

Employer Forklift Training and Evaluation Packet

For the employer and its designated qualified trainer or evaluator. Use this packet to plan and document actual equipment-specific practical training and workplace performance evaluation after formal instruction. A completed form alone does not establish competence or authorize operation.

Complete the steps in order

Step	Employer action	Record
1	Review prior formal instruction and identify equipment and workplace gaps.	Equipment and workplace review
2	Select persons with the knowledge, training and experience to train operators and evaluate competence.	Trainer and evaluator qualifications
3	Provide trainer demonstrations and supervised trainee practical exercises under safe conditions.	Practical training log
4	Observe actual workplace performance and address every applicable deficiency.	Performance evaluation
5	Certify training and evaluation and document permitted equipment and workplace limits.	Employer certification and authorization
6	Evaluate at least every three years and act earlier on refresher triggers.	Follow-up record

Responsibilities and limits

Tribune provides formal instruction and its completion record. This offering includes no physical demonstration or hands-on training. The employer may use qualified internal or outside trainers and evaluators, but remains responsible for ensuring competence before independent operation. Appropriate prior training may be credited after competence evaluation; fill the gaps instead of assuming that a card covers all trucks and workplaces.

Trainee operation is permitted only under direct supervision of qualified persons and where it does not endanger the trainee or other employees. Inspect equipment before use. Stop unsafe activity and remove unsafe trucks from service. Never sign blank forms or record events that did not occur.

Use and retain the records

Provide the operator with the actual truck manual and relevant workplace procedures. Keep records accessible in the employer training file. Use additional pages for each truck, attachment, workplace or repeat evaluation. Share with Tribune only through its approved secure process if a review is requested. Do not enter Social Security numbers or unnecessary medical information.

These are Tribune templates informed by OSHA requirements, not OSHA-issued or OSHA-approved forms. Employers must adapt them to actual equipment, manufacturer instructions and workplace hazards. Contact Tribune at (718) 790-2664 or tribunest.com for course-record questions.

Equipment and workplace review

Employer and worksite

Operator name and employee identifier

Truck type make model and truck identifier

Attachment and applicable capacity plate

Manufacturer manual revision or location

Formal instruction provider date and record identifier

Review topic	Applicable or not applicable with reason	Training or controls needed
Controls warnings operating limits and emergency actions		
Load weight dimensions capacity load center and attachment		
Inspection defects and authorized maintenance		
Surfaces edges overhead hazards and aisle clearance		
Pedestrians visibility traffic rules and blind intersections		
Ramps slopes docks trailers dockboards and elevators		
Stacking load stability racks and storage		
Fuel battery charging ventilation and exhaust		
Hazardous locations and truck suitability		
Other unique conditions or changed work areas		

Mark a topic not applicable only when the employer can demonstrate why it does not apply to safe operation in this workplace. General instruction does not replace training on applicable site conditions.

Review completed by and role

Review date and additional training assigned

Trainer and evaluator qualifications

The employer selects persons with knowledge, training and experience to train operators and evaluate competence. OSHA does not prescribe a separate train-the-trainer card. Document the actual basis for this designation.

Employer

Trainer name company and role

Truck types and attachments within trainer experience

Relevant knowledge training and operating experience

Evaluator name company and role

Truck types and workplaces within evaluator experience

Evaluator knowledge training and experience

Employer verification

- ☐ Manufacturer instructions and employer procedures reviewed
- ☐ Applicable equipment controls limitations and hazards understood
- ☐ Training area supervision and pedestrian safeguards arranged
- ☐ Evaluation criteria and stop-work procedures understood

Designated by name and role

Employer representative signature and date

A designation does not expand competence beyond the equipment and conditions listed. Use qualified assistance for gaps.

Practical training log

Operator employer and worksite

Truck and attachment identifiers

Trainer name and qualification record

Training dates and start end times

Practice area and safeguards

For each applicable skill, record the trainer demonstration and trainee practice. This page records training, not the separate final performance decision. Continue supervised practice and retraining as needed.

Skill or task	Demonstration date	Trainee practice date	Result or follow-up
Manual controls warnings capacity and limitations			
Pre-use visual and operational inspection			
Safe access restraint and pre-start checks			
Starting travel steering stopping and parking			
Visibility intersections pedestrians and rear swing			
Load pickup transport stacking and unstacking			
Ramps docks trailers and restricted areas if applicable			
Charging or refueling within authorized role			
Defect response emergency actions and reporting			
Workplace-specific hazards and operating restrictions			

Additional instruction and supervised practice needed

Trainer signature and date

Operator acknowledgement and date

Operator acknowledgement confirms participation only. It does not certify competence or transfer the employer responsibility to the employee.

Workplace performance evaluation

Operator employer and workplace

Evaluation date start end time

Truck make model identifier and attachment

Evaluator name company and role

Observe performance on applicable equipment under representative workplace conditions with safe controls. Mark S satisfactory, R needs retraining, or NA not applicable with a written reason. Do not mark unobserved applicable tasks satisfactory. Stop immediately if the activity creates danger.

