



Training Solutions, Delivered!

FORKLIFT OPERATOR TRAINING

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

Item Number: 4206
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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.

4206 FORKLIFT OPERATOR TRAINING FACT SHEET

LENGTH: 17 MINUTES

PROGRAM SYNOPSIS:

Powered industrial trucks are a necessary part of most industrial operations. They can be found in a variety of sizes and models, and many of them can be fitted with attachments for performing specialized tasks. These valuable machines are truly an extension of ourselves, but their proximity to people and property in the plant always presents potential hazards. If forklifts are used incorrectly, the resulting accidents can injure or kill operators and pedestrians and cause tremendous property damage. To prevent these accidents, operators must know, understand and follow all safe work procedures.

Steering and maneuvering, use of special attachments, vehicle capacity and stability, vehicle inspection and refueling procedures are all subjects featured in the video. Other topics include moving loads, pedestrian traffic, types of lift trucks and hazardous work surfaces.

PROGRAM OBJECTIVES:

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

- The three basic areas of forklift safety;
- Common causes of forklift accidents and resulting injuries;
- Forklift stability and causes of tip over;
- Rules for safely driving and parking the vehicle;
- Procedures for lifting and moving loads;
- What to look for when performing a pre-operational inspection.

PROGRAM OUTLINE:

THREE BASIC AREAS OF POWERED INDUSTRIAL TRUCK SAFETY

Operators must understand these three basic areas of forklift safety:

- ❶ The characteristics, operation and limitations of the vehicle in use;
- ❷ The hazards due to the characteristics of the area where the lift truck will be operated;
- ❸ The general safety rules that apply to all powered industrial trucks and their operation.

DIFFERENCES FROM AUTOMOBILES

- Every industrial truck has its own particular operating characteristics and limitations. Before operating any powered industrial truck, you need to understand that it is not an automobile.
- Forklifts have three or four wheels. Unlike automobiles, forklifts steer from the rear and have a dramatically different turning radius than that of a car.
- Under all conditions, the stopping distance is greater than that of an automobile.
- When mounting the vehicle, always place your feet and hands correctly and pull yourself into the driver's seat.
- Never jump on or off the machine. Once inside the cage, always keep your arms and feet inside the vehicle.

CONTROLS AND INSTRUMENTATION

- After entering the vehicle, make sure you know and understand the location and function of all the controls.
- Locate the fuel and power indicators as well as the braking and driving controls.
- Be aware that all trucks do not operate alike. You will need to understand their operation.

STEERING AND MANEUVERING

- Remember that the rear steering of a forklift causes wide swings at corners that can allow the vehicle to strike pedestrians or storage racks.

SPECIAL ATTACHMENTS

- Special attachments can block your vision and also change the operating characteristics of the lift truck.

- Some forklifts have devices that are designed to pick up drums, while others have protruding attachments that pick up rolls of material.
- Other devices compress material to lift and move it, making a pallet unnecessary.
- No matter what attachments you will be using, make sure you know and understand their characteristics. Maintain safe operation at all times.

VEHICLE CAPACITY

- Each powered industrial truck has a load capacity. This information can be found on the manufacturer's identification plate that is attached to the vehicle.
- The rated capacity is based on load center dimensions shown on the plate.

VEHICLE STABILITY

- The Stability Triangle is formed by three points that support the vehicle: one point near each of the two front wheels and another point located at the center of the steering axle.
- The lift truck uses the battery and motor or engine as well as a large counter weight located on the back of the truck to balance the load both laterally and longitudinally.
- The center of gravity of an unloaded vehicle is located near the center of the truck. When the truck is loaded, the center of gravity shifts forward in the direction of the load.
- The center of gravity of the forklift, combined with the load's center of gravity, produces a new center of gravity (the combined center of gravity).
- As the load is elevated, the combined center of gravity raises to a higher level. The action line is a vertical line passing through the combined center of gravity.
- If the center of gravity remains inside the Stability Triangle, the vehicle is stable. When the center of gravity or the line of action falls out of the triangle, the vehicle will turn over.

VEHICLE INSPECTION

- Before beginning your work period, make sure to perform a mandatory vehicle checkout.
- Make sure the vehicle is fueled or the battery is charged.
- Test the horn, lights, brakes and back-up alarm. If you discover any malfunctions, note them on the checkout sheet, tag the vehicle out of service and notify the proper authority.
- Before operating the truck, check out the working gear and the safety equipment. Check out the operating controls and make sure they work properly.
- Inspect the hydraulic hoses and connections and other parts that may show wear.
- Inspect the forks and other load-bearing parts that could develop cracks or splits.
- Never attempt to make repairs unless you have been trained or authorized to do so by your company.

REFUELING THE VEHICLE

- It is important that you refuel or recharge your vehicle safely. Make sure you understand the proper sequence for refueling your unit and wear the proper PPE.
- Before refueling propane trucks, deplete the gas in the line after shutting off the valve and then remove the tank to the refueling position.
- After filling the tank, check the valves and seals before replacing the tank. You should be able to smell the scented fuel if there are any leaks.
- Check all fittings and if you discover any leaks, tag the unit out of service.
- When refueling gasoline or diesel, make sure the truck is secured and the engine is not running.
- Avoid overfilling and clean up any spills using the proper procedures for fuel clean-up. Dispose of any clean-up materials in the correct container.

