

## General Guidelines for Forklift Operators

**Please note:** If the supervisor at the work site to which you have been assigned provides you with verbal or written instructions which conflict with the information and safety guidelines provided below, please contact Partners Personnel immediately.

### INTRODUCTION / OVERVIEW

Forklifts are specialized, multiuse vehicles. They can do many tasks that require heavy lifting, moving, stacking, loading and unloading materials of varied sizes, shapes, and weights that would be difficult to handle without them.

But forklifts are as tricky as they are useful. They can be dangerous if they're not operated by people who are familiar with the equipment — and with the safety rules that such equipment demands.

You can't drive a forklift like your personal car or truck, and you can't operate a powered vehicle in a plant the way you drive on the open road. A forklift, even unloaded, is heavier than many cars and not as well balanced. To drive a forklift safely, you have to understand the possible risks — and know just what to do to avoid accidents.

That's why OSHA permits only people who have had special training and received specific authorization (certification) to operate forklifts. In accordance with OSHA, Partners Personnel's policy is that no one will operate a forklift on any assignment through Partners Personnel who is not currently certified to operate such a vehicle.

Forklift safety training is so important and once is not enough. A review like this is important for operators and it helps the rest of us who work around forklifts understand just what this equipment can do and how much it takes to do it right. None of us can afford to get careless and risk accidents with forklifts. They can be deadly and costly.

### GENERAL HAZARDS

Forklifts have several main hazards that can result in injury or even death for drivers or pedestrians. The biggest dangers are that the forklift might:

- Tip over
- Fall off a loading dock
- Collide with a vehicle, equipment, or person
- Drop a load

Because both the forklift and the loads it carries are heavy, these accidents can be very serious. That's why the training of operators, and forklift safety consciousness are so important. Accidents happen when forklifts are not operated properly. When you know what you're doing with a forklift — and do it correctly — you've got a first-class tool for moving material, and not a lethal weapon.

### IDENTIFYING HAZARDS

As mentioned earlier, forklift operators have to avoid situations that could cause the truck or the load to drop. That's not an easy task when you look at the design of a forklift truck and the various weights and shapes it carries. When you try to identify the potential hazards of a specific job, you have to consider the following:

- The vehicle's capacity
- The characteristics of the load
- The route to be covered, including floor surfaces and obstructions
- Any limitations in the areas where the load is picked up and dropped
- Other activities going on in the work area
- The condition of the forklift itself

You can't judge all those possible hazards unless you're well-trained in the operations of the particular vehicle and really have your safety awareness front and center at all times.

## PROTECTION AGAINST HAZARDS

While forklifts certainly present risks, they are also designed with many features that protect operators. To make the most of these features, a trained forklift operator must understand and use the manual provided by the forklift manufacturer, as well as the safety rules required by OSHA, Partners Personnel and the client customer to which you have been assigned. If you do not understand any portion of the manual, ask your supervisor.

Let's look first at some of the protections that are part of forklift design. A forklift has:

- A label or nameplate that tells how heavy a load the forklift can carry safely.
- An overhead guard that protects the operator from falling objects and from being crushed if the vehicle tilts over.
- A load backrest extension on certain trucks that helps keep the load from falling backward.
- Mast tilt controls so you can move the load forward and backward while you're getting it in position (although not while you're moving).
- A safety platform firmly secured to the lifting carriage and/or forks for trucks designed to lift personnel.
- Lights and horn to warn others you're coming.

OSHA's forklift regulation offers further protections by requiring limits on forklift carbon monoxide gas emissions. In addition, the forklift regulation requires that areas where forklifts are operated have:

- Adequate lighting or extra lighting on the truck.
- Sufficient headroom under overhead installations, lights, pipes, sprinklers systems, etc.
- Clear fire aisles and access to stairways and fire equipment.
- Properly secured dockboard and bridgeplates.

The most important of all the requirements states that only trained authorized people can operate forklifts, and they must follow very specific safety procedures as they perform every part of their jobs.

## SAFETY PROCEDURES

A lot of forklift safety is common sense. For example, use your seat belts and wear hard hats and any other required protective gear.

Also, always obey speed limits and other traffic rules. When you're driving a forklift, speed is a risk, not a plus. Forklifts demand other common-sense precautions, also. For example, yield the right of way to pedestrians and keep out of their lanes. Use mirrors on the vehicle, walls, and ceilings to help see around corners.

The OSHA forklift regulation itself includes many common-sense precautions. Some of them apply not only to the forklift driver, but to everyone who works around forklifts. For instance:

- Stunt driving and horseplay are never permitted.
- Never drive a truck up to a person who's standing in front of a bench or wall or other fixed object.
- Never allow anyone to stand, walk or work under the elevated mast or attachment, even if it's empty.
- Never allow an unauthorized person to ride on a forklift.
- Keep your arms, hands, and legs inside the truck.

Here are some other key safety procedures drivers must follow when traveling in a forklift:

- Stay at least three (3) truck lengths behind another truck.
- Slow down, stop, and sound the horn at cross aisles and other places where you can't see well.
- Keep a clear view of the path of travel; if your load blocks your forward view, travel backwards for better visibility.
- Yield the right of way to emergency vehicles like ambulances and fire trucks.
- Slow down on wet or slippery surfaces.
- Slow down before making a turn; avoid sharp turns that could tip the truck.
- Stay with the truck if it tips -Note: a truck can tip even when empty.
- Avoid driving over loose objects.

