

1

PRE-SHIFT INSPECTION · ABOUT 5 MINUTES

Check the truck before it works

WHY IT MATTERS

A worn or broken part can fail in the middle of a lift or a turn. In one forklift death NIOSH investigated, the truck tipped on a turn, and inspectors later found an axle stop had been damaged before the crash and the steering had slack in it.

Source: NIOSH Alert 2001-109, Case 1.

READ THESE POINTS ALOUD

- 1 **Every truck, every day.** Examine it before it goes into service, at least once a day. If it runs around the clock, examine it after each shift.
1910.178(q)(7)
- 2 **Key off, walk around.** Look for leaks, cracked or bent forks, damaged hoses and mast chains, tire cuts, and a missing or unreadable data plate. Check chain tension with a stick, never your hand.
OSHA eTool
- 3 **Key on, test it.** Brakes, steering, horn, lights, backup alarm, lift, lower, tilt, and the seat belt.
OSHA eTool
- 4 **Found a problem? Don't drive it.** Report it to your supervisor right away and write it down. The truck stays out of service until it is fixed.
(q)(7), (p)(1), (q)(1)
- 5 **Don't fix it yourself** unless you are trained and authorized. Repairs are made by authorized people only.
(q)(1)
- 6 **Strange noise or shake while driving?** Stop, park the truck, and report it. The check doesn't end when the shift starts.
OSHA eTool

THE RULE BEHIND IT

29 CFR 1910.178(q)(7): trucks are examined before being placed in service, at least daily (after each shift if used around the clock), and defects are immediately reported and corrected. **(p)(1) and (q)(1):** an unsafe truck is taken out of service; repairs by authorized personnel only.

OSHA does not require a written checklist, but the employer must make sure trucks are properly inspected (OSHA letter, July 28, 2004). Points 2, 3 and 6 are recommended practice from OSHA's forklift eTool.

ASK THE CREW

- Q Which item on our checklist gets skipped when we are rushed?
- Q A truck fails the check. Where does it go, and who gets the keys?
- Q Who is authorized to make repairs here?

Given on _____

By _____

☐ Sign-in sheet filed

2

TIP-OVERS AND SEAT BELTS · ABOUT 5 MINUTES

Buckle up and stay in the seat

WHY IT MATTERS

NIOSH calls overturns the leading cause of forklift deaths, about 25% of them. The overhead guard is generally what crushes an operator who falls or jumps out of a tipping truck.

Source: NIOSH Alert 2001-109 (based on late-1990s federal data).

READ THESE POINTS ALOUD

- 1 Belt on, every trip**, on any truck that has one. It keeps you inside the guard if the truck goes over.
OSHA policy, 2004 letter
- 2 Sit-down truck tipping? Don't jump.** Stay in the seat, hold the wheel tight, brace your feet, and lean forward and away from the impact.
OSHA eTool
- 3 Stand-up truck with rear entry?** Step backward off the truck if it tips. Other truck types can differ, so check your operator's manual.
OSHA eTool
- 4 Speed, sharp turns, and raised forks can tip a truck.** Slow down before a turn, steer smoothly, and never turn with the forks up.
(n)(15), OSHA eTool
- 5 A cut, frayed, or missing belt is a defect.** Report it and don't drive the truck. Belts may not be removed.
(p)(1), (q)(6)

THE RULE BEHIND IT

Seat belts: 1910.178 has no seat belt paragraph, but OSHA's enforcement policy is that employers must require operators to use seat belts on trucks that have them, and (q)(6) bars removing them (OSHA letter, July 28, 2004).

(n)(15): reduce speed to a safe level in turns. **Appendix A** (non-mandatory) explains stability. The tip-over steps are recommended practice from OSHA's forklift eTool.

ASK THE CREW

- Q** Is every seat belt on our trucks working today?
- Q** Why is jumping more dangerous than staying in the seat?
- Q** Where on our site is a tip most likely: which turns, slopes, or rough spots?

Given on _____

By _____

☐ Sign-in sheet filed

3

PEDESTRIANS · ABOUT 5 MINUTES

People on foot come first

WHY IT MATTERS

Of the 74 forklift deaths the Bureau of Labor Statistics counted in 2017, 9 were pedestrians struck by a vehicle and 13 were workers struck by a forklift that was working rather than traveling.

