

**<Company Logo Image Here>**

**<Company Name>**

**Powered Industrial Truck (PIT) Policy**

**<Date>**

**POWERED INDUSTRIAL TRUCK (PIT) POLICY**

**Introduction**

This policy has been developed to help ensure all employees who operate a powered industrial truck (PIT), more commonly called a lift truck or a forklift, are properly trained and can effectively demonstrate the knowledge and skills needed for safe PIT operation.

Forklift drivers like you play an important part in <INDUSTRY>. You’re a professional who carries a great deal of responsibility. That’s why it’s critical to always be safe, getting to know the PIT and your work environment. Stay alert and cautious, even in daily routines.

**Responsibilities**

Management has a responsibility to:

* Provide equipment that is safe to operate.
* Avoid modifications to equipment, except by those authorized by the equipment manufacturer.
* Ensure adequate operator safety training is provided on all equipment used to move materials.
* Ensure only trained and authorized operators are permitted to drive powered industrial trucks.
* Establish and enforce safe operating rules and procedures.

The program administrator, <NAME OF PROGRAM ADMIN>, has a responsibility to:

* Ensure equipment is safe to operate.
* Avoid modifications to equipment, except by those authorized by the equipment manufacturer.
* Ensure proper PIT training is provided and certify that each operator was trained and evaluated.
* Establish and enforce safe operating rules and procedures.
* Conduct an annual review of the program.

The supervisor has a responsibility to:

* Designate and identify employees responsible for operating PITs.
* Monitor safe operation of equipment.
* Ensure no employee under his/her direction operates a PIT without proper certification.
* Ensure operator retraining is conducted when appropriate.
* Ensure all equipment is inspected daily.
* Ensure any damaged equipment is tagged “out of service” or otherwise made inoperable.
* Ensure equipment is repaired when malfunctioning.

You (the employee) have a responsibility to:

* Only operate the equipment for which you were specifically trained and authorized to use.
* Conduct any required pre-use inspections daily.
* Report any equipment damage or other unsafe condition(s) affecting equipment operation.
* Attend applicable training sessions.
* Follow all safety rules and operating procedures.

**Guidelines and qualifications**

Material handling:

Material handling is a significant safety concern.

There are numerous opportunities for personal injury and property damage if proper procedures and caution are not used during the movement of products and materials.

**OSHA reference for powered industrial trucks is 1910.178.**

**Pre-qualifications for PIT operators:**

All candidates must meet these basic requirements prior to starting initial or annual training.

* No adverse vision problems that cannot be corrected by glasses or contacts.
* No adverse hearing loss that cannot be corrected by hearing aids.
* No physical impairment(s) that would affect safe operation of the PIT.
* No neurological disorder(s) affecting balance or consciousness.
* Not taking any medication that affects perception, vision or physical abilities.

**Pre-qualifications for PIT trainers:**

To be considered a qualified PIT trainer, a person must possess a recognized degree, certificate or professional standing; or the person has demonstrated the ability to train and evaluate PIT operators by knowledge, training and experience.

**Operator training/permit information:**

* Only trained and authorized operators are permitted to drive PITs.
* Initial operator training should be given, and re-evaluated, every three years.
* Refresher training should be conducted when operators are found to be operating unsafely, have been in an accident or near miss, receive a poor evaluation, or when there are changes in the workplace or type of PIT.
* Training must be documented for each type of PIT, such as a sit-down rider truck or a stand-up truck, significant differences in weight ratings or differences in operating controls.
* OSHA requires an evaluation of each PIT operator’s performance at least once every three years.
* A written record of the training must be maintained and available for inspection.
* No employee will be allowed to operate a PIT (except for training purposes) until training, including testing, has been completed and a written operator’s permit issued.

• An employee operating a PIT must carry a valid, up-to-date operator’s permit.

• The operators’ training course shall include a written test and an on-the-job

evaluation.

* Both tests must be given during training.

