Forklifts are dangerous. They have a high center of gravity, which makes it easy for them to tip over. If operators are not careful they may also drop a load, collide with other objects (vehicle, equipment or people) or even fall off a loading dock.

This document provides a sample Powered Industrial Truck and Forklift Safety Program. You should modify it as needed to suit your organization’s specific operations.

Note: The Safety Program Sample begins on the next page.

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# Powered industrial trucks and forklift safety program sample

## Objective

The objective of this section of the ABC Company Safety and Health Policy and Training manual is to provide the fundamentals for the operation, use and maintenance of powered industrial trucks. This section applies to: fork trucks, tractors, platform lift trucks, motorized hand trucks, and other specialized industrial trucks powered by electric motors or internal combustion engines.

## References

(1) Title 29 Code of Federal Regulations Part 1910.178 "Powered Industrial Trucks"

## Scope

The policies and procedures in this section are to be used as a minimum to control the hazards associated with material handling activities throughout the workplace. This policy applies to all ABC Company facilities worldwide.

## Responsibility

Plant and facility managers are accountable and responsible for ensuring that an effective material handling program is established and maintained, and that appropriate training is conducted as described within this section.

Supervisors are responsible for insuring that all aspects of this policy are followed and appropriate training is conducted.

Employees who use forklifts will use them following the basic safety rules. Employees will visually inspect equipment before each use and, if found to need repair, will tag it and remove it from service until repairs are made.

## General requirements

Powered industrial truck operators must follow established safety rules at all times. These rules have been established to protect truck operators as well as other employees in the plant.

Nameplates and markings on powered industrial trucks should remain intact and should be maintained in legible condition. The manufacturer's written approval must be obtained for any modifications that affect truck capacity and/or safe operation. If a modification is made, the capacity, operation, and maintenance instruction plates, tags, or decals should be changed.

## Approved designations

Prior to using a truck in each area of the plant, the atmosphere or location should be classified as to whether it is hazardous or nonhazardous. The type of industrial truck used in each area is dependent on this classification. Only approved industrial trucks should be used in hazardous locations.

## Safety guards

The following safety guards should be provided on powered industrial trucks:

**Enclosure Guards:*** All hazardous moving parts should be guarded, such as exposed gears and chain-and-sprocket drives. Tires should also be guarded to prevent objects from being propelled towards the operator.

**Overhead Guard:*** An overhead guard should be provided where there is a danger of falling objects or where loads are lifted higher the operator's head. These guards should extend beyond the operator's position.

**Vertical Load Backrest Extension:*** A load backrest extension should be provided when the type of load present a hazard to the operator.

## Fuel handling and storage

Liquid fuels (gasoline, diesel fuel) should be handled and stored in accordance with National Fire Protection Association (NFPA) Flammable and Combustible Liquids Code (NFPA No. 30).

Liquefied petroleum gas (LPG) should be handled and stored in accordance with NFPA Storage and Handling of Liquefied Petroleum Gases (NFPA No. 58).
## Fuel handling and storage (continued)
- The engine should be stopped and the driver should dismount his vehicle before a truck is refueled.
- Fuel tanks will not be filled while the engine is running. Spillage will be avoided. Refueling must be performed out of all buildings and away from open doors.
- Spillage of oil or fuel will be carefully washed away or completely evaporated and the fuel tank cap replaced before restarting engine.
- No forklift will be operated with a leak in the fuel system until the leak has been corrected.

## Changing and charging batteries
The following safety rules should be followed when charging/changing batteries:
- Batteries should be charged only in the battery charging area.
- Trucks should be properly positioned and the brake applied before attempting to change or charge batteries.
- Material handling equipment should be provided for handling batteries.
- Facilities should be provided for:
  - Flushing and neutralizing spilled electrolyte
  - Fire protection
  - Protecting charging apparatus from damage by trucks
  - Ventilation for dispersal of fumes from gassing batteries
- A carboy tilter or siphon should be provided for handling electrolyte.
- When changing batteries, acid should be poured into water; water should not be poured into acid.
- Assure that vent caps are functioning. The battery (or compartment) cover(s) should be open to dissipate heat.
- Take precautions to prevent open flames, sparks, or electric arcs in the battery charging area.
- Smoking is prohibited in the charging area.
- Keep tools and metallic objects away from the top of uncovered batteries.
- Make sure that reinstalled batteries are properly positioned and secured in the truck.