Source: BLS forklift fact sheet (2019, covering 2011-2017) and supplemental table, 2011-2018.

READ THESE POINTS ALOUD

- 1 Yield to people on foot.** When someone walks across your path, stop, make eye contact, and wait for them to pass. Then go on slowly.
OSHA eTool
- 2 Slow down and sound the horn** at cross aisles, doorways, and blind corners.
(n)(4)
- 3 Look where you are going.** If the load blocks your view, travel with the load trailing. Use a spotter at blind spots.
(n)(4), (n)(6), OSHA eTool
- 4 Don't count on the backup alarm.** In a noisy building, people may not hear it.
OSHA eTool
- 5 No one under raised forks,** loaded or empty. Never drive up to someone standing in front of a bench, rack, or wall.
(m)(1), (m)(2)
- 6 Walking?** Use the walkways, stand clear of trucks at work, and remember a forklift can't stop suddenly and its rear end swings wide.
OSHA eTool

THE RULE BEHIND IT

1910.178(n)(4): slow down and sound the horn where vision is obstructed; travel with the load trailing if it blocks the view. **(n)(6):** look in the direction of travel. **(m)(1):** don't drive up to anyone in front of a fixed object. **(m)(2):** no one stands or passes under the elevated part of a truck.

Points 1, 4 and 6 are recommended practice from OSHA's eTool; 1910.178 has no pedestrian right-of-way rule (its only one, (n)(2), is for emergency vehicles). Permanent aisles used by forklifts must be kept clear and marked: 1910.176(a).

ASK THE CREW

- Q** Where do people and forklifts cross paths most on our floor?
- Q** Which corner or doorway has the worst view?
- Q** If you are walking and a driver hasn't seen you, what do you do?

4

LOADS AND THE DATA PLATE · ABOUT 5 MINUTES

Know your load limit

WHY IT MATTERS

An overloaded or off-center load can tip the truck or fall off the forks. In 2017, 12 of the 74 forklift deaths federal data counted were workers struck by a falling object or equipment.

Sources: OSHA forklift eTool, Load Handling; BLS forklift fact sheet (2019, covering 2011-2017).

READ THESE POINTS ALOUD

- 1 Read the data plate.** It shows the most the truck can lift at its rated load center and height. Plate missing or unreadable? Don't use the truck.
App. A-5.2, OSHA eTool
- 2 Never go over capacity.** Handle only loads within the truck's rated capacity.
(o)(2)
- 3 Long loads cut your capacity.** OSHA's example: a truck rated 3,000 lb at a 24-inch load center can carry only 2,400 lb when the load center is 30 inches.
App. A-5.3
- 4 Forks all the way in, mast tilted back.** Put the forks under the load as far as possible and keep the heaviest part toward the front wheels.
(o)(5), OSHA eTool
- 5 Only stable loads.** Wrap or band a damaged or loose load before you move it. Take extra care with off-center loads.
(o)(1), OSHA eTool
- 6 Carry it low.** Tilt forward with the load up only when it is over the rack or stack.
(o)(6), App. A-7.2

THE RULE BEHIND IT

1910.178(o)(1): only stable or safely arranged loads. **(o)(2):** only loads within rated capacity. **(o)(5):** forks under the load as far as possible, mast tilted back. **(o)(6):** no forward tilt of an elevated load except over a rack or stack.

Appendix A (non-mandatory): check the data plate for the maximum weight at the rated load center (A-5.2), the load-moment example (A-5.3), and carry heavy loads as low as possible (A-7.2).

ASK THE CREW

- Q** What capacity and load center are on the plate of the truck you drive today?
- Q** Which of our loads are long, tall, or off-center?
- Q** What do you do when you don't know what a load weighs?

5

TRAVEL AND VISIBILITY · ABOUT 5 MINUTES

Drive at a speed you can stop from

WHY IT MATTERS

The largest group of forklift deaths the Bureau of Labor Statistics counted in 2017, 20 of 74, were crashes, tip-overs, and similar vehicle incidents away from public roads.

Source: BLS forklift fact sheet (2019, covering 2011-2017), "nonroadway incidents."

