelerator or direction control pedal – functioning smoothly			
Service & parking brake – functioning smoothly			
Steering Operation – functioning smoothly			
Drive Control – Forward/Reverse – functioning smoothly			
Tilt Control – Forward and Back – functioning smoothly			
Hoist and Lowering Control – functioning smoothly			
Attachment Control – Operation			
Horn and Lights – functioning			

Gauges: ammeter, engine oil pressure, hour meter, fuel, temp., instrument monitors		
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Completed by:

Signature:

**Powered Industrial Trucks
Electric Fork Trucks
Operator's Daily Checklist**

Attachment C

This checklist must be completed prior to each shift during which an electric fork truck will be operated. This checklist is maintained on file by the Safety Office.

Division:	Facility:		
Location:	Date:		
Operator:	Equipment:		
Engine Off Checks	OK	Maintenance	
Leaks – Hydraulic Oil, Battery			
Tires – Condition and Pressure			
Forks, Top Clip Retaining Pin and Heel -- Condition			
Load Backrest Extension – Attached			
Hydraulic Hoses, Mast Chains, Cables & Stops – Check Visually			
Finger Guards – Attached			
Overhead Guard – Attached			
Safety Warnings – Attached (Refer to Parts Manual for Location)			
Battery – Water/Electrolyte Level and Charge			
Hydraulic Fluid Level – Dipstick			
Transmission Fluid Level – Dipstick			
Operator's Manual in Container			
Capacity Plate Attached – Information Matches Model, Serial Number and Attachments			
Battery Restraint System – Adjust and Fasten			
Operator Protection Sit-down Truck - Seat Belt – Functioning Smoothly Man-up Truck – Fall protection/Restraining means - Functioning			
Brake Fluid – Check level			
Motor On Checks (Unusual Noises Must Be Investigated Immediately)			
Accelerator Linkage – Functioning Smoothly			
Parking Brake – Functioning Smoothly			
Service Brake – Functioning Smoothly			
Steering Operation – Functioning Smoothly			
Drive Control – Forward/Reverse – Functioning Smoothly			
Tilt Control – Forward and Back – Functioning Smoothly			
Hoist and Lowering Control – Functioning Smoothly			
Attachment Control – Operation			
Horn – Functioning			
Lights & Alarms (where present) – Functioning			
Hour Meter – Functioning			
Battery Discharge Indicator – Functioning			
Instrument Monitors – Functioning			
Completed by:		Signature:	