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INTRODUCTION

The Safety Committee of the Oregon Association of Nurseries is concerned about health and safety issues that affect agriculture in Oregon. This program provides the most current forklift safety information to our membership and the agricultural community. The committee has developed a program that will provide the necessary training for employees and “fill in the blank” materials for employers. The OAN Safety Committee looks forward to feedback from the industry on this program.

The program was made possible through a 1996 grant from Oregon OSHA. In 2005, the OAN partnered with USDA-RMA to update the materials to reflect rules changes that have occurred.

PURPOSE

To train agricultural workers how to properly inspect, operate and maneuver standard and rough terrain forklifts.

To assist employers in understanding the law and their responsibility to their employees with regard to forklift safety.

SCOPE

These training materials are intended for agricultural employers and employees that use powered industrial trucks in the course of their jobs. These would include but not be limited to: nurseries, greenhouses, farms, dairies, landscape maintenance operations, vineyards and orchards.

LOCATION OF THE RULES

OSHA regulations for the use of forklifts and powered industrial trucks can be found in the Agricultural Operations and Farming Code (Division 4) of the Oregon Occupational Safety and Health Code. Section 437-004-1700 deals with safety requirements relevant to the design and maintenance of the powered industrial truck. Section 437-004-3410 describes additional elements for all vehicles. These are important sections for the employer to read, especially if alterations have been made to the truck, or equipment has been added that is not factory installed. An example of an alteration that would affect the stability and weight capacity of the truck might be the addition of heavier forks not purchased from the manufacturer.

Another tool for understanding the safe use of powered industrial trucks is the ANSI standard. It provides much the same information for the operator as covered in OR-OSHA rules, but in an easy to understand format. Compare the OR-OSHA rules with the ANSI standard. As always, OR-OSHA rules supersede any other regulation. A copy of the American National Safety Institute standard is available in most libraries (ANSI B56.14.15-6.2 18).
**HOW TO USE THIS TRAINING PROGRAM**

Locating the rules that apply to powered industrial trucks can be confusing, however, the rules themselves are very simple. For the purposes of this manual, they will be broken down into four groups: Inspection and Fueling; Load Safety; Operational Safety; and Rough Terrain. The terms *powered industrial truck* and *forklift* will be used interchangeably.

This program includes the following elements:

- Bilingual video on DVD
- Manual
- Appendix with examples of:
  - Written tests
  - Truck/trailer inspection check list
  - Driving test
  - Employee training list
  - Forklift inspection check list
  - Completion certificate

The video training session is only a portion of the training. **Employees are not properly trained if only the video portion is used.** All aspects of the program must be used to properly train and document the training of employees.

**Definitions**

This training program applies to Powered Industrial Trucks (PIT). They are also referred to as fork trucks, forklifts, platform lift trucks, motorized hand trucks, or any other specialized industrial trucks used in agriculture. They are not intended for highway use. The types of lift trucks to be discussed in these training materials are Standard Forklifts and Rough Terrain Forklifts. Always refer to the manufacturer’s manual for the specifics of the equipment being used. Use the right equipment in the right location. A complete description of which truck to use in a given situation is given in OR-OSHA rules.

**Who can operate**

Only operators who have received training and have been authorized by their employer can operate an industrial lift truck. The operator must be qualified visually, physically and mentally to operate a lift truck (**OAR Chapter 437-004-1708**).
Section I
INSPECTION & FUELING

INSPECTING THE POWERED INDUSTRIAL TRUCK

The OR-OSHA code is very specific about inspection requirements. They state:

1. All vehicles should be checked at the beginning of each shift to assure they are in safe operating condition and free from apparent damage that could cause them to fail.

2. Any defects found, which would affect the safe operation of the vehicle, must be corrected before the vehicle is used.

3. Any vehicle that develops defects during operation, and/or becomes unsafe in any way, must be reported immediately to a supervisor or designated authority, and the truck must not be operated until it has been repaired.

The ANSI Standard for PITS expands and clarifies the inspection process to include the following:

"At the beginning of each shift and before operating the truck, check its condition, giving special attention to:

a) tires and inflation pressure of pneumatic tires
b) warning devices
c) lights
d) battery
e) controller
f) lift and tilt systems, load-engaging means, chains, cable and limit switches
g) brakes
h) steering mechanism
i) fuel system(s)"

Do not make repairs or adjustments unless specifically authorized to do so, and the PIT is properly locked and/or tagged out.

