CAL POLY

Environmental Health and Safety,
Risk Management (EHSRM)

AERIAL LIFT SAFETY PROGRAM

DRAFT

Prepared by: Melonee Cruse

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Table of Contents

Contents

Purpose

This program oversees all aspects of the Aerial Lift and Mobile Elevating Work Platform (MEWP) Safety Program at California Polytechnic State University, San Luis Obispo. In compliance with Cal/OSHA and other regulatory codes, it ensures adherence to all legal requirements across Cal Poly's departments, field stations, and work or research operations involving this equipment.

Scope and Application

This program applies to all Cal Poly faculty, staff, and students who are required or request to operate aerial lifts and MEWPs, as well as those responsible for overseeing their operation, in any aspect of research, instruction, or work.

Roles and Responsibilities

All Cal Poly Staff, Faculty, and Eligible Students

- All Cal Poly faculty, staff, and students required to or requesting to operate aerial lifts or MEWPs, or responsible for overseeing their operation, must be familiar with the requirements of this program.
- All operators must complete training on the safe operation of aerial lifts or MEWPs and obtain a 3-year certification specific to the equipment type.

Departments That Own/Use Aerial Lifts or MEWPs

Departments owning, operating, or permitting the use of aerial lifts or MEWPs must:

- Ensure all faculty, staff, or student operators have current training and evaluations as per this program.
- Designate a Department Safety Coordinator (DSC) or other responsible person to oversee program implementation.

Responsibilities include:

- Selecting and purchasing/renting equipment suitable for job tasks based on hazard analysis.
- Training personnel to operate their specific equipment type.
- Conducting documented safety inspections and preventive maintenance.
- Ensuring operators adhere to safe work practices while using powered industrial equipment.
- Approving contractors/vendors to operate aerial lifts or MEWPs on department premises, ensuring they are properly trained if using department-owned equipment.

Supervisor or Manager of Lift Operators

Supervisors or managers must:

- Communicate program requirements to equipment operators.
- Assign and verify completion of operator training and evaluations.
- Verify operators document site safety and equipment inspections.
- Ensure unsafe/inoperable equipment is tagged and removed from service.
- Confirm purchased/rented equipment suits work environment and job task hazards.

- Submit training records to LMS for recordkeeping.
- Conduct periodic observations to ensure operator compliance and proper program implementation.

Aerial Lift or MEWP Equipment Operators

Operators are required to:

- Complete the EHS online training course and undergo evaluation by a qualified trainer or supervisor.
- Perform daily vehicle inspections.
- Report inoperable, damaged, or impaired vehicles to supervisors.
- Avoid operating unsafe equipment.

Contractors/Vendors Using Aerial Lifts or MEWPs on Cal Poly Property

- Contractors/vendors trained under their company's aerial lift or MEWP safety program may operate their own equipment on Cal Poly premises with departmental permission.
- Operators may be asked to provide verification of training for the specific equipment they are using.
- Work must stop immediately if untrained contractor/vendor employees are identified until properly trained personnel are available.

Environmental Health and Safety (EHS) – Aerial Lifts or MEWPs Safety Program Manager

The EHS Program Manager oversees all aspects of the program, including:

- Periodic program revisions to maintain compliance with evolving regulations.
- Communicating program updates and requirements to affected departments.
- Developing and updating training materials to align with Cal/OSHA regulations.
- Assisting departments with unique or department-specific training needs.
- Identifying safe locations for hands-on training and evaluations.
- Conducting program audits to ensure proper implementation.
- Providing customer support and collaborating on program improvements as needed.

Program Technical Information

Types of Aerial lift/Elevated Work Platforms	
Type	**Group**
Type 1 _ The lift only travels or moves in a stopped position. These are manually propelled or pushed, or towed behind booms	**Group B –** Boom Lifts (aerial lifts designed for the platform to be elevated beyond the tipping line.
Type 2 – Can be traveled with platform elevated, can only be operated from controls on the chassis	**Group A –** MEWPS that only lift vertically, or lifts that are not Group B. Does not extend beyond tipping axis
Type 3 – The lift is self-propelled where travel is controlled from a point on the work platform.	

