

## Forklift Operator Competence Checklist

It's a fundamental principle of safe forklift operations that driving should be limited to trained, competent and authorised operators. Use the checklist below as the performance standard (benchmark) for both new and experienced drivers; provide additional training to help drivers address any particular areas of weakness.

For support in carrying out a more detailed assessment or review, please contact the Health, Safety and Welfare Team by e-mailing: [safetyadvice@gov.im](mailto:safetyadvice@gov.im)

**Department:**

**Address:**

**Carried Out by:**

**Date Carried Out:**

<b>All Operators Should be Able to:</b>	<b>Yes</b>	<b>No</b>
Explain the reasons for operator training, the risks associated with lift-truck operation and the common causes of lift-truck accidents.		
Show they understand their duty of care for themselves and others, including the need under the Health and Safety at Work Act 1974 (HSW Act) to <i>'take reasonable care of their own health and safety and that of other people'</i> , and to co-operate with employers and others to help them comply with their legal duties.		
Identify the lift truck's main features, explaining how it works as well as its load-handling capabilities and capacities.		
Identify, where appropriate, handling attachments that may be used with the lift truck (for example, reel and drum clamps).		
Find and explain all controls, instruments and indicators, and say how to use them.		
Place the forks (or other handling attachment) in predetermined positions using the right controls, for example, show the correct parked position.		
Identify various forms of load, and explain the procedures for their stacking, de-stacking and separation.		
Assess the weight, and, where relevant, the load-centre of a load, and decide if the load is within the truck's actual capacity (safe working load).		
Show they understand the factors that affect machine stability, for example: <ul style="list-style-type: none"> <li>• Turning (especially the speed and sharpness of turn).</li> <li>• Load security and integrity.</li> <li>• Rated capacity and rated load centres.</li> </ul>		



<ul style="list-style-type: none"> <li>• Centres of gravity.</li> <li>• Ground conditions.</li> <li>• Speed and smoothness of operation.</li> </ul>		
Follow correct procedures when loading and unloading vehicles.		
Check the safety, soundness and rating of racking (and similar structures designed to receive loads), and place/remove loads on/from them, at various heights.		
Pick up and place loads correctly.		
Safely drive and manoeuvre the machine forward and in reverse, loaded and unloaded, on inclines, in restricted spaces and on level ground (and including, if applicable, on rough terrain).		
Show the precautions for parking the truck safely.		
Explain the purpose of safety devices such as stabilisers, level indicators and load indicators – and show how to use them.		
Say why it's important to use seat restraints such as seatbelts.		
Correctly carry out inspection and maintenance tasks as recommended in the truck manufacturer's instructions (for example pre-use checks of tyres, fluid levels and hydraulic hoses).		
Show what they would do in an emergency, for example, if a forklift starts to tip over as they are operating it.		
Explain why only trained/authorised people should operate trucks, and how to achieve this in practice (e.g. not leaving keys in the forklift).		

