

Forklifts

1. Purpose

The purpose of this policy is to provide the minimum requirements for the maintenance and use of forklifts.

2. Scope

This policy applies to all forklifts and other powered industrial trucks designed to move materials using forks. This policy does not apply to vehicles intended primarily for earth moving but modified to accept forks. This policy applies to employees and on-site contractors who utilize forklifts, employees whose duties require them to maintain forklifts, and supervisors of employees who use forklifts while working on behalf of USPL.

3. Minimum Requirements

	Minimum Requirements	Supporting Documentation
1.	Only trained operators shall operate forklifts.	Section 6.1
2.	Modifications and additions which affect capacity and safe operation shall not be performed without prior written approval from the manufacturer.	Section 6.1
3.	Before the forklift or powered industrial truck is used, the operator shall document the equipment inspection with the Pre-Use Forklift Inspection Form.	Section 6.6

4. Definitions

Attachment— A device other than conventional forks or load backrest extension, mounted permanently or removable on the elevating mechanism of a truck for handling the load. Popular types are fork extension clamps, rotating devices, side shifters, load stabilizers, rams, and booms.

Contractors— Contractors refer to all third party groups performing work on USPL assets.

Forklift— A high lift self-loading truck, equipped with load carriage and forks for transporting and stacking loads.

5. Roles and Responsibilities

5.1. Asset Operator

- A. Verify that forklifts are inspected prior to use by the operator and documented on the Forklift Pre-Use Inspection form or similar form.
- B. Verify that the atmosphere or location has been classified as to whether it is hazardous or non-hazardous prior to the consideration of industrial trucks being used therein and the type of industrial truck required shall have the proper designation for the work environment.

5.2. Forklift Operator (USPL Employee or Contractor)

- A. Shall understand and adhere to requirements of OSHA or this Forklifts policy.
- B. Shall not modify powered industrial trucks without manufacturer's prior written approval.
- C. Shall complete the Forklift Pre-Use Inspection form or similar form prior to each shift's use
- D. Shall report defective or malfunctioning equipment and any incident involving the use of forklifts to their supervisor as soon as practical.

6. Procedures

6.1. General Requirements

- A. All new forklifts shall meet the design and construction requirements as established by ANSI/ITSDF B56.1 Safety Standard for Low Lift and High Lift Trucks.
- B. Only trained workers shall operate forklifts.
- C. Modifications of forklifts, which affect capacity or safe operation, shall not be performed without the manufacturer's prior written approval.
 - 1. Free rigging, i.e. the direct attachment to or placement of rigging equipment (slings, shackles, rings, etc.) onto the tines of a forklift for a below-the-tines lift, may affect the capacity or safe operation of the forklift and therefore the manufacturer's prior written approval is required according to OSHA.
- D. All forklifts shall be equipped with a seatbelt, and operators must wear them at all times while the vehicle is in operation.
- E. Per BP S&OR High Value Learning RM-HVL-16, Safe Operation of Forklift Trucks, all newly purchased or leased forklift trucks require sequential seat belt/ignition interlocks, lap seat belts, speed limiters, reversing beepers and strobe/warning lights.
- F. All nameplates and markings shall be in place and maintained in a legible condition.
- G. No person shall be allowed to stand or pass under the elevated portion of a forklift, whether loaded or not.
- H. Forklifts shall not be refueled while the engine is running.
 - 1. Spillage of oil or fuel shall be cleaned up and the fuel tank cap replaced before restarting engine.

6.2. Operations

- A. Forklifts shall not be driven up to anyone standing in front of a fixed object.
- B. Unauthorized personnel shall not be permitted to ride on forklifts.
- C. Arms and legs are prohibited from being placed between the uprights of the mast or outside the running lines of the truck.
- D. When a powered industrial truck 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) A powered industrial truck 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.
- E. When the operator of a forklift 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.

- F. If at any time a powered industrial truck is found to be in need of repair, defective, or in any way unsafe, the truck shall be taken out of service until it has been restored to safe operating condition.

6.3. Traveling

- A. The truck shall be kept under control at all times.
- B. The driver shall be required to slow down and sound the horn at locations where vision is obstructed.
- C. If the load being carried obstructs forward view, the driver shall be required to travel with the load trailing.
- D. 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.
- E. 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.

