

INTRODUCTION

This Trainee's Guidebook contains valuable information that will be provided to you in the four lessons of the Forklift Operator Certification Series. The series is a key element of your organization's Forklift Operator Certification Program. It is designed to help certify forklift operators at your facility while ensuring that you receive the appropriate training that will help prevent injuries, death and property damage during lift truck operation.



- You must be trained, authorized and certified by your organization before operating any type of forklift and your performance must be reevaluated every three years.
- You will be required to receive refresher training if: 1) you have been observed operating a vehicle in an unsafe manner; 2) you have been involved in an accident or near-miss incident; 3) you have received an evaluation that reveals you are not operating the truck safely; 4) you have been assigned to operate a different type of truck; or 5) conditions in the workplace changes in a manner that could affect safe operation of the truck.

Did you know?



Forklifts are commonly known by a variety of terms that refer to all types of these vehicles, including powered industrial truck, lift truck, forklift, truck, work hoist, just to name a few.

How to Use The Contents of this Program:

1. View all four lessons of the program.
 - LESSON 1: Training & Pre-Operational Inspection (10 minutes)
 - LESSON 2: Safety (10 minutes)
 - LESSON 3: Load Capacity & Operation (12 minutes)
 - LESSON 4: Classification & Refueling/Recharging (13 minutes)
 You may view each lesson as many times as you wish.
2. Review the content of this guidebook and complete the review quiz at the end of each lesson.
3. Walk through the work environment(s) in which you will operate your forklift with your instructor, noting any specific obstacles, hazards, pedestrian traffic and other special conditions you may encounter during operation.
4. Review any specific requirements for the forklift(s) you will be certified to operate with your instructor.
5. Prepare for the performance evaluation by reviewing operating skills with your trainer and practicing maneuvering drills specified by your organization.
6. You will receive a completion certificate and wallet certification card upon successful performance of these steps.

32-Page Trainee's Guidebook
Actual Size....8.5"(h) x 5.5"(l)

TABLE OF CONTENTS

LESSON 1:	operator Training	Page 1
	Pre-operational Inspection	Page 3
	Review Quiz I	Page 5
LESSON 2:	stability	Page 7
	Review Quiz II	Page 10
LESSON 3:	Loading	Page 12
	operation	Page 14
	Review Quiz III	Page 16
LESSON 4:	classification	Page 18
	Refueling	Page 20
	Review Quiz IV	Page 22
	INSPECTION CHECKLIST	Page 25
	OPERATOR TRAINING CERTIFICATE	Page 27

The Inspection Checklist and Operator Training Certificate can be reproduced and used as needed. The checklist serves only as an example and each organization is encouraged to use it as presented or make adjustments to include their own specific inspection requirements.



Disclaimer

This program is intended to help employees understand general work practices and procedures for the operation of powered industrial trucks; however, each organization must make its own determination of the appropriate requirements for its specific operations. No warranty, expressed or implied, is made that the information presented in this program is adequate or appropriate for any particular application or any specific type of powered industrial truck.

American Training Resources, Inc.
www.americantrainingresources.com • 800-278-2780

LESSON 1: Training & Pre-Operational Inspection

operator Training

Just as with any piece of heavy equipment, certification begins with training. You will receive formal training and practical training before becoming a certified operator. The following is essential information you should learn during your instruction.

1. Forklifts Handle Differently Than Cars

- Perhaps the first point to understand about forklifts is that they maneuver drastically different than a car. A lift truck is much heavier and it steers from the rear instead of the front.
- While this allows them to fit into constricted spaces, it also causes the rear end to make wide swings. As you can see, when turning, the rear end will swing wide right.
- Also, because they are much heavier than a car, forklifts are more difficult to stop and require more braking distance.

Did you know?



A forklift is much heavier than a car and steers from the rear instead of the front.

2. Basic Forklift Characteristics

- During your training, you will learn what information can be found in the operator's manual, such as safe operating techniques and routine maintenance procedures. The operator's manual will also include any special operating requirements and other precautions for that specific vehicle.
- Knowing how each control works will also be included in your training. While each forklift is different, they all have an instrument and control area.
- You will learn what each control does, including how the accelerator and brake pedals, how the mast controls function, how to put the truck in forward and reverse and how to use the horn and the lights.
- You will also be shown where the vehicle's data plate is located and what information it contains, such as the unit's weight and lifting capacity.
- As part of your training, you will learn the limitations of the truck's forks and any compatible attachments.
- You will also learn how your line of sight is affected by the mast and the load and how to drive the vehicle facing in reverse if required.
- Stability is a major concern for forklift operators. You must be aware that a truck's stability will change depending on the load being carried and the height to which the load is raised. A powered industrial truck's stability is also impacted by inclines and uneven surfaces.