## Control of noxious gases and fumes
Concentration levels of carbon monoxide gas created by powered industrial trucks should not exceed levels specified in 29CFR 1910.1000. Currently, the 8-hour time weighted average limit is 50 parts per million (ppm). Industrial hygiene sampling should be conducted to verify carbon monoxide levels.

To control the levels of carbon monoxide in the plant, gasoline engines should not be idled in enclosed areas for long periods of time.
**Operator training**

OSHA regulations state that "the employer shall ensure that each powered industrial truck operator is competent to operate a powered industrial truck safely, as demonstrated by the successful completion of the training and evaluation specified in 1910.178 (l)".

Except for training purposes, no employee may operate a powered industrial truck without completing the required training. Trainees may only operate a powered industrial truck under the direct supervision of the instructor, and only where such operation poses no danger to the trainee or other employees.

A combination of formal and practical training must be utilized, along with an evaluation of the operator's performance in the workplace. Training and evaluation must be conducted by persons who have the knowledge, training, and experience to train powered industrial truck operators and evaluate their competence. Appendix A should be utilized as a tool to ensure all applicable training topics are addressed.

Refresher training, including and evaluation of the effectiveness of that training, must be conducted whenever one or more of the following occur:

- The operator has been observed to operate the vehicle in an unsafe manner
- The operator has been involved in an accident of near-miss incident
- The operator has received an evaluation that reveals that the operator is not operating the truck safely
- The operator is assigned to drive a different type of truck
- A condition in the workplace changes in a manner that could affect safe operation of the truck

An evaluation of each powered industrial truck operator's performance must be conducted at least once every three years.

NOTE: If an operator has been previously trained in topic(s) specified in Appendix 5 (Powered Industrial Truck Training Checklist) and the training was appropriate for the truck and working conditions in the workplace, additional training on those topic(s) is not required if the operator has been evaluated and found competent to operate the truck safely.

Certification - The employer shall certify that each operator has been trained and evaluated by documenting the name of the operator, the date of the training, the date of the evaluation, and the name of the person(s) who performed the training and/or evaluation (See Appendix 6 - Powered Industrial Truck Certification form).

**Operator and pedestrian safety**

For the safety of the operator as well as pedestrians, the following safety rules should be followed at all times in areas where trucks are operating:

- Pedestrians have the right of way all the times.
- Trucks should not be driven up to anyone standing in front of a bench or other fixed object.
- No person should be allowed to stand or pass under the elevated portion of any truck, whether loaded or empty.
- Unauthorized personnel are not permitted to ride on powered industrial trucks.
### Operator and pedestrian safety (continued)

- Arms and/or legs should not be placed between the uprights of the mast or outside the running lines of the truck.
- A safe distance should be maintained from the edge of ramps or platforms while on any elevated dock, or platform or freight car.
- A safe distance should be maintained from overhead installations, lights, pipes, sprinkler system, etc.
- Trucks will be equipped with a horn or other warning device that emits a clearly audible signal and is easily reached and used by the operator.
- Trucks should not be used for opening or closing freight doors.

### Unattended trucks

When an operator leaves the truck, but is within 25 feet of the truck and the truck is still in his or her view, the operator should do the following:

- Fully lower the load-engaging means
- Neutralize the controls
- Set brakes

When a truck is left unattended (the operator is 25 feet or more away from the truck or the operator cannot see the truck), the operator should do the following:

- Fully lower the load-engaging means
- Neutralize the controls
- Shut power off
- Set brakes
- Remove key or pull the connector plug
- Block wheels if the truck is parked on an incline

### Safe operating speeds

- Trucks must be under control at all times.
- Authorized speed limits should be observed at all times.
- Safe following distances must be observed. A safe following distance is approximately three (3) truck lengths from the truck ahead.
- Under all travel conditions the forklift will be operated at a speed that will permit it to be brought to a stop in a safe manner.
- Under all travel conditions the truck is to be operated at a speed that will permit it to be brought to a stop in a safe manner.
- Stunt driving and horseplay is prohibited.
- While negotiating turns, speed will be reduced to a safe level by means of turning the hand steering wheel in a smooth, sweeping motion. Except when maneuvering at a very low speed, the hand steering wheel will be turned at a moderate, even rate.
- Slow down for wet and slippery floors.
### Safe operating speeds (continued)
- Drivers should slow down and sound the horn at cross aisles and other locations where vision is obstructed.
- Grades should be ascended or descended slowly. When ascending or descending grades in excess of 10 percent, loaded trucks should be driven with the load upgrade.
- On all grades the load and load engaging means should be tilted back if applicable, and raised only as far as necessary to clear the road surface.
- Unloaded forklifts should be operated on all grades with the load engaging means downgrade.

