

## Forklift Operator Evaluation Form

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.

Operator Name	Evaluator Name
Date of Evaluation	Equipment Operated

OPERATOR BEHAVIORS	RATING	COMMENTS
<b>Pre-use Inspection</b>		
1. Follow Operator's Daily Checklist.	GOOD   FAIR   POOR   N/A	
2. Look for Damage.	GOOD   FAIR   POOR   N/A	
3. Document all findings on the checklist	GOOD   FAIR   POOR   N/A	
<b>Picking Up The Load</b>		
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	
<b>Traveling</b>		
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	
<b>Putting Down A Load</b>					<b>COMMENTS</b>
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	
<b>Parking</b>					
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	
<b>Fueling And Battery Recharging</b>					
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	
<b>Special Task Working With Stacks (If Applicable)</b>					
<b>To remove load from a high stack</b>					
1. Stop straight and about a foot away from the stack	GOOD	FAIR	POOR	N/A	
2. Raise the mast until the forks are at the right height. Move forward slowly until the load is flush with the back of the forks.	GOOD	FAIR	POOR	N/A	

3. Lift the load high enough to clear the item below. Look over both shoulders and back straight out to clear the edge of the stack.	GOOD FAIR POOR N/A	
4. Stop and lower the load to the traveling position.	GOOD FAIR POOR N/A	
5. Tilt the load back and move out slowly.	GOOD FAIR POOR N/A	
<b>Special Task Working With Stacks (If Applicable)</b>		<b>COMMENTS</b>
<b>To place a load on a stack</b>		
1. Approach it slowly and squarely.	GOOD FAIR POOR N/A	
2. Stop about a foot away.	GOOD FAIR POOR N/A	
3. Lift the mast high enough to clear the top of the stack.	GOOD FAIR POOR N/A	
4. Inch forward until the load is square over the stack.	GOOD FAIR POOR N/A	
5. Level the forks and lower the mast until the load is no longer supported by the works.	GOOD FAIR POOR N/A	
6. Keep forks level so you don't hook anything.	GOOD FAIR POOR N/A	
7. Look over both shoulders and back straight out.	GOOD FAIR POOR N/A	
<b>Ramps or Slopes (If Applicable)</b>		
1. Stay well back from the edge.	GOOD FAIR POOR N/A	
2. Never turn around on the slope.	GOOD FAIR POOR N/A	
3. Drive with your load on the uphill side. This means you drive up slopes with your load in front and drive down slopes in reverse unless you're loading a trailer. When forks are empty, back up a slope and drive down it forwards.	GOOD FAIR POOR N/A	
<b>Docks (If Applicable)</b>		
1. Make sure dock boards or bridge plates are properly secured and strong enough to handle the combined weight of your lift and its load.	GOOD FAIR POOR N/A	
2. Keep the bridge or dock plates as level as possible and free of oil, dirt, water, ice or snow.	GOOD FAIR POOR N/A	
3. Make sure railcars or trailers are secure so they won't roll forward when you drive on. Chock the wheels, set the brakes and use dock locks.	GOOD FAIR POOR N/A	
4. Make sure the floor is strong enough and that you have enough overhead clearance.	GOOD FAIR POOR N/A	
5. Check to see that the trailer or railcar is secured, and buckle your seatbelt before you enter.	GOOD FAIR POOR N/A	

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

Based on my evaluation, the operator has not demonstrated competence in operating the following equipment:

Evaluator Signature: \_\_\_\_\_ Operator Signature: \_\_\_\_\_