LESSON 1: operator Training

32-Page *Trainee's Guidebook*
Actual Size....8.5"(h) x 5.5"(l)

3. Load Characteristics

- In addition to receiving instruction on the characteristics of the vehicle, you will also learn about the various types of loads to be lifted and transported in your workplace.
- You will be shown how to safely balance and arrange loads so the truck will be stable when the load is lifted.
- You will also learn how to determine the weight of a load and how to make sure it does not exceed the rated lifting capacity of the forklift.

4. Work Environments

- Another important area of training is learning about the work environment in which you will be operating a powered industrial truck.
- You should become familiar with the travel routes of other vehicles and pedestrians in areas where you will be operating.
- You should also learn the types of traveling surfaces you will be operating on as well as the kinds of uneven flooring, inclines and other obstacles.
- In addition, you will be shown where operation can be difficult, such as narrow aisles and tight spaces.



Did you know?

You will receive additional training when you are assigned to operate a different vehicle or when conditions in your work area change that could affect the safe operation of your lift truck.

5. Other Training

- Of course, you will also be instructed in safe driving techniques, including rules for traveling near co-workers and other vehicles, the meaning of traffic signs in the workplace, safe traveling speeds and proper clearance distances.
- Be aware that you will receive additional training when you are assigned to operate a different vehicle or when conditions in your work area change that could affect the safe operation of your lift truck.
- You will also be retrained if you are observed driving in an unsafe manner or are involved in an accident or near miss.
- To maintain your certification to operate a powered industrial truck, your operating performance must be evaluated every three years.

LESSON 1: operator Training

2

Pre-operational Inspection

1. Inspecting Outside Components Of The Forklift

- A key element of your training will address how to perform a pre-operational inspection on your vehicle. This inspection should be conducted before each shift according to your organization's and/or the vehicle manufacturer's guidelines.
- Many organizations provide their operators with inspection checklists. If you have such a list, check off each item after it has been inspected.
- A good rule of thumb is to begin your inspection by checking out the overall condition of the truck, looking for broken or damaged parts on all sides and on any guards.



- Make sure the nameplate and any other decals are in place and legible.
- If the tires are inflated, make sure they have the proper air pressure. Check tires for damage such as cuts, embedded objects or excessive wear.
- Make sure the seatbelt and any other required safety devices are present and in good condition.

2. Checking The Unit's Fluids & Fuel System

- Check the unit's fluids to make sure they are at the appropriate levels. This includes brake fluid, transmission oil, hydraulic fluid, and power steering fluid as well as battery electrolyte and radiator coolant if applicable.
- You should learn to visually identify various types of fluids by their color or smell so you can identify what type of fluid is leaking if you discover puddles on the floor. For example, coolant usually has a greenish-yellow color and smells like sweet syrup.
- If the forklift is powered by a liquid fuel, such as gasoline or diesel, or a compressed gas, such as LPG, make sure it has enough fuel to complete your shift.
- Inspect the fuel system, hoses and fittings for cracks and loose connections.
- Be aware that frost on LPG hoses, valves or fittings indicates there is a leak.



Did you know?

Different types of forklifts often require specific inspection protocols, so it is important that you know all of the items to check for each class of vehicle you operate.

3

LESSON 1: Pre-operational Inspection

32-Page Trainee's Guidebook
Actual Size....8.5"(h) x 5.5"(l)

LESSON 1 Review Quiz

1. A forklift is much _____ than a car.
 - a. Heavier
 - b. Lighter
2. Some forklifts do not have an instrument and control area.
 - a. True
 - b. False
3. Which of the following will be included in your operator training?
 - a. How the accelerator and brakes work
 - b. How to use the horns and lights
 - c. What information is contained on the data plate
 - d. How your line of sight is affected by the mast
 - e. All of the above
4. You will learn how to determine the weight of a load and how to make sure it doesn't exceed the rated lifting capacity of the forklift.
 - a. True
 - b. False
5. You will be retrained if you are _____.
 - a. Observed driving in an unsafe manner
 - b. Involved in an accident or near miss
 - c. Both of the above and more
6. To maintain your certification to operate a powered industrial truck, your operating performance must be evaluated every _____ years.
 - a. 3
 - b. 5
 - c. 10
7. A good starting point in beginning your pre-operational inspection is to _____.
 - a. Check the forklift's fluids and fuel system
 - b. Check items in the operator's compartment
 - c. Check out the overall condition of the truck
8. Radiator coolant usually has a _____ color.
 - a. Greenish-blue
 - b. Greenish-yellow
 - c. Brownish-yellow
9. _____ on LPG hoses, valves or fittings indicates there is a leak.
 - a. Corrosion
 - b. Grease
 - c. Frost

