

## **POLICY**

This program is designed for the prevention of employee accidents and injuries while operating industrial trucks (forklifts). Only trained and certified operators, including supervisors, are allowed to operate Powered Industrial Trucks (Forklifts).

## **REFERENCES**

- §1910.178 – Powered Industrial Trucks

## **RESPONSIBILITIES**

Safe forklift operation is a responsibility shared between the Company and its employees.

### **Employer Responsibilities**

E & B Oilfield Services, Inc. is responsible for:

- Ensuring each powered industrial truck operator is competent to operate a powered industrial truck safely, as demonstrated by the successful completion of our training and evaluation
- Responding quickly to eliminate workplace hazards
- Ensuring all equipment is kept in good repair
- Ensuring employees follow safe job procedures
- Reviewing jobsite conditions whenever there is a significant change to any element of the job or there has been an injury or illness

### **Safety Committee Responsibilities**

- Assist in jobsite review for hazards to forklifts as necessary
- Assist in training employees to recognize and control workplace hazards
- Ensure operators of forklifts are certified operators
- Encourage employees to report hazards
- Implement appropriate controls
- Ensure corrective action is taken promptly

### **Employee Responsibilities**

- Operate forklifts only when certified to do so
- Follow safe job procedures
- Report hazards to a supervisor immediately

Powered Industrial Truck Operators: Operators are responsible for the following: Operating all powered industrial trucks in a safe manner consistent with safe rules of operation. Inspecting powered industrial trucks at the beginning of each work shift and completing the appropriate inspection forms. Reporting all equipment malfunctions and/or maintenance needs to their supervisors immediately. Park lift in safe place, remove key, tag or note problem.

## **TRAINING**

Training will include: formal classroom education, practical training, and an instructor's evaluation of the operator's performance. The instructor providing the training will be knowledgeable about the formal education and worksite requirements and qualified to provide operating instructions and evaluate each student's performance in the following:

- Load capacity
- 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: location, 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 and 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

### **Workplace-related topics include:**

- 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 potentially hazardous environmental conditions in the workplace
- 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
- Written approval is needed from the manufacture prior to any field modifications.

## **Refresher Training Requirements**

Refresher training, including an evaluation of the effectiveness of that training, will be conducted to ensure that the operator has the knowledge and skills needed to operate the powered industrial truck safely.

Refresher training will be conducted when:

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

The operator has been involved in an accident or near-miss incident

The operator has received an evaluation that reveals that the operator is not operating the truck safely

The operator is assigned to drive a different type of truck

A condition in the workplace changes in a manner that could affect safe operation of the truck

An evaluation of each powered industrial truck operator's performance will be conducted at least once every three years. Employee training records will be maintained for 5 years.

## **SAFE PRACTICES**

### **Operator Requirements**

- Operators must be certified to use the equipment he/she is operating
- Operators are prohibited from operating powered industrial trucks while under the influence of any of the following that might impair their driving skills:
  - Alcohol
  - Illegal drugs
  - Prescription or over the counter medications

### **Equipment Inspection and Maintenance**

- The operator will inspect their powered industrial truck before each shift
- A file will be maintained that lists the shift inspections of equipment. This file will be kept at the E & B Oilfield Services, Inc. Administration Offices
- A maintenance log will be kept that identifies repair needs and corrective actions taken for each powered industrial truck. This log will be kept at the Maintenance Administration Offices
- If repairs are needed on a powered industrial truck such that it cannot be safely operated, it will; be taken out of service until the repairs have been made
- After repairs have been completed, the powered industrial truck will be given a performance test to ensure that the equipment is safe to operate
- Forklifts will be kept in clean condition, free of dirt, excess oil and grease

## **Changing and Charging Batteries**

Equipment will be provided to safely flush and neutralize spilled battery acid and electrolyte

Smoking will be prohibited in all battery-charging areas

Eyewash equipment will be maintained in all charging areas

Precautions to prevent open flames, sparks and electric arcs in charging areas

Employees who change and service batteries and handle corrosive liquids will wear the proper

Personal Protective Equipment (PPE)