**The content of training**

The content of training includes information on the characteristics of the PIT and the characteristics of the environment in which the vehicle is operated.

* Employees must also be trained in the requirements of 29 CFR 1910.178.
* The following information may be covered in the training session:
  + Characteristics of the vehicle the employee is allowed to operate.
  + Operating instructions, warnings and precautions.
  + Differences between an automobile and PIT.
  + Location and function of the controls and instrumentation.
  + Engine or motor operation.
  + Steering and maneuvering.
  + Visibility.
  + Operation and limitations of the forks and/or attachments.
  + Vehicle capacity and stability.
  + Vehicle inspection and maintenance procedures.
  + Refueling or charging/recharging batteries.
  + Operating limitations.
  + Safety equipment.
  + Any other operating instructions, warnings or precautions listed in the operator’s manual.

**Basic rules of PIT operation**

* Only authorized and trained personnel will operate PITs.
* All PITs will be equipped with a headache rack, rotating beacon, back-up alarm and seat belts.
* The seat belt will be worn at all times.
* The operator will perform daily pre-operation inspections.
* Any safety defects (such as hydraulic fluid leak, defective brakes, steering, lights or horn, and/or missing lights, seat belt or back-up alarm) will be reported for immediate repair and/or request the PIT be taken “out of service”.
* Operators will follow the proper refueling safety procedures.
* Loads will be tilted back and carried no more than six inches from the ground.
* PITs will travel no faster than five mph (no faster than a regular walking pace).
* Operator will sound the PIT’s horn and use extreme caution when meeting pedestrians, making turns and cornering.
* Passengers may not ride on any portion of a PIT.
* If PITs are used as a man lift, an appropriate man-lift platform that complies with OSHA regulations and manufacturing guidelines will be used.
* Aisles will be maintained free from obstructions, marked and wide enough (six-foot minimum) for vehicle operation.
* Lift capacity will be marked on all PITs and the operator will assure loads do not exceed rated weight limits.
* When left unattended, PITs will be turned off, forks lowered to the ground and parking brake set.
* Operators are instructed to report all accidents, regardless of fault and severity, to their supervisor.
* Dock plates will be used when loading trailers and the operator will assure the dock plate is in good condition.
* Trailers will be parked squarely to the loading area and have wheels chocked in place; operators will follow established docking/un-docking procedures.
* If at any time a PIT needs repaired, is found defective or in any way unsafe, it shall be taken “out of service” until it has been restored to safe operating condition.
* PITs shall not be driven up to anyone standing in front of a bench or other fixed object.
* No person shall be allowed to stand or pass under the elevated portion of any PIT, whether loaded or empty.
* Unauthorized personnel are not permitted to ride on PITs.
* PITs, generally, have only one seat for the operator and are not designed to carry passengers.
* No one shall ride on the forks of a PIT or in a lifting basket while it is being transported.
* No part of the body shall be placed through the mast (upright) or outside the running lines of the PIT.
* When the operator gets off the PIT, the forks shall be fully lowered, controls shall be in neutral and the parking brake set.
  + Wheels shall be blocked if parked on an incline.
* If the operator will be more than 25 feet from the PIT, or out of sight, then the PIT must be turned off.
* A safe distance shall be maintained from the edge of ramps or platforms while on any elevated dock, or platform or freight car.
* PITs shall not be used for opening or closing freight doors.
* There shall be sufficient headroom under overhead installations, lights, pipes, sprinkler systems, etc.
* An overhead guard shall be used as protection against falling objects.
  + It should be noted that an overhead guard is intended to offer protection from the impact of small packages, boxes, bagged material, etc., representative of the job application, but not to withstand the impact of a falling capacity load.
* A load backrest extension shall be used whenever necessary to minimize the possibility of the load, or part of it, falling rearward.
* PITs shall not be parked, and loads/materials shall not be stored, in a way that blocks fire aisles, access to stairways or fire equipment.
* The PIT’s seat belt must be worn while in operation.

