Powered Industrial Truck Program
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I. Program Goals and Objectives
   This program establishes procedures for the safe operation of powered industrial trucks.

II. Scope and Application
   This program applies to the operation of all powered industrial trucks, owned or leased by Northwestern, and operated by staff, faculty, students, and contractors.

III. Regulatory Authority and Related Information
American National Standards Institute B56.1-2012, Safety Standard for Low Lift and High Lift Trucks
OSHA Compliance Directive CPL 2-1.28A, Compliance Assistance for the Powered Industrial Truck Operator Training Standards

IV. Responsibilities
A. Supervisors:
   i. Ensure employees who are required to operate powered industrial trucks have received the required training and certification.
   ii. Maintain documentation and records required in Section VIII.
   iii. Remove powered industrial trucks from service when the inspection, maintenance, or operator identifies any condition that makes the unit unsafe to operate.
   iv. Ensure all Powered Industrial Truck Operators are properly inspecting and safely operating the unit.
   v. Contact Risk Management Services to evaluate any safety concerns.

B. Powered Industrial Truck Operators:
   i. Attend and pass all training and evaluation prior to operating any powered industrial truck.
   ii. Complete a Pre-Use Inspection checklist prior to operating any lift (see Appendices 1 and 2 for more information).
   vi. Report all vehicle maintenance issues to supervisor.
   vii. Ensure all safety and manufacturer regulations and instructions are followed.
   viii. Attend and complete powered industrial truck training.

C. Risk Management Services:
   i. Review and revise this program to reflect changes in regulatory requirements as necessary.
   ii. Provide training in the safe operation of powered industrial trucks.
   iii. Provide consultation and guidance when necessary.
V. Powered Industrial Truck Procedures

A. Pre-Use Inspection
   iv. Complete the Pre-Use Inspection Checklist (Appendix 2) prior to operating any powered industrial truck.
   i. Any safety defects or impairments (such as hydraulic fluid leaks; defective brakes, steering, lights, or horn; and/or missing fire extinguisher, lights, or back-up alarm), must be reported to supervisor for immediate repair, locked, tagged, and taken out of service.

B. Operating Guidelines
   i. Operate powered industrial trucks in accordance with the manufacturer’s operating instructions and safety guidelines.
   ii. Only trained personnel are authorized to operate powered industrial trucks.
   iii. Seatbelts must be worn at all times during operation of powered industrial trucks, if a seatbelt is installed.
   iv. Stunt driving and horseplay are prohibited.
   v. Operators will yield the right of way to pedestrians and emergency vehicles.
   vi. All features that were received on the powered industrial truck from the dealer or manufacturer must be in the intended working condition, and not disabled, tampered, or removed from the equipment.
   vii. A truck beyond the vision or more than 25 feet from the operator is an unattended truck, and should have the keys removed and be in the proper parked position.

VI. Maintenance and Charging Batteries

A. Maintenance
   i. Only authorized personnel can make repairs.
   ii. Protective measures, including personal protective equipment (PPE), will be taken in an effort to prevent hazardous chemical exposure.
   iii. Before initiating repairs to the electrical system, disconnect the battery.
   iv. Repairs to a powered industrial truck must be conducted within a designated area for equipment or vehicle maintenance.

B. Charging Batteries
   i. Battery charging installations must be located in areas designated for that purpose.
   ii. Precautions must be taken to prevent open flames, sparks, or electric arcs in battery charging areas.
   iii. Employees charging and changing batteries shall be authorized to do the work, trained in the proper handling, and wear protective clothing, including face shields, long sleeves, rubber boots, aprons, and gloves.
C. Replacing a Propane Cylinder:
   i. Park the truck in a designated area and turn off engine.
   ii. Close the cylinder valve and remove the coupling from the cylinder.
   iii. Remove the empty cylinder from the cradle holding device and store in a designated area.
   iv. Select a full cylinder and inspect it for damage. Also inspect the fuel lines and couplings on the truck. Inspection of the washers and o-rings for damage or signs of aging is critical. Verify the cylinder valve is closed prior connecting.
   v. Carefully install the filled cylinder in the cradle on the truck so the cylinder locator pin enters the locating hole in the cylinder collar.
   vi. Reconnect the fuel line to the cylinder valve and open valve slowly.

VII. Training
   A. Training
   i. Each employee operating a powered industrial truck platform must receive training and instruction specific to the equipment used, and training must be completed prior to the use of any powered industrial truck.
   ii. Training can be conducted by either a competent trainer in the department, an equipment manufacturer, Risk Management, or a vendor who specializes in powered industrial truck training, and will certify:
      a. Classroom instruction, including a written exam
      b. Hands-on demonstration
      c. Operator evaluation
   iii. Training must cover the following:
      a. The purpose and use of equipment manuals.
      b. The Northwestern Powered Industrial Truck Program.
      c. Pre-use inspection checklist.
      d. The purpose of placards and decals.
      e. Worksite inspections.
      f. Factors affecting stability.
      g. Hands-on operation of the equipment.
   iv. If you are interested in becoming a powered industrial truck trainer within your department, contact Risk Management for approval.