### Driving on grades
- Dockboard or bridgeplates, should be properly secured before they are driven over. Dockboard or bridgeplates should be driven over carefully and slowly and their rated capacity should never be exceeded.
- Railroad tracks should be crossed diagonally wherever possible. Parking closer than 8 feet from the center of railroad tracks is prohibited.
- Elevators should be approached slowly, and then entered squarely after the elevator car is properly leveled. Once on the elevator, the controls should be neutralized, power shut off, and the brakes set.
- Motorized hand trucks should enter an elevator or other confined areas with the load end forward.

### Bridge plates, railroad tracks, and elevators
- Motorized hand trucks should enter an elevator or other confined areas with the load end forward.

### Trucks with lifting carriage / forks
If a truck is equipped with vertical only, or vertical and horizontal controls being elevated with the lifting carriage or forks for lifting personnel, the following additional precautions should be taken for the protection of personnel being elevated:
- Use of a safety platform firmly secured to the lifting carriage and/or forks.
- Means provided whereby personnel on the platform can shut off power to the truck.
- Protection from falling objects.
- Employees on the platform will wear safety belt or harness and be secured to the platform at all times.

### Loading and unloading
Operators should observe the following safety rules when loading and unloading:
- The driver should look in the direction of, and keep a clear view of the path of travel.
- Drivers should avoid running over loose objects on the roadway surface.
- Other trucks traveling in the same direction at intersections, blind spots, or other dangerous locations should not be passed.
- If the load being carried obstructs the forward view, the driver should travel with the load trailing.
- The right of way is to be yielded to ambulances, fire trucks, or other vehicles in emergency situations.
- Only stable or safely arranged loads should be handled. Operators should refuse improperly loaded skids or pallets or broken pallets.
Loading and unloading (continued)

- Only loads within the rated capacity of the truck should be handled. Operators should refuse loads that are too heavy for the truck.
- A load engaging means should be placed under the load as far as possible. Carefully tilt the mast backward to stabilize the load.
- Extreme care should be used when tilting the load forward or backward.
- An elevated load should not be tilted forward except when the load is in a deposit position over a rack or stack.
- When stacking or tiering, only enough backward tilt to stabilize the load should be used.
- While loading or unloading, operators should:
  > Where trailer restraining devices designed to prevent trailer movement are available they shall be locked to the "ICC bumper" during the loading and unloading operation.
  > Before a forklift is driven into a trailer verify the tractor is still coupled to the trailer or the support dolly has been deployed and is locked in place.
  > Set brakes and put wheel chocks under the rear wheels to prevent movement of highway trucks.
  > Use wheel stops or other positive protection to prevent railroad cars from moving.
  > Check the flooring of trucks, trailers, and railroad cars for breaks and weakness before they are driven onto.
  > Determine whether fixed jacks are necessary to support a semi-trailer during loading or unloading (may be necessary when the trailer is not coupled to a tractor).
- The maximum rated load of the truck will be plainly marked on the truck with large and visible signs. Under no circumstances will the maximum load be exceeded.
- Only stable or safely arranged loads will be handled. Caution will be exercised when handling off-center loads which cannot be centered.
- Only loads within the rated capacity of the lift truck will be handled.
- The long or high (including multiple-tiered) loads which may affect capacity will be adjusted.
- When attachments are used, particular care must be taken in securing, manipulating, positioning and transporting the load. Forklifts equipped with attachments will be operated as partially loaded trucks when not handling a load.

Routine inspection and maintenance

- Operators will be held responsible for checking the mechanical condition of their trucks at the start of each shift or before initial use.
- Operators will be instructed never to make adjustments or repairs on trucks, but to promptly report any faulty mechanical condition to maintenance for repair.
- Maintenance employees will make a thorough mechanical inspection of all trucks at least once a month, at which time necessary repair and parts replacement will be made.
Routine inspection and maintenance (continued)

- If at any time a powered industrial forklift is found to be in need of repair, defective or in any way unsafe, the truck will be taken out of service until it has been restored to safe operating condition.

- Open flames will not be used for checking electrolyte level in storage batteries or gasoline level in fuel tanks.

