

Safety Note #161

## FORKLIFT TRAINING REQUIREMENTS



Photograph courtesy of Sierra  
Foothill REC

According to Fed-OSHA, approximately every three days, someone in the United States is killed in a forklift-related accident. Each year, an additional 94,750 injuries from forklifts are reported. California regulations (Title 8, Section 3668) require the employer to ensure that each forklift operator is competent to operate a forklift safely, as demonstrated by the successful completion of the training and evaluation required. **Safety Note #162 General Forklift Safety and Videos E-002 Forklift Fundamentals and E-033 A Guide to Forklift Safety are available from the ANR EH&S Website at <http://safety.ucanr.org>.**

**Only operators authorized by the employer and trained in the safe operations of forklifts shall be permitted to operate forklifts.** This Safety Note summarizes the applicable training requirements.

### Trainer Requirements

- All forklift operator training and evaluation must be conducted by persons who have the knowledge, training and experience to train forklift operators and evaluate their competence.
- Trainers must provide direct supervision of trainees prior to their being certified to operate a forklift.
- Forklift trainers must be competent forklift operators and demonstrate to trainees how to navigate the evaluation driving course.

### Training Requirements

Required training shall consist of a combination of formal instruction (lecture, discussion, computer learning, video or written material), practical training and evaluation of the trainees performance. Training program content must contain the following:

- Review of California forklift regulations.
- Operating instructions, warnings and precautions for the types of forklifts being used.
- Forklift controls and instrumentation, where they are located and how they work.
- Engine or motor operation and fueling/charging methods.
- Steering and maneuvering, including the difference between forklifts and cars.
- Operating visibility including restrictions due to loads.
- Fork and attachment operation and use limitations.
- Forklift capacity and stability.
- Pre-shift inspections and maintenance requirements.
- Workplace-related conditions including vehicle/people traffic and surface driving areas.
- Composition of loads including stability, manipulation, stacking and un-stacking of loads.

### Refresher Training and Evaluation

Required refresher training includes an evaluation of the operator's performance at least once every three years or when:

- The operator is observed to operate the forklift in an unsafe manner.
- The operator has been involved in an accident or near-miss incident.
- The operator is assigned to drive a different type of forklift or conditions/tasks in the workplace have changed.