**Maintenance**

* Any PIT that is not in safe operating condition shall be removed from service.
  + Authorized personnel shall make all repairs.
* Repairs to fuel and ignition systems that involve fire hazards shall only be conducted in locations designated for such repairs.
* Repairs to the electrical system shall have the battery disconnected prior to such repairs.
* All parts that require replacement shall only be replaced by parts that are the safety equivalent to those used in the original design.
* PITs shall not be altered in any of the following ways:
  + So that parts are different from what they were when received from the manufacturer.
  + Adding extra parts not provided by the manufacturer.
  + Eliminating any parts.
  + Additional counter-weighting shall not be done unless approved by the PIT manufacturer.
* PITs shall be examined before being placed in service and shall not be placed in service if the examination shows any condition adversely affecting the safety of the vehicle.
  + Such examination shall be made at least daily prior to use each shift.
  + Defects, when found, shall be immediately reported and corrected.
* When the temperature of any part of the PIT is hotter than its normal operating temperature (creating a hazardous condition), the vehicle shall be removed from service and not returned until the cause has been fixed.
* PITs shall be kept in clean condition, free of lint, excess oil and grease.

**Recordkeeping**

* Maintain copies of daily vehicle inspection forms.
* Keep maintenance and service records for each PIT for as long as the vehicle remains in service.
* Maintain training records for each employee authorized to operate a PIT.
* The training records will include copies of the written test from the classroom training, the initial operator evaluation form, periodic operator evaluations and documentation regarding retraining sessions if applicable.

**Pre-operation checklist**

* The daily PIT checklist must be utilized on a per shift basis.
* Checklist shall be fully completed and turned into management.
* If any deficiencies are noted, the unit is to be placed “out of service” until the problem has been corrected.
* Additionally, it is the operator’s responsibility to notify the immediate supervisor so deficiencies can be corrected.

**Traveling**

* PITs must be operated at a safe speed depending upon conditions and the type of load being carried.
* Under all travel conditions, the PIT shall be operated at a speed that will allow it to a stop in a safe manner.
* The driver shall be required to slow down for wet and slippery floors.
* The right of way shall be yielded to emergency vehicles and pedestrians.
* The driver shall be required to 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 shall be required to travel with the load trailing.
* The driver shall be required to look in the direction of, and keep a clear view of, the path of travel.
* Grades shall be ascended or descended slowly.
  + When ascending or descending grades in excess of 5%, loaded trucks shall be driven with the load upgrade.
  + On all grades, the load and load-engaging means shall be tilted back if applicable and raised only as far as necessary to clear the road surface.
* Stunt driving and horseplay shall not be permitted.
* Dock boards or bridge plates shall be properly secured before driving over them carefully and slowly—rated capacity should never be exceeded.
* Do not run over loose objects on the road surface. This could cause the steering wheel to spin and strike the operator’s fingers.
* While negotiating turns, speed shall be reduced to a safe level by means of turning the hand steering wheel in a smooth, sweeping motion. Except when maneuvering at a very low speed, the hand steering wheel shall be turned at a moderate, even rate.

**Using PITs with trucks, trailers, tracks and elevated platforms**

* The flooring of trucks and trailers shall be checked for breaks and weakness before driving a PIT inside.
* The brakes of tractor trailers shall be set and wheel chocks placed under the rear wheels to prevent the trucks from rolling while they are boarded with PITs.
* Wheel stops or other recognized positive protection shall be provided to prevent railroad cars from moving during loading or unloading operations.
* Railroad tracks must be crossed slowly and at an angle, with a firm grip on the steering wheel of the PIT.
* Fixed jacks may be necessary to support a semi-trailer and prevent upending during the loading or unloading when the trailer is not coupled to a tractor.
* On docks, ramps or elevated platforms, maintain a safe distance from the edge.
* Drive over dock boards and bridge plates carefully and slowly—the rated load must never be exceeded.