Always refer to the manufacturer's manual for the specifics of the equipment being used. Often the manufacturer will include an inspection checklist in the manual.

Who is to inspect? The rules do not state specifically who, just that an inspection needs to take place. In the training video, the operator inspects the vehicle. This is another way for the operator to become familiar with the equipment. The inspection can be done by a trained supervisor, trained mechanic or a trained owner. The “who” is not as important as the inspection itself.
When does it need to be inspected? Forklifts should be inspected at the beginning of each shift.

Why inspect? It may seem to be a time consuming process; however, the time spent could not only avert a serious accident and injury, but also protect valuable equipment and personnel.

What to look for during the inspection

1. Inflation of pneumatic tires: Is the tire pressure correct? Are the tires worn?

2. Warning devices: Is the horn operational? If the forklift is equipped with a backup warning device, is it in working condition?

3. Lights: All lights on the forklift must be operational.

4. Lift and tilt systems: These may need to be tested with the vehicle started. Check to make sure they respond correctly and that nothing obstructs their movement.

5. Load engaging devices: There are clips that hold the forks in the desired position. They need to be in place and secure to keep the forks from unexpected movement during use.

6. Brakes: Some lift trucks may need to have the motor running to check the brakes. Others can be checked without starting the vehicle. Both the parking and service brakes should be inspected. Refer to the operator's manual for the specifics of the equipment being used.

7. Fluid levels: (Fueling will be covered later in this manual.) The inspection of the fluid levels should include: oil levels, fuel levels, hydraulic fluid, battery fluid. This inspection may be best done by a staff mechanic. Only trained personnel can check battery levels and hydraulic fluid levels.

8. Forward and reverse controls: These must be in working condition for obvious reasons.

9. Hoist chains: This is an overlooked area of inspection. The chains that raise the mast are crucial to the safe operation of a lift truck. Check to see if the cotter pins or other forms of pin retention are in place. Do not replace these pins with nails or pins that do not fit properly. If the cotter pin is worn or incorrectly replaced, it can cause a very serious accident (Illustration 1 – Page 13).

10. Hydraulic hoses: Bare hands should not be used to inspect hydraulic hoses. Carefully check the hoses that carry the hydraulic fluid. Look for kinks, worn spots or signs of wear. This is a crucial inspection area, as the hoses are typically located directly in front of the operator. If the hydraulic hose ruptures during operation and hot hydraulic fluid penetrates the skin of the operator, the fluid will have to be surgically removed.

11. Bolts: Make sure the bolts that hold the mast and overhead guard are secure. Sometimes during operation, because of vibration, the bolts become loose.

Refer to the operator's manual for the specifics of the PIT in use. The manufacturer may provide an inspection list to be followed.
INSPECTING THE TRUCK/TRAILER

Before entering a truck, semitrailer or rail car with a forklift, the following inspection and procedures must be followed:

1. The brake must be set and wheel chocks placed under the rear wheels of vehicles being boarded by a powered industrial truck. This will prevent the truck from moving and avoid a potential accident. This also applies to loading rail cars.

2. Dock boards or bridge plate must be in place and secure. Make sure the dock board or plate is adequately constructed to support the forklift; check rated maximum capacities.

3. Semitrailers not coupled or attached to a tractor must be supported by fixed jacks at the overhanging end when being boarded by a powered industrial truck. Fixed support jacks must be inspected to be sure they adequately support the trailer. If not, then the trailer must be supported by pads under the fixed jacks.

4. Physically inspect the flooring of the truck, trailer or rail car for breaks and weak areas. Forklifts are extremely heavy. If the flooring is inadequate, the forklift could break through.

5. Ramps must be properly attached to the dock and the truck or trailer prior to crossing with the forklift. If the ramp is not properly placed and the truck or trailer not properly secured, the weight of the forklift could force the truck forward and away from the dock and the forklift to roll backward off the dock.

