Environmental Health and Safety Policy Manual		
Issue Date: 05/19/2010	Updated: 2/26/2015	Policy # EHS-400.10
Powered Industrial Truck Safety Policy		

1.0 PURPOSE

To ensure safe operation and maintenance of powered industrial trucks (PIT), which include fork trucks, tractors, platform lift trucks, motorized hand trucks, and other specialized industrial trucks.

2.0 SCOPE

This policy applies to all departments that maintain and personnel who operate PITs.

3.0 RESPONSIBILITIES

3.1 Environmental Health and Safety (EHS) shall:

- Monitor compliance with this policy
- Perform program review and revisions as required by this policy.

3.2 Departments that maintain PITs shall:

- Provide initial training, as outlined in this policy, to PIT operators.
- Monitor performance of qualified PIT operators and recommend refresher training as determined necessary.
- Maintain PIT in sound condition and document and maintain vehicle inspection records.
- Remove any damaged PIT or implements from service until repairs are made.
- Ensure that rental PIT equipment is inspected and the operator is properly trained prior to use.
- Ensure PITs bear a label or other identifying mark indicating approval by the testing laboratory approved by American National Standard for PIT, Part II, ANSI B56.1-1969.
- Contact the PIT manufacturer for written approval prior to any modifications and additions which affect capacity and safety operation of the PIT. Capacity, operation, and maintenance instruction plates, tags, or decals shall be changed accordingly.
- Ensure PIT attachments are labeled showing approximate weight of the truck and attachment combination at maximum elevation with load laterally centered.
- Ensure that all nameplates and markings are in place and are legible.
- Notify EHS of changes to PIT inventory, Appendix A.
- Review contractor's PIT program with the assistance of EHS.

3.3 PIT Operators shall:

- Do not operate PITs until authorized by FS supervision.
- Operate PITs in a safe manner and comply with the requirements of this policy.
- Report any changes in medical condition that may affect driving ability to the supervisor.
- Possess a valid state driver's license and observe the restrictions placed on that license, including the use of corrective lenses.
- Report any unsafe PIT, implement or vehicle use to the appropriate supervision.

4.0 TRAINING AND EDUCATION:

4.1 Initial Training

Supervisors shall ensure that each PIT operator is competent to operate a PIT safely, as demonstrated by the successful completion of PIT training and evaluation. Upon completion, the successful PIT operator will receive a training certificate, Appendix B - *Training Certificate (Initial)*.

4.2 Training Elements

Training shall consist of a combination of formal instruction (e.g. lecture, discussion, interactive computer learning, video tape, and written material), practical training, and evaluation of the operator's performance operating the vehicle in the workplace. Section 4.2.1 provides a list of training tools that, when fully completed, will compose an adequate training curriculum. In addition to using the materials identified in 4.2.1, equipment and location-specific information is required to provide a comprehensive training session. Training may additionally be accomplished through the services of a qualified consultant/contractor. Regardless of the mechanism, the following elements must be components of the training:

- Operating instructions, warnings, and precautions
- Location and operation of truck controls and instrumentation
- Engine or motor operation
- Steering and maneuvering
- Visibility (including restrictions due to loading)
- Fork and attachment adaptation, operation and use limitations
- Vehicle capacity and stability
- Vehicle inspection and maintenance required of the operator
- Refueling and /or charging and recharging of batteries
- Operating limitations
- Surface conditions where the vehicle will be operated
- Composition of loads to be carried and load stability
- Load manipulation, stacking, and un-stacking
- Pedestrian traffic, narrow aisles and other hazards the vehicle may encounter
- Ramps and other sloped surfaces that could affect the vehicle's stability
- Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust
- Other unique or potentially hazardous conditions that could affect safe operation

4.2.1 Training Materials and Certification

Supervisors shall use the following training tools, as a minimum, to certify their operators:

- Fork Lift
  - Review Appendix C, Procedures for Using PIT.
  - Using the OSHA training website, complete the four OSHA Powered Industrial Truck – E-tools (Types and Fundamentals, Operating the Forklift, Understanding the Workplace, and Training Assistant) sections.
  - Review and complete Appendix D, Fork Lift Inspection Form (Page 2), with the operator prior to commencing the hands-on portion of training.
  - Complete a hands-on performance test and document using Appendix E, Performance Test for Fork Lift Operators.
- Skid Steer Loader
  - Review Appendix C.
  - Review the Safe Operation of Bobcat Skid Steer Loaders presentation and/or the Caterpillar Skid Steer Loaders video.
  - Review and complete Appendix D, Skid Steer Loader Inspection Form prior to the hands-on portion of the training.
  - Complete a hands-on performance test and properly document.
- Aerial Lift
  - Review Appendix C.
  - Review the Aerial Lift Training presentation.
  - Review and complete Appendix D, Aerial Lift Inspection Form, prior to the hands-on portion of the training.
  - Complete a hands-on performance test and properly document.

