



*Title:* **Powered Industrial Trucks**

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**POLICY:** To operate a powered industrial truck, personnel shall hold a valid Powered Industrial Truck Operator Permit. Operator Permits shall be obtained through Environmental Health and Safety (EH&S), and shall be renewed every three years.

**SCOPE:** Hospital wide.

**DEFINITIONS:**

**Motorized Hand Truck:** A powered industrial truck that is designed to be controlled by a walking individual. This is often referred to as a walker-stacker.

**Powered Industrial Truck:** A mobile, power driven truck or tractor controlled by an operator, as specifically defined below, used to carry, push, pull, lift, stack or tier material.

**PROCEDURES:**

**I. Responsibility for Vehicles**

- A. Responsibility for the assignment and control of a powered industrial truck shall rest with the Supervisor to whom such vehicle is regularly assigned. He shall be responsible for seeing that operators of such vehicles possess an EH&S issued Operator Permit for that vehicle.
- B. Operators shall be responsible for vehicles assigned to them by their supervisors.
- C. Hospital personnel, or contracted personnel under the direction of the Hospital, shall perform preventative maintenance on powered industrial trucks in conformance with the manufacturer's recommendations. Supervisors will make arrangements with Hospital or authorized contractors for corrective action, if required.
- D. Fuel powered industrial trucks (e.g., propane or gasoline powered) are not permitted in the Hospital buildings or loading docks.

**II. Operator Permit Procedure**

- A. The affected Supervisor shall notify EH&S to request employee training and certification for staff operation of an in-plant powered industrial truck. The request shall include employee name, department, and type of vehicle the employee will operate.
- B. The employee shall attend training and take a written examination to demonstrate adequate knowledge of the safety requirements for vehicle operation. The examination shall be arranged through and issued by EH&S.

- C. After successful completion of the written examination, EH&S or designee approved by EH&S shall provide practical training for the employee and evaluate the employee's performance. As part of the practical training, the employee must perform driving that simulates typical work maneuvers. The "Forklift Operator's Performance Test" form, provided in Appendix A, must be completed and signed by EH&S or approved designee.
- D. Once EH&S has received the successful performance test form, an Operator Permit will be issued to the employee by EH&S.
- E. Operator Permits must be renewed every three years. Renewal procedures include refresher training provided by EH&S, successful completion of an examination during training and a successful performance test, as described above.

### **III. Permit Suspension Guidelines**

- A. An Operator Permit shall remain valid unless suspended or revoked by EH&S, the employee's supervisor, the supervisor of the industrial vehicle, or on advice of Employee Health & Wellness or other medical provider. Any employee who observes unsafe operation of such vehicles will report the same to EH&S.
- B. Operator permit shall be suspended by EH&S or the Supervisor of the industrial vehicle if during any six month period, the employee commits three (3) violations of the safe operating procedures as outlined in the training. The permit shall be reissued when the employee demonstrates adequate knowledge of the rules for safe operation to the satisfaction of EH&S and Supervisor.
- C. Immediate suspension of the operator permit shall occur if any person is injured or property is substantially damaged due to an accident involving a powered industrial truck. Serious accidents shall be investigated by the Supervisor and EH&S. Those accidents attributed to gross negligence or horseplay shall be cause for permanently revoking the Operator Permit.

### **IV. Operation of Vehicles**

- A. Operators shall follow the rules as set forth in the training for powered industrial truck operators. Failure to follow these rules may result in suspension or revocation of the Operator Permit.
- B. Operators shall wear a hard hat when an overhead hazard exists.
- C. Operators shall visually check their vehicles and conduct a pre-operation inspection prior to operating the vehicle. The Forklift Pre-Operation Checklist, provided in

Appendix B, can be used to conduct this inspection. If a vehicle fails the pre-operation inspection, the Operator shall notify the Supervisor and the vehicle should be taken out of service until the necessary repairs have been made.

