

TRAVISTILLEY.COM / TRAINING CENTER

Powered Industrial Trucks / Forklift Fundamentals

INSTRUCTOR + PRINT PACKET

AUDIENCE	EST. TIME	REFERENCE
Forklift / PIT operators	40-55 min	29 CFR 1910.178(l)

IMPORTANT USE NOTE

Formal instruction component only. Practical training and workplace evaluation by a qualified trainer are required before independent operation.

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

Formal instruction component only. Practical training and workplace evaluation by a qualified trainer are required before independent operation.

Learning objectives

- Explain forklift stability, load center and center-of-gravity basics
- Use safe travel, visibility, pedestrian and dock practices
- Recognize truck-specific and workplace-specific hazards
- Understand OSHA requirements for practical training, evaluation, refresher training and certification

1. Forklifts are not cars

- Rear-wheel steering changes how the back end swings.
- A high center of gravity and narrow stability triangle make tip-over possible.
- Loads change steering, braking, visibility and stability.

DISCUSSION PROMPT

Where could this fail here?

2. Pre-use inspection

- Inspect tires, forks, mast, chains, hydraulics, controls, horn, brakes, lights and safety devices as applicable.
- Remove unsafe trucks from service.
- Know battery/LP/fuel hazards and charging/refueling rules.

DISCUSSION PROMPT

What control do we use?

3. Load handling

- Know capacity plate limits and attachments.
- Center and secure the load; tilt only as needed.
- Travel with the load low enough for stability and visibility.
- Never raise or transport people on forks unless using an approved personnel platform and procedure.

DISCUSSION PROMPT

What would make you stop?

4. Travel and visibility

- Look in the direction of travel; travel in reverse when the load blocks the view unless site rules specify another safe method.
- Slow at intersections, blind corners and wet/uneven surfaces.
- Maintain clearances from edges, racks, doorways and overhead hazards.

DISCUSSION PROMPT

Where could this fail here?

5. Pedestrians, docks and trailers

- Separate pedestrian routes where feasible.
- Sound the horn at cross aisles and obstructed locations per site rules.
- Verify dock plates, trailer restraint/chocks and floor capacity before entry.
- Never allow people under elevated forks or loads.

DISCUSSION PROMPT

What control do we use?

6. Training and evaluation

- Formal instruction must be combined with practical training and workplace evaluation.
- Operators need refresher training after unsafe operation, an accident/near miss, unsafe evaluation, different truck assignment, or workplace change.
- Operator performance must be evaluated at least once every three years.

DISCUSSION PROMPT

What would make you stop?

Stop-work / red-flag conditions

- Capacity plate is unreadable or attachment changes capacity
- Load blocks view and operator continues forward blindly
- Pedestrian enters the truck path without eye contact or separation
- Truck has brake, steering, fork, tire or hydraulic defects

SCENARIO

A loaded forklift is approaching a blind intersection while a pedestrian is walking in the cross aisle. What should the operator do?

RECOMMENDED RESPONSE

Slow or stop as needed, sound the horn per site rules, maintain control and proceed only after the path is clear and pedestrian separation is established.

Make it site-specific

- Train on each truck type actually used and manufacturer instructions
- Review traffic routes, pedestrian controls, ramps, docks, trailers and hazardous areas
- Conduct hands-on practice under qualified supervision
- Evaluate the operator in the actual workplace and document training/evaluation

Powered Industrial Trucks / Forklift Fundamentals

KEEP THIS PAGE

Key decisions to remember

- Forklifts are not cars:** Rear-wheel steering changes how the back end swings.
- Pre-use inspection:** Inspect tires, forks, mast, chains, hydraulics, controls, horn, brakes, lights and safety devices as applicable.
- Load handling:** Know capacity plate limits and attachments.
- Travel and visibility:** Look in the direction of travel; travel in reverse when the load blocks the view unless site rules specify another safe method.
- Pedestrians, docks and trailers:** Separate pedestrian routes where feasible.
- Training and evaluation:** Formal instruction must be combined with practical training and workplace evaluation.

Stop and get help when...