- Storage batteries used for electric-powered trucks require regular maintenance and charging. Adequate ventilation, emergency eyewash stations, and other appropriate equipment will be provided. Employees will be trained in the proper procedures to handle and charge batteries and to handle acids.

- All powered industrial trucks should be maintained in safe operating condition at all times. Maintenance activities should include regular inspections, preventive maintenance, and overhauls when necessary. Trucks that are not in safe operating condition should be removed from service until repairs are made. Repairs should be made only by authorized personnel.

- Powered industrial truck operators should inspect their trucks at the beginning of their shift. The operators should check the controls, tires, brakes, tires, and other moving parts. A standardized operator’s checklist should be used for these inspections. A sample Operator’s Daily Inspection Report is included at the end of this Section.

- Documentation should be maintained of all inspection and maintenance activities. A file should be maintained for each truck which contains the maintenance and inspection records for that vehicle. A sample Maintenance Log is included at the end of this Section.

Forms

Exhibit 1: Safety Procedures for Forklift Operators
Exhibit 2: Forklift Truck Daily Checklist
Exhibit 3: Daily Maintenance Log
Exhibit 4: Elevating Powered Industrial Truck Body Harness and Lanyard Inspection Form
Exhibit 5: Training Checklist
Exhibit 6: Training Certification Form

Note: The exhibits begin on the next page.
ABC Company considers safety a necessary and integral part of its business. No job is so important or so unimportant that it cannot be done safely. Since lift trucks are so much a part of our operations and since they can be the source of serious injury and costly damage, we are giving special attention to the safe operation of these vehicles.

A list of safety rules has been set up to ensure that all forklift operators have a uniform understanding of safe and efficient operations and know our safety rules. Our supervisors will make every effort to follow-up on the safe driving practices listed here. We will also do everything necessary to maintain our trucks and facilities in the safest condition and expect everyone to cooperate in keeping them that way. By matching safe driving with safe equipment, we will keep truck accidents and injuries to a minimum. We want to do everything we can to prevent our employees from getting injured.

All drivers will be given periodic reviews and possible testing by management. These reviews will be made a part of the workers’ individual personnel record. Operators with unsatisfactory records of accidents and rule violations will be transferred or possibly even terminated depending on the severity of the violation. All drivers are expected to do their part in operating their trucks in the safest and most efficient manner.

Note: The safety rules for forklift operators begins on the next page.
Safety rules for forklift operators

1. Only authorized operators will be permitted to operate powered industrial trucks.
2. Unauthorized personnel operating powered industrial trucks will be subject to discipline and or termination.
3. No person will be allowed to stand or pass under the elevated portion of any truck whether loaded or empty. This is the driver’s responsibility.
4. Passengers are not allowed to ride on industrial trucks.
5. Arms and legs must be kept within the running lines of the trucks.
6. When a powered industrial truck is left unattended, forks will be fully lowered, controls will be neutralized, power will be shut off and the brakes set. A powered industrial truck is unattended when the operator is 25 feet away from the vehicle which is in view, or whenever the operator leaves the vehicle and it is not in view.
7. Powered trucks must be slowed and horn sounded when:
   - When entering or leaving any door.
   - At all blind corners or other locations where vision is obscured.
   - When turning into or crossing main aisles, (One or two short blasts are considered sufficient).
8. If the load being carried obstructs forward view, the driver will be required to travel in reverse.
9. Under all travel conditions the truck will be operated at a speed that will permit it to be brought to a stop in a safe manner.
10. Powered trucks must keep to the right when meeting other vehicles.
11. Avoid wet, slippery floors. If, however, they must be used proceed with extreme caution.
12. Do not lift personnel with lift trucks. It is not an elevator.
13. All accidents must be reported to your supervisor immediately.
14. Keep loads as close to the floor as possible. Keep forks down when traveling empty.
15. Always drive several truck lengths behind other trucks.
16. Always watch for overhead obstructions while lifting.
17. Do not store material so that it obstructs fire equipment, alarm boxes, emergency equipment, electrical service cabinets or fire exits.
18. Do not overload any truck. Lift only up to the rated capacity of the truck. Know the load limits for extended or tilted masts.
19. Loads that are not safely piled, overloaded or insecure will not be moved.
20. Always look to the rear before backing and always watch for the tail swing.
21. Use caution and reduced speed when traveling up or down ramps and always keep the load on the high side.
22. Pallets must not be stacked more than 15 high,

I have been given a copy of the Safety Procedures for Forklift Operators. I have read these rules and will abide by them.