FUELING

Most agricultural operations have a specific area to fuel vehicles and equipment. Fuels should be handled in accordance with NFPA Flammable and Combustible Liquids Code. As with chemicals, some fuels require personal protective equipment (PPE). Refer to the Material Safety Data Sheets for any personal protective equipment required for the specific fuel application being used. Material Safety Data Sheets can obtained from the supplier of the fuels you are using. Propane tanks can only be filled by persons trained to do so and require insulated gloves and goggles.

The following steps must be taken when fueling a forklift:

1. Turn off the motor.
2. Put on any personal protective equipment required.
3. Fuel the vehicle.
4. Replace the tank cap.
5. Restart the motor.

In addition, these rules must be followed:

- Forklifts must not be fueled with the operator on them.
- Never check fluid levels with an open flame.
- No smoking in fueling areas.
- In the event of a spill or leak, all fuel must be completely absorbed or have evaporated and the fuel tank cap replaced before starting the forklift.

**Fuels, like chemicals, must be handled properly.**
Section II
LOAD SAFETY

STABILITY, LOAD CAPACITY AND CENTER OF GRAVITY

In order to understand the principles of load safety, and gain an understanding of stability and load capacity, the following terms must be defined:

Center of Gravity – the point of an object at which all of the weight of an object can be considered to be balanced.

Counterweight – the weight built into the basic structure of the truck, used to offset the weight of a load. It also maximizes the truck’s resistance to tipping over.

Grade – a percentage measurement of the slope of a surface. It usually is measured as the number of feet of rise or fall over a hundred foot horizontal distance.

Stability – the truck’s resistance to tipping over.

Line of Action – an imaginary vertical line through the center of gravity of an object.

Load Capacity – the maximum weight the truck can safely lift and carry.

A PIT must never be loaded past the vehicle’s rated load capacity. Manufacturers are required to put the rated load capacity and the weight of the vehicle on the truck. If the PIT being used is old or the plate is not legible, contact the manufacturer. It is required that this information is available.

It is extremely important and your responsibility to make sure the trucks being used are adequate for the loads being moved. In some cases, such as large specimen trees, large pallets of tree stakes, or long rolls of pond liner or shade cloth, the capacity may be beyond the limit and cause the truck to be unstable.
Here are some scenarios involving unstable or overweighted loads:

- The operator is instructed to pick up a load that is beyond its rated capacity. Since the load is too heavy, when lifted off the ground the rear wheel of the lift truck will come off the ground and the truck could tip, if elevation of the load is continued.

- The operator is asked to pick up a load with a manufacturer’s installed “stinger.” The roll is too long for the stinger and the rear wheels of the truck come off the ground. (A stinger is a long, pointed rod that allows the lifting of large rolls, such as carpet, shade cloth, pond liner, etc.)

- The operator is lifting an object that is weighted heavily on one side. The weight of the load is within the load capacity of the vehicle. However, the operator does not center the weight between the forks. The forklift tips to the heavy side and potentially the load could be lost and product damaged.

- The operator, with forks extended high into the air, is lifting a box or pallet within the rated capacity of the truck. Instead of lifting the box or pallet, and lowering the forks to 6-8 inches from the ground, he/she leaves the load suspended in the air. This load is not stable and the truck could tip forward. The load should always be lowered and not elevated while traveling. Lowering the forks could eliminate the possibility of damage to overhead obstacles such as roll-up doors, lighting, and piping.

- The operator, with forks extended high in the air, shifts the load to one side, causing the load to fall and the truck to potentially tip. The operator should keep the forks as close to the ground as possible until reaching the area for stacking. It is best to refrain from using the shift mechanism with a load elevated.

Another area that has been touched on, but needs further discussion is center of gravity. The center of gravity of an unloaded truck is behind the front wheels, approximately where the driver sits. The center of gravity of a load is the center of the bulk of the weight. When the truck lifts the load, the center of gravity of the two becomes one. The center of gravity then shifts forward approximately where the driver’s feet are. If the load is off center (as in the example in the video of an odd shaped load of trees), operator adjustments need to be made to ensure the stability of the truck and load combined. As in scenario three above, unless the operator places the forks at the center of the bulk of the weight, the truck will be unstable. The video will give examples and graphics to further explain. It is extremely important to understand the concepts of center of gravity and load stability.