Commonly Used MEWPs

Articulating Boom Lift - An aerial device with two or more hinged boom sections. Fall Protection is required when operating this lift. **Type 3, Group B**	
Elevating Work Platform - A device designed to elevate a platform in a substantially vertical axis. This device is stationary once set up and cannot be moved. Fall Protection is not required when operating this equipment, but is highly recommended. **Type 1, Group A**	
Pod - A portable device designed to reach places a traditional lift can't, such as through doorways, up steps, and in elevators. Lift pods are designed for one-person operation and can be used for facility maintenance projects. **Type 1, Group A**	
Extensible Boom Platform - An aerial device (except ladders) with an extensible boom. Telescopic booms with personnel platform attachments are considered to be extensible boom platforms. Fall Protection is required when operating this equipment. **Type 2 & 3, Group B**	
Scissor Lift - A device designed to elevate a platform in a substantially vertical axis. This device can also be driven by an operator inside the work platform and is generally designed to carry more than one person. Fall Protection is not required when operating this lift, but is highly recommended. **Also see Scaffolding Safety Program – Mobile Scaffolds** **Type 2 &3, Group A**	
Trailer Mounted Lift - A device that can be towed by a vehicle to a work site, then un-hitched. These units have extendable or folding outriggers to give stability while being operated. Fall Protection is required when operating this lift. **Type 1, Group B**	
Vehicle Mounted Lift - These devices typically have a bucket in place of a basket, which is designed for one person. Vehicle must have the brakes set, wheels chocked, and outriggers in place when operating this lift. **Type 1, Group B**	

Program Requirements and Procedures

Administrative Requirements

Department Responsibilities for Safe Equipment Use

Departments that own or rent aerial lifts or elevating work platforms must appoint a qualified individual to oversee safety requirements. This person is responsible for ensuring the equipment is used safely and in compliance with safety regulations.

Site Hazard and Equipment Assessment

Before using aerial lifts or elevating work platforms, both the department and the operator must:

1. **Assess Work Area Hazards:** Document any potential hazards in the area.
2. **Determine Equipment Needs:** Evaluate how the lift will be used and select appropriate equipment.

To support safe operations:

- Provide operators with necessary safety training and protective equipment.
- Mark hazardous areas with clear signs or painted lines.
- Minimize risks through thorough training, proper equipment selection, and regular maintenance.
- Require operators to inspect equipment before each use.

Use Attachments 1–7 to document hazard assessments and inspections.

Equipment Inventory

Departments must maintain a current inventory of all aerial lifts and elevating work platforms they own or use. This inventory ensures proper training, maintenance, and safe use of equipment for approved tasks only. Update the inventory when new equipment is added or old equipment is retired. Use Attachment 8 as a template for the inventory.

Pre-Operation Inspection and Site Hazard Assessment

Before using an aerial lift or elevating work platform, operators must:

1. Perform a **Pre-Operation Inspection** tailored to the equipment type. This includes visual and auditory checks of all safety and operational components, with results recorded on inspection checklists.
2. Complete or review a **Site Hazard Assessment** when working in a new or unfamiliar area or if new hazards arise.

This process ensures the appropriate equipment is selected for the job and all work area hazards are identified and mitigated. Refer to Attachments 1–7 for related forms.

Fall Protection Requirements

- Operators must use fall restraint or fall arrest systems when working at heights of 6 feet or more, except for scissor lifts equipped with guardrails.
- Fall protection requirements comply with Cal-OSHA regulations and are detailed in the Cal Poly Fall Protection Program on the EHS website.

- While EHS recommends fall protection for all lifts, specific requirements are noted on certain Pre-Operation Inspection Checklists.
- Operators must complete separate training for fall protection, in addition to aerial lift operation training.

Equipment Tag-Out for Repairs

Aerial lifts and Mobile Elevating Work Platforms (MEWPs) must not be used if deficiencies are identified during a Pre-Operation Inspection. If a hazardous issue is found:

1. The operator must inform their supervisor and tag out the equipment.
2. **Tag-Out Procedure:**
    a. Remove all vehicle keys and keep them secured.
    b. Place a warning tag near the controls with:
        i. The name and contact information of the person who tagged out the equipment.
        ii. The date of the tag-out.
        iii. The name and contact information of the department's responsible person.