5

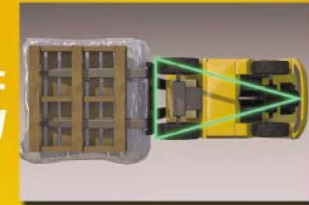
LESSON 1: Review Quiz

TRAINEE'S GUIDEBOOK

FORKLIFT OPERATOR CERTIFICATION SERIES



LESSON 1: Training & Pre-operational Inspection



LESSON 2: Stability



LESSON 3: Loading & operation



LESSON 4: Classification & Refueling/Recharging

For additional copies of this Guidebook, visit americantrainingresources.com or call 800-278-2780.

 American Training Resources

32-Page *Trainee's Guidebook*
Actual Size....8.5"(h) x 5.5"(l)

FORKLIFT DAILY/PRE-SHIFT INSPECTION CHECKLIST

Operator: _____ Date: _____

Supervisor: _____ Shift #: _____

Vehicle #: _____ Serial #: _____

Check (✓) the appropriate box to indicate if an item is OK or if your unit needs repairs or adjustments. (List details at bottom.)

Tires are inflated and free of excessive wear or damage. Nuts are tight.	OK	OK	OK	OK	OK	OK	OK	OK	OK
Forks and Mast are not bent, worn, or cracked	OK	OK	OK	OK	OK	OK	OK	OK	OK
Fork Pins and Fork Stops (if equipped) are not bent or missing	OK	OK	OK	OK	OK	OK	OK	OK	OK
Load Back Rest Extension is in place and not bent, cracked, or loose	OK	OK	OK	OK	OK	OK	OK	OK	OK
Overhead Guard is in place and not bent, cracked, or loose	OK	OK	OK	OK	OK	OK	OK	OK	OK
Attachments (if equipped) operate OK and are not damaged	OK	OK	OK	OK	OK	OK	OK	OK	OK
Forklift Body is free of excessive lint, grease, or oil	OK	OK	OK	OK	OK	OK	OK	OK	OK
Oil - Engine, Hydraulic & Gear Oil should be full and free of leaks	OK	OK	OK	OK	OK	OK	OK	OK	OK
Radiator - Full and free of leaks	OK	OK	OK	OK	OK	OK	OK	OK	OK
Fuel Level - OK and free of leaks	OK	OK	OK	OK	OK	OK	OK	OK	OK
Battery & Battery Connections (if applicable) - Charge level is OK when holding full forward tilt and connections are tight	OK	OK	OK	OK	OK	OK	OK	OK	OK
Covers over battery and other hazardous parts are in place and secure	OK	OK	OK	OK	OK	OK	OK	OK	OK
Load Rating Plate is present and readable	OK	OK	OK	OK	OK	OK	OK	OK	OK
Warning Decals and Operators' Manual are present and readable	OK	OK	OK	OK	OK	OK	OK	OK	OK
Seat Belt, Restraint or Harness are accessible and not frayed, damaged, or dirty	OK	OK	OK	OK	OK	OK	OK	OK	OK
Engine runs smooth and quiet without leaks or sparks from electrical components	OK	OK	OK	OK	OK	OK	OK	OK	OK
Horn functions properly	OK	OK	OK	OK	OK	OK	OK	OK	OK
Turn Signal (if equipped) operates smoothly	OK	OK	OK	OK	OK	OK	OK	OK	OK
Lights (head, tail, and warning) work and are visible	OK	OK	OK	OK	OK	OK	OK	OK	OK
Gauges and Instruments are all functional	OK	OK	OK	OK	OK	OK	OK	OK	OK
Lift and Lower operates smoothly without excessive noise	OK	OK	OK	OK	OK	OK	OK	OK	OK
Tilt operates smoothly without excessive drift or to the side	OK	OK	OK	OK	OK	OK	OK	OK	OK
Control Levers are labeled, accessible, and return to neutral	OK	OK	OK	OK	OK	OK	OK	OK	OK
Steering is smooth and responsive	OK	OK	OK	OK	OK	OK	OK	OK	OK
Brakes work and function properly. No fluid leaks.	OK	OK	OK	OK	OK	OK	OK	OK	OK
Parking Brake will hold the truck on an incline	OK	OK	OK	OK	OK	OK	OK	OK	OK
Backup Alarm (if equipped) functions properly	OK	OK	OK	OK	OK	OK	OK	OK	OK
Battery charge level is OK while holding full forward tilt.	OK	OK	OK	OK	OK	OK	OK	OK	OK
Comments (Items needing repair or adjustment):									

**32-Page Trainee's Guidebook
Actual Size....8.5"(h) x 5.5"(l)**