Consultant/contractors shall use equivalent tools as part of their training program. Each potential training provider's program shall be evaluated for acceptability by the appropriate supervisor prior to contracting the support. When a contractor/consultant is used for training the LSUHSC specific equipment inspection forms and, when applicable, Performance Test for Fork Lift Operators shall be incorporated for use into their program. The LSUHSC training certificate, Appendix B - *Training Certificate (Initial)*, shall be issued in addition to any certificate issued by the training provider.

4.3 Refresher Training

Refresher training in relevant topics shall be provided when a condition in the workplace changes in a manner that could affect safe operation of the PIT or when the operator:

- Is observed operating the vehicle in an unsafe manner.
- Is involved in an accident or near miss incident.
- The operator has received an evaluation that reveals that the operator is not operating the truck safely.

PIT operators that participate in refresher training shall not be authorized to operate equipment until they have demonstrated proficiency of operation through an employee evaluation.

4.4 Employee Evaluation

Evaluation of each powered industrial truck operator's performance shall be conducted by their supervisor at least once every three years. A training certificate, Appendix B - *Training Certificate (3-Year Evaluation)*, shall be issued with each three-year evaluation. Any qualified PIT operator who demonstrates poor proficiency at operation shall be required to complete refresher training.

5.0 EQUIPMENT

5.1 Warning Devices and Lights

All PIT must be equipped with audible warning devices to warn of approach. Such devices include a horn and back-up warning signal.

Auxiliary lighting is required when operating a PIT at night or in areas with low illumination (less than 2 foot-candles).

Under no circumstances are warning devices or auxiliary lighting to be deliberately disabled. Any PIT found to have a malfunctioning warning device(s) or auxiliary lighting must be immediately removed from service, tagged, and the malfunction repaired before returning to service.

5.2 Modifications

Some PITs are designed in such a way that the capacity of the unit may be increased by adding additional counterweights. No such modification may be made to a PIT without written approval by the manufacturer. Any PIT so modified must still meet the stability requirements found in ANSI Standard B56.1-1993. If the capacity of a PIT is modified, the capacity, operation, and maintenance instruction plates, tags, or decals must also be modified to reflect the new configuration and capacity.

6.0 VEHICLE MAINTENANCE

All nameplates, tags, or other markings placed on a powered industrial truck by the manufacturer and/or approving laboratory must be kept in place and legible. Nameplates and markings that are permanently obscured, missing, or otherwise damaged must be replaced. It is the responsibility of the powered industrial truck operator(s) to notify their supervisor upon discovering that the nameplates and/or markings have been obscured or are otherwise illegible.

Each department shall perform periodic maintenance on PIT in accordance with manufacturer’s instructions.

7.0 INSPECTIONS AND PROGRAM REVIEW:

Prior to operating a PIT during a work shift, operators must inspect the PIT for defects that might affect the safe operation of the vehicle using the *Powered Industrial Truck Pre-Operation Inspection Checklists* (Appendix D). The PIT shall be removed from

service, until repaired, if damage or defects are discovered that would prevent its safe operation.

EHS shall conduct a PIT program review every three years to verify the performance of training and inspections and maintenance of all associated records. The review will identify program deficiencies and facilitate the development of corrective actions.

8.0 RECORDKEEPING

FS shall maintain and update copies of PIT equipment lists and operating manuals.

Certification of training and vehicle maintenance records shall be permanently maintained by the FS department.

Daily vehicle inspection records shall be maintained for a period of three years.

Copies of all records shall be provided to EHS upon request to facilitate inspection and program review.

9.0 REFERENCES:

- 29 CFR Part1910.178, Powered Industrial Trucks
- 29 CFR Part 1926.600, Subpart O – Motor Vehicles, Mechanized Equipment, and Marine Operations

10.0 APPENDICES:

- Appendix A - Powered Industrial Truck Inventory
- Appendix B - PIT Training Certificates
- Appendix C - Procedures for Using Powered Industrial Trucks
- Appendix D - PIT Inspection Forms
  - Forklift Inspection Form
  - Skid Steer Inspection Form
  - Aerial Lift Inspection Form
- Appendix E – Performance Test for Forklift Operators

LSU Health NEW ORLEANS

Powered Industrial Truck Inventory

as of 09/13/2014

Department	Location	Type	Make & Model	Serial #
School of Dentistry	Power House	Forklift	Nissan – CP1B2L25S	CP1B-000629
Facilities Services	Dental Warehouse	Bobcat	S205	530513672
Facilities Services	Dental Warehouse	New Holland Tractor w/front loader	TC40A	86402727
Facilities Services	Downtown	Bobcat	763-H	51216401
Facilities Services	Downtown	Manlift	450-A Series II	0300110548
Facilities Services	Downtown	Genie Lift (Articulate boom)	PL1-24P	3191-33325
Facilities Services	Downtown	Genie Lift (Scissor lift)	PL1-24P	3191-33315