**Loading**

* Only stable or safely arranged loads shall be handled. Caution shall be exercised when handling off-center loads that cannot be centered.
* Do not lift loads that exceed the rated capacity of the truck.
* The long or high (including multiple-tiered) loads that may affect capacity shall be adjusted.
* PITs equipped with attachments shall be operated as partially loaded when not handling a load.
* A load-engaging means shall be placed under the load as far as possible; the mast shall be carefully tilted backward to stabilize the load.
* Extreme care shall be used when tilting the load forward or backward, particularly when high tiering.
* When stacking or tiering, use only enough backward tilt to stabilize the load.
* Do not tilt the mast forward when it is elevated except when picking up or depositing a load.

**Tip-over protocols**

* Never try to jump out when tipping.
* Stay in the PIT.
* Hold on tight.
* Brace feet.
* Lean away from the fall.
* The PIT is the operator’s responsibility until it is returned to its place at the end of the shift.

**Fueling**

* Propane
  + Always wear the proper protective equipment when changing tanks. This includes protective eyewear, gloves and long-sleeve shirts.
  + Shut valve off to use propane in the line before changing tanks.
  + Shut off the ignition after the engine stops.
  + Do not change tanks near an open flame or heat source. (No smoking allowed in this area.)
  + Propane is heavier than air and it will settle to the floor if there is a leak.
  + Check the condition of all valves and seals before connecting the new tank.
  + Handle tanks carefully. Propane can cause a “freeze burn” if it touches skin.
  + Do not store tanks in areas where leaking propane gas might accumulate.
* Gasoline or diesel
  + Always wear the proper protective equipment when fueling. This includes protective eyewear and gloves.
  + Shut off the engine.
  + Be sure to use the proper type of fuel.
  + Avoid overfilling the tank.
  + Clean up any spills following proper safety procedures for fuel spills.
  + Check for any leaks.
  + Replace the fuel cap.
* Batteries
  + Always wear the proper protective equipment when changing the battery. This includes protective eyewear and gloves.
  + Be aware of the nearest flushing station.
  + Shut off the engine.
  + Do not smoke or have an open flame in the battery changing area.
  + Do not locate battery charging stations within 36 inches of electrical panels.
  + Make sure the brake is set before changing the battery.
  + Make sure the battery is secure before lifting it.
  + Stand clear when moving the battery.
  + Make sure the ventilation system is working properly before charging a battery.
  + Always add battery acid to water, never the other way around.
  + If charging the battery, uncover the battery compartment to prevent the build-up of heat and hydrogen gas.
  + Make sure metal objects do not touch the terminals on the battery.
  + Make sure the charger is off before connecting it to the battery.
  + Make sure the vent caps are not plugged.
  + Never plug the charger into the PIT.
  + Provide a conveyor, overhead hoist or equivalent equipment to handle batteries.

**Shut-down procedures**

* Return the PIT to the proper area.
* Put the directional lever in neutral.
* Set the parking brake.
* Completely lower the forks.
* Put the mast in full vertical position.
* Turn off the PIT.
* Return the key to its proper place.

**Appendix A**

**Example (1) Performance Test of PIT Operators**

**Employee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Time:\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_**

[ ] 1. Performed truck inspection properly. [ ] 14. Lowered load smoothly and slowly.

[ ] 2. Shows familiarity with all truck controls. [ ] 15. Stops smoothly and completely.

[ ] 3. Gave proper signals when turning. [ ] 16. Load was balanced properly.

[ ] 4. Slowed down at intersections. [ ] 17. Forks all the way under the load.

[ ] 5. Sounded horn at intersections. [ ] 18. Parts or stock was carried in the proper containers.

[ ] 6. Obeyed all signs. [ ] 19. Checked bridge plates and ramps.

[ ] 7. Always looked in the direction of travel. [ ] 20. Placed loads within specified areas.

