Forklift Safety

OVERVIEW

Employees designated by their departments to operate forklifts are to successfully complete a formal instruction and practical training program.

RESPONSIBILITIES

Departments

- Designated operators successfully complete a forklift operator training program prior to operating a forklift.
- Only trained operators are allowed to operate forklifts.
- Forklifts are operated in a safe manner.
- Forklift operators' performance is evaluated once every three years.
- Forklift operators successfully complete refresher training if any of the following occur:
  - The operator is involved in an accident or near-miss incident.
  - The operator is seen operating the forklift in an unsafe manner.
  - An evaluation shows the operator is not operating the forklift in a safe manner.
  - The operator is assigned to drive a different type or modified forklift.
  - Conditions in the workplace change that could affect safe operation of the forklift.

Operators

- Forklift operators are to operate forklifts in a safe manner in accordance with the formal instruction and practical training received in the forklift training program.

NOTE: Refresher training is required only for operation topics in which the operator is found to be deficient.
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FORKLIFT OPERATOR TRAINING PROGRAM

A forklift operator training program consists of formal instruction and practical training. Practical training involves operating the forklift.

Formal Instruction

There are four options for obtaining formal instruction. The forklift operator may meet the formal training requirement by:

Option 1

- Completing the Washington State Department of Labor and Industries (L&I) Division of Safety and Health online training program. The program is available by selecting the applicable link from the Environmental Health and Safety (EH&S) website, at:
  
ehls.wsu.edu/

Option 2

- Completing classroom training conducted by the employing department using the L&I Division of Safety and Health training materials. The department may download the training materials through the EH&S website, at:
  
ehls.wsu.edu/

Option 3

- Completing training with the manufacturer's authorized training representative or a company specializing in forklift operator training.

  The department contacts the applicable training representative or company to arrange the training. The department processes the purchase with a Department Order, purchasing card, or Departmental Requisition, as applicable. See the instructions in BPPM 70.07, 70.08, and 70.10, respectively.

Option 4

- Completing an alternative formal forklift operator training program with approval from EH&S.

Practical Training (Operating the Forklift)

Each operator meets the practical training requirement by completing training with a department operator who has the knowledge, training, and experience to train and evaluate operators. Practical training consists of forklift operation demonstrations done by the trainer and practical exercises performed by the trainee, while under direct supervision.
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Practical Training (cont.)

The training demonstrations and practical exercises are to be specific to the types of:

- Forklift(s) the employee is to operate,
- Conditions where the forklift(s) are to be used, and
- Tasks the employee is required to perform.

Required practical training includes the topics related to the forklift (see below) and topics related to the workplace.

Topics Related to the Forklift

Practical training topics related to the forklift include the following:

- Manufacturer's operating instructions
- Warnings and precautions for the types of forklifts the operator will be authorized to operate
- Differences between the forklift and the automobile
- Forklift controls and instrumentation: location, purpose, and function
- Engine or motor operation
- Steering and maneuvering
- Visibility (including restrictions due to loading)
- Fork and attachment adaptation, operation, and use limitations
- Forklift capacity and stability
- Inspections and maintenance the operator is required to perform
- Refueling
- Charging and recharging batteries
- Operating limitations
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Topics Related to the Workplace

- Surface conditions where the forklift is to be operated
- Composition of loads to be carried and load stability
- Load manipulation, stacking, and unstacking
- Pedestrian traffic in areas where the forklift is to be operated
- Narrow aisles and other restricted places where the forklift is to be operated
- Use of door opening and closing devices
- Hazardous (classified) locations where the forklift is to be operated
- Ramps and other sloped surfaces that could affect the forklift’s stability
- Closed environment and other areas where insufficient ventilation or poor forklift maintenance could cause a build-up of carbon monoxide or diesel exhaust
- Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation

FORKLIFT OPERATOR EVALUATION

Departments are to evaluate forklift operators at least once every three years. The evaluation consists of observing the forklift operator conducting normal tasks to determine if the operator is performing safely.

TRAINING AND EVALUATION RECORDS

Departments are to keep written records of operator training and evaluations. Each written record must include, at a minimum, the following information:

- Name of the operator
- Date of the training or training
- Name of the person giving the training or evaluation

A training and evaluation form for University-provided training is available at the EH&S website. Companies providing training are to provide records that meet the above criteria.
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**RECORDS (cont.)**
Departments must maintain training records in accordance with the University's retention schedule (see *BPPM* 90.01). See also *BPPM* 60.71.

**ASSISTANCE**
Contact EH&S for assistance; telephone 509-335-3041.