READ THESE POINTS ALOUD

- 1 Keep to the posted plant speed limit**, and always drive at a speed that lets you stop safely.
(n)(1), (n)(8)
- 2 Leave about three truck lengths** behind the truck ahead. Don't pass at intersections, blind spots, or other dangerous places.
(n)(1), (n)(3)
- 3 Look where you are going.** Load blocking your view? Travel in reverse with the load trailing, and look behind you.
(n)(4), (n)(6)
- 4 Slow down for wet or slippery floors and for turns.** Turn the wheel in a smooth, even motion.
(n)(10), (n)(15)
- 5 Coming in from bright daylight?** Drive slowly into the building. For a moment you may not see a person in front of you.
OSHA eTool
- 6 No stunt driving or horseplay.** Keep your arms and legs inside the truck and out of the mast.
(n)(9), (m)(4)

THE RULE BEHIND IT

1910.178(n)(1): observe plant speed limits; stay about three truck lengths back. **(n)(3):** no passing at intersections or blind spots. **(n)(4), (n)(6):** horn and slow down where vision is blocked; look in the direction of travel. **(n)(8):** a speed that permits a safe stop. **(n)(9), (n)(10), (n)(15):** no horseplay; slow for wet floors and turns. **(m)(4):** arms and legs inside the truck and out of the mast.

OSHA sets no miles-per-hour limit. The limit is your plant's posted one. Point 5 is recommended practice from OSHA's eTool.

ASK THE CREW

- Q** What is our posted speed limit, and where do people go over it?
- Q** Where do we most often drive with a blocked view?
- Q** Which spot on our site needs a mirror, a sign, or a spotter?

6

DOCKS AND TRAILERS · ABOUT 5 MINUTES

Secure the trailer before you drive in

WHY IT MATTERS

NIOSH found that most forklift deaths happen when a worker is crushed by a truck that overturned or fell off a loading dock. OSHA lists a trailer moving during loading as one of the dock hazards.

Source: NIOSH Alert 2001-109; OSHA forklift eTool, Loading Docks.

READ THESE POINTS ALOUD

- 1 Trailer brakes set and wheels chocked** (or held by the restraint your dock uses) before any forklift drives in.
(k)(1), (m)(7), 1910.26(d)
- 2 Check the trailer floor** for holes and weak spots before you drive onto it. A trailer with no tractor may need jacks so it can't tip up.
(m)(7), (k)(3)
- 3 Dock plate secured and rated for the load.** Cross it slowly and straight, and never go over its rated capacity.
(n)(11), 1910.26
- 4 Stay back from the dock edge.** Watch your tail swing when you turn near it.
(m)(6), OSHA eTool
- 5 Horn going in and coming out** of the trailer. Use the dock light or headlights in a dark trailer.
OSHA eTool
- 6 Don't open or close freight doors** with the forklift.
(m)(6)

THE RULE BEHIND IT

1910.178(k)(1), (m)(7): brakes set and wheel chocks or blocks in place while loading; check trailer floors first. **(k)(3):** fixed jacks may be needed under an uncoupled semitrailer. **(m)(6):** safe distance from dock edges; no opening freight doors with the truck. **(n)(11):** dock plates secured, driven over slowly, capacity never exceeded. **1910.26:** dockboard rules, including chocks or similar measures (d).

For over-the-road trailers, OSHA says federal DOT brake rules preempt its enforcement of (k)(1) and (m)(7) (OSHA letter, Nov. 8, 2005). Your site's dock procedure still applies.

ASK THE CREW

- Q Who checks the chocks or restraint before we enter a trailer, and how does the driver know it's done?
- Q Which dock door or plate here worries you most?
- Q What do we do with a trailer floor that looks damaged?

7

RAMPS AND GRADES · ABOUT 5 MINUTES

Load pointed uphill, and never turn on a slope

WHY IT MATTERS

OSHA warns a forklift can tip sideways on even a very small grade. In one death NIOSH investigated, a foreman turned while backing down an incline with the forks raised, and the truck overturned on him.

Sources: OSHA forklift eTool, Traveling & Maneuvering; NIOSH Alert 2001-109, Case 2.