## **General Safety**

- Only authorized, trained personnel will operate lift trucks
- Before start of shift, a visual inspection must be conducted. Employees will not operate an unsafe forklift at any time
- Fill fuel tanks out of doors while engine is off
- Operators will drive with both hands on the steering wheel. Horseplay is prohibited. Do not drive with wet or greasy hands
- No person will ride as a passenger on a forklift or on the load being carried
- A forklift will not be used to elevate a platform or pallet with persons on it, except work platforms especially designed for this purpose. Work platforms must have standard guard rails, and must be securely fastened to the forks
- No person will stand or walk under elevated forks
- Operators should avoid making jerky starts, quick turns, or sudden stops. The operator will not use reverse as a brake
- Slow down on wet and slippery surfaces, cross aisles or locations with obstructed visions
- Operators entering a building or nearing a blind corner will make their approach at reduced speed. Sound horn and proceed carefully
- Operators will give pedestrians the right-of-way at all times
- Operators will not drive toward any person who is in front of a fixed object or wall
- Operators will not overtake and pass another forklift traveling in the same direction, at intersections, blind spots, or hazardous locations
- Operators should not put their fingers, arms, or legs between the uprights of the mast, or beyond the contour of the forklift
- Forks should always be placed under the load as far as possible. Do not lift a load with one fork
- No load should be moved unless it is absolutely safe and secure
- Use extra care when handling long lengths of bar stock, pipe, or other materials
- Avoid sharp or fast end-swing
- Compressed gas cylinders shall be moved only in special pallets designed for this purpose
- When unloading trucks or trailers, the brakes on the vehicle will be set (locked) and the wheels chocked
- Forklifts must be safely parked when not in use. The controls will be neutralized, power shut off, brakes set, key removed, and the forks left in a down position flat on the surface, and not obstructing walkways or aisles
- A forklift will not be left on an incline unless it is safely parked and the wheels blocked
- Only stable and safely arranged loads will be handled
- Only loads within the rated capacity of the powered industrial truck will be handled

### Traveling

- E & B Oilfield Services, Inc. speed limits will be observed, and under all travel conditions, a powered industrial truck will be operated at speeds that will permit it to be brought to a stop in as safe manner
- Three truck lengths (or two seconds) will be maintained between powered industrial trucks in operation
- The powered industrial truck will be kept under control at all times
- When vision is obscured, the operator will slow down and sound the horn
- If the load blocks the operator's view, the powered industrial truck will be driven in the direction that provides the best visibility
- The powered industrial truck will cross railroad tracks at a diagonal
- The powered industrial truck will be parked 8 feet or further from the center line of the railroad tracks
- The operator will keep a clear view of the path of travel
- The loaded powered industrial truck will be driven with the load upgrade when driving on ascending or descending grades greater than 10%
- Dock boards and bridge plates will be properly secured before they are driven over
- When the forklift is not carrying a load, the operator shall travel with the forks as low as possible (maximum of 3 inches on paved surfaces). When carrying a load, it should be carried as low as possible (consistent with safe operation, 2 to 6 inches above the surface)
- The forks should not be operated while the forklift is traveling
- On a downgrade, the load will be to the rear, and the forks raised only enough to clear the surface
- On an upgrade, the load will be ahead, and the forks raised only enough to clear the surface



**Forklift Daily Inspection Checklist:**

**KEY OFF Procedures**

**The vehicle inspection**

- Overhead guard
- Hydraulic cylinders
- Mast assembly
- Lift chains and rollers
- Forks
- Tires
- Gas gauge
- Check the engine oil level
- Examine the battery
- Inspect the hydraulic fluid level
- Check the engine coolant level

**KEY ON Procedures**

**Test the standard equipment**

- Front, tail, and brake lights
- Fuel gauge (if diesel)
- Windshield wiper
- Heater