6.4. Loading

- A. Only secure, stable or safely arranged loads shall be handled. Caution shall be exercised when handling off-center loads which cannot be centered.
- B. Only loads within the rated capacity of the truck shall be handled.
- C. Forklifts equipped with attachments shall be operated as partially loaded forklifts when not handling a load.
- D. The forks shall be placed under the load as far as possible; the mast shall be carefully tilted backward to stabilize the load.
- E. Extreme care shall be used when tilting the load forward or backward.

6.5. Industrial truck designations

- A. The atmosphere or location shall have been classified as to whether it is hazardous or non-hazardous prior to the consideration of industrial trucks being used therein and the type of industrial truck required shall be determined by the **Asset Operator**.

6.6. Forklift Inspections

- A. Forklift Pre-Use Inspection Form – Appendix I
 - 1. Forklifts shall be inspected using the Forklift Pre-Use Inspection form, Appendix 1 or equivalent, prior to performing work with the equipment.
 - 2. All subsequent operators, who use the lift during the same shift, shall review the current shift's Forklift Pre-Use Inspection form to ensure it was completed before use.

7. Maintenance

- A. Any problems or malfunctions that affect the safety or operation of a forklift or powered industrial truck shall be immediately taken out of service, repaired by a competent mechanic and functionally tested before continued use.
- B. Regular maintenance shall be performed on forklifts and powered industrial trucks in accordance with the manufacturer's recommendations.
- C. Forklifts in need of repairs to the electrical system shall have the battery disconnected prior to such repairs.

- D. Industrial trucks shall be kept in a clean condition, free of lint, excess oil, and grease. Noncombustible agents should be used for cleaning trucks.

8. Training

- A. Forklift operators shall receive initial training consisting of formal instruction, practical training (demonstrations performed by the trainer and practical exercises performed by the trainee), and evaluation of the operator's performance in the workplace.
 - 1. BP S&OR High Value Learning RM-HVL-16 requires training to include the mandatory use of seat belts and the correct response to forklift truck rollovers (the risk of fatality in a rollover incident is greatly reduced when a seat belt is worn and the operator braces themselves by placing their feet firmly on the floor of the cab, gripping the steering wheel tightly and leaning away from the direction of the fall).
- B. Forklift operators shall be trained on the specific type of forklift they are expected to operate (e.g. typical warehouse counterbalance forklift trucks, teletrucks with extending mast or boom, rough terrain forklift trucks, etc.).
- C. VTA or similar Learning Management System shall document training certification for USPL employees who are qualified to operate specific powered industrial trucks.
 - 1. Certification shall state that the operator has been trained and evaluated as required by OSHA 29 CFR 1910.178 (I). The certification shall include the name of the operator, the date of the training, the date of the evaluation, and the identity of the person performing the training evaluation.
- D. If USPL Operations rents or leases a forklift, the vendor shall supply on-site orientation to employees who have previously completed forklift training.
- E. An evaluation of each forklift operator's performance shall be conducted at least once every three years.
- F. Refresher training in relevant topics shall be required if:
 - 1. The operator has been observed to operate the vehicle in an unsafe manner.
 - 2. The operator has been involved in an accident or near-miss incident.
 - 3. The operator has received an evaluation that reveals that the operator is not operating the truck safely.
 - 4. The operator is assigned to drive a different type of truck.
 - 5. A condition in the workplace changes in a manner that could affect safe operation of the truck.

9. References

- 1. OSHA Regulations, 29 CFR 1910.178 Powered industrial trucks.
- 2. BP S&OR High Value Learning RM-HVL-16, Safe Operation of Forklift Trucks.

Appendix I - Forklift Pre-Use Inspection Checklist

To be completed by the first forklift operator for each piece of equipment prior to use each shift. This inspection form shall be available at the job site.

Forklift No. _____

For Week of: _____

VISUAL	SUN	MON	TUE	WED	THU	FRI	SAT
Engine oil							
Fuel system							
Radiator							
Hydraulics							
Tires							
Mast							
Carriage							
Forks							
Attachments							
Frame							
LP Components							
OPERATIONAL	SUN	MON	TUE	WED	THU	FRI	SAT
Operators compartment							
Gauges							
Safety Restraint							
Steering							
Controls							
Emergency Brake							
Service Brake							
Horn							
Lights							
Operation							
MARKING CODE							
(√) - Checked condition OK	(X) - Checked condition NOT OK			(NA) - Not Applicable			
SIGNATURE OF OPERATOR or INSPECTOR FOR EACH DAY							
Monday:			Friday:				
Tuesday:			Saturday:				
Wednesday:			Sunday:				
Thursday:							