READ THESE POINTS ALOUD

- 1 Go up and down slowly.** Always look in the direction of travel.
(n)(7), (n)(6)
- 2 Loaded: the load points uphill.** Drive forward going up, in reverse going down.
(n)(7)(i), OSHA eTool
- 3 Empty: the forks point downhill.** Reverse going up, forward going down. Walking a pallet jack? Forks point downhill, loaded or empty.
OSHA eTool
- 4 Never turn on a ramp.** Line up before you reach it, and keep away from its edges.
OSHA eTool
- 5 Load tilted back and just high enough** to clear the surface.
(n)(7)(iii)
- 6 Don't park on a slope** unless the wheels are blocked, and don't use a ramp steeper than your truck's maker allows.
(m)(5)(i), OSHA eTool

THE RULE BEHIND IT

1910.178(n)(7): ascend and descend grades slowly. **(n)(7)(i):** on grades over 10 percent, loaded trucks travel with the load upgrade. **(n)(7)(iii):** on all grades, load tilted back and raised only as far as needed to clear the surface. **(m)(5)(i):** block the wheels of a truck parked on an incline.

The rule's load-upgrade line is written for grades over 10 percent. OSHA's eTool recommends the same on every ramp and incline, and adds the empty-truck and no-turning practices.

ASK THE CREW

- Q** Where are the ramps and slopes on our site, including outside?
- Q** Going down a ramp with a load, which way do the forks point? With no load?
- Q** What makes a ramp worse on some days?

8

FUELING AND BATTERY CHARGING · ABOUT 5 MINUTES

No sparks where you fuel or charge

WHY IT MATTERS

Charging batteries can give off hydrogen, which is highly explosive, and battery acid causes severe burns. Propane vapor is heavier than air and collects in low spots, where a heat source can ignite it.

Source: OSHA forklift eTool, Power Sources (Electric; Internal Combustion).

READ THESE POINTS ALOUD

- 1 Only in the designated area.** Fuel and charge where your site says. No smoking, open flames, or sparks there, and never use a flame to check a fuel or battery level.
(g)(1), (g)(10), (g)(11), (p)(5)
- 2 Engine off to fuel.** Clean up any spill and put the cap back before you restart. Never run a truck with a fuel leak.
(p)(2), (p)(3), (p)(4)
- 3 Propane tanks:** changed only by trained, authorized people. Wear a face shield, long sleeves, and gauntlet gloves to check tanks and fittings. The relief valve points up.
OSHA eTool
- 4 Charging:** truck in position, brake set, battery cover open to let heat and gas out.
(g)(8), (g)(9)
- 5 No metal on top of a battery.** Keep tools off it and take off metal jewelry before charging.
(g)(12), OSHA eTool
- 6 Acid in your eyes?** Flush at the eyewash for 15 minutes and get medical help. When mixing, pour acid into water, never water into acid.
OSHA eTool, (g)(7)

THE RULE BEHIND IT

1910.178(g): designated charging areas (1) with means to flush spilled electrolyte, fire protection, and ventilation (2); acid into water (7); truck positioned and brake set (8); covers open (9); no smoking (10); no flames, sparks, or arcs (11); no tools on batteries (12). **(p)(2)-(p)(5):** engine off to fuel, clean spills, no running with leaks, no open flames. **(f):** fuel storage per NFPA 30 and 58.

Eyewash where acid can reach eyes or skin: 1910.151(c). Points 3 and 6 (first aid) and the jewelry step are recommended practice from OSHA's eTool.

ASK THE CREW

- Q** Where is our nearest eyewash, and when was it last checked?
- Q** Who is authorized to change propane tanks or batteries here?
- Q** What do you do if you smell propane?

Given on _____

By _____

☐ Sign-in sheet filed

9

PARKING AND LEAVING THE TRUCK · ABOUT 5 MINUTES

Forks down, power off, brake on

WHY IT MATTERS

OSHA warns that an unattended truck is a danger to the operator and others unless it is properly secured. The hazards it names: the truck moving on its own, and people or equipment running into a badly parked truck.

Source: OSHA forklift eTool, Traveling & Maneuvering, Parking.