B. Re-Evaluation
   i. Documented re-evaluation of an operator will be completed at least once every three years, or when:
      a. The operator is observed using the powered industrial truck in an unsafe manner.
      b. The operator is involved in an accident or near-miss incident.
      c. A condition in the workplace changes that could affect the safe operation of the powered industrial truck.
VIII. Recordkeeping
   i. Supervisors will maintain records of:
      a. Employee’s powered industrial truck training and certification.
      b. Pre-use inspection checklists for each powered industrial truck.
      c. All powered industrial truck maintenance documents.
   ii. These records must be available for a review for 3 years.

IX. Contact
    For questions, contact Gwen Butler, Director, Environmental Health and Safety, at call 847-491-4936 or gwen.butler@northwestern.edu.
Appendix 1  Powered Industrial Truck Pre-Use Checklist Instructions

These instructions address how to conduct a Powered Industrial Truck Pre-Use Checklist. Powered Industrial Trucks are a mobile, power driven vehicle used to carry, push, pull, lift, stack, or tier material.

*Prior to operating any powered industrial truck, the Pre-Use Inspection Checklist must be completed.* This applies to the beginning of every work shift, or whenever a new operator takes control of the powered industrial truck. When complete, submit the completed Pre-Use Checklist to the departmental supervisor.

**Step 1: Type of Powered Industrial Truck, and Location of Use**
Identify the operator of the Powered Industrial Truck, the ID or serial number of the equipment, type of equipment to be used, and the location of use for the equipment.

**Step 2: Inspection Item(s) and Description**
Using Section 1 of the Pre-Use Checklist, thoroughly inspect the powered industrial truck. To the right of each inspection item and description, indicate whether the item “Passes”, “Fails”, or is “Not Applicable” (P/F/NA).

**Step 3: Safety Precautions**
Using Section 2 of the Pre-Use Checklist, inspect the worksite and check to confirm that all personal protective equipment is being used, and hazards are recognized or mitigated.

**Step 4: Completing the Pre-Use Inspection Checklist**
Following the completion of an operator’s Pre-Use Inspection Checklist, return the checklist to the supervisor. Supervisors will maintain these documents in accordance with this program.
# Powered Industrial Truck Pre-Use Inspection Checklist

<table>
<thead>
<tr>
<th>#</th>
<th>Inspection Item and Description</th>
<th>P/F/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check braking and plugging distances while traveling slowly at first. If ok, then check at higher speeds. Ensure acceleration is smooth, not jerky.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Bent, dented, or broken parts.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Fuel, oil, radiator, and hydraulics are in good condition.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Drive wheels, steer wheels, load wheels, casters, etc. are in good condition.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Chains, cables, and hoses are in place.</td>
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<tr>
<td>6</td>
<td>Forks are secure, not bent, cracked, or badly worn.</td>
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</tr>
<tr>
<td>7</td>
<td>All guards in place and in good condition. Overhead and load backrest are in good condition.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Operator harness or seat belt, fire extinguisher, name/data plate, warning labels, etc. are in good condition.</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>All controls, steer tilter, pedals, etc. are in good condition. Seat locks in position.</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>All indicator lights and alarms are working.</td>
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<tr>
<td>11</td>
<td>Power disconnect cuts off all electrical power.</td>
<td></td>
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<tr>
<td>12</td>
<td>Horn, audible signals, entry bar, flashing lights, indicator lights, etc. work properly.</td>
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<tr>
<td>13</td>
<td>No binding in the steering.</td>
<td></td>
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<tr>
<td>14</td>
<td>Battery cable and connector are in good condition. Cable routing (not outside of truck). Battery retainer securely in place.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Attachments function properly, no unusual noise, securely in place especially removable attachments.</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Parking brake- seat, hand, or foot.</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Test all hydraulic functions for smooth and proper operation and no unusual noise.</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Travel limit, lift limit, tilt limit, safety reverse, etc. are in good condition.</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Battery discharge meter in full green or 75% charge after raising forks.</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Acquisition, tracking. Brakes set, alarm works, test by slowly driving off end aisle wire (SP/Turret Option)</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Alarm beeps and truck slows down or stops as programmed at aisle end. (SP/Turret Option)</td>
<td></td>
</tr>
</tbody>
</table>

### Safety Precautions (Have, Look For, or be Aware of)

- Personal Protection in use. (Seatbelt, safety glasses, hardhat, etc.)
- Electrical power cables or panels, (minimum 10 feet away). If larger lines or wet conditions contact EH&S or the Electrical shop for guidance. Insolated small lines in dry conditions 3 feet away.
- Floor conditions: Drop offs, holes, uneven surfaces, and sloped floors.
- Housekeeping: Debris, floor obstructions, cords, construction material and supplies.
- Watch for vehicular and pedestrian traffic. Set up barricades if necessary.
- Chemical lines, gas lines, drain lines, and utilities.
- Overhead obstructions
- Loads (do not exceed capacity)

### Comments

**IF THE POWERED INDUSTRIAL TRUCK FAILS ANY PART OF THIS INSPECTION, REMOVE THE KEY AND REPORT THE PROBLEM TO YOUR SUPERVISOR. DO NOT ATTEMPT TO MAKE REPAIRS UNLESS YOU ARE A TRAINED AND AUTHORIZED SERVICE PERSON. ALL SERVICE IS TO BE DOCUMENTED. IF ANYTHING HAS BEEN JERRY RIGGED NOTIFY YOUR SUPERVISOR AT ONCE.**