

Safe Operating Rules

This chapter outlines the minimum Safety Standards for forklift operators as required by OSHA. Forklift safety should exceed these requirements. The explicit purpose of forklift safety is to eliminate:

1. **Accidents and Injuries**
2. **Property Damage**
3. **Equipment Abuses and Damage**

Meeting OSHA requirements requires understanding and enforcement of these standards with the implementation of training programs for forklift operators. The following safe operating rules include all the rules required by OSHA and State OSHA. It is recommended that the employee forklift-training program include these operating rules. Issue each forklift operator a copy of these OPERATING RULES, and have each operator acknowledge them by signing that they have received a copy of these rules and understand them. Post a copy on the bulletin board near forklift operations to satisfy OSHA and State OSHA requirements.

Remember, training requires documentation. Undocumented training has the same basic legal effect as no training. The forklift operator must acknowledge receipt of these rules for documentation to occur under OSHA and State OSHA requirements.

OPERATING RULES

1. Only drivers authorized by the employer, licensed and trained in the safe operation of industrial trucks, pallet jacks or industrial tow tractors will be permitted to operate such vehicles. Methods will be devised to train operators in safe operation of powered industrial trucks.
2. Drivers will check the vehicle at least once per shift, and if it is found to be unsafe, the matter will be reported immediately to a supervisor, foreman or mechanic, and the vehicle will not be put in service again until it has been made safe. Attention will be given to the proper functioning of tires, horn, lights, battery, controller, brakes, steering mechanism, and the lift system of forklifts (forks, chains, cable, and limit switches). Electric pallet jacks must include the proper functioning of the horizontal and vertical emergency stop systems.
3. Vehicles will not exceed authorized or safe speed, always maintaining a safe distance from other vehicles, keeping the truck under positive control at all times and all established traffic regulations will be observed.
4. For trucks traveling in the same direction, a safe distance may be considered to be approximately 3 truck lengths or preferably a time lapse-3 seconds passing the same point. A turn will never be made at such a speed that will cause the fork lift or pallet jack to overturn, due to the centrifugal force of gravity. Fork lift and pallet jacks have a very high center of gravity and will turn over when a turn is made at excessive speed.
5. **NO RIDERS WILL BE PERMITTED ON VEHICLES.** A person may not ride or be elevated on the forks of a lift truck or pallet jack without the use of a safety platform. A safety platform is defined as:
 - a. Having 42" high guard rails around all sides.
 - b. Having a mid rail, midway between the guard rails and platform.
 - c. Having 4+high toeboards around the platform.

- d. Having chain, or other devices, securing the platform to the mast of the fork lift.
 - e. Having a guard high to protect the person from the crushing action of the mast and backrest.
6. Stunt driving and horseplay are prohibited.
 7. A loaded vehicle will not be moved until the load is safe and secure.
 8. When leaving a vehicle unattended, the power will be shut off, brakes set, the mast brought to the vertical position, and the load-engaging means left in the down position. When left on an incline, the wheels will be blocked.

Note: A powered industrial truck is unattended when the operator is 25 feet or more away from the vehicle which remains in his view, or whenever the operator leaves the vehicle and it is not in his/her view.

9. When the operator of an industrial truck is dismounted and within 25 feet of the truck still in his view, the load engaging means will be fully lowered, controls neutralized, and the brakes set to prevent movement.
10. Trucks will not be driven up to anyone standing in front of a bench or other fixed object of such size that the person could be caught between the truck and object.
11. Operators will look in the direction of travel and will not move a vehicle until certain that all persons are in the clear. Pedestrians have the right of way at all times.
12. Vehicles will not be run onto any elevator unless the driver is specifically authorized to do so. Before entering an elevator, the driver will make sure that the capacity of the elevator will not be exceeded. Once on an elevator, the power will be shut off and the brakes set.
13. Motorized hand trucks will enter elevators or other confined areas with the load end forward.
14. Vehicles will not be driven in and out of highway trucks and trailers at unloading docks until such trucks are securely blocked and brakes set.
15. Vehicles will not be operated on floors, sidewalk doors, or platforms that will not safely support the loaded vehicle.
16. Employees will never be allowed to ride on the forks or on the sides or backs of lift trucks and pallet jacks.
17. No riders will be permitted on vehicles unless provided with adequate riding facilities.
18. The forks will always be carried as low as possible, consistent with safe operations, usually 4 inches off the floor.
19. Extreme care will be taken when tilting loads. Loads may fall or forklifts can easily be turned over while tilting moderate loads.
20. Fork lifts and pallet jacks will not be driven in and out of highway trucks and/or trailers at unloading/loading docks until such trucks are securely blocked and brakes set. Chock all trucks and trailers.
21. Employees will not place any part of their bodies outside the running lines of an industrial truck or between mast uprights or other parts of the truck where shear or crushing hazards exist.
22. Employees will not be allowed to stand, pass, or work under the elevated portion of any industrial truck, loaded or empty, unless it is effectively blocked to prevent it from falling.

