

Loss Control Bulletin #41



**Republic
Indemnity**

Federal OSHA issued revised forklift operation training requirements on 12/1/98. The Federal standard reference is **29 CFR 1910.178 (i)** and applies to all except the agriculture and maritime industries. Training requirements for the construction industry are contained in **29 CFR 1926.602 (d)**. The changes include:

- Descriptions of the training methods and content to be covered
- Establishment of requirements for driver evaluation and retraining
- Establishment of a certification process

Changes to the regulations require employers to develop and implement training and refresher retraining programs that address:

- General principles of safe truck operation
- Types of vehicles used in the workplace
- The hazards created by these vehicles in the workplace

- The general requirements of the OSHA standard

TRAINING PROGRAM - Content of Training Program should include:

- Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate
- Differences between operating a forklift truck and an automobile
- Forklift truck controls and instruments, their locations, how they function
- Engine or motor operation
- Steering and maneuvering characteristics of forklift trucks
- Visibility restrictions due to loading
- Fork attachment operation and limitations
- Vehicle load capacity
- Vehicle stability (the Stability Triangle)
- Vehicle inspections and required operator maintenance
- Refueling and/or recharging of batteries
- Changing of batteries
- Operating limitations
- Review of the operating instructions, warnings, and precautions included in the operator's manual supplied by the forklift truck manufacturer
- Surface conditions where the vehicle will be operated
- Specific characteristics of loads to be moved and stability considerations
- Storage arrangement and access limitations
- Load manipulation, stacking, and unstacking
- Pedestrian traffic safety in areas where forklift truck is to be operated
- Narrow and congested aisles constricting forklift truck maneuvering

- Hazardous locations the forklift may be operating in
- Ramps and sloped surfaces that can affect vehicle stability
- Weather conditions that can affect stability and maneuverability of forklift truck
- Areas where forklift truck operations are prohibited
- Closed environments and other areas where insufficient ventilation could cause a build-up of carbon monoxide or diesel exhaust to dangerous levels
- Other unique or potentially dangerous conditions of the workplace that could affect the safe operation of forklift trucks.

DRIVER EVALUATION - An evaluation of a driver's performance by a qualified instructor* must be completed as part of the initial training, after each refresher training, and once every three years. An evaluation may include a combination of the following:

- Discussions with the employee
- Observations of the employee driving the forklift
- Written documentation of previous training
- A formal driving test

Although the regulations do not require employers to issue a "license" to operators, employers are required to provide each operator with training and to maintain certain records of driver certification for each operator.

The guidelines provided in this bulletin are only intended to provide an overview of some of the more important steps that can be taken by management to establish a safe workplace. The guidelines are not considered exhaustive of all measures and controls that can be implemented by management to address all potential loss or injury producing causes. Ultimately it is the responsibility of management to take the necessary steps to provide for employee and customer safety.

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CERTIFICATION - Documentation of driver certification requires that the following information be maintained for each operator:

- The name of the operator
- Date training was provided
- Date of any evaluations conducted
- Name of the person(s) who provided training and evaluation
- Operator certification records are required to be maintained for a period of three years unless training is provided more frequently. In such cases, only the most recent certification records need to be maintained

REFRESHER TRAINING – A specific frequency of refresher training is not specified in the regulations but must be given when any of the following occurs:

- The operator was observed operating in an unsafe manner.
- The operator was involved in an accident or a near-miss incident.
- An evaluation reveals that the operator is not operating a truck safely.
- The operator is assigned to drive a different type of truck.
- When a workplace condition has changed that can affect the safe operation of a truck.

Some forklift manufacturers will provide operator training to their customers upon request. In addition, the websites of forklift manufacturers typically contain useful training materials.

For additional information, please call your Republic Indemnity Loss Control Representative.

* A qualified instructor is a person who may possess a recognized degree, certificate, or professional standing, or who has extensive knowledge, training, and experience and has demonstrated the ability to train and evaluate industrial truck operators.

Training Resources for Employers

Powered industrial truck training materials Fed-OSHA: <http://www.osha.gov/dcsp/ote/trng-materials/pit/pit.html>

Fork lift safety training material OR-OSHA: <http://www.cbs.state.or.us/external/osha/pdf/workshops/221w.pdf>

29 CFR 1910.178: http://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=STANDARDS&p_id=9828

29 CFR 1910.178 App A: http://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=STANDARDS&p_id=9829

29 CFR 1926.602 (d): http://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=STANDARDS&p_id=10769

National Safety Council Training Seminar Schedule: <http://www.nsc.org/train/>

Safety Center Training Seminar Schedule: <http://www.safetycenter.org>

Online OSHA Forklift Training Course: <http://www.free-training.com/osha/forklift/forkmenu.htm>

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