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# **SAFE USE AND OPERATION OF FORKLIFTS: TRAINING REQUIREMENTS**

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

**Item Number: 5262**  
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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.

## **5262 SAFE USE AND OPERATION OF FORKLIFTS: TRAINING REQUIREMENTS FACT SHEET**

**LENGTH: 2:32 MINUTES**

### **PROGRAM SYNOPSIS:**

Forklifts, also called lift trucks or powered industrial trucks, are powerful machines that are invaluable in the movement of products and materials in warehousing, industry and construction. These useful machines can also be extremely dangerous and are involved in many incidents of property damage, injuries and fatalities each year. OSHA regulates their use and requires operators of powered industrial trucks to receive general training on their operation as well as “hands-on” practical training.

### **PROGRAM OBJECTIVES:**

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

- The training requirements needed to operate a forklift safely;
- A forklift’s handling and stability characteristics;
- How to perform the pre-operational inspection;
- How to properly lift and move loads;
- Operating safely around pedestrians.

### **INSTRUCTIONAL CONTENT:**

#### **SAFE USE AND OPERATION OF FORKLIFTS: TRAINING REQUIREMENTS**

- The required OSHA training for a forklift operator is the same no matter if the forklift is to be used in general industry or in construction.
- It is the employer’s responsibility to implement an operator training program and ensure that only trained operators who have successfully completed the training program are allowed to operate powered industrial trucks. To help achieve this, employers may issue certification cards as a way to document the certification process.
- Operator training must include both formal and practical training. Examples of formal training include video-based training or classroom training, while practice training includes vehicle demonstrations and practical exercises.
- The training program must include a practical evaluation of the operator’s ability to operate the forklift in a workplace setting. Part of this training must include “hands-on” training for the specific type of powered industrial truck they will be certified to operate.
- Operator training includes some of the following required information: the information that can be found in the operator’s manual, the function of each control including the accelerator, brake, transmission and mast controls, the location of the vehicle’s data plate and the important information it contains, the unique handling characteristics of the lift truck, the factors that affect the forklift’s stability and the common loads to be lifted and transported.
- All powered industrial truck training and evaluation must be conducted by a person with the necessary knowledge, training and experience to train operators and evaluate their competency.
- An evaluation of each trained operator must be conducted during the initial training and at least once every 3 years.
- Refresher training will be required anytime an operator has been observed driving unsafely, been involved in an incident or near-miss or has received an evaluation that indicates unsafe operation.
- Refresher training will also be required if an operator has been assigned to drive a different type of lift or if workplace conditions affecting safe operation have changed.
- An operator evaluation is required after completing any required refresher training.

**SAFE USE AND OPERATION OF FORKLIFTS: TRAINING REQUIREMENTS**

**ANSWERS TO THE REVIEW QUIZ**

1. a

2. a

3. c

**SAFE USE AND OPERATION OF FORKLIFTS: TRAINING REQUIREMENTS**  
**REVIEW QUIZ**

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

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

1. The required OSHA training for a forklift operator in general industry is the same as for a forklift operator in construction.
  - a. True
  - b. False
  
2. Forklift operator training must include a practical evaluation of the ability to operate the forklift in a workplace setting.
  - a. True
  - b. False
  
3. Which of the following is not included as part of operator training?
  - a. The information that can be found in the operator's manual
  - b. The function of each control
  - c. The retail value of the industrial truck
  - d. Understanding the data plate
  - e. The factors that affect the forklift's stability