Ascending and descending grades will be dealt with under Operational Safety, but need to be addressed briefly in this section. If a load is unstable on flat ground, it will be much more unstable on grades. Ascending and descending grades at an angle diagonally, which should not be done, is potentially deadly when loaded. The load could and probably would shift, and the truck would roll.
SLIDING AND TIPPING OF TIERED LOADS

When the forks are not long enough to reach or slide a load to its desired location, use the forks to tip and slide the load. For example: Fruit crates are being loaded by forklift onto the back of a flatbed truck. Two crates are being loaded at once and are therefore stacked. The operator needs to get the stacked boxes into the center of the truck as opposed to the outside edge. In order to accomplish this he/she:

1. Lifts the load to the bed of the truck
2. Pulls the forks out to the edge of the boxes
3. Tilts the forks down and raises the forks up, raising the edge of the boxes slightly
4. Slides the boxes to the center of the truck

Ensure the boxes are securely stacked, with all four corners supported. There is a potential danger in tipping tiered boxes. If the tiered boxes topple over, people standing around the truck could be hurt or killed, depending on the weight of the load. If this process is to be used, alert foot traffic. Never allow anyone near the truck or trailer being loaded or unloaded when the forklift operator is tipping loads with the forks. When tipping the boxes or the load, never tip it more than is safe. Only experienced operators should perform this maneuver.
Section III
OPERATIONAL SAFETY

SAFE TRAVEL

Safe operation of the forklift is the responsibility of the operator. Operators must be trained on the company’s specific safety requirements. Training is the responsibility of the employer.

The following rules must be followed:

1. Use of a safety belt is highly recommended.
2. Traffic regulations must be observed. This includes company determined speed limits.
3. A safe distance must be maintained if more than one lift truck is in use. A distance of three truck lengths is recommended.
4. No horseplay or stunt driving is permitted.
5. Blind spots, intersections, and dangerous locations should be observed and approached with caution. Sound the horn or warning device if visibility is limited.
6. Slow down when visibility is obstructed.
7. Travel at a safe speed, so that the vehicle can be safely brought to a stop.
8. Always look in the direction of travel. If the load obstructs the operator’s vision, travel with load trailing.
9. Travel with the forks raised only high enough to clear obstacles and uneven surfaces.
10. Turns should be made with smooth sweeping motions.
11. Avoid turning on steep grades or inclines.
12. Make stops, starts and directional moves as smoothly as possible to avoid shifting the load and/or overturning the truck.
13. Only the operator is allowed on the forklift. One seat...one person.
15. Never drive up to a pedestrian standing in front of a fixed object.
16. Never allow people to walk or stand under the forks when lifted.
17. If the job requires someone to be lifted by the forklift, use only authorized OSHA compliant man lift baskets (Illustration 2 – Page 15).
18. Keep body parts within the compartment of the forklift. Never allow body parts between the mast and the body of the truck.
19. Do not block fire escapes or fire extinguishers when parking the forklift.
20. Slow down on wet or slippery surfaces.
ASCENDING AND DESCENDING GRADES

When traveling on a steep grade, loaded trucks must be driven with the load upgrade. When ascending or descending a grade without a load, keep the forks facing downgrade. Always drive straight, never on a diagonal. This could cause the truck to turn over, or the load to shift...or both.

ROLLOVER SAFETY

If the forklift starts to turn over, follow these steps:

1. NEVER jump from the forklift. Ride the forklift down.
2. Plant feet firmly.
3. Tightly hug the steering wheel.
4. Lean forward and away from the point of impact.
5. Keep all body parts inside the rollocage.

PARKING

1. Lower the forks to the ground. Make sure the tips of the forks are not going to cause a trip hazard.
2. Turn off the engine (if the operator is going to be more than 25 feet away from the forklift or if the vehicle is out of sight).
3. Apply the parking brake.
4. Chock the wheels when on an incline or working on the truck.

LIFTING PERSONNEL

Forklifts are designed to lift product, but there may be some cases where people need to be lifted. It is not legal to lift people while standing on forks or pallets. In order to lift people a “man lift basket” is required. It must meet OR-OSHA requirements as outlined in Illustration 2 on page 15. The basket must be attached to the forks or carriage with a chain or pins. Never allow employees to step outside the basket when lifted.
Section IV
ROUGH TERRAIN FORKLIFTS

Definition
A rough terrain forklift is simply a forklift with oversized tires and high ground clearance. It is designed to be used on unstable (soft) and uneven work surfaces. A rough terrain forklift may be necessary when the intended operational area has gravel or dirt, even mud. Some rough terrain forklifts are equipped with four wheel drive, making them especially useful in field operations where a standard forklift would get stuck. Some rough terrain forklifts have articulating fronts.