[ ] 8. Turned corners correctly – remained [ ] 21. Stacked loads evenly and neatly.

conscious of rear end swing.

[ ] 9. Yielded to pedestrians. [ ] 22. Did drive in reverse when required.

[ ] 10. Approached load properly. [ ] 23. Did not exceed the load capacity of the truck.

[ ] 11. Lifted loads correctly and safely. [ ] 24. When parked, placed forks flat on the floor,

neutralized controls, set parking brake and

[ ] 12. Maintained complete control. turned power off.

[ ] 13. Traveled with load at proper height. [ ] 25. Followed proper instructions for

maintenance and refueling.

Evaluator:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**OPERATOR SUMMARY**

**Employee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Employer:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_**

***Pass Fail***

**1. Written Test \_\_\_\_\_ \_\_\_\_**

**2. Knowledge of equipment \_\_\_\_\_ \_\_\_\_**

**3. Knowledge of daily procedures \_\_\_\_\_ \_\_\_\_**

**4. Operating ability (driving test) \_\_\_\_\_ \_\_\_\_**

**Comments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**QUALIFICATION: *Accepted*\_\_\_\_\_\_ *Denied*\_\_\_\_\_\_**

**Signature of examiner:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_**

**Example (2) Performance Test of PIT Operators**

Operator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dept. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evaluator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Yes No N/A

**Pre-operations Inspection**

Walk around

Forks [ ] [ ] [ ]

Rops/fops [ ] [ ] [ ]

Tires [ ] [ ] [ ]

Physical (oil, decals, missing or damaged parts, etc.) [ ] [ ] [ ]

**Start-up Procedures**

Check parking brake and transmission [ ] [ ] [ ]

Fasten seat belt [ ] [ ] [ ]

Proper start up [ ] [ ] [ ]

Check gauges [ ] [ ] [ ]

Check hydraulics [ ] [ ] [ ]

Test all functions [ ] [ ] [ ]

**Operations**

Releases parking brake [ ] [ ] [ ]

Sounds horn [ ] [ ] [ ]

Checks for pedestrians [ ] [ ] [ ]

Accelerates smoothly [ ] [ ] [ ]

Limits speed to conditions [ ] [ ] [ ]

Turns smoothly [ ] [ ] [ ]

Stays in lanes [ ] [ ] [ ]

Aware of tail swing [ ] [ ] [ ]

Stops smoothly [ ] [ ] [ ]

Comes to full stop [ ] [ ] [ ]

Applies parking brake [ ] [ ] [ ]

Aligns forks with load [ ] [ ] [ ] Understands fork tilt [ ] [ ] [ ]

Approaches slowly [ ] [ ] [ ]

Places forks completely under load [ ] [ ] [ ]

Tilts carriage slightly back [ ] [ ] [ ]

Looks over both shoulders and in mirror [ ] [ ] [ ]

Releases parking brake [ ] [ ] [ ]

Accelerates slowly in reverse [ ] [ ] [ ]

Checks load stability [ ] [ ] [ ]

**Transport**

Accelerates smoothly when changing directions [ ] [ ] [ ]

Keeps load just high enough for good sight [ ] [ ] [ ]

Scans area of operation [ ] [ ] [ ]

Slows for turns [ ] [ ] [ ]

Changes steering modes smoothly [ ] [ ] [ ]

Knows direction on hills and slopes [ ] [ ] [ ]

Approaches stacking location properly [ ] [ ] [ ]

Comes to complete stop [ ] [ ] [ ]

Positions load properly [ ] [ ] [ ]

Removes forks from load properly [ ] [ ] [ ]

Lowers mast properly (before moving) [ ] [ ] [ ]

Checks for pedestrians [ ] [ ] [ ]

Sounds horn [ ] [ ] [ ]

Backs away slowly [ ] [ ] [ ]

Returns unit to start position [ ] [ ] [ ]

**Shut Down**

Picks level location [ ] [ ] [ ]

