



# Industrial Lift Truck – WELL Sheet

WELL Sheet #: 1036  
Revision: 2022-12

<b>Date:</b>		<b>Operator:</b>		<b>Lift Truck:</b>		
Observer:		Signature:				
Observer:		Signature:				
<b>Work Location:</b>				<b>Yes</b>	<b>No</b>	<b>N/A</b>
1.	Equipment pre-use inspection completed and documented					
2.	Inspection items requiring attention dealt with					
3.	Seatbelt engaged					
4.	Drives at a speed that allows a safe stop					
5.	Moves the machine safely and smoothly					
6.	Looks in the direction of travel before/during movement					
7.	Sounds horn at cross aisles & blind corners					
8.	Keeps all body parts inside the cab					
9.	Handles only secure, safely arranged loads within capacity					
10.	Travels with load/lifting attachment as low as safely possible					
11.	Travels in reverse and/or uses as spotter when needed					
12.	Stacks loads straight & squarely.					
13.	Uses proper pedestrian procedures					
14.	Travels on grades correctly.					
15.	Follows correct parking/shutdown procedures					
16.	Consistently demonstrates alertness, control & safe habits					
17.	Other					
<b>Comments:</b>						



This guide contains explanatory information related to the items listed in the Industrial Lift Truck WELL Sheet document.

This is not an exhaustive list of operational competencies but rather a quick reference checklist of some of the main operational competencies that a properly trained operator must be able to demonstrate on an ongoing basis.

1. **Equipment pre-use inspection completed & documented.** Forklift operators must complete a pre-use inspection of any unit they are assigned to operate. Such inspections include checking for loose, missing and/or damaged parts, fluid levels and/or leaks, warnings/placards and decals and finally, a check that all powered systems are functional throughout their entire operational range.
2. **Worksite inspection completed & documented.** Supervisors must ensure that any potentially hazardous items discovered during an equipment inspection are repaired or otherwise dealt with. If appropriate, the unit involved should be identified as unsafe for use, taken out of service and returned to service only when the appropriate repairs/ adjustments have been made by qualified personnel.
3. **Engages seatbelt.** The seatbelt is designed to keep the operator safely in the cab in the event of a tip over or rollover and must be worn at all times while seated in the operating position.
4. **Drives at a speed that allows a safe stop.** Regardless of the site/environmental conditions or tasks being performed, operators must always be able to stop the equipment in a safe, controlled manner.
5. **Moves the machine safely & smoothly.** The forces caused by the motion of a forklift can cause its stability to become dangerously reduced. These forces can be limited by keeping the activation speed of the machine's parts down and by making smooth and gentle turning, stopping, starting motions as well as smooth mast/boom raising, lowering and tilting movements, with or without a load.
6. **Looks in the direction of travel before/during movement.** Regardless of whether the machine is travelling in forward or reverse direction, or the boom/platform is going up or down, operators must always focus their attention in the direction of travel. Moving the wheels and/or platform over distances of even a few feet without looking in the direction of travel before moving and thereafter is unacceptable. Momentarily looking away from the direction of travel to check environmental or other concerns is acceptable in some instances, but the majority of an operator's attention should always be focused in the direction of travel.
7. **Sounds horn at cross aisles & blind corners.** The horn is not meant to be used as a device to be sounded for extended periods to clear out pedestrian and/or vehicle traffic. It is designed to be periodically sounded in order to warn others of the presence of the forklift. Operators should be aware of this and briefly sound the horn when approaching areas like cross aisles and blind corners or wherever others may be unaware of the approach of the equipment.



