

Sit-Down Counterbalance Forklift

Professional downloadable safety training

TRAINING OUTCOME

Recognize counterbalance truck stability and rear-swing hazards

AUDIENCE

Sit-down counterbalance operators

TIME

30-40 min

REFERENCE

29 CFR 1910.178(I)

USE NOTE

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

Start with the hazard. Build the safe decision.

Use this slide to connect the topic to what employees actually see, touch, drive or do.

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.

ASK THE ROOM

01

Where could this go wrong here?

02

What control keeps us safe?

03

What should make us stop?

What employees should be able to do

Keep the session practical: recognize the hazard, choose the control, know when to stop.

01

Recognize counterbalance truck stability and rear-swing hazards

02

Use correct mounting, restraint, travel and load-handling practices

03

Inspect the truck and respond to defects

04

Demonstrate safe turning, stacking, parking and dock approach

Counterbalance geometry

Start with what the employee is exposed to.

- 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.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Mounting and operator restraint

Tie every point to a visible action or decision.

- 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.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

Travel position and steering

Tie every point to a visible action or decision.

- 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.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Load pickup and placement

Tie every point to a visible action or decision.

- 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.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

Ramps, docks and trailers

Tie every point to a visible action or decision.

- 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.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Shutdown and parking

Tie every point to a visible action or decision.

- 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.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

These are the moments to slow down and regain control.

01

Seat belt/restraint is damaged or bypassed

02

Turning fast with a raised load

03

Operating close to rack uprights without accounting for tail swing

04

Entering a trailer without confirmed restraint/chocks and floor condition

What would you do next?

Give the group 30-60 seconds before revealing the recommended response.

**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.

DISCUSS

01

What is the hazard?

02

What control is missing?

03

What is the safest next action?

04

What is our site rule?

This is where generic training becomes your program.

Replace examples with your actual equipment, procedures, hazards and expectations.



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

BEFORE WORK

01

Show the actual procedure

02

Show the actual
equipment/task

03

Confirm questions are
answered

04

Complete required evaluation

Can the employee apply it?

Written knowledge matters. Safe performance in the real workplace matters more.

☐ 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

Use the included evaluation form when hands-on demonstration or workplace verification is appropriate or required.

Knowledge check 1-5

Use the printable test in the course package for employee responses.

1

Rear-wheel steering means the operator must watch for:

2

A loaded counterbalance forklift should normally travel with the load:

3

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

4

Before lifting a load, the operator should check:

5

Fast turns increase:

Knowledge check 6-10

Use the printable test in the course package for employee responses.

6

When parking unattended, forks should be:

7

A dock plate should be entered only after:

8

An attachment can:

9

Tail swing is most important near:

10

This course replaces practical evaluation on the actual truck.

Know the hazard. Use the control. Stop when it is not right.

- 01 Recognize counterbalance truck stability and rear-swing hazards
- 02 Seat belt/restraint is damaged or bypassed
- 03 Actual truck controls, capacity plate and attachments

NEXT STEPS

- 01 Answer questions
- 02 Complete site-specific training
- 03 Complete required hands-on evaluation
- 04 Document attendance/completion

Use this package as a strong training foundation.

Always align the material to current requirements, manufacturer instructions and your own procedures.

Primary reference

29 CFR 1910.178(l)

Training use note

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

BEFORE YOU DELIVER

- ✓ Confirm current OSHA/state-plan requirements
- ✓ Insert your procedures and equipment information
- ✓ Use qualified/competent trainers where required
- ✓ Complete practical/workplace evaluation where required
- ✓ Keep training and authorization records

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