

Forklift Operator Evaluation Form

Instructions: Use this checklist during the field session to evaluate operator proficiency. It can also be used for periodic evaluation to ensure that operators are continuing to operate forklifts properly.

| Operator Name | | Evaluator Name | | | | |
|---------------------------|--------------------------------------------------------------------------------------|---------------------------|-------------|-------------|------------|-----------------|
| Date of Evaluation | | Equipment Operated | | | | |
| OPERATOR BEHAVIORS | | Good | Fair | Poor | N/A | Comments |
| Preuse Inspection | | | | | | |
| 1 | Follow the Operator's Daily Checklist. | | | | | |
| 2 | Look for damage. | | | | | |
| 3 | Document all findings on the checklist. | | | | | |
| Picking Up A Load | | | | | | |
| 1 | Square up on the center of the load. | | | | | |
| 2 | Stop with the fork tips about 1 foot from the load. | | | | | |
| 3 | Clear personnel from the area near the load. | | | | | |
| 4 | Level the forks; then slowly drive forward until the load contacts the carriage. | | | | | |
| 5 | Lift the load carefully and smoothly until it is clear. | | | | | |
| 6 | Tilt the mast back slightly to stabilize the load. | | | | | |
| 7 | Look over both shoulders. | | | | | |
| 8 | After out and stopped, lower the load to travel height. | | | | | |
| Traveling | | | | | | |
| 1 | Do not raise or lower the load and forks while traveling. | | | | | |
| 2 | Maintain a safe speed. | | | | | |
| 3 | Observe all traffic rules, warning signs, floor load limits and overhead clearances. | | | | | |
| 4 | Keep arms and legs inside the forklift. | | | | | |
| 5 | Follow other vehicles at a safe distance. | | | | | |
| 6 | Slow down when cornering. | | | | | |
| 7 | Use the horn to alert others. | | | | | |
| 8 | Travel with the load facing uphill while on a ramp or incline. | | | | | |
| 9 | Stop smoothly. | | | | | |

| OPERATOR BEHAVIORS | | Good | Fair | Poor | N/A | Comments |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|------|------|---------------------------|-----|----------|
| Putting Down A Load | | | | | | |
| 1 | Make sure there is sufficient clearance for the load. | | | | | |
| 2 | Clear personnel for the area near the load. | | | | | |
| 3 | Square up to the location; then stop about 1 foot away. | | | | | |
| 4 | Raise the load to placement level. | | | | | |
| 5 | Move slowly forward. | | | | | |
| 6 | If the load is on a pallet, lower it into position and lower the forks further. | | | | | |
| 7 | Look over both shoulders before backing out. | | | | | |
| 8 | Back straight out until the forks have cleared. | | | | | |
| 9 | Lower the forks to traveling position. | | | | | |
| Parking | | | | | | |
| 1 | Fully lower the forks. | | | | | |
| 2 | Neutralize the controls. | | | | | |
| 3 | Set the brakes. | | | | | |
| 4 | Turn off the power. | | | | | |
| 5 | If parked on an incline, block the wheels. | | | | | |
| 6 | Park only in authorized areas. | | | | | |
| Fueling And Battery Recharging | | | | | | |
| 1 | Turn the engine off. | | | | | |
| 2 | Keep a fire extinguisher nearby. | | | | | |
| 3 | Use the proper Personal Protective Equipment (PPE). | | | | | |
| 4 | Follow safe fueling and battery recharging procedures. | | | | | |
| 5 | Clean up spills immediately. | | | | | |
| FINAL EVALUATION | | | | | | |
| <input type="checkbox"/> | Based on my evaluation, the operator has successfully completed the evaluation and is qualified to operate the following equipment: | | | | | |
| <input type="checkbox"/> | Based on my evaluation, the operator has not demonstrated competence in operating the following equipment: | | | | | |
| Equipment Type | | | | | | |
| Evaluator Signature | | | | Operator Signature | | |