Training Certificate (Initial)

LSU Health NEW ORLEANS

Powered Industrial Truck Training

This is to certify that

_____

has satisfactorily completed the LSUHSC Training Course for

_____

Date _____ *Instructor* _____

Training Certificate (3-Year Evaluation)

LSU Health NEW ORLEANS

Powered Industrial Truck Training

This is to certify that

_____

has satisfactorily demonstrated continued competency to operate the

_____

_____ _____

Date *Instructor*

LSUHSC Procedures for Using Powered Industrial Trucks

GENERAL HANDLING OF PIT AND MATERIALS:

Area Requirements for PIT

- Sufficient safe clearances shall be allowed for aisles at loading docks, through doorways and wherever turns or passages must be made.
- Aisles and passageways shall be kept clear and in good repair, with no obstruction across or in aisles that could create a hazard.
- Permanent aisles and passageways shall be appropriately marked.
- Low clearances shall be identified and clearly marked and kept clear of all obstructions.
- Load-bearing columns and mechanical systems (e.g., process piping, fire sprinkler system piping) that are present in PIT traffic lanes shall be protected from damage.
- Every effort shall be made to keep pedestrian traffic separated from PIT operations.

Secure Storage

- Storing of materials shall not create a hazard.
- Bags, containers, bundles, etc., stored in tiers shall be stacked, blocked, interlocked and limited in height so that they are stable and secure against sliding or collapse.

Housekeeping of Storage Areas

- Storage areas shall be kept free from accumulation of materials that constitute hazards from tripping, fire, explosions, or pest harborage.
- Vegetation control will be exercised when necessary.

Guarding

- Covers and/or guard-rails shall be provided to protect personnel from the hazards of open pits, tanks, vats, ditches, etc.
- High Lift Rider Trucks shall be fitted with overhead guards unless operating conditions do not permit.
- If the type of load presents a hazard, equip fork trucks with a vertical load back rest extension.

Designated Locations

- The atmosphere or location shall have been classified as to whether it is hazardous or nonhazardous prior to the consideration of industrial trucks being used therein.
- Control of carbon monoxide creation must not exceed concentration levels of 35 part per million per 8 hour time weighted average.

Fuel Handling and Storage

The storing and handling of gasoline and diesel fuel shall be in accordance with NFPA 30, Flammable and Combustible Liquids Code:

- Proper storage containers will be used.

- No more than 10 gallons of gasoline and/or diesel may be storage. Where flammable cabinets are installed, storage of gasoline and/or diesel may not exceed 180 gallons.
- Liquids shall be separated from incompatible materials.
- Storage areas shall be designed and operated to prevent the discharge of liquids, be located in well ventilated areas, kept free of weeds, debris, and other combustible materials not necessary to the storage, and be protected from the weather by a canopy or roof that does not limit the dissipation of heat or dispersion of flammable vapors and does not restrict fire-fighting access and control. Furthermore, storage areas will be equipped with a fire extinguisher and precautions shall be taken to prevent open flames, sparks or electric arcs in storage area. Smoking is prohibited in storage areas

Fueling PIT

- Fuel tanks shall not be filled while the engine is running.
- Spillage shall be avoided. Spillage of oil or fuel shall be promptly cleaned up.
- The fuel tank cap shall be replaced before starting the engine.
- No PITs shall be operated with a leak in the fuel system. The PIT shall be placed out-of-service until the leak has been corrected.

Changing and Charging Storage Batteries

- Battery charging areas shall be designated for that purpose and properly marked.
- If electrolyte is handled, facilities shall be provided for flushing and neutralizing spilled electrolyte, for protecting charging apparatus from damage by trucks, for adequate ventilation for dispersal of fumes from gassing batteries and for fire protection. Safety equipment shall be provided in each battery charging area. This equipment includes, but is not limited to:
  - Face shields, rubber aprons and rubber gloves;
  - Acid resistant floor covering and a fire extinguisher.
  - A carboy tilter or siphon shall be provided for handling electrolyte.
- When handling electrolyte, an eyewash station and emergency shower in compliance with ANSI Z358.1-1998 shall be provided and located within 25 feet of the battery charging area.
- When charging batteries, acid and water shall be mixed externally and then poured into the battery. Note: Acid shall be poured into water; water shall not be poured into acid.
- Open flames shall not be used for checking electrolyte level in storage batteries.
- When necessary, a conveyor, overhead hoist, dolly or other material handling equipment and proper spreader bar shall be provided for moving batteries.
- Reinstalled batteries shall be properly positioned and secured in the truck.
- Batteries shall be of a size and weight between the minimum and maximum listed on the truck data plate. Batteries less than the maximum size shall be located as far to the rear as possible and shimmed to stay there, thus providing the proper counterweight.
- Trucks shall be properly positioned and the brake applied before attempting to change or charge batteries.
- The charger should always be shut off prior to connecting or disconnecting the battery. Always plug the charger into the battery plug, not the truck plug and make sure the charger voltage is the same as the battery voltage.