- D. Operators shall drive at a safe speed (not in excess of 5 miles per hour in a clear area and not faster than walking pace in congested areas) and keep their vehicle under control at all times. Sudden stops should be avoided, except in emergencies.
- E. Operators shall come to a full stop at all stop signs, before entering any main aisle, and at all blind corners and sound horn.

#### **V. Battery Maintenance for Electric Trucks**

- A. Powered industrial truck maintenance is performed by a service contractor. Supervisors shall ensure that the service contractor performs their work in accordance with applicable standards.
- B. Only trained and authorized personnel shall charge batteries. Battery maintenance personnel shall wear personal protective equipment including chemical splash goggles, appropriate gloves, and long sleeves.
- C. Battery charging installations shall be located in areas designated for that purpose. The areas shall be kept free of extraneous combustible materials. Precautions shall be taken to prevent open flames, sparks, or electric arcs in battery-charging areas. Smoking shall be prohibited in the charging area. Contact EH&S for proper battery disposal.
- D. Where onboard chargers are used, charging shall be accomplished at locations designated for such purpose, taking into account the electrical requirements of the charger and facilities for fire protection. Electric installations shall be in accordance with NFPA 70, *National Electrical Code*, and any local ordinances.
- E. Trucks shall be properly positioned and brake applied before attempting to charge batteries.
- F. Tools and other metallic objects shall be kept away from the top of uncovered batteries.
- G. Care shall be taken to assure that vent caps are functioning. The battery or compartment cover(s) shall be open to dissipate heat. Where charging batteries, the vent caps shall be kept in place to avoid electrolyte spray.

#### **VI. Spill Response**

- A. If a battery acid spill occurs, the Operator or other trained staff shall pour Xsorb®, Acid Neutralizing Absorbent on the spill as per the instructions provided on the bottle. The waste materials shall then be placed into an appropriate leak-

proof container. Contact EH&S at 4-6783 for disposal.

- B. If an oil or grease (or another petroleum product) spill occurs, the Operator or other trained staff shall pour granular absorbent material (e.g., Speedi-dry or Solid-a-Sorb) on the spill. A large broom shall be used to sweep back and forth over the spill to allow the absorbent material to adequately absorb the petroleum product. The waste materials shall then be placed into an appropriate leak-proof container. Contact EH&S for disposal.

## **VII. Accident/Injury Reporting**

An injured employee shall seek immediate medical attention from Employee Health & Wellness or the Emergency Department (after hours) and must complete an Employee Injury/Illness Report. All accidents involving personal injury or property damage shall be reported by the Operator to his immediate supervisor and University Police (for property damage).

**INQUIRIES/REQUESTS:** Environmental Health and Safety  
HSC-L1-059  
Zip 8017  
Main Office: 444-6783  
Fax: 444-6845

**RELATED FORMS:** Forklift Operator's Performance Test (Appendix A)  
Forklift Pre-Operation Check List (Appendix B)  
Ergo Tug Operator's Performance Test (Appendix C)  
Employee Injury/Illness Report

**RELATED DOCUMENTS:** 29 CFR 1910.178 Powered Industrial Trucks  
NFPA 505-12 Powered Industrial Trucks  
NFPA 70 National Electrical Code

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**APPENDIX A - Stony Brook University Hospital**

***Powered Industrial Truck Operator's Performance Test***

The evaluator will indicate satisfactory completion by placing a check mark in the box. Once approved, EH&S will issue a Powered Industrial Truck Operator Permit to employee.

EMPLOYEE \_\_\_\_\_ DATE: \_\_\_\_\_ TIME: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

LOCATION OF TEST: \_\_\_\_\_

PIT(s) TESTED: \_\_\_\_\_

- 1. Showed familiarity with truck controls.
- 2. Used proper signals when turning.
- 3. Slowed down at intersections.
- 4. Sounded horn at intersections.
- 5. Obeyed all 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. Stopped smoothly/slowly.
- 16. Load properly balanced.
- 17. Forks under load all the way.
- 18. Carried parts/stock in approved containers.
- 19. Checked bridgeplates/ramps.
- 20. Placed load within marked area.
- 21. Stacked load evenly and neatly.
- 22. Drove backward when required.
- 23. Checked load weights.
- 24. Placed forks on floor when parked, controls neutralized, brake on set, power off.
- 25. Followed proper instructions for maintenance-checked both before and after.