READ THESE POINTS ALOUD

- 1 Walking away?** If you will be 25 feet or more from the truck, or out of sight of it: forks fully down, controls in neutral, power off, brake set. Take the key.
(m)(5)(i), (m)(5)(ii)
- 2 Stepping off close by?** Within 25 feet and in view: forks fully down, controls in neutral, brake set. The power may stay on.
(m)(5)(iii)
- 3 Park on hard, level ground.** If you must stop on an incline, block the wheels.
(m)(5)(i), OSHA eTool
- 4 Park only where you are allowed.** Never block fire aisles, stairways, exits, or fire equipment.
(m)(14), OSHA eTool
- 5 Get off without jumping.** Use the handhold, not the steering wheel.
OSHA eTool
- 6 Propane truck parked for a long time?** Turn the tank's service valve off.
OSHA eTool

THE RULE BEHIND IT

1910.178(m)(5)(i): an unattended truck has its forks fully lowered, controls neutralized, power shut off, and brakes set; wheels blocked on an incline. **(m)(5)(ii):** "unattended" means 25 feet or more away, or out of view. **(m)(5)(iii):** within 25 feet and in view, forks down, controls neutral, brakes set. **(m)(14):** keep fire aisles, stairway access, and fire equipment clear.

Taking the key, the handhold, and the propane valve are recommended practice from OSHA's eTool.

ASK THE CREW

- Q** Where are our parking spots, and are they being used?
- Q** You step off for a quick word 10 feet away. What do you have to do first?
- Q** Where have you seen a forklift parked in the way of an exit or fire equipment?

10

LIFTING PEOPLE · ABOUT 5 MINUTES

Nobody rides the forks

WHY IT MATTERS

Falls to a lower level caused 11 of the 74 forklift deaths federal data counted in 2017. In one death NIOSH investigated, a cage platform that was not secured to the forks toppled off when the worker in it stepped to one side.

Sources: BLS forklift fact sheet (2019, covering 2011-2017); NIOSH Alert 2001-109, Case 6.

READ THESE POINTS ALOUD

- 1 Never lift a person on the forks**, or on a pallet or anything else set on the forks. No riders unless the truck has a safe place built for one.
(m)(3), NIOSH
- 2 Use only an approved platform made for lifting people**, secured to the forks or carriage.
NIOSH, OSHA eTool
- 3 Rails, chains, or a harness and lanyard** must be in place and properly used. That goes for order pickers too.
NIOSH, OSHA 2004 letter
- 4 Position first, then lift.** Lift only when the truck is directly below the work. Never drive the forklift with someone raised on a platform.
NIOSH, OSHA eTool
- 5 Keep everyone out from under the platform** while it is raised.
(m)(2)

THE RULE BEHIND IT

1910.178(m)(3): unauthorized people may not ride; a safe place to ride is provided where riding is authorized. **(m)(2):** no one under the elevated part of a truck. The old personnel-platform paragraph, (m)(12), was removed in 2003 as unenforceable (68 FR 32638). OSHA said the hazard is still serious.

OSHA can cite fall hazards from raised platforms under the General Duty Clause, weighing the ASME B56.1 standard (OSHA letter, June 28, 2004). Points 2 to 4 are guidance from NIOSH Alert 2001-109 and OSHA's eTool.

ASK THE CREW

- Q** Do we have an approved platform? Where is it, and who checks it?
- Q** What jobs tempt people to ride the forks instead?
- Q** If you see someone riding the forks, what do you say?

11

ATTACHMENTS · ABOUT 5 MINUTES

An attachment changes the truck

WHY IT MATTERS

Clamps, sidershifters, and other attachments add weight and push the load farther forward. OSHA warns that this lowers the truck's lifting capacity and raises the risk of a tip-over or a falling load.

Source: OSHA forklift eTool, Parts: Attachments.

