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Sit-Down Counterbalance Forklift

INSTRUCTOR + PRINT PACKET

AUDIENCE	EST. TIME	REFERENCE
Sit-down counterbalance operators	30-40 min	29 CFR 1910.178(l)

IMPORTANT USE NOTE

Equipment-specific formal instruction. Hands-on training and workplace evaluation on the actual truck type are required.

What is inside this packet

- Instructor quick-start and site-specific preparation checklist
- Slide-by-slide trainer guide with discussion prompts
- Employee handout / key takeaways
- Printable 10-question knowledge check
- Separate answer key and coaching notes
- Attendance record
- Practical / workplace evaluation checklist
- Certificate wording and completion record
- Primary regulatory/source reference

Run a strong session without overcomplicating it.

1. PREPARE	Review the deck and packet. Insert your procedures, equipment, routes, photos, emergency contacts and site rules.
2. PRESENT	Use the PowerPoint/PDF on a screen. Pause for discussion rather than reading every bullet.
3. CHECK	Give the knowledge check. Review missed items and coach to the expected decision.
4. VERIFY	Complete required hands-on or workplace-specific practice/evaluation with an appropriate trainer/evaluator.
5. DOCUMENT	Use the attendance record, evaluation and certificate only after required training elements are complete.

BEFORE EMPLOYEES WORK

Equipment-specific formal instruction. Hands-on training and workplace evaluation on the actual truck type are required.

Learning objectives

- Recognize counterbalance truck stability and rear-swing hazards
- Use correct mounting, restraint, travel and load-handling practices
- Inspect the truck and respond to defects
- Demonstrate safe turning, stacking, parking and dock approach

1. Counterbalance geometry

- The counterweight balances the load across the front axle pivot.
- Turning, speed, slopes, load height and off-center loads can move the combined center of gravity outside the stability area.
- Rear steering creates tail swing.

DISCUSSION PROMPT

Where could this fail here?

2. Mounting and operator restraint

- Use three points of contact where applicable.
- Use the operator restraint/seat belt provided by the manufacturer.
- Keep body parts inside the operator compartment and never jump from a tipping sit-down truck.

DISCUSSION PROMPT

What control do we use?

3. Travel position and steering

- Carry the load low and tilted only enough for stability.
- Turn smoothly and slow before corners.
- Watch rear swing near racks, people, columns and doorways.

DISCUSSION PROMPT

What would make you stop?

4. Load pickup and placement

- Square to the load, level forks, enter fully and center the load.
- Check load stability and capacity before lifting.
- Raise only when stopped and positioned for stacking.

DISCUSSION PROMPT

Where could this fail here?

5. Ramps, docks and trailers

- Follow site rules for direction of travel on grades with loads.
- Keep clear of dock edges and verify dock plates and trailer restraint.
- Account for wet surfaces, debris and limited clearances.

DISCUSSION PROMPT

What control do we use?

6. Shutdown and parking

- Lower forks fully, neutralize controls, set brake and shut off power when unattended.
- Park only in approved areas without blocking exits, aisles or emergency equipment.

DISCUSSION PROMPT

What would make you stop?

Stop-work / red-flag conditions

- Seat belt/restraint is damaged or bypassed
- Turning fast with a raised load
- Operating close to rack uprights without accounting for tail swing
- Entering a trailer without confirmed restraint/chocks and floor condition

SCENARIO

A sit-down forklift begins to tip sideways during a turn. What should the seated operator do?

RECOMMENDED RESPONSE

Stay in the operator compartment, hold on, brace and lean away from the direction of the tip; do not jump from a tipping sit-down counterbalance truck.

Make it site-specific

- Actual truck controls, capacity plate and attachments
- Site traffic plan, pedestrian routes and speed expectations
- Grade/ramp rules and dock/trailer procedures
- Hands-on stacking/unstacking and workplace evaluation

Sit-Down Counterbalance Forklift

KEEP THIS PAGE

Key decisions to remember

- Counterbalance geometry:** The counterweight balances the load across the front axle pivot.
- Mounting and operator restraint:** Use three points of contact where applicable.
- Travel position and steering:** Carry the load low and tilted only enough for stability.
- Load pickup and placement:** Square to the load, level forks, enter fully and center the load.
- Ramps, docks and trailers:** Follow site rules for direction of travel on grades with loads.
- Shutdown and parking:** Lower forks fully, neutralize controls, set brake and shut off power when unattended.

Stop and get help when...

