



INDUSTRIAL LIFT TRUCK OPERATION

1. PURPOSE

This policy is developed to establish a uniform policy for selecting and training Industrial Powered Lift Truck operators for Okaloosa County. This policy will ensure that all operators are trained in the proper use and in the safe operations of the industrial powered lift trucks.

2. POLICY

- 2.1. Safety is very important in the operation of powered industrial trucks. It is management's responsibility to provide the best equipment possible.
- 2.2. Each employee is obligated to use forklifts as safely as possible to prevent accidents involving employees and equipment. Employees should also communicate safety to each other whenever this equipment is in use.

3. RESPONSIBILITIES

Responsibilities are as follows:

3.3. Safety Inspections

- 3.3.1. Inspections should be done to each powered industrial truck before use, even if someone else has already used it.
- 3.3.2. Any and all problems should be reported to one's supervisor immediately who will schedule to have the powered industrial truck repaired by qualified individuals.
- 3.3.3. All areas of operation should be checked daily for any hazards.

3.4. Accident Reporting

- 3.4.1. All accidents involving employees and/or equipment no matter how small the damage should be reported immediately to a supervisor.

3.5. Fork Lift Use

- 3.5.1. All operators must attend a safety class as prescribed in Section 4.

3.5.2. Only qualified employees will be allowed to operate industrial lift trucks.

3.5.3. All operators must become familiar with the local facility regulations and safety features of the equipment.

3.6. **Inspection Policy**

3.6.1. The below procedures will be used before using any industrial lift truck at the beginning of any work operation.

3.6.2. At the beginning of your shift or at the time the section needs a powered industrial truck, an employee will check all conditions informing the section supervisor of any defects.

3.6.3. If any conditions exist with the powered industrial truck that is unsafe, the forklift should be pulled from duty and taken to qualified persons for repair.

3.7. **Certification**

3.7.1. Every Okaloosa County employee who has completed the operator's course for industrial lift trucks will receive an Operator's Permit.

3.7.2. Operator's Permits must be kept in the possession of the qualified employee during operation of the powered industrial truck.

3.7.3. Supervisors/employees are responsible in ensuring their Operator's Permits remain current. Supervisors should re-schedule training as required.

3.7.4. The department head shall ensure that each operator has been certified, trained and evaluated as required by section 4.0. The certification shall include the name of the operator, the date of the training, the date of the evaluation, and the identity of the person(s) performing the training or evaluation

4. **TRAINING**

4.1. Industrial lift truck operators will follow all general safety rules and any specific safety rules set forth within their respective work area. Training will be either contracted out provided by a reputable organization (i.e. CLARK, Inc.), or selected employees may be trained by a reputable training source and be used as in-house instructors. If neither of these two alternatives is possible, notify the County Risk Management Director for assistance.

4.2. **Safe operation**

4.2.1. The director 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 this section.

4.2.2. Prior to permitting an employee to operate a powered industrial truck (except for training purposes), the Supervisor shall ensure that each operator has successfully completed the training required by this section.

4.2.3. Any operator will check the industrial lift truck before use regardless of whether someone else has been using it.

4.3. **Training program implementation**

4.3.1. Trainees may operate a powered industrial truck only:

4.3.1.1. Under the direct supervision of persons who have the knowledge, training, and experience to train operators and evaluate their competence; and

4.3.1.2. Where such operation does not endanger the trainee or other employees.

4.3.2. Training shall consist of a combination of formal instruction (e.g., lecture, discussion, interactive computer learning, video tape, written material), practical training (demonstrations performed by the trainer and practical exercises performed by the trainee), and evaluation of the operator's performance in the workplace.

4.3.3. All operator training and evaluation shall be conducted by persons who have the knowledge, training, and experience to train powered industrial truck operators and evaluate their competence.

4.4. **Training program content**

Powered industrial truck operators shall receive initial training in the following topics, except in topics which it can be demonstrated that the topic is not applicable to safe operation of the truck in the employee's workplace.

4.5. **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 restrictions 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.

4.6. **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

4.7. **Refresher training and evaluation**

4.7.1. Refresher training, including an evaluation of the effectiveness of that training, shall be conducted as required by the following section to ensure that the operator has the knowledge and skills needed to operate the powered industrial truck safely.

4.7.2. Refresher training in relevant topics shall be provided to the operator when:

- 4.7.2.1. The operator has been observed to operate the vehicle in an unsafe manner

- 4.7.2.2. The operator has been involved in an accident or near-miss incident
 - 4.7.2.3. The operator has received an evaluation that reveals that the operator is not operating the truck safely
 - 4.7.2.4. The operator is assigned to drive a different type of truck; or
 - 4.7.2.5. A condition in the workplace changes in a manner that could affect safe operation of the truck.
- 4.7.3. An evaluation of each powered industrial truck operator's performance shall be conducted at least once every **three years**.