- Care shall be taken to assure that vent caps are functioning. The battery (or compartment) cover(s) shall be open to dissipate heat, but vent caps shall be kept in place to avoid electrolyte spray or splatter.
- Smoking shall be prohibited in the charging area.
- Precautions shall be taken to prevent open flames, sparks or electric arcs in the battery charging area.
- Tools and other metallic objects shall be kept away from the top of uncovered batteries.

PIT REQUIREMENTS:

- High Lift Rider Trucks shall be equipped with an overhead guard. The overhead guard shall not be covered with any opaque rain covering or shield that would interfere with the operator's overhead vision.
- PITs operated in areas where general lighting is less than 2 lumens per square foot shall be equipped with auxiliary lighting.
- PIT with internal combustion engines shall not be operated in areas where carbon monoxide levels may exceed Permissible Exposure Limits.
- Lift trucks shall be equipped with a load backrest to prevent the load from falling toward the truck when the load is elevated and tilted backward.
- All PITs shall be equipped with an operational horn in its original location as provided by the manufacturer.
- All PITs shall be equipped with a back-up alarm. Lift trucks that do not currently have a back-up alarm shall be retrofitted with a back-up alarm approved by the manufacturer.
- A manufacturer's "Operator's Manual" shall remain on the PIT at all times.

VISUAL SAFETY INSPECTION OF PIT:

- The operator shall conduct a visual safety inspection prior to using the PIT.
- Deficiencies or any mechanical defect that would prevent the safe operation of the PIT will be corrected or repaired immediately by authorized personnel or the PIT will be removed from service, parked and lock-out/tag-out procedures initiated until such repairs are completed.

LOCK-OUT/TAG-OUT PROCEDURES:

1. Pass a chain through the steering wheel and around the overhead guard supports.
2. Both the supervisor and the employee shall lock the ends of the chain with two differently keyed padlocks.
3. The two keys will be removed and secured in a safe place.
4. A lock-out tag will be placed on the chain and signed by the employee and the supervisor.
5. After repairs are completed, the tag and locks may be removed.

PREVENTATIVE MAINTENANCE OF PIT:

- Preventive maintenance shall be performed as recommended by the manufacturer.
- No repairs shall be made to lift trucks in locations where flammable gases, flammable vapors or combustible dusts are present.

- Repairs to the fuel and ignition systems that involve fire hazards shall be conducted only in locations designated for such repairs.
- All lift trucks shall be kept in a clean condition, free of lint, excess oil and grease. Noncombustible agents should be used for cleaning trucks. Solvents with a low flash point (below 100 °F) shall not be used.
- The battery shall be disconnected prior to repairs to the electrical system.
- All parts of any lift truck requiring replacement shall be replaced only by parts equivalent as to safety with those used in the original design.
- Lift trucks shall not be altered so that the relative positions of the various parts are different from what they were when originally received from the manufacturer nor altered either by the addition of extra parts not provided by the manufacturer or by the elimination of any parts.

PIT OPERATIONS:

- Trucks shall not be driven up to anyone standing in front of a bench or other fixed object.
- No person shall be allowed to stand or pass under the elevated portion of any truck, whether loaded or empty.
- Unauthorized personnel shall not be permitted to ride on PIT. A safe place to ride shall be provided where riding of trucks is authorized.
- The employer shall prohibit arms or legs from being placed between the uprights of the mast or outside the running lines of the truck.
- When a PIT is left unattended, load engaging means shall be fully lowered, controls shall be neutralized, power shall be shut off, and brakes set. Wheels shall be blocked if the truck is parked on an incline.
- A PIT 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 view.
- When the operator of the PIT is dismounted and within 25 feet of the truck still in his view, the load engaging means shall be fully lowered, controls neutralized, and the brakes set to prevent movement.
- A safe distance shall be maintained from the edge of ramps or platforms while on any elevated dock, or platform. PIT shall not be used for opening or closing freight doors.
- Brakes shall be set and wheel blocks shall be in place to prevent movement of trucks and trailers while loading or unloading. Fixed jacks may be necessary to support a semitrailer during loading or unloading when the trailer is not coupled to a tractor. The flooring of trucks and trailers shall be checked for breaks and weakness before they are driven onto.
- There shall be sufficient headroom under overhead installations, lights, pipes, sprinkler system, etc.
- An overhead guard shall be used as protection against falling objects. It should be noted that an overhead guard is intended to offer protection from the impact of small packages, boxes, bagged material, etc., representative of the job application, but not to withstand the impact of a falling capacity load.
- A load backrest extension shall be used whenever necessary to minimize the possibility of the load or part of it from falling rearward.
- Only approved PIT shall be used in hazardous locations.
- Fire aisles, access to stairways, and fire equipment shall be kept clear.

