

Safe Lift Truck Operation

Competency / Proficiency Evaluation

Part 1. E-Learning (Initial Orientation & Awareness)

Part 2. On-The-Job Training



Part 3. Competency / Proficiency Evaluation (CE)

Overview

Competency or Proficiency Evaluations are conducted to verify that New and Existing (Incumbent) lift truck operators are competent to use the Lift Truck(s), and Attachment(s) specified in the Competency Evaluation checklist. This is THE KEY requirement essential before equipment can be operated without direct supervision of a competent operator.

Once this part of the training is complete, congratulations, you can now be download and print a certificate of completion

New operators are granted Conditional Competency for 3 months, following a successful competency evaluation. A 2nd evaluation must then be completed.

Incumbent operator competency is reviewed every 3 years, at a minimum. Other events that may trigger a competency review include (but are not limited to): incident(s), extended absence, historical trends, observations, new equipment and/or change(s) in technology.



Safe Lift Truck Operation



Competency / Proficiency Evaluation (CE)

Basic Information

Trainee Name		Trainee Number		Department/Division	
Evaluator Name		Date CE Completed			
Supervisor Name		Location CE Performed			
Trainee Type	<input type="checkbox"/> New Operator <input type="checkbox"/> Incumbent Operator <input type="checkbox"/> Experienced Operator	Approximate Total 'On-The-Job' Training Hours			
		Operator Experience	<input type="checkbox"/> 3 - 12 Months		
			<input type="checkbox"/> 1 - 3 Years		
			<input type="checkbox"/> 3+ Years		

Lift Truck Selection

Select the type(s) of lift trucks included in the competency/proficiency evaluation (CE). Add a lift truck description (e.g. manufacturer, load limits, or other defining criteria).

Note: Mark only those where competency was successfully demonstrated.

Select	Class	Type	Description
<input type="checkbox"/>	I	Electric Motor Rider	
<input type="checkbox"/>	II	Electric Motor Narrow Aisle	
<input type="checkbox"/>	IV	Internal Combustion Engine (Solid or Cushion Tires)	
<input type="checkbox"/>	V	Internal Combustion Engine (Pneumatic Tires)	
<input type="checkbox"/>	VII	Rough Terrain	

Attachment Selection(s)

Select the attachments types included in the competency/proficiency evaluation (CE).

Note: Mark only those where competency was successfully demonstrated.

<input type="checkbox"/> Fork	<input type="checkbox"/> Blade
<input type="checkbox"/> Roll Clamp	<input type="checkbox"/> Work Platform
<input type="checkbox"/> Flat Clamp	<input type="checkbox"/> Hoist/Picker/Jib
<input type="checkbox"/> Bucket	<input type="checkbox"/> Other:

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Competency / Proficiency Evaluation (CE)

Evaluation Criteria						
Category and Steps	Standard	Evaluator Rating				
	Observed Performance Measure	Meets Criteria			Correction Notes (Document Deficiencies Only)	Trainee Initials
Safety Considerations		✓	✗	N/A		
Lift Truck Capacity	Identified capacity from data plate for the truck type and attachment(s)					
PPE / Seatbelts	Observed compliance to site required PPE and seatbelts					
Pre-Operation		✓	✗	N/A		
Pre-Start Check	Completed visual inspection and documented findings on pre-use inspection form (provided)					
Pre-Use Check	Completed a pre-operation inspection (after engine start-up) and documented findings on pre-use inspection form (provided)					
Driving and Manoeuvring (forward/backward)		✓	✗	N/A		
Due Care to Surroundings	Checked all directions/overhead clearances and demonstrated adequate awareness of surroundings					
Audible Warning	Sounded audible warning (e.g. horn), as required					
Approaching Loads	Approached load(s) at safe speed(s) and under control					
Intersections	Reduced truck speed at intersections and sounded horn					
Corners	Maintained lift truck and/or stability and clearance around corners					
Traffic Aisles	Maintained driving speed, appropriate to the conditions					
Slopes / Inclines	Operated parallel to the slope at all inclines (i.e. straight up / down)					
Dock / Platform Clearance	Maintained safe operating distance (1m back) from all edges					
Rough Terrain	Maintained stability while crossing rough terrain (tracks, dock plates, potholes, etc.)					
Enter / Exit Railcars / Trucks	Secures dock-plates, wheel locks and brakes to site specifications					

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Competency / Proficiency Evaluation (CE)

General Load Handling Skills		✓	✗	N/A		
Lifting & Relocating Loads	Maintained load stability and balance during movement					
Stacking (Placing) Load	Maintained stack stability and vertical alignment					
Stacking (Leaving) Load	Separated from load without affecting stack stability					
Side Shifter Assembly	Utilized side shifter assembly, when required					
Parking		✓	✗	N/A		
Parking	Lowered attachments / load to ground level, applied parking brake, shut-down vehicle					

Trainee Sign-Off

By signing this document I declare that I have reviewed and understood all items in this competency evaluation checklist marked 'yes'.

I further verify that I am able to perform the required skills and have demonstrated proficiency to the evaluator.

Name

Signature

Date

Evaluator Sign-Off

By signing this document I verify that the trainee demonstrated competence in all of the applicable performance categories listed in this evaluation checklist during the performance of routine work on multiple occasions.

I further declare that I am confident in the trainee's overall ability to utilize the identified lift truck(s) and attachment(s) in a safe manner.

Name

Signature

Date

Supervisor Sign-Off

By signing this document I verify the instructor is competent and the employee has completed all required training components.

Note: In some cases where the supervisor acts in multiple capacities (i.e. as instructor and supervisor), additional sign-off here is not required.

Name

Signature

Date