OPERATIONAL SAFETY
All the same rules apply to the rough terrain forklift that apply to the standard forklift. There are some additional cautions because of the difference in the area of operation.

1. Choose the route with the fewest obstructions. If the only route has holes, bumps, slick spots or loose material, SLOW DOWN.

2. Keep a safe distance from the edges of ditches or excavations where the ground could give way. Remember, these forklifts are extremely heavy and what might not collapse under normal weight might give way under the weight of a rough terrain forklift, especially if loaded. Extreme caution must be exercised if the path is muddy or slick and/or sloped.

3. Travel slowly and avoid turning on slick, muddy or sloped areas. This could cause the truck to become unstable and slide or turn over.

4. Keep the load as low as possible.

ROLLOVER SAFETY
Just as with the standard forklift, the rollover safety rules to be followed are:

1. Never jump from the forklift. Ride the forklift down.

2. Plant feet firmly.

3. Tightly hug the steering wheel.

4. Lean forward and away from the point of impact.

5. Keep all body parts inside the roll cage.
**PARKING**

When leaving the rough terrain forklift on level surfaces, follow the same procedures as for the standard forklift.

1. Tilt the carriage slightly forward and lower the forks *until* the tips touch the ground.
2. Shut off the engine.
3. Apply the parking brake.
4. If parked on an incline, chock the wheels.

In rough terrain situations the unanticipated movement of the truck *could* cause the forklift to tip over.

**LOAD SAFETY**

1. Stay within the rated load capacity of the truck. If the area conditions are soft or uneven ground, the load capacity may be less than the rated capacity. Reduce the load to keep the truck stable.

2. Keep the forks as far apart as possible. Make sure they are equal distance from the center and *locked* into place. Loads placed on the tips will change the center of gravity and make the forklift unstable.

3. Keep the load against the carriage.
Illustration 2

MAN LIFT BASKET

Platform must be secured to carriage or forks

437-004-1700 (9) (h)
APPENDIX
# FORKLIFT TRAINING QUESTIONS

## Basic Module

### True or False

1. **T** F When forward visibility is obstructed by the load, lean out the side of the forklift so you can see around the load.

2. **T** F The maximum weight of the load that your truck is allowed to carry should be listed on the truck.

3. **T** F If the truck you are driving starts to tip over, jump off the opposite side of the truck.

4. **T** F The stability of the lift truck is based on the principle of balance.

5. **T** F When traveling with or without a load, always keep the forks at least 3 feet off the ground.

6. **T** F Seat belts only need to be used during training or when your supervisor is around.

7. **T** F Always park the forklift in front of a fire extinguisher.

8. **T** F When people are walking in the path of the forklift, honk the horn and keep going.

9. **T** F It is correct parking procedure to leave the forks in the air.

10. **T** F It is all right to carry a fellow employee on the forks of the forklift as long as you are only going a very short distance and the job needs to be done.

11. **T** F When loading a trailer not attached to the truck, it is necessary to put jacks under the front end to support the trailer.

12. **T** F Dock and bridge plates have rated maximum capacities.

13. **T** F The forklift driver is responsible for making sure the trailer is secured and the floor is safe to drive on.

14. **T** F If the proper procedures for securing the truck or trailer are not followed, the truck/trailer can shift forward and the forklift can fall out of the truck/trailer.

15. **T** F If the truck flooring is not inspected prior to entering with the forklift, the flooring, if weak, could give way and the forklift fall through.
Multiple Choice

1. Inspection on forklifts should be done _______.
   a. Once per month  c. Daily
   b. Two times a year  d. Once per shift

2. When carrying a load, you must keep the forks
   a. as low to the ground as possible.
   b. as far under the load as possible, with the load against the masts.
   c. whatever feels safest to you.
   d. Both A and B.

3. To be qualified to drive a forklift you must ________.
   a. Have a valid driver's license.
   b. Be at least 21 years of age.
   c. Receive specific training for the forklift type and model.
   d. None of the above.