PIT TRAVELING:

- Any PIT that are needed for use on any of LSUHSC campuses shall be loaded onto a flatbed trailer and transported to that campus. No PIT will be driven on a public road greater than one mile.
- All traffic regulations shall be observed. A safe distance shall be maintained and the truck shall be kept under control at all times.
- The right of way shall be yielded to ambulances, fire trucks, or other vehicles in emergency situations.
- Other trucks traveling in the same direction at intersections, blind spots, or other dangerous locations shall not be passed.
- The driver shall be required to 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 shall be required to travel with the load trailing.
- The driver shall look in the direction of, and keep a clear view of the path of travel.
- Grades shall be ascended or descended slowly.
- When ascending or descending grades in excess of 10 percent, loaded trucks shall be driven with the load upgrade.
- On all grades the load and load engaging means shall be tilted back if applicable, and raised only as far as necessary to clear the road surface.
- Under all travel conditions the truck shall be operated at a speed that will permit it to be brought to a stop in a safe manner.
- Stunt driving and horseplay shall not be permitted.
- The driver shall be required to slow down for wet and slippery floors.
- Dock board or bridge plates shall be properly secured before they are driven over.
- Dock board or bridge plates shall be driven over carefully and slowly and their rated capacity never exceeded.
- Running over loose objects on the roadway surface shall be avoided.
- While negotiating turns, speed shall be reduced to a safe level by means of turning the hand steering wheel in a smooth, sweeping motion. Except when maneuvering at a very low speed, the hand steering wheel shall be turned at a moderate, even rate.

PIT LOADING:

- Only stable or safely arranged loads shall be handled. Caution shall be exercised when handling off-center loads which cannot be centered.
- Only loads within the rated capacity of the truck shall be handled.
- The long or high (including multiple-tiered) loads which may affect capacity shall be adjusted.
- Trucks equipped with attachments shall be operated as partially loaded trucks when not handling a load.
- A load engaging means shall be placed under the load as far as possible; the mast shall be carefully tilted backward to stabilize the load.
- Extreme care shall be used when tilting the load forward or backward, particularly when high tiering. Tilting forward with load engaging means elevated shall be prohibited except to pick up a load. An elevated load shall not be tilted forward except when the

load is in a deposit position over a rack or stack. When stacking or tiering, only enough backward tilt to stabilize the load shall be used.

PIT OFFLOADING HIGHWAY TRUCKS:

- The brakes of highway trucks shall be set and wheel chocks placed under the rear wheels to prevent the trucks from rolling while they are boarded with powered industrial trucks.
- Fixed jacks may be necessary to support a semitrailer and prevent upending during the loading or unloading when the trailer is not coupled to a tractor.

USE OF ELEVATORS:

- Ensure that the combined weight of the lift truck and its load does not exceed the capacity of the elevator before entering an elevator.
- Approach all elevators slowly and then enter squarely with the load engaging attachment entering first. Once on the elevator, the controls shall be neutralized, power shut off and the brakes set.
- Elevators shall be approached slowly, and then entered squarely after the elevator car is properly leveled. Once on the elevator, the controls shall be neutralized, power shut off, and the brakes set.
- Motorized hand trucks must enter elevator or other confined areas with load end forward.

USE OF LIFT CAGES/ PLATFORMS:

Whenever a PIT is equipped for lifting personnel, only commercially designed and manufactured cages/ platforms meeting ANSI Standards B56.1.7.34 may be utilized. No hand built or temporary units may be used. In addition, the cage/platform shall have:

- A non-slip floor surface, no less than 4 feet by 4 feet;
- A high mesh screen toward the upright;
- 42" high railings and 4" toe plate on all sides;
- A railing and gate that shall hold 200 lbs of horizontal push without giving;
- A gate that only swings inward and works easily;
- fork channels under the floor; and
- A chain or other positive locking device utilized to ensure the cage is secured to the fork carriage.
- Protection from overhead hazards/ falling objects as necessary for the operating conditions shall be provided.
- PIT operator shall remain at the controls. Only minor adjustments or movements may be made and only at creep speed. Traveling with the lift cage elevated is prohibited.
- PIT operators will be tied off inside the manlift using a full body harness.

