

Powered Industrial Truck Operator Evaluation Form

4/22/2022

Instructions: Use this checklist during the field session to evaluate operator proficiency. It can also be used for periodic evaluation to ensure that operators are continuing to operate powered industrial trucks properly.

Operator Name		Operator NetID	Evaluator Name	
Date of Evaluation	Make/Model		Classification*	Lift Code*

*<https://www.osha.gov/etools/powerd-industrial-trucks/types-fundamentals/types/classes>

OPERATOR BEHAVIORS	RATING				COMMENTS
Pre-use Inspection					
1. Inspects equipment for damage.	GOOD	FAIR	POOR	N/A	
Picking Up The Load					
1. Square up on the center of the load.	GOOD	FAIR	POOR	N/A	
2. Stop with the fork tips about 1 foot from the load.	GOOD	FAIR	POOR	N/A	
3. Clear personnel from the area near the load.	GOOD	FAIR	POOR	N/A	
4. Level the forks; then slowly drive forward until the load contacts the carriage.	GOOD	FAIR	POOR	N/A	
5. Lift the load carefully and smoothly until it is clear.	GOOD	FAIR	POOR	N/A	
6. Tilt the mast back slightly to stabilize the load.	GOOD	FAIR	POOR	N/A	
7. Look over both shoulders.	GOOD	FAIR	POOR	N/A	
8. After out and stopped, lower the load to travel height.	GOOD	FAIR	POOR	N/A	
Traveling					
1. Do not raise or lower the load and forks while traveling.	GOOD	FAIR	POOR	N/A	
2. Maintain a safe speed.	GOOD	FAIR	POOR	N/A	
3. Observe all traffic rules, warning signs, floor load limits and overhead clearances.	GOOD	FAIR	POOR	N/A	
4. Keep arms and legs inside the forklift.	GOOD	FAIR	POOR	N/A	
5. Follow other vehicles at safe distance.	GOOD	FAIR	POOR	N/A	
6. Slow down when cornering.	GOOD	FAIR	POOR	N/A	
7. Use the horn to alert others.	GOOD	FAIR	POOR	N/A	
8. Travel with the load facing uphill while on a ramp or incline.	GOOD	FAIR	POOR	N/A	
9. Stop smoothly.	GOOD	FAIR	POOR	N/A	

Putting Down A Load					COMMENTS
1. Make sure there is sufficient clearance for the load.	GOOD	FAIR	POOR	N/A	
2. Clear personnel from the area near the load.	GOOD	FAIR	POOR	N/A	
3. Square up to the location; then stop about 1 foot away.	GOOD	FAIR	POOR	N/A	
4. Raise the load to placement level.	GOOD	FAIR	POOR	N/A	
5. Move slowly forward.	GOOD	FAIR	POOR	N/A	
6. If the load is on a pallet, lower it into position and lower the forks further.	GOOD	FAIR	POOR	N/A	
7. Look over both shoulders before backing out.	GOOD	FAIR	POOR	N/A	
8. Back straight out until the forks have cleared.	GOOD	FAIR	POOR	N/A	
9. Lower the forks to traveling position.	GOOD	FAIR	POOR	N/A	
Parking					
1. Fully lower the forks.	GOOD	FAIR	POOR	N/A	
2. Neutralize the controls.	GOOD	FAIR	POOR	N/A	
3. Set the brakes.	GOOD	FAIR	POOR	N/A	
4. Turn off the power.	GOOD	FAIR	POOR	N/A	
5. If parked on an incline, block the wheels.	GOOD	FAIR	POOR	N/A	
6. Park only in authorized areas.	GOOD	FAIR	POOR	N/A	
Fueling and Battery Recharging					
1. Engine off.	GOOD	FAIR	POOR	N/A	
2. Fire extinguisher nearby.	GOOD	FAIR	POOR	N/A	
3. Proper attire and personal protective equipment worn.	GOOD	FAIR	POOR	N/A	
4. Safe fueling and battery recharging procedures followed.	GOOD	FAIR	POOR	N/A	
5. Spills cleaned up immediately.	GOOD	FAIR	POOR	N/A	
Other Comments					