Forklift Safety

**NOTE:** The website URL for Workday reference guides that are referenced in this section is: https://confluence.esg.wsu.edu/display/WKB/Workday

**OVERVIEW**

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

**RESPONSIBILITIES**

**Departments**

Departments are to ensure that:

- 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.

**NOTE:** Refresher training is required only for operation topics in which the operator is found to be deficient.
Forklift Safety

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.

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 one of the following options.

Option 1
Completing Powered Industrial Trucks training, available through the Human Resource Services (HRS) Learning and Development website, at:
hrs.wsu.edu/training/

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:
ehs.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 procurement card, or a Create and Change Purchase Order or Create Requisition transaction in Workday, as applicable. See the instructions in BPPM 70.08 and 70.10, respectively, and the Workday Create and Change Purchase Order and Create Requisition reference guides.

Option 4
Completing an alternative formal forklift operator training program with approval from EH&S.

Practical Training

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
Forklift Safety

Practical Training (cont.) demonstrations done by the trainer and practical exercises performed by the trainee, while under direct supervision.

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 and the workplace (see below).

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 is to 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
Forklift Safety

Topics Related to the Workplace

Practical training topics related to the workplace are:

- 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.
Forklift Safety

TRAINING (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.