PARKING:

Operators are responsible for the safe parking of their lift truck. When parking a PIT or leaving a PIT partially unattended (the operator is more than 25 feet from the PIT), the operator will adhere to the following:

- Make sure that the lift truck is a safe distance from the edge of ramps or platforms while on any elevated dock, or platform, or freight car. Parking within 8 feet from the center of railroad tracks is prohibited.

- Never park the lift truck where it may block an exit, block a stairway, hallway, door, fire equipment, fire extinguishers or electrical service panel.
- Fully lower the forks.
- Shut off all controls.
- Set the brakes.
- If on an incline, chock the wheels.
- Remove the key from the ignition.

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LSUHSC – NISSAN FORKLIFT DAILY INSPECTION SHEET

SAFETY AND OPERATIONAL CHECKS (PRIOR TO FIRST USE EACH DAY)
Have a **qualified** mechanic correct all problems.

Motor Off Checks	OK (☑)	List Maintenance Required
Leaks – Hydraulic Oil, Battery		
Tires – Condition and Pressure		
Forks, Top Clip Retaining Pin and Heel -- Condition		
Load Backrest Extension – Attached		
Hydraulic Hoses, Mast Chains, Cables & Stops – Check Visually		
Finger Guards – Attached		
Overhead Guard – Attached		
Safety Warnings – Attached (Refer to Parts Manual for Location)		
Battery – Water/Electrolyte Level and Charge		
Hydraulic Fluid Level – Dipstick		
Transmission Fluid Level – Dipstick		
Operator's Manual in Container		
Capacity Plate Attached – Information Matches Model, Serial Number and Attachments		
Battery Restraint System – Adjust and Fasten		
Operator Protection Sitdown Truck - Seat Belt – Functioning Smoothly Man-up Truck – Fall protection/Restraining means - Functioning		
Brake Fluid – Check level		

Motor On Checks (Unusual Noises Must Be Investigated Immediately)	OK (☑)	List Maintenance Required
Accelerator Linkage – Functioning Smoothly		
Parking Brake – Functioning Smoothly		
Service Brake – Functioning Smoothly		
Steering Operation – Functioning Smoothly		
Drive Control – Forward/Reverse – Functioning Smoothly		
Tilt Control – Forward and Back – Functioning Smoothly		
Hoist and Lowering Control – Functioning Smoothly		
Attachment Control – Operation		
Horn – Functioning		
Lights & Alarms (where present) – Functioning		
Hour Meter – Functioning		
Battery Discharge Indicator – Functioning		
Instrument Monitors – Functioning		

ALL OPERATORS MUST BE TRAINED AND EVALUATED ON THE TYPES OF INDUSTRIAL TRUCKS AND ATTACHMENTS THEY WILL BE OPERATING.

Inspector Name (print):_____

Inspector Signature:_____

Inspection Date: _____

LSU Health NEW ORLEANS

LSUHSC - BOBCAT DAILY INSPECTION SHEET

SAFETY AND OPERATIONAL CHECKS (PRIOR TO FIRST USE EACH DAY)
Have a **qualified** mechanic correct all problems.

Engine Off Checks	OK (☑)	List Maintenance Required
Leaks – Fuel, Hydraulic Oil, Engine Oil or Radiator Coolant		
Tires – Condition and Pressure		
Forks, Top Clip Retaining Pin and Heel – Check Condition		
Load Backrest – Securely Attached		
Hydraulic Hoses, Mast Chains, Cables and Stops – Check Visually		
Overhead Guard – Attached		
Finger Guards – Attached		
Propane Tank (LP Gas Truck) – Rust Corrosion, Damage		
Safety Warnings – Attached (Refer to Parts Manual for Location)		
Battery – Check Water/Electrolyte Level and Charge		
All Engine Belts – Check Visually		
Hydraulic Fluid Level – Check Level		
Engine Oil Level – Dipstick		
Transmission Fluid Level – Dipstick		
Engine Air Cleaner – Squeeze Rubber Dirt Trap or Check the Restriction Alarm (if equipped)		
Fuel Sedimentor (Diesel)		
Radiator Coolant – Check Level		
Operator's Manual – In Container		
Nameplate – Attached & Information Matches Model, Serial Number & Attachments		
Seat Belt – Functioning Smoothly		
Hood Latch – Adjusted and Securely Fastened		
Brake Fluid – Check Level		

Engine On Checks (Unusual Noises Must Be Investigated Immediately)	OK (☑)	List Maintenance Required
Accelerator or Direction Control Pedal – Functioning Smoothly		
Service Brake – Functioning Smoothly		
Parking Brake – Functioning Smoothly		
Steering Operation – Functioning Smoothly		
Drive Control – Forward/Reverse – Functioning Smoothly		
Tilt Control – Forward and Back – Functioning Smoothly		
Hoist and Lowering Control – Functioning Smoothly		
Attachment Control – Operation		
Horn and Lights – Functioning		
Cab (if equipped) – Heater, Defroster, Wipers – Functioning		
Gauges: Ammeter, Engine Oil Pressure, Hour Meter, Fuel Level, Temperature, Instrument Monitors – All Functioning		

ALL OPERATORS MUST BE TRAINED AND EVALUATED ON THE TYPES OF INDUSTRIAL TRUCKS AND ATTACHMENTS THEY WILL BE OPERATING.