- Cross railroad tracks diagonally if possible.
- Drive slowly and carefully over dock boards or bridge plates; don't exceed their rated capacity.
- If you're going up or down a grade of more than 10 percent, drive with the load facing uphill and raise it only enough to clear the surface.
- Watch rear-end swing and be careful handling long, high or wide loads.
- Never carry riders on forks or on truck.
- Don't pass another truck at intersections, blind spots or other dangerous locations.
- Keep a safe distance from the edge of elevated ramps or platforms.

Safety procedures don't end there. You also have to be cautious in the steps you follow when you load and unload a forklift.

**Before loading**, make sure the load is within the truck's rated capacity, is stable, and can be centered. If a load is loose or uneven, stack and/or tie the pieces.

**To pick up the load**, set the forks high and wide enough to go under it. Then drive into the loading position, put the load squarely on the forks, and drive under the load until it touches the carriage slightly. Next, tilt the mast back and lift the load. Before you start to travel, tilt it back a little more.

**As you carry the load**, keep it tilted back and low with the forks 6 -8 inches above the ground. Don't raise or lower the load while you're moving, and don't carry anything on the overhead guard.

**When you load**, turn the forklift slowly into position and go straight into trailers or railcars.

**When you unload onto a truck**, be sure the truck's rear wheels are chocked, with brakes locked on. Check that the dock plate is secure, then position the load, tilt it forward, and release.

**To unload into a rack or stack**, check how high you can safely stack materials. Then raise and position the load to the correct height, move it slowly into position, and tilt the load forward and lower it onto the rack or stack. Finally, pull the forks back slowly, then back out slowly, looking over your shoulder.

**Parking** a forklift has its own precautions. First, try to find a parking space away from traffic on a flat surface that doesn't block aisles, doors, exits, etc. Before getting off the truck, lower forks or attachments to the floor, put drive in neutral, turn off key, set parking brake, and apply chocks to wheels.

OSHA also has specific procedures to follow when you leave a truck unattended or are, for any reason, 25 or more feet away from it. In those instances, you must fully lower the load engaging means, neutralize the controls, shut off the power, set the brakes, and remove the keys. If you're parked on an incline, block the wheels.

Yet another series of details in the OSHA regulation covers refueling or recharging forklift trucks. Those tasks must be performed with the forklift engine turned off in assigned, ventilated areas away from anything that could cause a fire or explosion. Smoking is, of course, prohibited, and fire extinguishers, spill and cleanup equipment should be nearby.

**Batteries** have an explosion risk that could cause fire, burns, and blindness, so don't touch them. Use acid-resistant, material-handling equipment and wear face and body protection designed to resist corrosion. Remove the battery cap slowly and leave it open to release heat. Pour acid into water, not vice versa, to prevent overheating or splattering.

**Gas or propane** fueling must be done according to instructions provided by the truck manufacturer. Don't use an open flame to check the fuel level and be very careful not to let the fuel spill. If it does, clean it up quickly and cap the tank before starting the truck engine. If you're using propane, take the empty tank outside and open the valve to let any leftover propane escape to the open air.

**It is a good idea to check the machine daily before use.** You want to be sure everything is working properly and is in good shape. Follow procedures from the manufacturer's manual, those set by the client company to which you are assigned, by Partners Personnel. Be sure there are no leaks, and that forks aren't bent or damaged.



Never use a truck that has a defect, or that sparks or smokes, needs a repair, or is in anyway unsafe and leave repairs to authorized personnel in proper areas. That's another OSHA requirement.

### **WRAP-UP**

Like any tools, forklifts are a great help if you use them correctly. And like any vehicles, they will function safely for a long time if they are well-maintained and are operated properly. The message here is that forklifts must be operated by skilled, knowledgeable people who respect the equipment and care about safety. The rest of us must respect the risks associated with forklifts — and the skills and safety knowledge of the trained operators.

Don't cut corners or take chances. The risks are simply too great.

Operating a forklift is serious business. That's why operators must be authorized for the job and thoroughly trained to do it properly and safely. And its why OSHA has come up with such a long, detailed list of safety requirements and procedures. By following them, and exercising caution and common sense, we can get forklifts to handle much of the heavy lifting — without heavy risks.

### **Acknowledgment of Receipt of the General Guidelines for Forklift Operators**

I acknowledge that I have received a copy of Partners Personnel "General Guidelines for Forklift Operators" and have read and understand its contents.

I also understand that I am required to adhere to these guidelines at all times when operating a forklift as an Associate of Partners Personnel. I understand that failure to follow these guidelines or participating in any unsafe activities at any job site will result in disciplinary action being taken, up to and including termination of employment.

I also hereby certify that I have been trained within the last 12 months by a duly authorized trainer to operate a forklift.

I understand that Partners Personnel will be confirming the above training with my previous employer, and I herewith give my permission to any of my previous employers to release this information to People Direct.

Your Signature:  Date: \_\_\_\_\_

Your Name (Printed): \_\_\_\_\_

Partners Personnel–Management Services, LLC

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name and Title of Company Representative: \_\_\_\_\_