4. The use of a ________ is mandatory when elevating people with the forklift.
   a. Hard hat  c. Man lift basket
   b. Life jacket  d. Pallet

5. Elevated loads must be tilted forward ONLY when directly over the place to be unloaded because:
   a. Too much forward tilt can cause the truck to topple forward.
   b. An unsecured load can slide off the forks.
   c. The center of gravity is changed on elevated loads.
   d. All of the above.
   e. None of the above.

6. The forklift inspection process include all of the following except:
   a. Checking the forks for cracks and wear.
   b. Checking the lift mechanism for lift, tilt and side shift functions.
   c. Operation of both service and parking brakes.
   d. Checking fuel & hydraulic systems for leaks using an open flame.

7. A forklift is considered unattended when the driver is:
   a. 25 or more feet from the forklift.
   b. out of sight of the forklift.
   c. standing next to the forklift.
   d. A, B & C.

8. The following procedures must be followed before entering a truck, trailer or railcar:
   a. Wheel chocks are placed in front of the rear wheels.
   b. If the truck is attached, the brakes are set.
   c. The truck has been inspected for tears, weak or broken flooring.
   d. The dock or bridge plate is in place and secure.
   e. All of the above.
### FORKLIFT TRAINING QUESTIONS

#### Basic Module
**Spanish Version**

#### Verdadero o Falso

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. T</td>
<td>F</td>
<td>Cuando la vista de adelante esté bloqueada por la carga, recarguese al lado del montacarga para poder ver alrededor de la carga.</td>
</tr>
<tr>
<td>2. T</td>
<td>F</td>
<td>El peso máximo que es permitido levantar por el montacarga está escrito en la montacarga.</td>
</tr>
<tr>
<td>3. T</td>
<td>F</td>
<td>Si el montacargas empieza a voltearse, salte del lado opuesto del montacarga.</td>
</tr>
<tr>
<td>4. T</td>
<td>F</td>
<td>La estabilidad del montacargas está basado en el principio de balanza.</td>
</tr>
<tr>
<td>5. T</td>
<td>F</td>
<td>Cuando camine con o sin una carga, siempre mantenga las horquillas al mínimo tres pies arriba de la tierra.</td>
</tr>
<tr>
<td>6. T</td>
<td>F</td>
<td>Los cinturones de seguridad son necesarios únicamente durante el tiempo de entrenamiento o cuando esté el supervisor.</td>
</tr>
<tr>
<td>7. T</td>
<td>F</td>
<td>Siempre se estaciona el montacargas en frente de un extinguidor de fuego.</td>
</tr>
<tr>
<td>8. T</td>
<td>F</td>
<td>Cuando pasen los peatones enfrente del montacargas, toque el claxon y siga adelante.</td>
</tr>
<tr>
<td>10. T</td>
<td>F</td>
<td>Está bien llevar a otro trabajador en las horquillas del montacargas si solamente se va una distancia corta y si es un trabajo urgente.</td>
</tr>
<tr>
<td>11. T</td>
<td>F</td>
<td>Cuando cargando un tráiler que no está enganchado al camión, es necesario poner un gato en frente para soportar el tráiler.</td>
</tr>
<tr>
<td>12. T</td>
<td>F</td>
<td>Placas de embarque y remolque tienen el rango de capacidad máxima.</td>
</tr>
<tr>
<td>13. T</td>
<td>F</td>
<td>El chofer del montacargas es responsable para ver que esté seguro el tráiler y que el suelo esté bien para manejar adentro.</td>
</tr>
<tr>
<td>14. T</td>
<td>F</td>
<td>Si los procedimientos correctos para asegurar el camión o el tráiler no se están usando, el camión/traile se puede mover para adelante y la montacarga se puede caer del troque o el tráiler.</td>
</tr>
<tr>
<td>15. T</td>
<td>F</td>
<td>Si el suelo del tráiler no está inspeccionado antes de entrar con el montacargas y el suelo está débil, se puede caer el montacargas por el suelo.</td>
</tr>
</tbody>
</table>
Selección Múltiple

1. Una inspección de montacargas tiene que ser hecha:
   a. Una vez por mes  c. Diariamente
   b. DOS veces al año  d. Una vez cada turno

2. Cuando lleva una carga, mantenga las horquillas de levante
   a. Lo más bajo posible al suelo.
   b. Lo más debajo de la carga que sea posible, con el peso contra las columnas.
   c. Lo que usted sienta más seguro.
   d. Respuesta A y B.