Inspector Name (print):_____

Inspector Signature:_____

Inspection Date: _____

LSU Health NEW ORLEANS

LSUHSC - JLG LIFT DAILY INSPECTION SHEET

STEP 1 - WALK-AROUND VISUAL INSPECTION (Power Off)	OK? (☑)	LIST MAINTENANCE REQUIRED
Platform Assembly - No loose or missing parts. No visible damage. Lockbolts in place. Footswitch in good working order, not modified, disabled or blocked.		
Platform Control Console - Switches & levers return to neutral & are properly secured. No loose or missing parts. No visible damage. Decals/placards secure and legible. Control marking legible.		
Slave Cylinder - No visible damage. Pivot pins secure. Hydraulic hoses undamaged, not leaking.		
Boom Sections/Uprights/Lift Cylinders and Master Cylinder- No visible damage. Pivot pins secure. Hydraulic hoses undamaged, no leaking. Uprights in vertical position.		
Horizontal Limit Switches - Switches operable. No visible damage.		
Drive Motor, Brake and Hub - No visible damage. No evidence of leakage.		
Wheel/Tire Assembly, Right Rear - Properly secured. No loose or missing lug nuts. No visible damage.		
Hydraulic Filter - Housing secure. No visible damage. No evidence of leakage.		
Hood, Right Side - Properly secured. No loose or missing parts.		
Control Valve - No loose or missing parts. No evidence of leakage. No unsupported wires or hoses. No damaged or broken wires.		
Fuel Supply - Filler cap secure. No visible damage to the tank or evidence of leaks.		
Ground Controls - Switches operable. No visible damage. Decals secure and legible.		
Hydraulic Oil Supply - Recommended oil level sight gauge. (Check level with cold oil, systems shut down, machine in stowed position) Cap in place and secure.		
Wheel/Tire Assembly, Right Front - Properly secured. No loose or missing lug nuts. No visible damage.		
Oscillating Axle - No loose or missing hardware. No visible damage.		
Steer Cylinder - Properly secured. No visible damage or signs of leakage. Evidence of proper lubrication.		
Tie Rod Ends & Steering Spindles - No loose or missing parts. No visible damage.		
Wheel/Tire Assembly, Left Front - Properly secured. No loose or missing lug nuts. No visible damage.		
Battery - Proper electrolyte levels. Cables tight. No visible damage or corrosion.		
Engine Air Filter - No loose or missing parts. No visible damage. Element clean.		
Hood, Left Side - Properly secured. No loose or missing parts.		
Engine Oil Supply - Full mark on dipstick. Filler cap secure.		
Turntable Bearing - No loose or missing hardware. No visible damage. Evidence of proper lubrication. No evidence of loose bolts or looseness between bearing or structure.		
Swing Motor & Worm Gear - No loose or missing hardware. No visible damage. Evidence of proper lubrication.		
Muffler & Exhaust System - Properly secured. No evidence of leakage.		
Auxiliary Power Pump - No loose or missing parts. No evidence of leakage. No damaged wires.		
Hydraulic Pump - No loose or missing parts. No evidence of leakage.		
Wheel/Tire Assembly, Left Rear - Properly secured. No loose or missing lug nuts. No visible damage.		
Rotator Cylinders - No visible damage. Cyclinder pins secure. Hydraulic hoses undamaged and not leaking.		
Platform Gate - Latch, stop and hinges in working condition and properly secured. No loose or missing parts.		

Inspector Name (print):_____

Inspector Signature:_____

Inspection Date: _____

continued on back →

LSU Health NEW ORLEANS

LSUHSC - JLG LIFT DAILY INSPECTION SHEET

FUNCTION CHECK: A functional check of all systems must be performed, *once the walk-around inspection is complete*, in an area free of overhead and ground level obstructions.

WARNING: TO AVOID SERIOUS INJURY, DO NOT OPERATE MACHINE IF ANY CONTROL LEVERS OR TOGGLE SWITCHES - CONTROLLING PLATFORM MOVEMENTS - DO NOT RETURN TO THE OFF OR NEUTRAL POSITION WHEN RELEASED.