Tags may only be removed after the equipment has been repaired and deemed safe for use.

Operating Procedures/Hazard Identification and Controls

At the start of each work shift, operators must review and assess the following equipment and work area conditions to ensure safe operations:

1. **Work Area Assessment:**
    a. Inspect the work area for hazards and address or control them before beginning operations.
    b. Conduct an environmental hazard assessment to determine the appropriate aerial lift or MEWP for the conditions.(use Attachment 8)
2. **Equipment Inspection:**
    a. Review operating instructions, warnings, and precautions for the specific equipment being used.
    b. Inspect equipment controls and instrumentation according to the manufacturer's guidelines and Cal Poly inspection form (Attachments 1–7).
3. **Pre-Operation Actions:**
    a. Alert all individuals in the work area to planned activities and potential hazards.
    b. Ensure the equipment is positioned on a firm, level surface, minimizing the use of blocks or ramps for leveling.
    c. Set outriggers if the equipment is equipped with them.
4. **Safe Equipment Operation:**
    a. Always face the direction of travel while operating.
    b. Avoid traveling horizontally with the platform elevated or extended.
    c. Do not exceed the platform or basket capacity.
    d. Wear a proper safety harness, secured to the designated tie-off point on the platform (if required per inspection forms, Attachments 1–7).
5. **Work Zone and Safety Practices:**
    a. Barrier off the swing area beneath the platform to protect people below.
    b. Avoid standing on guardrails, ladders, or other objects while on the platform.
    c. Maintain good housekeeping on and around the platform.
    d. Never drop or throw objects from the platform.
    e. Confirm the area below is clear before lowering the platform.
6. **Prohibited Practices:**
    a. Do not lean the platform against structures.
    b. Avoid using the boom to push against or pull the equipment horizontally.

By following these guidelines, operators ensure safe and efficient use of aerial lifts and MEWPs.

Training Requirements

Operator Training Procedures

Aerial lifts or MEWPs Operators

- Must have completed online training provided by Cal Poly, appropriate for the type of aerial lift platform.
- Must complete and pass a hands-on Evaluation/Training provided by an independent third-party consultant, or an employee of Cal Poly, that has completed a Train-The-Trainer class.
- If fall protection is used during the operations of an aerial platform the operator must have been trained in its use according to the Cal Poly Fall Protection Safety Program.

Learning Hub online training course code: (use this code to search for training in the learning Hub.

CALPOLY-CGRP-EHS-AERIAL-WORK-PLATFORM

Evaluation

Training begins with online training. After completion, each department has the option to provide the evaluation/training by a knowledgeable, trained, and experienced staff member, or hire a third-party vendor/consultant to provide the training and evaluation.

Departments must arrange for their personnel to be trained and evaluated. The operator training/evaluation can be provided by the trainee's supervisor if that supervisor has successfully completed a Forklift or Aerial Lift Train-the-Trainer course, or can document that they have the knowledge, experience, and training to evaluate the operator's performance. Training/evaluation is documented in a form filled out by the trainer and kept on record in the Cal Poly Learning Management System (LMS), the Learning Hub. Contact EHS for more information *Attachment 10, Aerial Lift / MEWP Program Evaluation*

Refresher Training

Cal/OSHA requires refresher training to ensure the operator has the knowledge and skills needed to operate aerial lifts or MEWPs (Mobile Elevating Work Platforms) safely when:

- The operator has been observed operating the aerial lifts or MEWPs in an unsafe manner.
- The operator has been involved in an accident or near-miss incident.
- The operator has received an evaluation that reveals they are not operating the aerial lifts or MEWPs safely.
- The operator is assigned to a different type of aerial lift or MEWP that they haven't been trained on.
- A change in workplace conditions affects the safe operation of the aerial lifts or MEWPs.