**Each of the 25 questions is valued at 4 points.**  
**Total Rating: \_\_\_\_\_ (Passing score is 80 or higher)**

Evaluator's Name (Please Print): \_\_\_\_\_

Evaluator's Signature: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_

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**APPENDIX B**

<b>Stony Brook University Hospital Forklift Pre-Operation Checklist</b>			
<b>Dept.:</b>	<b>Date:</b>	<b>Time:</b>	<b>Shift:</b>

**TITLE: Powered Industrial Trucks**

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<b>Manufacturer:</b>		<b>Model:</b>	<b>ID #:</b>		
	<b>Inspection Item</b>	<b>N/A</b>	<b>Pass</b>	<b>Fail</b>	
1.	Check the lift truck's appearance. Is it in good condition, free of lint, excess oil and grease?				
2.	Check the lift chains for equal tension, broken pins and extra wear.				
3.	Are the forks properly aligned, free of cracks, holes, and any other visible damage?				
4.	Are the fork lock pins in place and operational?				
5.	Are the lift and tilt cylinders free of damage and leaks?				
6.	Are the mast hydraulic hoses, cables & wire harnesses free of damage and leaks?				
7.	Are all the mast welds free of cracks, rust, or other signs of possible damage?				
8.	Is the load back rest secure and in good overall condition?				
9.	Are all tires/wheels in good condition? If air filled, is pressure correct?				
10.	Are all lug nuts in place and secure?				
11.	Is overhead guard secure and in good overall condition?				
12.	Are there any signs of oil leaks under the truck?				
13.	Check the fluid levels (hydraulic oil, engine oil, coolant, brake fluid, power steering, etc.)				
14.	Are the battery and wire connections in good condition?				
15.	Is the battery restrained and secure? Is the battery the correct weight?				
16.	Are all warning labels and the data plate in place and legible?				
17.	Is the operator's training materials with the unit (provided there is a place for it on the truck)?				
18.	Start the unit and check that all dashboard gauges are working properly				
19.	Check the horn, lights, seat belt, rearview mirrors, backup alarm and strobe light.				
20.	Does the mast rise, lower and tilt smoothly?				
21.	Hold the brake pedal down to 10 seconds, is there any noticeable drift with pressure?				
22.	Check the break parking brake. Is it working properly				
23.	Make sure there isn't excessive play in the steering control.				
24.	Drive forward and reverse. Does the truck accelerate and stop smoothly?				
<b>25.</b>	<b>Check attachment(s) for proper operation.</b>				
<b>Operator's Signature</b>					

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**Stony Brook University Hospital**

***Ergo Tug Operator's Performance Test***

The evaluator will indicate satisfactory completion by placing a check mark in the box. Once approved, EH&S will issue an Ergo Tug Truck Operator Permit to employee.

EMPLOYEE \_\_\_\_\_ DATE: \_\_\_\_\_ TIME: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

LOCATION OF TEST: \_\_\_\_\_

PIT(S) TESTED: \_\_\_\_\_

Acceptable ✓ or Deficient ✕	Road Test Procedure
	Approached load properly, secured and tightened safety straps.
	Showed familiarity with tug controls.
	Used caution when turning.
	Slowed down at intersections.
	Kept a clear view of direction of travel.
	Turned corners correctly - was aware of rear end swing.
	Stopped smoothly/slowly.
	Carried bins with swivel wheels oriented properly.
	Drove in reverse properly.
	Followed proper instructions for maintenance-checked both before and after use.

**Each of the 10 questions is valued at 10 points each.**

**Total Rating: \_\_\_\_\_ (Passing score is 80 or higher)**

**Evaluator's Name (Please Print): \_\_\_\_\_**

**Evaluator's Signature: \_\_\_\_\_**

**Employee's Signature: \_\_\_\_\_**