STEP 2 - FUNCTIONAL INSPECTION (Power On)	OK? (☑)	LIST MAINTENANCE REQUIRED
Boom Horizontal Limit Switches - Check to see switches are operable and are not damaged.		
Ground Controls Check - Raise and lower Lower Boom. Check for smooth operation. Check Boom Upright tilting for proper synchronization.		
Ground Controls Check - Raise, extend, retract and lower Upper Boom. Check for smooth operation.		
Ground Controls Check - Telescope boom IN and OUT several cycles at various degrees of elevation lengths. Check for smooth telescope operation.		
Ground Controls Check - Swing turntable to LEFT and RIGHT a minimum of 45 degrees. Check for smooth motion.		
Ground Controls Check - Check that platform self-leveling system functions properly during raising and lowering of boom.		
Ground Controls Check - Check rotator for smooth operation and assure platform will rotate 75 degrees in both directions from centerline of boom.		
Ground Controls Check - Drive forward and reverse. Steer left and right. Check for proper operation. (NOTE: When the boom is raised above horizontal, high drive speed is cut out).		
Ground Controls Check - Auxiliary Power - Turn engine off. Operate each function control switch (e.g. Tele, Lift & Swing) to assure that they function in both directions using auxiliary power instead of engine power.		
Ground/Platform Select Switch - With the select switch still set to GROUND, start engine. Attempt to use platform controls. Platform controls should not operate.		
Platform Control Check - Set Select Switch to PLATFORM. Raise and lower Lower Boom from the platform. Check for smooth operation. Check Boom Upright tilting for proper synchronization.		
Platform Control Check - Raise, extend, retract and lower Upper Boom. Check for smooth operation.		
Platform Control Check - Telescope boom IN and OUT several cycles at various degrees of elevation lengths. Check for smooth telescope operation.		
Platform Control Check - Swing turntable to LEFT and RIGHT a minimum of 45 degrees. Check for smooth motion.		
Platform Control Check - Check that platform self-leveling system functions properly during raising and lowering of boom.		
Platform Control Check - Check rotator for smooth operation and assure platform will rotate 75 degrees in both directions from centerline of boom.		
Platform Control Check - Drive forward and reverse. Steer left and right. Check for proper operation. (NOTE: When the boom is raised above horizontal, high drive speed is cut out).		
Platform Control Check - Auxiliary Power - Operate each function control switch (e.g. Tele, Lift & Swing) to assure that they function in both directions using auxiliary power instead of engine power.		
Footswitch - Check that functions will operate when pedal is approximately at its center of travel. If switch operates within last 1/4" of travel, top or bottom, it should be adjusted.		
Footswitch - Depress footswitch & engage telescope & hold control. Release footswitch. Motion must stop immediately. If not, contact a qualified service technician before continuing operation.		
Footswitch - Depress footswitch and engage lift and hold control. Release footswitch. Motion must stop immediately. If not, contact a qualified service technician before continuing operation.		
Footswitch - Turn the engine to OFF. Depress footswitch and attempt to start engine. If starter engages or engine turns over, contact a qualified service technician before continuing operation.		
Chassis Out of Level Indicator - With the aid of an assistant to monitor the indicator light on the platform console, manually activate the indicator light by compressing on of the three tilt indicator mounting springs. If the light does not illuminate, shut down machine and contact a qualified service technician before continuing operation.		

LSU Health NEW ORLEANS

LSU Health Sciences Center
New Orleans

Performance Test for Forklift Operators

Instructions: Please print clearly, and complete each blank. Mark each task as a pass or fail. If the item does not apply, mark the item as N/A.

Operator_____ **Truck #/Model**_____

Dept._____

Evaluator_____ **Date**_____

Task	Pass	Fail
1. Shows familiarity with truck controls		
2. Gave proper signals when turning		
3. Slowed down at intersections		
4. Sounded horn at intersection		
5. Obeyed signs		
6. Kept a clear view of direction of travel		
7. Turned corners correctly – was aware of rear end swing		
8. Yielded to pedestrians		
9. Drove under control and within proper traffic aisles		
10. Approached load properly		
11. Lifted load properly		
12. Maneuvered properly		
13. Traveled with load at proper height		
14. Lowered load smoothly/slowly		
15. Stops smoothly/completely		
16. Load balanced properly		
17. Forks under load all the way		
18. Carried parts/stock in approved containers		
19. Checked bridge plates/ramps		
20. Did place loads within marked areas		
21. Did stack loads evenly		
22. Did drive backward when required		
23. Did check load weights		
24. Did place forks on the floor when parked, controls neutralized, brake on set, power off		
25. Followed proper instructions for maintenance		

Overall Performance (circle one) Pass Fail

Comments:_____

_____

_____

_____ _____

Operator signature **Evaluator signature**