Training content is reviewed by EHS based on observed hazards, type of equipment, departmental needs, and work requirements. If an operator has previously received training on a topic specified in this program, and such training is relevant to a new aerial lift or MEWP and/or working conditions, additional training in that topic is not required if the operator has been evaluated and found competent to operate the new equipment or in the new working conditions safely.

Program Audit and Observations

Supervisor responsibility

Supervisors or Managers of aerial lift and MEWP operators must conduct periodic observation not less than twice annually to ensure operators are compliant with the procedures and guidelines outlined in this plan. Supervisor observations must include:

- Verification of training completion
- Verification of lift or vehicle inspections
- Review of site assessments
- Visual observation of operator performance.

A sample of a supervisor audit is provided in *Attachment 10 Sample Supervisor Observation*

EHS Program Manager responsibility

The EHS Program Manager for the Aerial Lift and Mobile Elevating Work Platform program must conduct an annual review of the written program and department program implementation. The EHS observations includes:

- A review of the Supervisor or Manager Observation
- A review of site assessment, lift or MEWP inspection
- A visual observation of an operator using a lift or MEWP.

The EHS Program manager will contact the supervisor to schedule the observation. The observation may be made in conjunction with a supervisor's periodic observation.

Definitions

Aerial Device - Any vehicle-mounted or self-propelled device that is telescopic or extensible, articulating, or both, and is primarily designed to position personnel.

Boom - An elevating member, the lower end of which is so attached to a rotating or non-rotating base that permits elevation of the free end in the vertical plane.

Counterweight - The rear section or area of the lift which is usually made of solid steel, and/or combination of steel and the weight of the battery on electric lifts, that counterbalances the boom leverage and basket load.

Data Plate - Manufacturer's equipment specification and information data, which includes basket load rating/lift capacity, lift heights, vehicle weight, and vehicle attachments. This plate is required to be affixed to all Aerial Lift Equipment by regulatory code. This is the vehicle operator's primary source of basic information about their vehicle for safe-work and use planning.

Emergency Lowering Means - Any elevating work platform equipped with a powered elevating assembly, and having a platform height exceeding 60 inches, must be supplied with safe means of lowering the basket or platform during an emergency or malfunction.

Fall Protection - An approved full-body safety harness with lanyard is to be worn at all times and attached to a secure anchor point when drivers or personnel are using a boom-type lift or vehicle-mounted lift. Fall protection must also be worn when using scissor lifts on uneven surfaces or near locations with tip-over hazards.

Guard Rails - Railing around the perimeter of the work platform. This railing consists of a top rail between 39" – 45" with a mid-rail. Units with the top rail less than 39" must have fall protection in use to operate.

Lower Controls - Operating controls located on the base of the unit which can be switched to override the basket or platform control during an emergency.

Mast - Part of the lifting mechanism to which the hydraulic lift cylinder or worm drive is attached that supports the basket as it is lifted up and down.

Outriggers - Extendable legs that are either manually set in place or, in some cases, hydraulically extended to give added stability to the unit base.

Platform - Any personnel carrying device (bucket, basket, cage, stand, tub, or equivalent) which is a component of an aerial device.

Upper Controls - Operating controls located on the basket or work platform of the unit. These controls can only be overridden with the operator's permission or in case of an emergency.

Record Keeping Requirements

Under revision

References

The following Title 8 Cal/OSHA codes dictate the requirements of this program:

§1670. Personal Fall Arrest Systems, Personal Fall Restraint Systems and Positioning Devices

See more: Fall Protection: Equipment and Inspection Fact Sheet - Cal Poly, EHS.