4.8. Avoidance of duplicative training

If an operator has previously received training in a topic specified in section 4.3, and such training is appropriate to the truck and working conditions encountered, additional training in that topic is not required if the operator has been evaluated and found competent to operate the truck safely.

5. RULES FOR INDUSTRIAL LIFT TRUCK USE

5.1. Truck operations

- 5.1.1. Trucks shall not be driven up to anyone standing in front of a bench or other fixed object.
- 5.1.2. No person shall be allowed to stand or pass under the elevated portion of any truck, whether loaded or empty.
- 5.1.3. Unauthorized personnel shall not be permitted to ride on powered industrial trucks. A safe place to ride shall be provided where riding of trucks is authorized.
- 5.1.4. The employer shall prohibit arms or legs from being placed between the uprights of the mast or outside the running lines of the truck.
- 5.1.5. Employees shall abide by the following when leaving the industrial lift truck unattended and/or parked:
 - 5.1.5.1. When a powered industrial truck is left unattended, load engaging means shall be fully lowered, controls shall be neutralized, power shall be shut off, and brakes set. Wheels shall be blocked if the truck is parked on an incline.
 - 5.1.5.2. A powered industrial truck is unattended when the operator is 25 ft. or more away from the vehicle which remains in his view, or whenever the operator leaves the vehicle and it is not in his view.

- 5.1.5.3. When the operator of an industrial truck is dismounted and within 25 ft. of the truck still in his view, the load engaging means shall be fully lowered, controls neutralized, and the brakes set to prevent movement.
- 5.1.6. A safe distance shall be maintained from the edge of ramps or platforms while on any elevated dock, or platform or freight car. Trucks shall not be used for opening or closing freight doors.
- 5.1.7. Brakes shall be set and wheel blocks shall be in place to prevent movement of trucks, trailers, or railroad cars while loading or unloading. Fixed jacks may be necessary to support a semi-trailer during loading or unloading when the trailer is not coupled to a tractor. The flooring of trucks, trailers, and railroad cars shall be checked for breaks and weakness before they are driven onto.
- 5.1.8. There shall be sufficient headroom under overhead installations, lights, pipes, sprinkler system, etc.
- 5.1.9. An overhead guard shall be used as protection against falling objects. It should be noted that an overhead guard is intended to offer protection from the impact of small packages, boxes, bagged material, etc., representative of the job application, but not to withstand the impact of a falling capacity load. The overhead guard is also not to be blocked with plywood or cardboard so as to protect the driver from rain.
- 5.1.10. A load backrest extension shall be used whenever necessary to minimize the possibility of the load or part of it from falling rearward.
- 5.1.11. Only approved industrial trucks shall be used in hazardous locations.
- 5.1.12. Whenever a truck is equipped with vertical only, or vertical and horizontal controls elevatable with the lifting carriage or forks for lifting personnel, the following additional precautions shall be taken for the protection of personnel being elevated.
 - 5.1.12.1. Use of a safety platform firmly secured to the lifting carriage and/or forks.
 - 5.1.12.2. Means shall be provided whereby personnel on the platform can shut off power to the truck.
 - 5.1.12.3. Such protection from falling objects as indicated necessary by the operating conditions shall be provided.
- 5.1.13. Fire aisles, access to stairways, and fire equipment shall be kept clear.

5.2. **Traveling**

- 5.2.1. All traffic regulations shall be observed, including authorized plant speed limits. A safe distance shall be maintained approximately three truck lengths from the truck ahead, and the truck shall be kept under control at all times.

- 5.2.2. The right of way shall be yielded to ambulances, fire trucks, or other vehicles in emergency situations.
- 5.2.3. Other trucks traveling in the same direction at intersections, blind spots, or other dangerous locations shall not be passed.
- 5.2.4. The driver shall be required to slow down and sound the horn at cross aisles and other locations where vision is obstructed. If the load being carried obstructs forward view, the driver shall be required to travel with the load trailing.
- 5.2.5. Railroad tracks shall be crossed diagonally wherever possible. Parking closer than 8 feet from the center of railroad tracks is prohibited.
- 5.2.6. The driver shall be required to look in the direction of, and keep a clear view of the path of travel.
- 5.2.7. Grades shall be ascended or descended slowly.
 - 5.2.7.1. When ascending or descending grades in excess of 10 percent, loaded trucks shall be driven with the load upgrade.
 - 5.2.7.2. On all grades the load and load engaging means shall be tilted back if applicable, and raised only as far as necessary to clear the road surface.
- 5.2.8. Under all travel conditions the truck shall be operated at a speed that will permit it to be brought to a stop in a safe manner.
- 5.2.9. Stunt driving and horseplay shall not be permitted.
- 5.2.10. The driver shall be required to slow down for wet and slippery floors.
- 5.2.11. Dockboard or bridgeplates shall be properly secured before they are driven over and shall be driven over carefully and slowly and its rated capacity never exceeded.
- 5.2.12. Elevators shall be approached slowly, and then entered squarely after the elevator car is properly leveled. Once on the elevator, the controls shall be neutralized, power shut off, and the brakes set.
- 5.2.13. Motorized hand trucks must enter elevator or other confined areas with load end forward.
- 5.2.14. Running over loose objects on the roadway surface shall be avoided.
- 5.2.15. While negotiating turns, speed shall 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 shall be turned at a moderate, even rate.