- Seat belt/restraint is damaged or bypassed
- Turning fast with a raised load
- Operating close to rack uprights without accounting for tail swing
- Entering a trailer without confirmed restraint/chocks and floor condition

Our site-specific information

- ☐ Actual truck controls, capacity plate and attachments
- ☐ Site traffic plan, pedestrian routes and speed expectations
- ☐ Grade/ramp rules and dock/trailer procedures
- ☐ Hands-on stacking/unstacking and workplace evaluation

Employee notes:

Sit-Down Counterbalance Forklift - Knowledge Check

Employee: _____ Date: _____

1. Rear-wheel steering means the operator must watch for:

- ☐ A. Tail swing
- ☐ B. Front axle lockup
- ☐ C. Automatic braking
- ☐ D. Fork spread only

2. A loaded counterbalance forklift should normally travel with the load:

- ☐ A. Low and stable
- ☐ B. Raised above eye level
- ☐ C. Fully tilted forward
- ☐ D. Resting on the floor

3. During a tip-over in a seated sit-down forklift, the operator should generally:

- ☐ A. Stay in the compartment and brace rather than jump
- ☐ B. Jump clear immediately
- ☐ C. Remove the seat belt
- ☐ D. Stand up on the seat

4. Before lifting a load, the operator should check:

- ☐ A. Capacity, load stability and fork engagement
- ☐ B. Only the destination height
- ☐ C. Only the clock
- ☐ D. Only tire pressure

5. Fast turns increase:

- ☐ A. Tip-over risk
- ☐ B. Rated capacity
- ☐ C. Fork strength
- ☐ D. Visibility

Score: _____ / 10 Passing requirement / retraining criteria:

6. When parking unattended, forks should be:

- ☐ A. Fully lowered
- ☐ B. Raised to eye level
- ☐ C. Left in the rack
- ☐ D. Tilted forward in the aisle

7. A dock plate should be entered only after:

- ☐ A. Its placement/capacity and trailer condition/restraint are verified
- ☐ B. The horn is disabled
- ☐ C. The load is raised
- ☐ D. A pedestrian waves

8. An attachment can:

- ☐ A. Change truck capacity and operating characteristics
- ☐ B. Never affect capacity
- ☐ C. Eliminate the need for training
- ☐ D. Allow overloading

9. Tail swing is most important near:

- ☐ A. Racks, columns, doorways and pedestrians
- ☐ B. Open parking lots only
- ☐ C. Battery chargers only
- ☐ D. Empty aisles only

10. This course replaces practical evaluation on the actual truck.

- ☐ A. False
- ☐ B. True

Employee signature: _____

Answer key + coaching notes

1. **A - Tail swing** | Rear-wheel steering means the operator must watch for:
2. **A - Low and stable** | A loaded counterbalance forklift should normally travel with the load:
3. **A - Stay in the compartment and brace rather than jump** | During a tip-over in a seated sit-down forklift, the operator should generally:
4. **A - Capacity, load stability and fork engagement** | Before lifting a load, the operator should check:
5. **A - Tip-over risk** | Fast turns increase:
6. **A - Fully lowered** | When parking unattended, forks should be:
7. **A - Its placement/capacity and trailer condition/restraint are verified** | A dock plate should be entered only after:
8. **A - Change truck capacity and operating characteristics** | An attachment can:
9. **A - Racks, columns, doorways and pedestrians** | Tail swing is most important near:
10. **A - False** | This course replaces practical evaluation on the actual truck.

COACHING RULE

Do not treat a passing written score as proof of hands-on competency. Retrain missed critical concepts and complete workplace-specific verification where required.

Attendance + completion record

Course: Sit-Down Counterbalance Forklift

Date: _____ Instructor: _____ Department / Location: _____

Employee Printed Name	Employee Signature	Job / Department	Date

Site-specific topics / notes:

Can the employee apply it?

Employee: _____ Evaluator: _____ Date: _____

Evaluation Item	Meets	Coach	N/A
Performs pre-use inspection	☐	☐	☐
Mounts/dismounts safely	☐	☐	☐
Uses seat belt/restraint	☐	☐	☐
Controls speed and tail swing	☐	☐	☐
Maintains correct travel/load position	☐	☐	☐
Stacks and retrieves load smoothly	☐	☐	☐
Uses safe dock/trailer procedure	☐	☐	☐
Parks correctly	☐	☐	☐

Comments / coaching:

Result: ☐ Competent for evaluated task (subject to employer authorization) ☐ More training/practice needed

Evaluator signature: _____ Employee signature: _____

CERTIFICATE OF TRAINING

This certifies that

completed the formal / awareness training portion of
Sit-Down Counterbalance Forklift

Date: _____ Instructor: _____
Employer / Location: _____

Equipment-specific formal instruction. Hands-on training and workplace evaluation on the actual truck type are required.

Regulatory / source reference

Primary reference: 29 CFR 1910.178(l)

<https://www.osha.gov/etools/power-industrial-trucks/training>

Before delivery

- Confirm current OSHA and applicable state-plan requirements
- Confirm manufacturer instructions and employer procedures
- Insert workplace-specific hazards, controls, emergency contacts and rules
- Use competent/qualified trainers or evaluators where required
- Complete practical/workplace training and authorization requirements where applicable
- Retain training records according to employer and regulatory requirements

FINAL REMINDER

Equipment-specific formal instruction. Hands-on training and workplace evaluation on the actual truck type are required.