§3636. Application

§3637. Definitions

§3638. Equipment Instructions and Marking

§3639. Factors of Safety in Design of Work Platform Assembly

§3640. Maintenance and Repairs

§3642. Platform Equipment

§3645. Stability on Inclined Surfaces

§3646. Operating Instructions (Elevating Work Platforms)

§3647. Pin-On Platforms

§3648. Operating Instructions (Aerial Devices)

Program History

Issued by: Melonee Cruse

Next review date:

Revision	Approval Date	Summary of change
1.0	MM/YYYY	
2.0	MM/YY	

Attachments

Attachment 1 - **Articulating Boom Lift Pre-Operation Inspection**

WEAR FALL PROTECTION WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location. All forms must be approved/signed by supervisor

Lift MFG	Model	Serial
Date	Start Time	

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects			
Check drive hubs, engine for oil leaks			
Check platform entry mid-rail/gate, and platform or basket housekeeping			
Examine the battery & fire extinguisher			
Check fuel level to assure that the unit can operate the duration of the job			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly			
Tires/Rollers/Monitor tire air pressure if pneumatic			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life)			
Check all basket controls, foot switch, horn for proper operation			
Battery discharge indicator, Hour meter			
Steering and drive system			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket)			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 2 - Elevating Work Platform Pre-Operation Inspection

FALL PROTECTION RECOMMENDED WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location.
All forms must be approved/signed by supervisor

Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects			
Check outriggers, outrigger limiting switches, and locking pins			
Check platform entry mid-rail/gate, and platform or basket housekeeping			
Examine the battery & fire extinguisher			
Check battery level to assure that the unit can operate the duration of the job			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly			
Tires/Rollers/Monitor tire air pressure if pneumatic			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life)			
Check all basket controls, foot switch, horn for proper operation			
Battery discharge indicator, Hour meter			
Steering and drive system			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket)			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 3 - Lift Pod Pre-operation Inspection

FALL PROTECTION RECOMMENDED WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location.
All forms must be approved/signed by supervisor

Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level.			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects.			
Check outriggers, outrigger limiting switches, and locking pins.			
Check platform entry mid-rail/gate, and platform or basket housekeeping.			
Examine the battery & fire extinguisher.			
Check battery level to assure that the unit can operate the duration of the job			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly.			
Tires/Rollers/Monitor tire air pressure if pneumatic.			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life)			
Check all basket controls, foot switch, horn for proper operation			
Battery discharge indicator, Hour meter			
Steering and drive system			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket)			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 4 - Extensible Boom Platform Pre-Operation Inspection

WEAR FALL PROTECTION WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location.
All forms must be approved/signed by supervisor

Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level.			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects.			
Check drive hubs, engine for oil leaks.			
Check platform entry mid-rail/gate, and platform or basket housekeeping.			
Examine the battery & fire extinguisher.			
Check fuel level to assure that the unit can operate the duration of the job.			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly.			
Tires/Rollers/Monitor tire air pressure if pneumatic.			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life).			
Check all basket controls, foot switch, horn for proper operation.			
Battery discharge indicator, Hour meter.			
Steering and drive system.			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket).			
Check outriggers for proper operation if equipped.			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 5 - Scissors Platform Lift Pre-operation Inspection

FALL PROTECTION RECOMMENDED WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location.
All forms must be approved/signed by supervisor

Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level.			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects.			
Check outriggers, outrigger limiting switches, and locking pins.			
Check platform entry mid-rail/gate, and platform or basket housekeeping.			
Examine the battery & fire extinguisher.			
Check battery level to assure that the unit can operate the duration of the job			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly.			
Tires/Rollers/Monitor tire air pressure if pneumatic.			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life).			
Check all basket controls, foot switch, horn for proper operation.			
Battery discharge indicator, Hour meter.			
Steering and drive system			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket).			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 6 - Trailer Mounted Aerial Lift Pre-operation Inspection

WEAR FALL PROTECTION WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location.
All forms must be approved/signed by supervisor.

Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level.			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects.			
Check outriggers, outrigger limiting switches, and locking pins.			
Check platform entry mid-rail/gate, and platform or basket housekeeping.			
Examine the battery & fire extinguisher.			
Check battery level to assure that the unit can operate the duration of the job.			
Check trailer lights, reflectors, parking brake, axle components, surge brake, safety chains.			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly.			
Tires/Rollers/Monitor tire air pressure if pneumatic.			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life).			
Check all basket controls, foot switch, horn for proper operation.			
Battery discharge indicator, Hour meter.			
Steering and drive system.			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket).			
Check outriggers for proper operation if equipped.			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 7 - Vehicle Mounted Lift Pre-operation Inspection

WEAR FALL PROTECTION WHEN USING THIS LIFT

Instructions: Operators must check off each item as being *OK (PASS)* and safe to use during daily operation. *FAIL* must be signed off by supervisor or removed/tagged Out of Service. Complete an Inspection and Site Hazard Assessment tor every new location. All forms must be approved/signed by supervisor.