Date Signed ______________  Name _________________________________________
### Exhibit 2

**Forklift truck daily checklist**

<table>
<thead>
<tr>
<th>Item</th>
<th>Good</th>
<th>Fair</th>
<th>Needs repair</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheels and tires</td>
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<tr>
<td>Mast</td>
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<tr>
<td>Tilt controls</td>
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<tr>
<td>Overhead Cage</td>
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<tr>
<td>Horn</td>
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<tr>
<td>Steering</td>
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<tr>
<td>Gauge(s) condition</td>
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<tr>
<td>Head and tail lights</td>
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<tr>
<td>Safety flasher</td>
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<tr>
<td>Safety beeper</td>
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<tr>
<td>Back-up alarm</td>
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<tr>
<td>Hydraulic cylinder</td>
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<td>Battery</td>
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<tr>
<td>Fuel</td>
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<tr>
<td>Fire extinguisher</td>
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<tr>
<td>Seat</td>
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<tr>
<td>Brakes</td>
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<tr>
<td>Emergency brake</td>
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<tr>
<td>Accelerator</td>
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<tr>
<td>Shift mechanism</td>
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<tr>
<td>Capacity plate</td>
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</tbody>
</table>

* Repairs completed by: ________________________  Date: ____________________
Exhibit 3
Daily maintenance log

<table>
<thead>
<tr>
<th>Truck no.</th>
<th>Make</th>
<th>Mechanic</th>
<th>Description of work performed</th>
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</table>
Exhibit 4

Elevated powered industrial truck body harness and lanyard inspection

This check is to be conducted before the start of each shift

<table>
<thead>
<tr>
<th>Equipment # _____________________________</th>
<th>Date _________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name ___________________________</td>
<td>Supervisor ____________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Issue</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the body harness free from wear, damage, or distortion?</td>
<td></td>
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<tr>
<td>Are straps cut, broken, torn or scraped?</td>
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<tr>
<td>Are the buckles, snap hooks, and other hardware free of cracks and sharp edges?</td>
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<tr>
<td>Are the buckles on the harness working properly?</td>
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<tr>
<td>Are lanyards free from wear, or show signs of broken fibers, pulled stitches and discoloration?</td>
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<tr>
<td>Do the snap hooks of the lanyard close and lock tightly?</td>
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<tr>
<td>Are the lanyard anchors and mountings tight and undamaged?</td>
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<td></td>
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</tbody>
</table>

Notes:

1. Any damaged or defective equipment shall be tagged, removed from service, and reported to Facilities at (phone #). Repairs shall only be done by qualified personnel using manufacturer’s guidelines and replacement equipment. Any equipment that cannot be repaired shall be destroyed and removed from the facility.

2. Any equipment that has been subject to loading shall be inspected by the area supervisor before it can be used again.

3. N/A = Not Applicable (if N/A is checked an explanation shall be given in the Comments column)

Signature:                                                                                                   Date:
Powered industrial trucks and forklift safety program sample

Exhibit 5
Powered industrial truck training checklist

The following topics must be covered unless the employer can demonstrate that certain topics are unnecessary because they are not applicable to the safe operation of the truck(s) in the workplace:

**Truck-related topics**
- Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate
- Differences between the truck and the automobile
- Truck controls and instrumentation: where they are located, what they do, and how they work
- Engine or motor operation
- Steering and maneuvering
- Visibility (including restriction due to loading)
- Fork and attachment adaptation, operation, and use limitations
- Vehicle capacity
- Vehicle stability
- Any vehicle inspection and maintenance that the operator will be required to perform
- Refueling and/or charging and recharging of batteries
- Operating limitations
- Any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the employee is being trained to operate

**Workplace-related topics**
- Surface conditions where the vehicle will be operated
- Composition of loads to be carried and load stability
- Load manipulation, stacking, and unstacking
- Pedestrian traffic in areas where the vehicle will be operated
- Narrow aisles and other restricted places where the vehicle will be operated
- Hazardous (classified) locations where the vehicle will be operated
- Ramps and other sloped surfaces that could affect the vehicle's stability
- Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust
- Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation
Exhibit 6
Powered industrial truck certification

Operator name: 

Operator signature: 

Date of training: 

Training performed by: 

Trainer’s signature 

Date of evaluation: 

Evaluation performed by: 

Evaluator’s signature: