

Safe Lift Truck Operation

On-The-Job Training

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



Part 2. On-The-Job Training

Part 3. Competency Evaluation / Proficiency Evaluation

Overview

On-The-Job Training is typically the 2nd Part of your comprehensive Lift Truck Training program and involves working closely with your on-site Lift Truck Operation Instructor.

You can expect Safe Lift Truck Operation ‘On-The-Job Training’ to take a minimum of 8 hours to complete and may be conducted over several days.

Your instructor will cover every aspect of safe lift truck operation and will use a variety of actions to teach each applicable point. Actions may include: 1. Explanations of processes and equipment used by your instructor, 2. Demonstrations by your instructor, 3. Questions to verify you understand the content or processes, and 4. Practical skill demonstrations by you, the trainee.

It is your responsibility to learn the skills and ask questions when you don’t understand. Don’t worry, your instructor will provide you with sufficient practice time until you are competent to use the lift truck(s) and attachment(s) that are in operation at your site, in a safe manner.



Safe Lift Truck Operation



On-The-Job (OTJ) Training

Explain

Demonstrate

Question

Practical

Basic Information

Trainee		Training Location(s)	
Instructor(s)			
Start Date			

OTJ > Company / Instructor Notes

The following 'On-The-Job' Training checklist was developed to assist instructors in providing learners with the necessary skills and concepts to safely operate a powered industrial lift truck (LT). The performance categories and learning objectives/content outlined are designed to cover every aspect of lift truck operation. Safety, personal responsibility, and problem-solving skills must be emphasized wherever possible.

Part of the training process involves increasing the trainee's confidence. Trainees should be given practice time sufficient to demonstrate the skill(s) necessary to proceed to the next stage.

For consistent evaluation of learner development/skill each of the teaching points (including all subheadings), where applicable must be fully covered in order for the training to be considered complete. In cases where the primary heading is not applicable (n/a), all subheadings will be 'not applicable'. The following letter designations (E, D, Q and P) denote the appropriate action to be taken with each teaching point. One or more may be required for each teaching point.

Action(s)	Description
E	Explanation of process/equipment by instructor.
D	Demonstration by instructor.
Q	Question to confirm understanding of content or process.
P	Practical skill performed by trainee.

Practical training will include hands-on demonstrations by the instructor or another competent employee and exercises by the trainee.

Note: Competency of any person authorized to deliver lift truck training to employees must be determined by the employer. This competency may include, but is not limited to, the following criteria:

- successful completion of the site's Powered Industrial Lift Truck training program (90% score overall with demonstrated competency),
- knowledge and experience sufficient to explain and safely demonstrate all of the required training elements of this program,
- sufficient verbal and written communication skills, and
- strong interpersonal abilities to enable effective course delivery.

Safe Lift Truck Operation



On-The-Job (OTJ) Training

Explain

Demonstrate

Question

Practical

OTJ Training Checklist

Instructor Training Content/Criteria		Complete
Action(s)	Introduction	✓ N/A
E	Review process used to determine competency	
E	Ask trainee if there are any questions from the eLearning component	
E	Emphasize importance of training, and hazards (new and experienced drivers)	
E	Review Site Specific Rules and Procedures for operating lift truck equipment	
Action(s)	Practical Control and Safety Device(s)	✓ N/A
E D Q P	Truck Control Steering / Directional Controls / Lift / Pedals (Accelerator/Brake/Clutch/Parking/Inching)	
E D Q P	Safety Devices Overhead Guard / Seat Belt / Horn / Back-up Alarm	
Action(s)	Inspections & Maintenance	✓ N/A
	Pre-Operational Checklist	
E	• Where to obtain one	
E	• What to do with completed one	
E	• Purpose and proper use	
E D	• How to perform the required inspections	
E D Q	• Sample Checklist - review site pre-use inspection checklist	
P	• Complete the checklist	
E	Data Plate > Review data plate information relative to the pre-operational checks	
E	Precautions > Discuss precautions - i.e. when you can/cannot operate a lift truck based on: <ul style="list-style-type: none"> • The condition of the lift truck. • The condition of the operator (physical, psychological, fatigue, etc.) 	
E	Consequences > Review potential consequences when operating a lift truck without first inspecting it	
E	Maintenance Responsibility > Discuss who is responsible for maintenance of the lift truck (review the site's policy)	
Action(s)	Safe Driving	✓ N/A
	Centre of Gravity > Review the affect the following have on the center of gravity: <ul style="list-style-type: none"> • 1. Tilt • 2. Load (weight / size & shape / position of forks or attachments / distribution) • 3. Mast height • 4. Grade or slope 	
E D P	Load Stability > Review load stability and identify methods to promote stability	
	Site Conditions / Hazards	
E D P	• Lifting around pedestrians	
E D P	• Facility concerns (e.g. clearances)	
E D P	• Location of ramps, obstacles, slopes, conditions, unstable surfaces, precautions, etc.	