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Lift MFG Model Serial

Date Start Time

KEY OFF Procedures	Pass	Fail	N/A
Check that the operator's manual and decals are in place and legible, and that the operator has reviewed the manual and is aware of its limitations.			
Check Hydraulic cylinders/Lifting mechanism/Fluid level.			
Check welds, pins, missing nuts or bolts and other structural parts for cracks or defects.			
Check outriggers, outrigger limiting switches, and locking pins.			
Check platform entry mid-rail/gate, and platform or basket housekeeping.			
Examine the battery & fire extinguisher.			
Check battery level to assure that the unit can operate the duration of the job.			
Check lights, reflectors, parking brake.			
Operator is responsible for inspecting all fall protection and ensuring that all fall protection is being worn and attached properly.			
Monitor tire air pressure.			

Front Right psi		Front Left psi		Right Rear psi		Left Rear psi	

KEY ON Procedures	Pass	Fail	N/A
Check all ground controls for proper operation, including emergency lowering means (remember, these could save your life).			
Check all basket controls, foot switch, horn for proper operation.			
Battery discharge indicator, Hour meter.			
Steering and drive system.			
Check limit switches, alarms, and flashing beacon if equipped (operating the lift by raising/swing/extending booms, tilt/rotate the basket).			
Check outriggers, leveling jacks and foot pads.			

Starting Hour Meter Reading	**Operator's Printed Name**	**Operator's Signature**
DATE	**Supervisor's Printed Name (If marked FAIL)**	**Supervisor's Signature**

Attachment 8 – SITE HAZARD ASSESSMENT

Instructions: An Operator must conduct a **Site Hazard Assessment** for Mobile Elevating Work Platform (MEWP) Equipment owned/operated or rented by their department to identify all hazards in the area of intended work, and to select appropriate equipment for the work-task. A site must be reassessed when the site or conditions change.

Department/Shop:_____ Date: _____

Work Site Location:_____

Type of Work to be conducted: _____

Site Evaluation	YES	NO	N/A
Is the work surface structurally strong enough to handle the lift, and free of drop-offs?			
Are surface conditions where the lift is used free of obstructions and on level surface?			
Are there proper barricades to control pedestrian and vehicle traffic in the work zone?			
Are there overhead obstructions or restricted places where the lift will be operated?			
Will the basket handle the loads to be carried without exceeding the rated capacity?			
Are there ramps and other sloped surfaces that could affect the vehicle's stability?			
Will the lift be used for electrical work or near high voltage lines?			
Are there *Classified Hazardous* locations where the vehicle will be operated?			
Is there an enclosed environment(s) or other areas where insufficient ventilation or poor vehicle maintenance could cause a build-up of carbon monoxide or diesel exhaust buildup for combustion motors, or hydrogen gas buildup at electric vehicle recharging stations?			
Is wind or other weather a concern? Are there sustained winds or gusts stronger than the manufacturer's rated design allowance?			
List below other potentially hazardous site-conditions that could affect safe operation:			

Process/Use of Lift Truck	YES	NO	N/A
Has the proper Lift been chosen for the type of work being conducted?			
Does the Lift have the proper lift height and capacity for the job?			
Are proper PPE (hardhats, etc.) and full body harnesses w/lanyards available and used?			
Is the basket free of trip hazards and proper housekeeping maintained?			
Are there designated parking areas for Lift(s)? (Clear of exits, fire extinguishers, hydrants, pedestrian-aisles, doorways, footpaths, or electrical panels.)			
Is the fueling and/or charging area well ventilated?			
Is there proper lighting in the areas the Lift is being used?			
Are propane bottles being kept in a secure area, and are they tagged *Full* or *Empty*?			
List below other potentially hazardous process-conditions that could affect safe operation:			