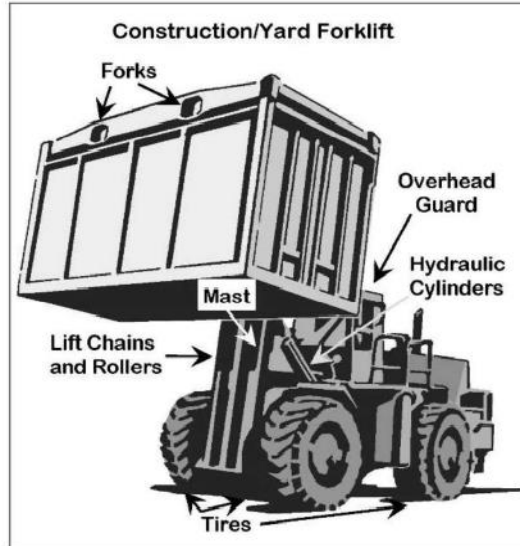
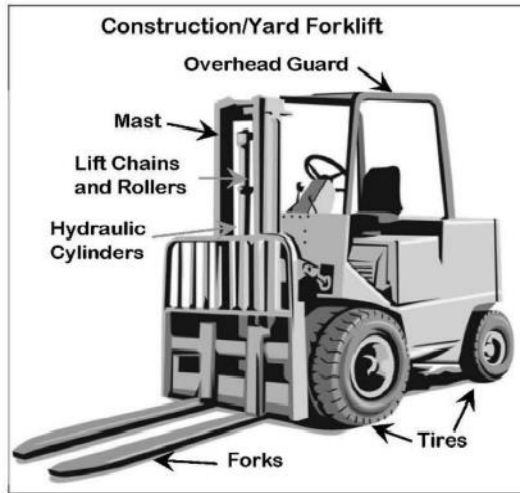
**ENGINE RUNNING Procedures**

**Check the gauges**

- Oil pressure indicator lamp
- Ammeter indicator lamp
- Ammeter
- Hour Meter
- Water Temperature Gauge

**Test the standard equipment**

- Steering
- Brakes
- Horn
- Safety seat (if equipped)
- Check the transmission fluid level
- Check the operation of load-handling attachments



Comments/Observations: \_\_\_\_\_

Printed name and signature of person(s) conducting inspection \_\_\_\_\_ Date \_\_\_\_\_

Printed name and signature of person(s) conducting inspection \_\_\_\_\_ Date \_\_\_\_\_





### Performance Evaluation for Forklift Operators

Employee: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Evaluator: \_\_\_\_\_ Equipment Type: \_\_\_\_\_

YES NO

- Shows familiarity with truck controls.
- Gave proper signals when turning.
- Slowed down at intersections.
- Sounded horn at intersections.
- Obeyed signs.
- Kept a clear view of direction of travel.
- Turned corners correctly - was aware of rear end swing.
- Yielded to pedestrians.
- Drove under control and within proper traffic aisles.
- Approached load properly.
- Lifted load properly.
- Maneuvered properly.
- Traveled with load at proper height.
- Lowered load smoothly/slowly.
- Stops smoothly/completely.
- Load balanced properly.
- Forks under load all the way.
- Carried parts/stock in approved containers.
- Checked bridge-plates/ramps.
- Did place loads within marked area.
- Did stack loads evenly and neatly.
- Did drive backward when required.
- Did check load weights.
- Placed forks on the ground when parked, controls neutralized, brake on set, power off.
- Followed proper instructions for maintenance - checked both at beginning and end.

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Total Rating:**  Excellent  Good  Fair  Poor  Fail

\_\_\_\_\_  
Evaluator's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Operator's Signature

\_\_\_\_\_  
Date



## Certification of Forklift Operator Training

The Company certifies that the following employee has been trained and has demonstrated competence in the following areas of powered industrial truck operations:

### 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 an 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.

### Workplace-related topics:

- Surface conditions where the vehicle will be operated.
- Composition of loads to be carried and load stability.
- Load manipulation, stacking, and un-stacking.
- Pedestrian traffic in areas where the vehicle will be operated.
- Narrow aisles and restricted areas that the vehicle will be operated.
- Hazardous (classified) locations where the vehicle will be operated.
- Ramps and 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.

Employee Name: \_\_\_\_\_

Name of Trainer: \_\_\_\_\_

Signature of Trainer: \_\_\_\_\_

Date of Training: \_\_\_\_/\_\_\_\_/\_\_\_\_ Date of Evaluation: \_\_\_\_/\_\_\_\_/\_\_\_\_