- 8. Keeps all body parts inside the cab.** The cab, with its overhead protective structure is designed to keep the operator protected from falling, flying and/or intruding material or debris. It can only do this when the operator keeps all his/her body parts like feet, hands, arms, legs and especially, head, under its protective structure.
- 9. Handles only secure, safely arranged loads within capacity.** It is the operator's responsibility to ensure the security and integrity of loads handled by the machine. This may involve dismounting the unit to rearrange parts of loads such that their weight is evenly distributed or to secure loose and/or unstable loads such that they do not shift or come apart during transport. In addition, operators must only handle loads that are within the rated capacity of the equipment. Operating a forklift with the rear wheel off, or nearly off the ground must be strictly prohibited.
- 10. Travels with load/lifting attachment as low as safely possible.** All of the forces that act on the unit and cause stability to decrease are multiplied with the elevation of the mast/boom. The higher it is lifted, the less stable the machine becomes. It is far easier to tip a forklift over when the mast/boom is elevated than when it not. Operators should be in the habit of lowering the lifting attachment as soon as reasonably possible while loading and unloading and should travel only when the mast/boom is as low as safely possible, regardless of whether a load is being handled.
- 11. Travels in reverse and/or uses as spotter when needed.** When carrying tall or bulky loads that obstruct forward vision, operators should drive in reverse so they can get a clear view in the direction of travel. It is especially advisable to operate in reverse when carrying loose and/or slippery loads to prevent them from sliding off the front of the forks when braking. If operators are having trouble seeing in both forward and reverse directions while travelling, a "spotter" or signal person should be used to act as a guide and direct operators.
- 12. Stacks loads straight & squarely.** Where operators are required to stack loads on top of one another, they must be able to do so in such a way as to make a reasonably straight stack with each load placed squarely on the one beneath it. Inability to do this will lead to leaning columns of product that could potentially fall over and cause injury and/or damage.
- 13. Uses proper pedestrian procedures.** Implementing a policy in which pedestrians have the right of way is a sound safety practice. In most cases involving pedestrians, authorities give priority to life over machinery. However, pedestrians should be encouraged to yield the right of way to forklifts as they are often invisible to the operators who, even if they see pedestrians, are often unable to avoid them. Ideally, both should be looking out for each other and when pedestrians and forklifts encounter one another, forklift operators should stop, make eye contact with the pedestrian and motion (wave or gesture) the pedestrian to cross if it safe to do so. Pedestrians could also wave forklifts through depending on the situation. It is also advisable for pedestrians to remain within designated walkways and wear high visibility clothing when working near powered mobile equipment like forklifts.
- 14. Travels on grades correctly.** When carrying a load, forklift operators must travel with the load upgrade. This means they should drive up grades forward but back down them in reverse, always keeping the load upgrade. This ensures load security and maximizes equipment traction and



braking. When travelling with no load, it is best to keep the forks or lifting attachment downgrade and the heavy counterweigh upgrade for the same reasons as mentioned above. Elevating the mast, turning, zig-zagging or anything but straight up or down travel on grades must be avoided.

**NOTE:** This procedure is not to be used with powered pallet trucks (jacks). Operators must always remain upgrade of loaded or unloaded units. If this is not possible operators must position themselves off to either side of the units while downgrade of them.

- 15. Follows correct parking/shutdown procedures.** When parking or leaving a machine unattended (out of sight or 25 ft/8 m or more away) operators must:
  - a. Lower the lifting attachment to the floor (fork tips down).
  - b. Place the transmission in neutral.
  - c. Set the park brake.
  - d. Shut off the power (engine or battery).
  - e. Leave the steer wheel straight (so a sudden turn does not surprise the next operator).
  - f. Close the propane cylinder service valve (if equipped) when leaving it for more than an hour indoors. It is a good idea to do this with the engine running until it stalls, and then shut the key off.
  - g. Use proper (3-point) mounting and dismounting procedures.
  
- 16. Consistently demonstrates alertness, control & safe habits.** Long after their training is completed, operators must be able to demonstrate safe operating skills on an ongoing basis. By regulation, those that have close calls or actual damage/injury-producing incidents must receive refresher training and re-evaluation.
  
- 17. Other.** Any other items that may have particular importance at the worksite as they relate to forklift safety.

**Comments/Notes.** Any thoughts, concerns, observations, etc., as they relate to the use of the WELL Sheet.