Evaluator Name and Signature	Date
Supervisor Name and Signature	Date

Attachment 9 – Lift Equipment Survey for Department

Instructions: Use this form to identify all equipment impacted by the Aerial Lift Safety Program. This must be done by physical inspection. This survey may be conducted by a Responsible Person in a department, Safety Coordinator, or their designee. Update the inventory list as equipment is purchased or retired from service and at least annually. **Note: An inventory of all Aerial Lift/Platform devices owned and operated by a department must be conducted and reported to Fleet Services.**

MFR	Type	Power Source	Name Plate Data	Max. Lift Capacity	Locations	PPE	Users
Example: Gene	Scissor Lift	Electric/ AC-DC	Model ZH1 S/N 4561V12X789	Platform 600 lbs.	Wine/Vit	Full body harness w/Lanyard	Wine/Vit Staff Trained Student Workers

Attachment 10: Practical Knowledge Evaluation Test for Type 2 MEWPs

TYPE 2 MEWPs

Date: _____

Name of Evaluator: _____ Name of Trainee: _____

Lift Model: _____ Cal Poly Vehicle ID#: _____

Rental Company: _____

Check applicable column. Then mark the Operator Performance column if acceptable. OBSERVATIONS	*Vertical Axis	**Work Platform Movement	Operator Performance **Pass, Fail or NA**
Assess the suitability for the task.			
Visually check the condition of the MEWP.			
Direct the operator and evaluate ability to Interpret and execute the command and communication gestures.			
Get someone else to position the vehicle.			
Position the platform along a flat vertical surface.			
Move the work platform along this surface.			
Position the platform above a flat surface.			
Move the work platform across this surface.			
Position the platform below a flat surface.			
Move the platform across this surface.			
Position the platform in a space with limited accessibility.			
Demonstrate correct procedure in the event of an Inclination warning.			
Put the MEWP into the transport position.			
Smoothness of the maneuvers.			
Accuracy of the maneuvers.			
Perform recovery maneuvers.			
Perform rescue maneuvers from the around position.			
Position the unit at a location.			
Carry out the suitability examination.			

*NOTE "Vertical axis" refers to the vertical movements of the work platform due to movements of the lifting structure. It includes awareness of the position of the platform and lifting structure when raising and lowering the platform and when slewing the lifting structure.

**NOTE: “Work platform movement" refers to any movement of the work platform excluding movements resulting from operation of the lifting structure. This Includes horizontal platform movements when the MEWP base Is moved, vertical and horizontal platform movements caused by travelling over uneven ground, bounce and sway resulting from lifting structure flexing.

Attachment 10 (continued) TYPE 2 MEWPs - SECTION 2

TYPE 2 MEWPs – SECTION 2

Date: _____

OBSERVATIONS

Name of Instructor: _____ Name of Trainee: _____

Check applicable column. Then mark the Operator Performance column if acceptable OBSERVATIONS			*Vertical Axis	**Work Platform Movement	Operator Performance **Pass, Fail or NA**
TRAVELING		Visually check the condition of the MEWP			
Platform raised	Platform on vehicle axis (forwards or backwards)	Travel In a straight line forward.			
		Travel in a straight line backwards.			
		Travel in a curve (slalom, bend) forward.			
		Travel In a curve (slalom, bend) backwards.			
	Platform at right angles to vehicle to the left or to the right	Travel In a straight line forward.			
		Travel in a straight line backwards.			
		Travel In a curve (slalom, bend) forward.			
		Travel in a curve (slalom, bend) backwards Travel with simultaneous platform movements.			
VERIFICATION		Guide the operator and evaluate ability to interpret and execute the command and communication gestures.			
		Travel safely over different types of surface conditions approved by the manufacturer.			
		Use the audible warning correctly.			
		Look backwards before moving backwards.			
		Demonstrate safe travel and obey all rules and notice boards.			
		Adapt driving to suit the traffic conditions (congestion, bend, etc.).			
		Smoothness of maneuvers.			
		Accuracy of maneuvers.			
		Demonstrate correct procedure in the event of an inclination warning.			
		Position of the MEWP in its stowed/parked location (remove key).			