5.3. Loading

- 5.3.1. Only stable or safely arranged loads shall be handled. Caution shall be exercised when handling off-center loads which cannot be centered.
- 5.3.2. Only loads within the rated capacity of the truck shall be handled.
- 5.3.3. The long or high (including multiple-tiered) loads which may affect capacity shall be adjusted.
- 5.3.4. Trucks equipped with attachments shall be operated as partially loaded trucks when not handling a load.
- 5.3.5. A load engaging means shall be placed under the load as far as possible; the mast shall be carefully tilted backward to stabilize the load.
- 5.3.6. Extreme care shall be used when tilting the load forward or backward, particularly when high tiering. Tilting forward with load engaging means elevated shall be prohibited except to pick up a load. An elevated load shall 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 shall be used.

5.4. Operation of the truck

- 5.4.1. If at any time a powered industrial truck is found to be in need of repair, defective, or in any way unsafe, the truck shall be taken out of service until it has been restored to safe operating condition.
- 5.4.2. Fuel tanks shall not be filled while the engine is running. Spillage shall be avoided.
- 5.4.3. Spillage of oil or fuel shall be carefully washed away or completely evaporated and the fuel tank cap replaced before restarting engine.
- 5.4.4. No truck shall be operated with a leak in the fuel system until the leak has been corrected.
- 5.4.5. Open flames shall not be used for checking electrolyte level in storage batteries or gasoline level in fuel tanks.

5.5. Tip Over Procedures

- 5.5.1. In case of tip over, the operator should observe the following:
 - 5.5.1.1. Operator to remain in seat and not jump.
 - 5.5.1.2. Grip steering wheel and brace feet.
 - 5.5.1.3. Tip with truck.

6. MAINTENANCE OF INDUSTRIAL TRUCKS

- 6.1. Any power-operated industrial truck not in safe operating condition shall be removed from service. All repairs shall be made by authorized personnel.
- 6.2. No repairs shall be made in Class I, II, and III (flammable) locations.
- 6.3. Those repairs to the fuel and ignition systems of industrial trucks that involve fire hazards shall be conducted only in locations designated for such repairs.
- 6.4. Trucks in need of repairs to the electrical system shall have the battery disconnected prior to such repairs.
- 6.5. All parts of any such industrial truck requiring replacement shall be replaced only by parts equivalent as to safety with those used in the original design.
- 6.6. Industrial trucks shall not be altered so that the relative positions of the various parts are different from what they were when originally received from the manufacturer, nor shall they be altered either by the addition of extra parts not provided by the manufacturer or by the elimination of any parts, except as provided in paragraph 6.11 of this section. Additional counter weighting of fork trucks shall not be done unless approved by the truck manufacturer.
- 6.7. Industrial trucks shall be examined before being placed in service, and shall not be placed in service if the examination shows any condition adversely affecting the safety of the vehicle. Such examination shall be made at least daily. Where industrial trucks are used on a round-the-clock basis, they shall be examined after each shift. Defects when found shall be immediately reported and corrected.
- 6.8. Water mufflers shall be filled daily or as frequently as is necessary to prevent depletion of the supply of water below 75 percent of the filled capacity. Vehicles with mufflers having screens or other parts that may become clogged shall not be operated while such screens or parts are clogged. Any vehicle that emits hazardous sparks or flames from the exhaust system shall immediately be removed from service, and not returned to service until the cause for the emission of such sparks and flames has been eliminated.
- 6.9. When the temperature of any part of any truck is found to be in excess of its normal operating temperature, thus creating a hazardous condition, the vehicle shall be removed from service and not returned to service until the cause for such overheating has been eliminated.
- 6.10. Industrial trucks shall be kept in a clean condition, free of lint, excess oil, and grease. Noncombustible agents should be used for cleaning trucks. Low flash point (below 100 deg. F.) solvents shall not be used. High flash point (at or above 100 deg. F.) solvents may be used. Precautions regarding toxicity, ventilation, and fire hazard shall be consonant with the agent or solvent used.
- 6.11. Industrial trucks originally approved for the use of gasoline for fuel may be converted to liquefied petroleum gas fuel provided the complete conversion

results in a truck which embodies the features specified for LP or LPS designated trucks. Such conversion equipment shall be approved. The descriptions of the component parts of this conversion system and the recommended method of installation on specific trucks are contained in the OSHA standards.