Safe Lift Truck Operation



On-The-Job (OTJ) Training

Explain

Demonstrate

Question

Practical

OTJ Training Checklist

Instructor Training Content/Criteria		Complete	
Action(s)	Safety Rules / Guidelines / Tips	✓	N/A
E	Pinch Points > Review where to place hands and feet, staying clear of pinch points		
	Stay in Your Lift Truck > Review body position in the lift truck (i.e. under the overhead guard - including hands and feet)		
	Speed > Review smooth starting and stopping and appropriate speed (i.e. KEEP SPEED DOWN!)		
	Avoid Quick Turns > Discuss potential consequences to making sharp turns with a raised load (e.g. the higher you lift a load, the more unstable it becomes)		
	Don't Jump > Review steps to take in the event of a TIP OVER <ul style="list-style-type: none"> • 1. DON'T JUMP! • 2. Remain seated, and go with the truck. • 3. Grip the wheel securely. • 4. Brace yourself with your feet. 		
	Look Out > Remind trainees to monitor their surroundings (i.e. slow down as required, look-out for pedestrians, traffic and intersections, sound the horn frequently and ALWAYS come to a complete stop before changing direction)		
	Seat Belt > Use it always.		
	Horn > Instruct trainees to sound the horn at blind corners, intersections, and doorways <ul style="list-style-type: none"> • *Refer to the company policy for site specific instructions 		
	No Riders > Riders are not permitted anytime		
	No Lifting People > Unless using a special basket designed for lifting people safely		
	Right Angle Stacking > Remind trainees to SLOW DOWN - the higher the load is raised, the less stable it becomes		
	Equipment Maintenance Problems - e.g. Chain Slack > Discuss what to do when maintenance problems arise (i.e. stay alert, DO NOT ATTEMPT to repair chains, the hydraulic system or other maintenance issues, obtain assistance from maintenance personnel and report defects)		
	Center Your Loads > Review steps taken to stable a load (e.g. adjust attachment inward/outward, centre loads)		
	Loose Loads > Review policy for transporting loose loads (i.e. never lift or carry loose or poorly stacked loads / correctly stack and bind loads to prevent damage to the load, the lift truck, pedestrians or the lift truck operator)		
Wide & Long Loads > Review stability differences (i.e. less stable), lifting and carrying requirements (low and balanced, more room to maneuver is required - SLOW DOWN, watch load clearance)			
Elevators > Review the maximum weight capacity of elevators and lifts before use. Discuss calculation requirements (i.e. calculate the total weight of the lift truck and load before entering an elevator)			
Loading Docks > Review safety concerns (i.e. monitor distance from the edge of the loading dock - a fall from a loading dock in a lift truck can be fatal)			

Safe Lift Truck Operation



On-The-Job (OTJ) Training

Explain

Demonstrate

Question

Practical

OTJ Training Checklist

Instructor Training Content/Criteria		Complete	
Action(s)	Equipment Operation	✓	N/A
E D P	Mounting / Dismounting <ul style="list-style-type: none"> Lower load to resting position. Set the parking brake and turn the engine off. Maintain 3 points of contact. 		
E D P	Travelling Unloaded <ul style="list-style-type: none"> Seat belt. 		
E D P	<ul style="list-style-type: none"> Adjust mast and attachment. 		
E	<ul style="list-style-type: none"> Observe surface conditions. 		
E D P	<ul style="list-style-type: none"> Speed of operation and warning device use at intersections, etc. 		
E	<ul style="list-style-type: none"> Keep limbs inside the protective enclosure. 		
E D P	<ul style="list-style-type: none"> Backing up. 		
E D P	Load Inspection <ul style="list-style-type: none"> Securement Stability Non-routine lifts and load capacity. 		
E D P	Loading & Lifting <ul style="list-style-type: none"> Correct attachment Load centering / placement (with various attachments) Raising the load (stability / dangers) 		
E	Travelling Loaded <ul style="list-style-type: none"> Visibility limitations. 		
E D P	<ul style="list-style-type: none"> Travelling in reverse vs. forward when visibility is impaired. 		
E D P	<ul style="list-style-type: none"> Steering while loaded. 		
E D P	<ul style="list-style-type: none"> Operating on grades or ramps. 		
E D P	<ul style="list-style-type: none"> Operating distances from edges (dock, platform, etc.) 		
E D P	<ul style="list-style-type: none"> Operating of different terrain. 		
E D P	Positioning / Placing Loads <ul style="list-style-type: none"> Dos and don'ts (for example, stacking along a walkway, people in the area, material being stacked, site requirements, etc.) 		
E D P	<ul style="list-style-type: none"> Progressive Stacking 		
E D P	Parking <ul style="list-style-type: none"> Tilt the mast forward until the lifting device is level or flat on the floor. Apply the parking brake and if necessary chock the wheels, if you have any doubt about the lift truck moving. Position the steer wheels straight so that the next person is not surprised when they move the truck. Shut off the engine and dismount using three point contact, where applicable. 		

Safe Lift Truck Operation



On-The-Job (OTJ) Training

Explain

Demonstrate

Question

Practical

OTJ Training Checklist

Instructor Training Content/Criteria		Complete	
Action(s)	Handling Load Types (As Applicable)		N/A
E D P	Pallets		
E D P	Lumber		
E D P	Chemical Totes		
E D P	Rolls / Bales		
E D P	Barrels		
E D P	Bins		
E D P	Other:		
Action(s)	Railcar and Truck Securement		N/A
	Review pre-loading requirements:		
E D P	Railcar: apply handbrake, position the loading ramp		
E D P	Truck: Secure by means of wheel chocks, vehicle restraint or both, position the loading ramp		
Action(s)	Refueling		N/A
	Battery Charging		
E	<ul style="list-style-type: none"> Review changing and charging preparation procedures 		
E	<ul style="list-style-type: none"> Review battery dangers, safety precautions and battery acid contact / spills procedures 		
	Propane Fueling > Review company-specific procedure and demonstrate refueling.		
E	<ul style="list-style-type: none"> Review propane handling procedures 		
E	<ul style="list-style-type: none"> Review refueling preparation procedures 		
Action(s)	Driving Test		N/A
Q P	Have trainee conduct a driving test - manoeuvring through obstacle course / site.		