READ THESE POINTS ALOUD

- 1 Use the plate for the combination.** The capacity with the attachment is usually lower than with forks alone. On the sample plate in OSHA's eTool, 5,000 lb with forks drops to 4,500 lb with a sidershifter.
OSHA eTool
- 2 Added attachment? The plate must show it.** For a non-factory attachment, ask the maker to mark the truck with the attachment and the combined weight.
(a)(4), (a)(5)
- 3 Empty isn't empty.** Drive a truck with an attachment as a partly loaded truck, even with no load on it.
(o)(4)
- 4 Trained on it before you use it.** Training covers each attachment you will run. New attachment? Get retrained first.
(l)(3)(i)(G), OSHA eTool
- 5 No homemade add-ons.** No slings or chains hung from the forks, and no welding or add-ons that affect capacity or safe operation, without the maker's written approval.
(a)(4), (q)(6)
- 6 Check it daily.** Look for bent or cracked parts and hydraulic leaks, and test the attachment control.
OSHA eTool

THE RULE BEHIND IT

1910.178(a)(4): no modifications or additions that affect capacity or safe operation without the manufacturer's prior written approval; plates changed to match. **(a)(5):** for non-factory front-end attachments, the user requests marking that shows the combined weight. **(a)(6):** nameplates legible. **(l)(3)(i)(G):** training on attachments. **(o)(4):** operate as partially loaded. **(q)(6):** no added or removed parts.

Hanging a load from the forks (free rigging) needs the manufacturer's written approval, or a registered engineer's if the maker refuses or doesn't answer (OSHA letter, Oct. 22, 1999). Retraining and daily attachment checks are eTool guidance.

ASK THE CREW

- Q** Which attachments do we use, and does each truck's plate list them?
- Q** Who here is trained on each one?
- Q** Have you seen a load hung from the forks with a chain or sling?

Given on _____

By _____

☐ Sign-in sheet filed

12

NEAR MISSES AND REFRESHER TRAINING · ABOUT 5 MINUTES

Report the close calls

WHY IT MATTERS

In 2017, the Bureau of Labor Statistics counted 9,050 forklift injuries that cost workers days away from work. OSHA's forklift rule was number 8 on its list of most-cited standards for fiscal year 2025.

Sources: BLS forklift fact sheet (2019, covering 2011-2017); OSHA, Top 10 Most Frequently Cited Standards.

READ THESE POINTS ALOUD

- 1 A near miss is a close call.** Nobody hurt, nothing broken, but it almost happened. Report every one, the same shift.
- 2 Why report it:** OSHA requires refresher training for an operator involved in an accident or a near miss. It is how a bad habit gets fixed before someone gets hurt.
(I)(4)(ii)(B)
- 3 Other refresher triggers:** seen driving unsafely, a failed evaluation, a new type of truck, or a change in the workplace that affects safe driving.
(I)(4)(ii)
- 4 Every three years, no matter what,** each operator's driving is evaluated again, even with a clean record.
(I)(4)(iii)
- 5 Report defects and hazards too:** a truck problem, a blind corner, a damaged dock plate. Truck defects are reported right away.
(q)(7)
- 6 These talks are reminders.** They don't replace the formal training, practical training, and hands-on evaluation OSHA requires.
(I)(2)(ii)

THE RULE BEHIND IT

1910.178(I)(4)(ii): refresher training when an operator (A) drives unsafely, (B) has an accident or near miss, (C) fails an evaluation, (D) is assigned a different type of truck, or (E) faces a workplace change that could affect safe operation. **(I)(4)(iii):** evaluation at least once every three years. **(I)(6):** the employer certifies each operator's training and evaluation.

How and when to report near misses is your company's procedure; the rule sets what happens after one.

ASK THE CREW

- Q** What close call did you see this year that never got reported?
- Q** What stops people from reporting one?
- Q** Did anything change here this year (a new truck, a new layout) that calls for refresher training?

Toolbox Talk Sign-In Sheet

Make a copy for each talk. Everyone who attends prints and signs their name. File the sheet with your safety records.

Talk title _____

Date _____ Time / shift _____

Presenter _____ Location _____

	Printed name	Signature
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Questions, hazards, or near misses raised (and who will follow up)

Presenter signature _____ Supervisor reviewed _____

A toolbox talk is a reminder, not operator training. OSHA requires formal instruction, practical training, and an evaluation in your workplace before anyone drives a forklift on their own, 29 CFR 1910.178(l)(1)(ii) and (l)(2)(ii), and the employer's certification of each operator, (l)(6). Online classroom training for your crew: easyforkliftcertification.com/group-forklift-certification/