3. Para ser calificado para manejar un montacargas, tiene que:
   a. tener una licencia de manejar válida.
   b. tener al menos 21 años de edad.
   c. Recibir entrenamiento específico para el tipo y marca de montacargas.
   d. Ninguna respuesta.

4. El uso de ________ es obligatorio cuando se levante a personas con el montacargas.
   a. Un casco de seguridad
   b. Un salvavidas
   c. Una canastilla de seguridad
   d. Una palet

5. Las cargas elevadas se inclinan adelante solamente cuando se acercan al lugar de descargar porque:
   a. Las horquillas demasiado hacia adelante puede causar que se ladee el montacargas.
   b. Una carga insegura puede resbalar de las horquillas.
   c. El centro de gravedad se cambia en cargas elevadas.
   d. Todas las primeras tres respuestas.
   e. Ninguna de las respuestas.

6. El proceso de inspeccionar el montacargas incluye todo lo siguiente menos:
   a. Inspeccionar las horquillas por rajadas y puntos de desgaste.
   b. Inspeccionar el mecanismo de levantamiento, inclinación y movimiento de lado a lado.
   c. La operación de los frenos de servicio y de mano.
   d. Inspeccionar el sistema de combustible y hidráulico para derrames usando una llama abierta.

7. Un montacargas se considera no atendido cuando el chofer esta:
   a. 25 or más pies de lejos del montacargas.
   b. Afuera de la vista del montacargas.
   c. De pie al lado del montacargas.
   d. A, B y C.

8. Hay que seguir los procedimientos siguientes antes de entrar en un camión, un traile o en un carro ferrocarrilero:
   a. Bloqueo de llantas se ponen en frente de las llantas de atrás.
   b. Si el camión esta enganchado al traile, los frenos están puestos.
   c. El traile ha sido inspeccionado para rajadas o un suelo débil o quebrado.
   d. La plataforma o la rampa están bien en su lugar y seguras.
   e. Todas respuestas de arriba.


FORKLIFT TRAINING QUESTIONS
Rough Terrain Module

True or False

1. T F Travel over rough roads can start the load bouncing and actually flip the load off the forks.
2. T F If the load blocks your vision, it is okay to travel forward if you sound the horn.
3. T F Turning on a wet slope could cause the forklift to slide and tip over.
4. T F Because the rough terrain forklift is like the standard in some ways, no extra training is necessary.
5. T F The principles of stability and center of gravity do not apply to the rough terrain forklift.

Multiple Choice

6. When parking the rough terrain forklift on an incline, the following procedures must be done:
   a. Park the forklift angled side ways across the hill.
   b. Tilt the carriage slightly forward and lower the forks to the ground.
   c. Shut off the fuel supply.
   d. Apply the parking brake and shut off the engine.
   e. A & C only.
   f. B & D only.
FORKLIFT TRAINING QUESTIONS

Rough Terrain Module
Spanish Version

Verdadero o Falso

1. T  F  El viajar en terreno disparejo puede comenzar la carga que salte y voltear la carga de las horquillas.

2. T  F  Si la carga bloquea la vista de adelante, está bien seguir adelante si toca el claxón.

3. T  F  Dando vuelta en un declive mojado puede causar que el montacargas se resbale y se vuelque.

4. T  F  Porque el montacargas para terrenos escabrosos es como el estándard en algunas maneras, no es necesario más entrenamiento.

5. T  F  Las reglas de estabilidad y del centro de gravedad no aplican para el montacargas de terrenos escabrosos.

Selección Múltiple

6. Cuando se estacione el montacargas de terrenos escabrosos en un declive, hay que seguir los procedimientos siguientes:
   a. Se estaciona el montacargas atravesado al declive.
   b. Incline las columnas ligeramente hacia adelante y baje las horquillas hasta que las puntas toquen el piso.
   c. Apagar la línea de combustible.
   d. Ponga el freno de mano y apague el motor.
   e. A y C solamente.
   f. B y D solamente.
# FORKLIFT TRAINING QUESTIONS