RECHARGING THE BATTERIES

- Electric trucks use batteries for their power source. These present hazards that require specific safety precautions.
- Some companies have a charging station that operators use on a regular basis, while other facilities have a complete battery shop where all battery replacement and the addition of acid is handled by a competent person.

- As an operator, you will probably place your vehicle on the battery charger after your shift or other times it becomes necessary.
- When charging the battery, secure the forks, turn off the motor and set the parking brake. Detach the power cable from the truck and make sure the charger is in the off position before attaching the charging cable.
- After attaching the charger to the power cable, set the timer and turn the charger on.

SPECIALIZED INDUSTRIAL TRUCKS

- Before operating any specialized truck, you must be trained in the use of that specific vehicle.
- When using a stand-up rider unit, make sure you know and understand the features and driving techniques specific to this vehicle.
- To operate these units and others such as the powered pallet jack, you must be trained and authorized. If you have any questions, ask your supervisor.

HAZARDOUS WORK SURFACES

- When operating any industrial truck, always pay attention to other lift trucks, pedestrians and the condition of the roadway.
- Because lift trucks aren't operated like other vehicles, they confront many hazards that wouldn't be hazardous to other vehicles.
- You must plan your route carefully and pay attention to obstructions such as pedestrians and uneven road surfaces.
- Other road hazards include oil, grease or water that you may have to drive over.
- When driving through the plant, keep the load as low as possible to clear obstructions and to minimize the blind spot that exists just beyond the load.

COMPOSITIONS OF LOADS

- Loads can vary in shape, size and condition.
- Partially filled containers can shift, causing the center of gravity to move away from the center of the forks.
- Odd-shaped loads or loads that exceed the load center dimensions can cause the center of gravity to shift forward. This can cause the lift truck to tip forward.

LIFTING AND MOVING LOADS

- After making sure that the load is secure and does not exceed the capacity of your truck, you may move the load.
- Enter pallets with the forks positioned correctly. After engaging the load, tilt it back slightly to rest against the mast.
- Before moving the load, make sure the area around you is clear of obstructions and co-workers.
- Back up, lower the load to the proper height above the surface and drive away.
- When stacking the load on a rack, raise the load to the correct height and position it correctly.
- Make sure the forks are level and the load is properly placed on the rack, then raise the forks slowly.
- Before backing out, make sure you have safe clearance behind and around the truck and that no pedestrians are behind you.
- If it is safe to move, retract the forks to clear the pallet and back away slowly.

PEDESTRIAN TRAFFIC

- Sound your horn to announce your presence and allow ample stopping distance for pedestrians. At blind intersections, slow down and sound the horn before crossing.
- Remember that pedestrians always have the right of way.
- When operating in close quarters and restricted areas, maintain a slow speed and be prepared to stop. Pay special attention to the turning radius of the rear of the truck.

TYPES OF FORKLIFTS

- All powered industrial trucks are grouped by type and class. As a trained lift truck operator, you must understand which class and type of forklift you are operating.
- This information can be found on the identification plate of the vehicle. If you don't understand this information, check with your supervisor or trainer.
- Forklifts are divided into seven classes; they are classified by the type of work they were designed to do.

- More importantly, forklifts are grouped by the type of power units they use, such as electric, gasoline or propane, as well as the safety features they incorporate.
- You must know the type of vehicle you are using and understand the areas in which it is safe to operate.

SLOPED SURFACES

- When moving up or down grades, such as ramps and other sloped surfaces, remember to keep the load uphill.
- Avoid turning while moving on a grade, as it will increase your chance of tipping over.

FORKLIFT OPERATOR TRAINING

ANSWERS TO THE REVIEW QUIZ

1. b

2. d

3. a

4. d

5. a

6. b

7. b

8. c

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REVIEW QUIZ

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

Name _____ Date _____

1. If your company has given you authorization to operate a regular forklift, this authorization also allows you to operate other vehicles such as a high-lift order picker or powered pallet jack.
 - a. True
 - b. False

2. Which of the following is a difference between a forklift and an automobile?
 - a. Forklifts use rear wheels to steer
 - b. Forklifts require a greater stopping distance
 - c. Forklifts are not designed to carry passengers
 - d. All of the above

3. It is mandatory that you perform a vehicle inspection of your truck before beginning every shift.
 - a. True
 - b. False

4. What would you do if a large load you are moving blocks your forward view?
 - a. Lean out of the cage and look around the load
 - b. Have a co-worker serve as a spotter to guide you in the desired direction
 - c. Stand up and look over the load
 - d. Drive and face towards the rear

5. You should keep the load uphill at all times whether you are traveling up or down a grade.
 - a. True
 - b. False

6. When a forklift has been loaded, the center of gravity _____.
 - a. Shifts towards the rear of the truck
 - b. Shifts forward in the direction of the load
 - c. Remains near the center of the truck

7. Tests have proved that in the event of a tip-over, the safest thing to do is to jump off the vehicle before it hits the ground.
 - a. True
 - b. False

8. To find out details about a particular forklift's type as well as data concerning load capacity and load centers, consult the _____.
 - a. Operator control panel
 - b. Daily checkout sheet
 - c. Information plate on the vehicle
 - d. None of the above