



POLICY: VII: 01—Lift Truck Operating Procedures
Procedure review: Annually

DATED: August 1998
UPDATED: March 2021

APPROVED: Executive Director of Facilities and Construction:

I. PURPOSE

To define specific operating and safety procedures for the training and certification of Facilities Management (FM) lift truck operators to meet safety standards.

II. DEFINITIONS

A. Lift truck - A small truck equipped for lifting and transporting loads.

III. RESPONSIBILITIES

- A. Risk Management Safety and Training Coordinator- Responsible for ensuring compliance with this procedure. Responsibilities include training and maintaining necessary documentation.
- B. Risk Management Machine Safety Specialist - Responsible for hands-on training of lift truck operations.
- C. Lift truck drivers - Responsible for following all aspects of this procedure as well as safe operation of the lift trucks.
- D. FM Supervisors – Responsible for adherence to the policy and notifying Risk Management of employees that require training.

IV. PROCEDURES

- A. First operator of each shift shall complete the pre-start checklist prior to operation of the lift truck.
- B. Each additional operator shall verify the pre-start checklist has been completed for that shift. Any time a defect is detected, supervisors shall be notified immediately and lift truck shall be taken out of service.
- C. Drivers must complete required online and hands-on training before operating a lift truck.
- D. Drivers must be prepared by using safety equipment required for the job. This may include, but not limited to, a seat belt, hardhat, gloves, or other protective equipment. Safety glasses should be worn at all times when operating a lift truck.
- E. Smoking is prohibited while operating, fueling, or anywhere near a lift truck.

- F. Eating or drinking is prohibited while operating a lift truck.
- G. Cell phone use is prohibited while operating a lift truck.
- H. Lift trucks should not be used for towing, opening doors, or pushing objects along the floor.
- I. Lift trucks are to be operated in designated areas only where the floor can hold the weight of both the truck and the load. It is the driver's responsibility to know the weight of the lift truck and the weight of the intended load.
- J. The right of way must be yielded to persons walking or working in the area. The horn should be used when approaching people and at intersections.
- K. An overhead guard is required to protect the driver from falling objects. If there is a great amount of overhead loading with heavy objects, then the driver must notify the supervisor to have a guard installed. Never remove guards or use a lift truck without the proper guards in place.
- L. Riders are not allowed on the truck or forks.
- M. Avoid areas that do not have proper clearance.
- N. When driving on ramps and inclines:
 - a. Travel with the load facing uphill. This is to prevent the load from shifting and the back wheels from coming off the ground.
 - b. Do not turn, lift or try to move the fork truck while on an incline.
- O. Unloading highway trailers:
 - a. Before entering the trailer, the trailer shall be secured in place with wheel chocks and the brakes have been set.
 - b. If a trailer has been uncoupled from the truck, check to see if it is properly jacked at the front and that the trailer wheels are chocked so the trailer will not move when entering or leaving the trailer.
 - c. When using a dock board or bridge plate to enter a truck or trailer, make sure it is secured in place to prevent it from kicking out from under the lift truck.
 - d. Before entering a truck or trailer with the lift truck, check the floor to see if it will hold the weight of the truck plus the load. If there is any doubt, do not enter the truck or trailer.
 - e. Maintain constant communication with the driver of any truck to prevent the truck from being pulled away while loading or unloading.
- P. Lifting a load:
 - a. Do not exceed the lifting capacity of the truck as specified by the manufacturer.
 - b. Do not lift a load that appears to be unstable, unbalanced, or loosely packed.

- c. Spread the forks to the widest point of pick-up to prevent loss of the load. Extremely wide loads must be picked up from the center of the load with constant guarding against shifting and losing the balance. With the forks level, insert them under the load at least 2/3 of the load length. If the forks are longer than the load being picked up, check to be sure the forks do not accidentally puncture or pick up the object behind the load.
- d. When stacking a load, the lift should be high enough to clear the lower load.
- e. When unstacking a load, enter the lift area slowly and lift high enough to clear the lower load before pulling back.
- f. After a load has been picked up from an overhead storage rack, tilt the mast back and slowly lower the load down to the traveling height. Travelling height should be a few inches off the ground and tilted slightly upward in the front.
- g. Standing or walking under a raised load is not permitted. Keep a safe fall area clear at all times.
- h. Cross railroad tracks in a diagonal direction.
- i. Stop, start, and turn in a manner that will prevent the load from shifting or spilling. Come to a complete stop before changing directions. This will prevent the load from shifting or overturning, and allow the load to change directions as well.
- j. Travel in reverse when a load is large enough to block your forward vision.

Q. Parking:

- a. When parking or leaving a lift truck unattended, the forks should be completely down, the engine turned off, and the parking brake set.
- b. If parking on a ramp, place chocks behind the wheels (on the down-hill side) to prevent rolling.

R. Fueling and/or Charging:

- a. Refueling a lift truck requires the same care required when handling any flammable or corrosive liquids. Refueling or charging must be done in a designated area that is well ventilated and away from a source of heat.
- b. The engine must be turned off, brakes applied and the operator out of the truck.
- c. Smoking while fueling or charging is prohibited.
- d. To change a LP tank, relieve the tank pressure in the lines by shutting the tank valve and running the engine until it stops. Remove the empty tank and replace it with a full one, making sure to secure the tank and to check the line and valve for leaks. If a leak is found in the tank, immediately remove the tank from service.

- e. If a leak is found at the engine, shut the engine off and report the leak to the supervisor. Do not operate any lift truck with a LP leak; it could cause a fire or explosion. On dual fuel trucks, one tank must be at least 1/4 full to keep the vapor saturation level in the tank above the explosive level.
- f. Battery operated lift trucks can become a chemical hazard due to the corrosive solution in the battery. When filling batteries, do not spill or splash electrolyte and check vent caps to make sure they are not plugged.
- g. Keep metal objects away from batteries. If a metal object touches the hot terminal and any ground, it will cause arcing and could cause the battery gas to explode.
- h. Charge batteries in a well-ventilated area with the battery compartments open to dissipate the heat and gas from the compartments. Batteries being charged give off hydrogen and oxygen and in certain concentrations these gases will explode.

S. Training

- a. Staff must be trained and certified in the safe operation of lift trucks prior to operating a lift truck. Retraining must occur every three years or if there is an incident that demonstrates a driver's lack ability to safely operate a lift truck.
- b. Training shall include the details of this procedure and "hands-on" operating training. An Operator's certificate will be issued to each driver who passes the course. This certification training and the issuance of the permit must be repeated every three years.
- c. Online training to be assigned and completed through SafetySkills software. Training will be documented by the instructor.