

Lift Truck Operator Evaluation

Classes 1, 4, 5

Operator's Name:
Trainer or Evaluator's Name:

Date: ___/___/_____

Lift Truck Identification	
Classification: Classes 1, 4, 5	Model:
Manufacturer:	Capacity:

Workplace Related Topics

Each of the following subjects must be reviewed with the Operator:

OK	Site-Specific Hazard Recognition Discussion and Review
	Surface conditions where the vehicle will be operated.
	Composition of the loads to be carried and load stability.
	Load manipulation, stacking and unstacking.
	Pedestrian traffic in areas where the vehicle will be operated.
	Narrow isles 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 of the vehicle.
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Truck-Specific Topics

OK	Operators Manual Review and Discussion
	Operator has reviewed the Operators Manual and is familiar with the specific truck to be operated.

Operator Evaluation

OK	Not OK	Beginning Lift Truck Operation
		Completes Operator's Daily Checklist, before operating the lift truck.
		Seat belt or restraint is secured before operating the lift truck.
		Operator is wearing the appropriate safety equipment.
		The key switch is turned on and the truck activated correctly.
		Checks that batteries are fully charged or that the fuel tank is full
		Releases parking brake or uses one foot to depress and hold the deadman pedal down.
		Raises the forks to the proper level before moving the vehicle.

OK	Not OK	General Operating Safety
		Operator's hands are correctly positioned on the steering assembly.
		All body parts remain within the vehicle's operator compartment
		Visually scans the surrounding area, and uses the vehicles mirrors and/or fixed mirrors at the work site.
		Raises the forks 4"-6" off the surface before moving the truck.
		Moves the directional/speed control smoothly.
		Increases and decreases speed gradually by smoothly moving the speed control or depressing and releasing the accelerator pedal.



		Maintains a proper speed.
		Watch for debris or surface irregularities in the direction of travel.
		Uses the brakes properly to bring the truck to a stop.
		The operator exits only after the truck comes to a complete stop and the parking brake is applied.

OK	Not OK	Basic Driving Skills
		Maintains a clear view in the direction of travel
		Slows down and looks before turning into an aisle or intersection.
		Positions the truck to execute a smooth turn.
		Completes the turn without striking objects.
		Aware of the swing of the front and rear of the truck while turning.
		Stops smoothly before entering an intersection.
		Sounds horn.
		Watches for vehicle and pedestrian traffic before proceeding.
		Continues through the intersection slowly and cautiously.
		Obeys site-specific traffic rules and signals.

OK	Not OK	Pedestrian Traffic
		Decreases speed when approaching a pedestrian.
		Yields right of way to all pedestrians.
		Sounds horn to alert pedestrians.
		Gets pedestrians' attention before passing.
		Never lets anyone stand under a raised carriage loaded or unloaded.



OK	Not OK	Picking Up a Load
		Verifies that load is within the rated capacity of the lift truck.
		Checks load stability. Repositions and balances load if it is unstable.
		Lift truck is squared with the load when approaching.
		Forks are spaced as far apart as possible before entering a load.
		Line the truck and forks up with the pallet openings of the load before picking up the load.
		Move the forks forward slowly until the load just touches the backrest.
		Raises the load off the surface while watching for overhead obstructions.
		Tilts the mast back to cradle the load.
		Checks behind the truck and sounds horn before backing out with the load.
		Maintains vision in the direction of travel and proceeds slowly.
		Lowers forks and retracts carriage (if applicable) to most stable driving position.

OK	Not OK	Moving a Load
		The operator travels with the load as close to the floor as possible..
		Always tries to keep a clear view of his path of direction.
		Observes all site-specific traffic rules and speed limits.
		Keeps the mast tilted back so the loaded truck is most stable.
		If the load obstructs forward vision the truck is driven rear first.
		No sudden turns or maneuvers while at safe speed.



		Maintains a safe distance behind another truck.
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OK	Not OK	Deploying a Load
		Aligns the truck squarely and centers the load with the stacking area..
		Raises the load so the forks clear the stacking level slightly.
		Tilts the mast to the vertical position.
		Slowly moves the truck forward, or extends the fork carriage until the load is over the rack or stacking area.
		Lowers the load until it touches the rack or stacking surface.
		Avoids over lowering by visually checking for slack in carriage chains.
		Never adjusts load position by shoving it with forks
		Retracts the forks if applicable.
		Looks behind and sounds horn before backing away from the load.
		Lowers the forks as low as possible.

OK	Not OK	Loading and Unloading a Trailer
		Verifies that the load capacity of the trailer floor is sufficient for the fully loaded lift truck.
		Checks that trailer wheels are chocked, brakes set and jacks in place.
		Checks that the dock plate, dock board or hydraulic ramp is in place and properly secured.
		Checks that the trailer entrance is wide enough.
		Checks the trailer of the floor for cracks, weaknesses and openings.
		Enters the trailer slowly and cautiously. Looks in the direction of travel when exiting the trailer.



OK	Not OK	Loading and Unloading Railroad Cars
		Checks that the hand brake is applied, wheel blocks and derailler are set before entering the railroad car.
		Checks the condition of the floor for cracks, weaknesses and openings
		Checks that the railroad car entrance is adequate.
		Enters the railroad car slowly and cautiously.
		Looks in the direction of travel before exiting the railroad car.

OK	Not OK	Elevators
		Checks the elevator capacity to make sure it can support the weight of the forklift truck with a load.
		Checks that the height of the entrance is adequate for a loaded truck.
		Approaches the elevator slowly and stops at a safe distance from the elevator.
		Enters the elevator squarely.
		Shuts the truck off and applies the brakes while on the elevator.

OK	Not OK	Traveling on Ramps
		Operator has control of the truck and travels slowly and cautiously.
		Operator travels with forks down hill when traveling unloaded.
		Operator travels with load uphill when traveling with a load.
		Operator does not attempt to turn on the ramp.



OK	Not OK	Traveling on Dock Plates or Dock Boards
		Dock Boards or Dock plates will be properly secured before attempting to drive over them.
		Is aware of a dock plate being wet, slippery or rough.
		Dock Boards or Dock Plates will be driven over carefully and slowly and their rated capacity will never be exceeded.

OK	Not OK	Parking
		Parks the trucks in a designated parking area.
		Fully lowers the forks.
		Applies the parking brake.
		Turns the Key Off.

Please review this evaluation with the operator:

Evaluator: _____

Date: ____/____/____

Operator: _____

Date: ____/____/____