- Capacity plate is unreadable or attachment changes capacity
- Load blocks view and operator continues forward blindly
- Pedestrian enters the truck path without eye contact or separation
- Truck has brake, steering, fork, tire or hydraulic defects

Our site-specific information

- ☐ Train on each truck type actually used and manufacturer instructions
- ☐ Review traffic routes, pedestrian controls, ramps, docks, trailers and hazardous areas
- ☐ Conduct hands-on practice under qualified supervision
- ☐ Evaluate the operator in the actual workplace and document training/evaluation

Employee notes:

Powered Industrial Trucks / Forklift Fundamentals - Knowledge Check

Employee: _____ Date: _____

1. OSHA PIT training must include:

- ☐ A. Formal instruction, practical training and workplace evaluation
- ☐ B. Online training only
- ☐ C. A written test only
- ☐ D. One year of driving experience

2. Operator performance must be evaluated at least:

- ☐ A. Once every three years
- ☐ B. Every ten years
- ☐ C. Only after an accident
- ☐ D. Never if training is documented

3. A forklift load should generally be carried:

- ☐ A. Low and stable while traveling
- ☐ B. As high as possible for visibility
- ☐ C. At shoulder height
- ☐ D. With the mast fully forward

4. If a load blocks forward view, the operator should:

- ☐ A. Use a safe travel method such as reverse travel when appropriate and allowed
- ☐ B. Drive forward quickly
- ☐ C. Raise the load higher
- ☐ D. Ask a pedestrian to walk in front

5. Pedestrians should:

- ☐ A. Be kept clear of the truck/load path and never stand under raised forks
- ☐ B. Walk under raised forks if the truck is stopped
- ☐ C. Ride on the counterweight
- ☐ D. Guide loads by holding the forks

Score: _____ / 10 Passing requirement / retraining criteria:

6. A truck with a safety defect should be:

- ☐ A. Removed from service until corrected
- ☐ B. Used only on day shift
- ☐ C. Driven slower
- ☐ D. Marked with tape and used

7. Refresher training can be triggered by:

- ☐ A. Unsafe operation, accident/near miss, unsafe evaluation, different truck or workplace change
- ☐ B. Only annual calendar date
- ☐ C. Only a new supervisor
- ☐ D. Only operator request

8. The capacity plate matters because it:

- ☐ A. Shows rated capacity and conditions/attachments that affect capacity
- ☐ B. Shows employee certification
- ☐ C. Replaces the pre-use inspection
- ☐ D. Sets the speed limit

9. At a blind intersection the operator should:

- ☐ A. Slow and use the horn/other site controls
- ☐ B. Accelerate through quickly
- ☐ C. Raise the load
- ☐ D. Turn off warning devices

10. Passing this course by itself means the employee is OSHA-certified to operate a forklift.

- ☐ A. False
- ☐ B. True

Employee signature: _____

Answer key + coaching notes

- 1. A - Formal instruction, practical training and workplace evaluation** | OSHA PIT training must include:
- 2. A - Once every three years** | Operator performance must be evaluated at least:
- 3. A - Low and stable while traveling** | A forklift load should generally be carried:
- 4. A - Use a safe travel method such as reverse travel when appropriate and allowed** | If a load blocks forward view, the operator should:
- 5. A - Be kept clear of the truck/load path and never stand under raised forks** | Pedestrians should:
- 6. A - Removed from service until corrected** | A truck with a safety defect should be:
- 7. A - Unsafe operation, accident/near miss, unsafe evaluation, different truck or workplace change** | Refresher training can be triggered by:
- 8. A - Shows rated capacity and conditions/attachments that affect capacity** | The capacity plate matters because it:
- 9. A - Slow and use the horn/other site controls** | At a blind intersection the operator should:
- 10. A - False** | Passing this course by itself means the employee is OSHA-certified to operate a forklift.

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: Powered Industrial Trucks / Forklift Fundamentals

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
Completes pre-use inspection	☐	☐	☐
Uses seat belt/restraint when provided	☐	☐	☐
Maintains low stable travel position	☐	☐	☐
Uses safe speed and controlled turns	☐	☐	☐
Demonstrates safe load pickup/placement	☐	☐	☐
Maintains pedestrian separation and horn use	☐	☐	☐
Safely approaches docks/ramps/trailers	☐	☐	☐
Parks truck with forks lowered and controls neutralized	☐	☐	☐

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
Powered Industrial Trucks / Forklift Fundamentals

Date: _____ Instructor: _____
Employer / Location: _____

Formal instruction component only. Practical training and workplace evaluation by a qualified trainer are required before independent operation.

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

Formal instruction component only. Practical training and workplace evaluation by a qualified trainer are required before independent operation.