

Cal Poly ILT forklift practical evaluation

Instructions: Use this checklist during the field session to evaluate operator proficiency. It can also be used for period evaluation to ensure that operators are continuing to operate forklifts properly. Per Cal/OSHA regulation 3668 and evaluator is someone who has the knowledge, training and experience to train operators and evaluate their competence on the equipment they wish to operate. Faculty and staff with a current forklift certification on the specific type of equipment would be a good choice for evaluator.

Operator Name/ Department		Evaluator Name
Date of Evaluation	Equipment Operated	

OPERATOR BEHAVIORS		COMMENTS
Pre-use Inspection		
1. Completed daily inspection checklist?	YES NO	
2. Look for Damage.	YES NO	
3. Submitted any deficiencies found in daily inspection to maintenance	YES NO	
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 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	
Hazards specific to operating a forklift at Cal Poly? Instructor to communicate any Cal Poly specific hazards to operator such as uneven surface locations, blind turns.	Please document specific hazards, if any in comments.				

Based on my evaluation, the operator has successfully completed the evaluation and is qualified to operate the following equipment:

Evaluator Signature: _____

Operator Signature: _____

Please scan and email completed form to Environmental Health & Safety for completion credit. Learning Management System will notify operator in 3 years of need to requalify. If you have any questions please contact Christina Juarez at 805-756-6674