

# Risk Control Bulletin

## Powered Industrial Trucks Operator Training Requirements

RISK CONTROL



Almost one million powered industrial trucks are operated in America by an estimated 1.5 million operators. Statistics developed by the Occupational Safety and Health Administration (OSHA) indicate that industrial trucks are involved in about 100 fatalities and contribute to almost 95,000 injuries per year. Insufficient operator training is estimated to be a contributing factor in about 25% of these accidents. OSHA regulations in effect since 1971 require that "only trained and authorized operators shall be permitted to operate a powered industrial truck. Methods shall be devised to train operators in the safe operation of powered industrial trucks."

New regulations effective March 1, 1999 establish standards for complying with this training requirement.

The following questions and answers provide an overview of the new regulations.

### What equipment is covered?

- All powered industrial trucks as defined by the American Society of Mechanical Engineers (ASME) – "...mobile power-propelled truck used to carry, push, pull, lift, stack, or tier material." Powered industrial trucks include equipment commonly referred to as a pallet truck, lift truck, tow-motor, powered pallet jack, fork truck, etc.

### What industries are covered?

- General industry, construction and maritime.

### Who must be trained?

- Anyone who will operate a powered industrial truck – even experienced operators.

### Who can provide the training?

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

### What training is required?

- Each operator must receive training, which is specific to the type of equipment that will be operated and the environment in which it will be used.

### Equipment Specific Topics:

- All operating instructions, warnings and precautions.
- Differences between the truck and the automobile.
- Controls and instrumentation: location, what they do; and how they work.
- Power plant operation and maintenance - Steering and maneuvering.
- Visibility restrictions caused by equipment and loads.
- Fork and attachment operation.
- Vehicle capacity.
- Vehicle stability.
- Vehicle inspection and maintenance.
- Refueling or battery charging.
- Operating limitations.



#### Workplace Specific Topics:

- Surface conditions.
- Composition of probable loads and stability.
- Load transport, stacking and unstacking.
- Pedestrian traffic.
- Narrow aisle and other areas of restricted operation.
- Operation in hazardous locations.
- Ramp and sloped surface operation.
- Unique or potentially hazardous conditions.
- Operating in closed environments – inadequate ventilation for exhaust fumes.

#### What training format must be used?

Training must include a combination of:

- Formal instruction – lecture, discussion, interactive computer learning, videotape, written material.
- Practical training – demonstrations performed by the trainer and practical exercises performed by the trainee.
- Evaluation of the operator's performance in the workplace.

#### How often must refresher training be done?

Refresher training must be provided whenever:

- Operator has been observed operating the vehicle in an unsafe manner.
- Operator is involved in accident or near-miss incident.
- Operator receives an evaluation that indicates that the operator is not operating the vehicle safely.
- Changes in equipment or site conditions occur which could affect the safe operation of the truck.

#### How often each operator must be evaluated:

- At least once every three years.

#### What training documentation is required?

- Name of each operator.
- Date of training.
- Date of evaluation.
- Identity of person(s) performing the training or evaluation

#### When is compliance required?

- All operators hired before December 1, 1999 must be trained and evaluated by December 1, 1999.
- All operators hired after December 1, 1999 must be trained and evaluated before the employee is assigned to operate a powered industrial truck.

#### What are the benefits of compliance?

- Reduction in number of injuries and fatalities.
- Savings in medical costs.
- Saving in administrative time involved in handling workers' compensation claims.
- Saving of "indirect costs" associated with all accidents.
- Reduction in lost production time and output.
- Reduction in cost of damage to stock, equipment, finished goods.
- Compliance with OSHA regulations and avoidance of fines.

#### References

Federal Register, OSHA Regulations, Standards – 29CFR 1910.178