*NOTE "Vertical axis" refers to the vertical movements of the work platform due to movements of the lifting structure. It includes awareness of the position of the platform and lifting structure when raising and lowering the platform and when slewing the lifting structure.

**NOTE: “Work platform movement" refers to any movement of the work platform excluding movements resulting from operation of the lifting structure. This Includes horizontal platform movements when the MEWP base Is moved, vertical and horizontal platform movements caused by travelling over uneven ground, bounce and sway resulting from lifting structure
flexing.

Attachment 11: Practical Knowledge Evaluation Test for Type 3 MEWPs

TYPE 3 MEWPs – SECTION 1

Date: _____

Name of Evaluator: _____ Name of Trainee: _____

Lift Model: _____ Cal Poly Vehicle ID#: _____

Rental Company: _____

Check applicable column. Then mark the Operator Performance column if acceptable OBSERVATIONS			*Vertical Axis	**Work Platform Movement	Operator Performance **Pass, Fail or NA**
SUITABILITY		Assess the suitability for the task.			
VERIFICATION		Visually check the condition of the MEWP.			
		Verify that the safety-related items specified by the manufacturer operate correctly.			
Platform raised	Platform in the direction of travel	Travel in a straight line forward.			
		Travel in a straight line backwards.			
		Travel in a curve (slalom, bend) forward.			
		Travel in a curve (slalom, bend) backwards.			
	Platform in opposite direction to travel	Travel in a straight line forward.			
		Travel in a straight line backwards.			
		Travel in a curve (slalom, bend) forward.			
		Travel in a curve (slalom, bend} backwards.			
	Platform at right angles to direction	Travel in a straight line forward.			
		Travel in a straight line backwards.			
		Travel in a curve (slalom, bend) forward.			

	of travel	Travel in a curve (slalom, bend) backwards.			

TRAVELING	Travel safely over different types of ground.			
	Use the audible warning correctly.			
	Look backwards before moving backwards.			
	Display safe travel and obey all rules and notice boards.			
	Adapt driving to suit the traffic conditions (congestion, bend, etc.).			
	Smoothness of maneuvers.			
	Accuracy of maneuvers.			
POSITIONING	Position the work platform above a flat surface.			
	Move the work platform across this surface.			
	Position the work platform below a flat surface.			
	Move the work platform across this surface.			
	Position the work platform in a restricted space.			
	Demonstrate the correct procedure in the event of an inclination warning.			
	Move and position the platform with combined functions.			
	Movements.			
	Position the MEWP in its garage location (remove the key).			
EMERGENCY	Perform recovery maneuvers.			
	Perform rescue maneuvers (from the ground position).			

*NOTE "Vertical axis" refers to the vertical movements of the work platform due to movements of the lifting structure. It includes awareness of the position of the platform and lifting structure when raising and lowering the platform and when slewing the lifting structure.

**NOTE: “Work platform movement" refers to any movement of the work platform excluding movements resulting from operation of the lifting structure. This Includes horizontal platform movements when the MEWP base Is moved, vertical and horizontal platform movements caused by travelling over uneven ground, bounce and sway resulting from lifting structure flexing.

Attachment 12: MEWP Operator Training: Certificate of Completion

I the undersigned [Trainer/Evaluator's name], an employee at [agency or vendor name] acting in the capacity of evaluator for [Agency/University] after having verified the theoretical and practical knowledge of [Operator's name] or (see roster dated) issue the following [operator/supervisor/occupant] with the **Safe Operating Aptitude Certificate**.

For the operating of MEWPs of the following classifications:

_____ _____
_____ _____
_____ _____

Signature: _____ Date: _____

This certificate of completion is valid until: _____

CAL POLY

AUTHORIZATION TO OPERATE MEWPs

OPERATOR NAME: _____
(print)

Is authorized to operate MEWPs:

TYPE: **Valid until:**

_____
_____
_____

Date: _____

Operator signature: _____

Supervisor Name: _____

Supervisor Signature: _____