



Training Solutions, Delivered!

OPERATING ELECTRIC PALLET JACKS SAFELY

(Concise)

**Leader's Guide, Fact Sheet
& Quiz**

Item Number: 3661
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This easy-to-use Leader's Guide is provided to assist in conducting a successful presentation.

PREPARING FOR THE MEETING

Here are a few suggestions for using this program:

- a) Review the contents of the Fact Sheet that immediately follows this page to familiarize yourself with the program topic and the training points discussed in the program. The Fact Sheet also includes a list of Program Objectives that details the information that participants should learn from watching the program.
- b) If required by your organization, make an attendance record to be signed by each participant to document the training to be conducted.
- c) Prepare the area and equipment to be used for the training. Make sure the watching environment is comfortable and free from outside distractions. Also, ensure that participants can see and hear the TV screen or computer monitor without obstructions.
- d) Make copies of the Review Quiz included at the end of this Leader's Guide to be completed by participants at the conclusion of the presentation. Be aware that the page containing the answers to the quiz comes before the quiz itself, which is on the final page.

CONDUCTING THE PRESENTATION

- a) Begin the meeting by welcoming the participants. Introduce yourself and give each person an opportunity to become acquainted if there are new people joining the training session.
- b) Introduce the program by its title and explain to participants what they are expected to learn as stated in the Program Objectives of the Fact Sheet.
- c) Play the program without interruption. Upon completion, lead discussions about your organization's specific policies regarding the subject matter. Make sure to note any unique hazards associated with the program's topic that participants may encounter while performing their job duties at your facility.
- d) Hand out copies of the review quiz to all of the participants and make sure each one completes it before concluding the training session.

3661 OPERATING ELECTRIC PALLET JACKS SAFELY (Concise) FACT SHEET

LENGTH: 10 MINUTES

PROGRAM SYNOPSIS:

Electric pallet jacks, often called pallet trucks, are designed for lifting and transporting palletized materials over relatively short distances. They come in many different types and styles and are vital to daily operations in today's industry. Even though they seem simple to use, they can be very dangerous when used by an untrained operator or in an unsafe manner. This program discusses how to safely operate electric-powered pallet jacks so operators can deliver their loads while avoiding injury and property damage.

Topics include pre-operational inspection, driving and handling characteristics, lifting, moving and placing loads, avoiding incidents involving pedestrians and working on loading docks.

PROGRAM OBJECTIVES:

After watching the program, the participant will be able to explain the following:

- What to look for during a pre-operational inspection of an electric pallet jack;
- How to safely lift, travel and place a load;
- How to prevent operator and pedestrian injuries and damage to other vehicles and property;
- What precautions must be taken when working on loading docks.

INSTRUCTIONAL CONTENT:

BACKGROUND

- Electric pallet jacks, often called pallet trucks, are designed for lifting and transporting palletized materials over relatively short distances.
- There are two common types of pallet trucks: the walker, or walkie as it sometimes called, is designed for the operator to walk ahead or behind the truck while operating the controls; and, the rider truck, also known as a walkie-rider, allows the controls to be operated from either the floor or from the operator's platform on the vehicle.
- While there are many types of makes and models of pallet trucks, most share the following features: directional and speed controls, lift and lower buttons, a t-bar support handle, horn, battery, pallet forks, load wheels, steering tires and brake controls.
- Rider trucks will also be equipped with a rider platform.

THE T-BAR SUPPORT HANDLE

- A common safety feature found on many pallet trucks is the reverse switch found on the T-bar. This safety device helps protect operators from being pinned between the truck and a solid object.
- When pressure is applied to the reverse switch, the truck will reverse direction and move away from the operator.
- The T-bar handle also acts as an emergency brake. When the handle is moved to a complete vertical or horizontal position, the truck will stop moving. This stops the truck in the event the operator loses grip on the handle or falls to the ground.

PRE-OPERATIONAL INSPECTION

- As a trained and authorized operator, it is your responsibility to use this equipment safely. The first step towards safe use is conducting a pre-operational inspection.
- Before use, take a good look all around the vehicle. Look for any fluid leaks, cracked or broken parts or anything that looks out of place. Pay special attention to the wheels, tires and forks.
- Test all control functions for proper operation. Raise and lower the forks, test the forward and reverse controls, the horn as well as the various braking controls and the emergency reverse button located on the T-bar.
- During the pre-operational inspection, verify the presence of the vehicle's data plate and make sure it is legible. The data plate provides important information, such as the make and model of the vehicle and its maximum capacity.

- Other information specific to your make and model of pallet truck can be found in the operator's manual, which must remain with the vehicle at all times.
- If your inspection reveals any problem or defect with the truck, do not use it. Mark the vehicle out of service and report the situation to your supervisor.