Lowers forks level with ground [ ] [ ] [ ]

Sets parking brake [ ] [ ] [ ]

Places unit in neutral [ ] [ ] [ ]

Allows for cool down [ ] [ ] [ ]

Stops engine [ ] [ ] [ ]

Removes key [ ] [ ] [ ]

Dismounts properly [ ] [ ] [ ]

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

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

**Appendix B**

**Example (1) PIT Operator Daily Checklist**

Location \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_to\_\_\_\_\_\_\_\_\_\_\_

Vehicle Vehicle

description \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Hour meter

Operator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ reading \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*CHECK ITEMS AS SATISFACTORY, LEAVE BLANK IF NOT.*

------------------------------------------------------------------------

ITEM -----DAY----- SEE

TO CHECK M T W R F S COMMENT #

------------------------------------------------------------------------

Battery charged [ ][ ][ ][ ][ ][ ] [ ]

Steering components (loose/tight) [ ][ ][ ][ ][ ][ ] [ ]

Horn - audible [ ][ ][ ][ ][ ][ ] [ ]

Service brakes - hold/stop [ ][ ][ ][ ][ ][ ] [ ]

Parking brake - locks/releases [ ][ ][ ][ ][ ][ ] [ ]

Tires - condition [ ][ ][ ][ ][ ][ ] [ ]

Starts only with key [ ][ ][ ][ ][ ][ ] [ ]

Lifting/lowering control [ ][ ][ ][ ][ ][ ] [ ]

Tilt control [ ][ ][ ][ ][ ][ ] [ ]

Fuel system/amount (leaks) [ ][ ][ ][ ][ ][ ] [ ]

Hydraulic fluid (amount) [ ][ ][ ][ ][ ][ ] [ ]

Hydraulic system (no leaks) [ ][ ][ ][ ][ ][ ] [ ]

Drive controls [ ][ ][ ][ ][ ][ ] [ ]

Head lights (for loading trailers) [ ][ ][ ][ ][ ][ ] [ ]

Flashing strobe (public areas) [ ][ ][ ][ ][ ][ ] [ ]

Back-up alarms (restricted rear

Visibility - propane tank) [ ][ ][ ][ ][ ][ ] [ ]

Overhead guard [ ][ ][ ][ ][ ][ ] [ ]

Load (carriage) backrest [ ][ ][ ][ ][ ][ ] [ ]

Fire extinguisher [ ][ ][ ][ ][ ][ ] [ ]

Windows (if applicable) [ ][ ][ ][ ][ ][ ] [ ]

Attachment(s) [ ][ ][ ][ ][ ][ ] [ ]

Battery (water level - charge) [ ][ ][ ][ ][ ][ ] [ ]

Battery (posts and caps) [ ][ ][ ][ ][ ][ ] [ ]

*OPERATORS INITIALS* [ ][ ][ ][ ][ ][ ]

COMMENTS:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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|  |  |  |
| --- | --- | --- |
| Forklift Serial Number: | | |
| Operator: | | |
| Hour Meter Reading: | | Date: |
| **√** | **Visual Check** | |
|  | **Tires** are inflated and free of excessive wear or damage. Nuts are tight. | |
|  | **Forks and mast** are not bent, worn or cracked. Upper limit stops are o.k. | |
|  | **Load back rest extension** is in place and not bent, cracked or loose. | |
|  | **Overhead guard** is in place and not bent, cracked or loose. | |
|  | **Attachments** (if equipped) operate o.k. and are not damaged. | |
|  | **Forklift body** is free of excessive lint, grease or oil. | |
|  | **Hydraulic oil** is full and free of leaks. | |
|  | **Battery connections** are tight. | |
|  | **Covers** over battery and other hazardous parts are in place and secure. | |
|  | **Load rating plate** is present and readable. | |
|  | **Warning decals** and operators’ manual are present and readable. | |
|  | **Seat belt** or restraint is accessible and not damaged, oily or dirty. | |
|  | **Motor** runs smooth and quiet without leaks or sparks from the exhaust. | |
|  | **Horn** works. | |
|  | **Turn signal** (if equipped) operates smoothly. | |
|  | **Lights** (head, tail and warning) work and are aimed correctly. | |
|  | **Gauges** and instruments are working. | |
|  | **Lift and lower** operates smoothly without excessive drift. | |
|  | **Til**t operates smoothly without excessive drift or “chatter”. | |
|  | **Control levers** are labeled, not lose or binding, and freely return to neutral. | |
|  | **Steering** is smooth and responsive free of excessive play. | |
|  | **Brakes** work and function smoothly without grabbing. No fluid leaks. | |
|  | **Parking brake** will hold the forklift on an incline. Backup alarm (if equipped) works. | |
|  | **Backup alarm** (if equipped) works. | |
|  | **Battery charge** level is o.k. while holding full forward tilt. | |