23. Railroad tracks will be crossed diagonally, wherever possible. Parking closer than 9 feet from the centerline of railroad tracks is prohibited.
24. The width of one tire on the powered industrial truck will be the minimum distance maintained from the edge by the truck while it is on any elevated dock, platform, freight car or truck.
25. When powered industrial trucks are used to open and close doors, the following provisions will be complied with:
 - A. A device specifically designed for opening or closing doors will be attached to the truck.
 - B. The force applied by the device to the door will be applied parallel to the direction of travel of the door.
 - C. The entire door opening operation will be in full view of the operator.
 - D. The truck operator and other employees will be clear of the area when the door might fall while being opened.
26. Prior to driving onto trucks, trailers and railroad cars, their flooring will be checked for breaks and other structural weaknesses.
27. Other trucks traveling in the same direction will not be passed at intersections, blind spots, or dangerous locations.
28. The driver will slow down and sound the horn at cross aisles and other locations where vision is obstructed. If the load being carried obstructs forward view, the driver will be required to travel in reverse, with the load trailing.
29. The driver will slow down and sound the horn at cross aisles and other locations where vision is obstructed. If the load being carried obstructs forward view, the driver will be required to travel with the load trailing.
30. Grades will be ascended or descended slowly.
 - A. When ascending or descending grades in excess of 10 percent, loaded trucks will be driven with the load upgrade (drive-up and back down).
 - B. On all grades, the load and load-engaging means will be tilted back if applicable and raised only as far as necessary to clear the road surface.
 - C. Motorized hand and hand/rider trucks will be operated on all grades with the load-engaging means downgrade.
 - D. Electric pallet jacks will be operated on all grades or ramps with the load down grade, preventing a runaway jack from crushing the operator.
31. Trucks will not be loaded in excess of their rated capacity. The rated capacity of the truck must be clearly visible by the operator. On forklifts, it is recommended the maximum capacity be stenciled on both sides of the mast and on the inside, directly opposite of the operator as he/she sits on the seat.
32. Pallet jacks will enter elevators or other confine areas with the load end forward. Operators of hand jacks and electric jacks not designed for riding, will not ride on the jack. This includes using the jack as a scooter.
33. No truck will be operated with a leak in the fuel, oil and hydraulic systems.
34. Tilting forward with the load engaging means elevated will be prohibited except when picking up a load. Elevated loads will not be tilted forward except when the load is being deposited onto a storage rack or equivalent. When stacking or tiering, backward tilt will be limited to that necessary to stabilize the load. Even though the load is not heavy, by tilting forward the fork lift can be overturned, due to the change in the trucks center of gravity.

35. The load engaging device will be placed in such a manner that the load will be securely held or supported.
36. Special precautions will be taken in the securing and handling of loads by trucks equipped with attachments, and during the operation of these trucks after the loads have been removed. Any attachment changes the center of gravity and the maximum capacity rating of the lift.
37. The engine must remain running and the operator at the controls, when a person is elevated in a safe platform. In case of hydraulic failure, the running pumps will afford some degree of protection in descending the person safely to floor level.
38. Forklift and electric pallet jack operators may not smoke while operating this equipment. Sparks, open flames or smoking are not allowed in an area within 50 feet of any battery charging or refueling operation. Never connect or disconnect a charger to a battery, unless the charger is in the off position.