DRIVING & HANDLING CHARACTERISTICS

- Because pallet jacks can be driven with the load leading or trailing, the steering wheels may be either in the front or the back of the vehicle.
- When operating with the forks trailing, the steering wheels are located in the front of the vehicle. This allows the truck to turn sharply, cutting corners abruptly.
- When this is the case, a wide turn is required to avoid collision.
- When operating with the forks leading, the steering wheels are in the back of the truck. This also allows sharp turning to either side; however, the rear end will now swing wide to the outside of a turn.
- When this is the case, keeping the truck tight to the inside of the turn is required to avoid collisions.
- Because the pallet truck can accelerate and turn abruptly, you should avoid sudden, extreme movements.
- Make a point to start, stop, turn and brake in a smooth, controlled manner. This includes coming to a complete stop before changing direction.

LIFTING LOADS SAFELY

- Before moving a load, it must be centered on a pallet and stable. Off-center loads or loads that are unstable may fall when moved.
- These types of loads must be reconfigured so they are centered on the pallet and may need to be secured before moving.
- Before lifting a pallet, make sure both forks are completely under the pallet and the pallet is resting against the back stop.
- Lifting a load with the forks partially under the pallet can cause damage to the pallet and spill the load.
- Understand that the forks are raised using a scissor-like action that lowers the load-bearing wheels and raises the forks. If these wheels contact a lower support board of the pallet while lifting, the pallet can be torn apart.

TRAVELING WITH & PLACING A LOAD

- Before traveling with a load, make sure you know where you are going. Inspect your route for obstructions or hazards before proceeding with the pallet truck.
- Before moving, lift the load a few feet off the floor and then proceed to your destination.
- When placing a load, come to a complete stop before lowering the pallet.
- When parking your pallet truck, only park in approved areas. Never park in front of emergency equipment, in aisle ways or in front of exits.
- When parking any type of powered industrial truck, including a pallet truck, you must lower your forks, place the vehicle in neutral and apply the parking brake.

WALKING WITH A PALLET JACK

- When using a walkie type truck, walk ahead of the truck and just to the side. Walking with the load trailing allows good visibility and reduces the chances of a collision.
- Of course, there are many situations where you must walk behind the truck with the load leading. When this is the case, keep both hands on the controls and proceed cautiously.
- Be aware that the forks stick out beyond the load further than it may seem. Be extra cautious when approaching objects with the load leading in this manner.
- Whether walking ahead or behind the pallet truck, always travel at a normal walking pace and stay alert for pedestrians and other vehicles.

AVOIDING INCIDENTS INVOLVING PEDESTRIANS & OTHER VEHICLES

- When approaching intersections, blind corners or aisle ways, stop and sound your horn; this will alert pedestrians and other vehicle operators of your presence. Always remember that pedestrians have the right of way.

- When following other trucks, maintain a three-truck distance between trucks; this allows room to maneuver and stop if needed. Following too closely is a sign of careless operation and can quickly lead to an incident.
- Before moving your pallet truck, make sure the area is clear of personnel and be sure to look behind you before backing up.
- Raising and lowering the forks creates a hazard for pedestrians as well. Not only can a foot be easily crushed when the forks are lowered, the scissor action created by raising or lowering the load wheels creates a dangerous pinch point that must be avoided.
- Never drive a pallet truck directly toward a pedestrian who is standing in front of a solid object such as a wall or bench.

PROTECTING YOURSELF & OTHERS FROM INJURY

- When operating a rider truck, be sure to keep your hands and feet inside the operating area. Allowing hands and feet to protrude beyond the frame of the truck can lead to serious injury as the truck passes near fixed objects or other vehicles.
- Operators should not leave the rider's platform until the truck has come to a complete stop. Stepping off too soon can lead to twisted ankles, knees or other injuries.
- No matter what type of pallet truck you operate, make sure your hands and feet are free of oil, grease or other slippery substances.
- As a trained and authorized operator, it is your responsibility to prohibit any riders from your truck.

WORKING ON LOADING DOCKS

- Loading docks feature tight quarters, lots of traffic and materials combined with pallet trucks and forklifts entering and leaving trailers or railcars. Caution must be used at all times.
- Before entering any trailer with a powered pallet jack, you must make sure the trailer's brakes are set and its wheels are chocked.
- Inspect the flooring of any trailer or railcar for defects such as cracks, holes, rotten wood and other weaknesses.

OPERATING ELECTRIC PALLET JACKS SAFELY (*Concise*)

ANSWERS TO THE REVIEW QUIZ

1. a

2. c

3. b

4. a

5. d

OPERATING ELECTRIC PALLET JACKS SAFELY
REVIEW QUIZ

The following questions are provided to determine how well you understand the information presented in this program.

Name _____ Date _____

1. A pallet jack's operator's manual must remain with the vehicle at all times.
 - a. True
 - b. False

2. When following other trucks, maintain a _____ distance between vehicles.
 - a. One-truck
 - b. Two-truck
 - c. Three-truck

3. The only time you should drive your pallet truck directly toward a pedestrian standing in front of a solid object is when you are sure you have ample time to stop or turn before reaching him.
 - a. True
 - b. False

4. Operators of pallet trucks are responsible for prohibiting riders from their vehicles.
 - a. True
 - b. False

5. What should you do before entering a trailer with a pallet truck?
 - a. Make sure the trailer's brakes are set
 - b. Make sure the trailer's wheels are chocked
 - c. Make sure the trailer flooring isn't defective
 - d. All of the above
 - e. None of the above