**Example (2) PIT Operator Daily Checklist**

**Check each item before the shift starts.** Put a check in the box if the item is o.k. Explain any unchecked items at the bottom and report them to a supervisor. **Do not use an unsafe forklift! Your safety is at risk.**

**Appendix C**

**Example PIT Written Test**

## Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. A pre-shift inspection shall include checking which of the following:
2. Brakes
3. Hydraulics/leaks
4. Controls
5. All of the above
6. When leaving the lift truck unattended, the operator shall:
7. Lower the forks to the floor
8. Turn lift truck OFF
9. Set parking brake
10. All of the above
11. Seat belts must be worn:
12. Only when there is a load on the forks
13. At all times while operating the lift truck
14. When traveling outside the building
15. Never, it is not necessary
16. Report any defects found on the lift truck:
17. At the end of your shift
18. Sometime before any scheduled maintenance will take place
19. At the beginning of your shift, or as soon as defect is found
20. It is not necessary to report defects
21. If you see your load start to shift, you should reach through the mast to steady it.
22. True
23. False
24. When traveling up a ramp or incline:
25. The load should be uphill/upgrade from the lift truck
26. The load should be downhill/downgrade from the lift truck
27. The load should be raised so you can see where you are going
28. Lift trucks have handling characteristics that are different from cars.

a) True

b) False

1. If the load blocks your forward view:
2. Stand up to see over the load
3. Raise the load high enough to see underneath it
4. Continue to drive “blindly” hoping you do not hit anything
5. Drive the lift backwards while looking over your shoulder
6. When picking up a load, the operator shall:
7. Make sure the forks are centered and fully under the load
8. Slightly tilt the forks backward to stabilize the load
9. Drive slowly with the load raised no more than six inches off the ground
10. All of the above
11. When loading or unloading tractor trailers:
12. Dock plates must be in place
13. The flooring of trucks/trailers shall be checked for damage or weakness
14. Set parking brake of truck and place chocks under rear wheels
15. All of the above
16. It is o.k. to park the PIT or store loads/materials in front of doorways or fire equipment.
17. True
18. False
19. It is permissible to exceed the rated load capacity of the lift truck by:
20. 0%

b) 10%

c) 25%

d) 100%

1. The operator shall sound the horn:
2. At cross aisles
3. Locations where vision is obstructed
4. When pedestrians/co-workers are nearby
5. All of the above
6. A PIT steers with its rear wheels and hence its rear end swings on turns.
7. True
8. False
9. An untrained/unauthorized person may operate a PIT:
10. If everyone else is busy
11. Anytime, it does not matter
12. If a supervisor is watching them closely
13. Never, not until trained and authorized

Answer Key

1. D – all of the above
2. D – all of the above
3. B – at all times
4. C – at beginning
5. False
6. A – upgrade
7. True
8. D – Drive backwards
9. D – all of the above
10. D - all of the above
11. False
12. A – 0%
13. D – all of the above
14. True
15. D - Never