## ANSWER KEY

### Basic Module

**True or False**

1. F
2. T
3. F
4. T
5. F
6. F
7. F
8. F
9. F
10. F
11. F
12. T
13. T
14. T
15. T

**Multiple Choice**

1. d
2. d
3. c
4. c
5. d
6. d
7. d
8. e

### Rough Terrain Module

1. T
2. F
3. T
4. F
5. F
6. F
FORKLIFT TRAINING

DRIVING TEST

Learning Objectives

The operator should demonstrate proficiency in:

- Ascending and descending incline
- Tail swings
- Fork height
- Parking
- Securing material
- Carrying load
- Stacking material
- Overhead obstacles
- Traffic and pedestrian observation

Set up an obstacle course in a manner that best depicts the daily use of the forklift, utilizing the list above. If there are no inclines in your operation, omit it from the obstacle course. Customize this to your operation. This section is not optional. In order for operators to be properly trained they must demonstrate they can handle a forklift. Make sure the above objectives are included in some manner. Let the operator go through the course without interruption (unless life or property is in jeopardy). If there is need for correction or additional instruction, do so, then send the operator back through the course. Repeat until management or the trainer is satisfied with the operator's ability to maneuver the forklift safely.

For the Rough Terrain and Truck/Trailer loading module, similar proficiency tests should be given. Develop them according to the use of the equipment.
SAMPLE COURSE LAYOUT

(See Diagram below)

The trainer should observe the operator:

1. Properly engaging forklift.
2. Checking roll-up door to see if all the way up and fork and mast will clear the door.
3. Slowing down on the decline and going down straight.
4. Watching for traffic and people, sounding horn.
5. Securing the material on the pallet, placing forks all the way under pallet, cradling load.
6. Sounding horn upon entering building and going into cooler.
7. Watch tail swing while turning and placing pallet in cooler.
8. Sound hour prior to exiting cooler with pallet 2.
9. Checking clearing of second roll-up door.
10. Sounding horn as corner is rounded down narrow traffic way.
11. Watch for pedestrians, stopping if needed.
12. Placing pallet 2 in secure manner.
13. Parking so as not to obstruct fire extinguisher or electrical panel; lowering forks to ground; setting parking brake; and shutting down equipment.

Have operator move forklift from parking area and proceed to south roll-up door, down incline and pick up pallet 1. Take pallet 1 into cooler and place by pallet 2. Pick up pallet 2 and exit cooler and go through north roll-up door then south through traffic area and place where pallet 1 was sitting. Repark forklift.
FORKLIFT INSPECTION FORM

PRE-OPERATION INSPECTION

Check Fluid Levels

☐ Fuel
☐ Hydraulic Oil
☐ Coolant
☐ Engine Oil
☐ Transmission Oil
☐ Battery Fluid

Check for Leaks

☐ Fuel
☐ Oil
☐ Water
☐ Hydraulic Oil

Check for Operation

☐ Seat Belt
☐ Warning Devices (Horn or Beeper)
☐ Lights
☐ Hoist, Tilt
☐ Steering
☐ Gauges

Brakes

☐ Service
☐ Parking

Comments ________________________________________________________________

Operator ______________________________________________________________

Veh # ________________ Date ________________
TRUCK/TRAILER PRE-LOADING INSPECTION FORM

Truck #.__________________________
Date____________________________
Fecha

☐ 1. Brakes are set.

☐ 2. Rear wheels are chocked.

☐ 3. Dock boards/bridge plate in place and secure. Rated maximum capacity is adequate.

☐ 4. If unattached, trailer is supported adequately by landing gear or fixed jacks.

☐ 5. Flooring has no breaks or weak areas. Walls have no dents or cuts.

☐ 6. Ramp is properly attached to the dock and truck/trailer.

Driver _________________________________ Date ______________

Truck Checker ____________________________

OREGON MOTOR VEHICLE 11
Training List

The following people have been trained and certified by ____________________________
and are qualified to drive our industrial lift trucks.

Trainer ______________________________________ Date ________________

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Signature</th>
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This is to certify that

________________________
Employee

has successfully completed the following training Modules
of the Oregon Association of Nurseries

Forklift Training Program

Basic Forklift Module — Rough Terrain Forklift Module —

on this the ___ day of __________________, 20___
at

________________________
(Company Name)

Signed __________________________