Observed performance criterion	S R NA	Observation or NA reason
Identifies manual warnings controls limitations and correct capacity		
Completes inspection and responds correctly to defects		
Uses safe access and applicable restraint or protection		
Starts and checks controls using truck instructions		
Controls speed stopping steering and rear swing		
Maintains clear travel view and responds to blind intersections		
Separates pedestrians and communicates before movement		
Checks load suitability weight stability and fork engagement		
Transports loads low and places stacks in a controlled manner		
Uses ramps docks trailers and dockboards safely when applicable		
Parks and leaves the truck secured		
Follows fuel or charging procedures within assigned role		
Recognizes emergencies unsafe conditions and stop-work needs		

Evaluation tasks loads route and conditions

Deficiencies and immediate restrictions

Decision: ☐ Satisfactory for stated scope ☐ Not yet satisfactory ☐ Incomplete evaluation

Evaluator signature and date

Any applicable R item requires corrective instruction and re-evaluation before independent operation in that scope. NA is not a substitute for an unobserved applicable skill. Record the follow-up on the next page.

Corrective training and re evaluation

Operator employer and truck scope

Original evaluation date and evaluator

Deficient skills or triggering incident

Immediate restrictions and responsible supervisor

Deficiency or trigger	Corrective training and date	Trainer	Re-evaluation evidence result and date

Re-evaluator name and qualifications

Remaining restrictions or outstanding tasks

Final result: ☐ Satisfactory for stated scope ☐ Further training required ☐ Evaluation incomplete

Re-evaluator signature and date

Employer representative review and date

Do not release an operator to independent work while applicable deficiencies remain. Return to the certification page only after actual training and evaluation are complete.

Employer certification and authorization

Complete after training and workplace evaluation have actually occurred. This record supports the employer certification under 29 CFR 1910.178(l)(6). Authorization is limited to the equipment and conditions listed.

Employer and worksite

Operator name

Formal instruction dates provider and record identifier

Practical training dates and trainer identities

Workplace evaluation dates and evaluator identities

Truck types identifiers and attachments covered

Authorized work areas tasks and restrictions

Supporting training and evaluation records

Employer certification: Based on the attached truthful records, the employer certifies that the named operator has been trained and evaluated in accordance with the applicable powered industrial truck operator training requirements and found competent for the stated scope.

Employer authorization: ☐ Authorized within the scope above ☐ Not authorized pending additional action

Employer representative name and role

Employer representative signature and date

Next routine performance evaluation due no later than

Operator acknowledgement signature and date

Evaluate performance at least once every three years. Unsafe operation, accident or near miss, deficient evaluation, different truck type, or changed workplace conditions affecting safety require earlier relevant refresher training and evaluation. A printed card date does not override those triggers.

Equipment inspection and defect record

Date shift and operator

Employer truck make model identifier and hour meter

Power source and attachment

Use before service and at least daily; examine after each shift for round-the-clock use. Adapt to the actual manual. Mark OK, DEF defect, or NA with reason. Conduct operational checks only where safe and within your training. Never reach into moving equipment or touch suspected high-pressure leaks.

Visual or operational check	OK DEF NA	Defect or NA reason
Correct legible plate manual and safety warnings		
Tires wheels forks locks and load backrest		
Mast chains hoses guards and visible structural condition		
Leaks battery or fuel system condition		
Restraint access steps and operator protection		
Fluids and energy source checks permitted by manual		
Horn lights alarms and instruments		
Steering service brake and parking brake		
Lift tilt and attachment controls		
Other manufacturer or workplace checks		

Defects reported to and date time

Truck removed from service location and control

Disposition: ☐ No unsafe defect identified ☐ Do not operate pending correction

Operator signature

Authorized repair or release reference name and date

Based on the OSHA and Industrial Truck Association sample daily checklist guidance. The official samples contain separate electric and internal-combustion checklists. Use the manufacturer-specific checklist where available.

Refresher tracking and official references

Operator employer and authorized scope

Most recent satisfactory evaluation date

Routine re-evaluation due date

Date and trigger	Immediate action and limits	Training evaluator and completion reference

Act before the next routine date when needed

- ☐ Unsafe operation observed
- ☐ Accident or near miss
- ☐ Evaluation identifies unsafe performance
- ☐ Assignment to a different type of truck
- ☐ Workplace change that could affect safe operation

Official references

- <https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.178>
- <https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.178AppA>
- <https://www.osha.gov/laws-regs/regulations/standardnumber/1926/1926.602>
- <https://www.osha.gov/etools/powered-industrial-trucks/training>
- <https://www.osha.gov/training/library/powered-industrial-trucks/checklist>

Reference review date: October 21 2026. OSHA guidance and sample inspection forms support employer planning; they do not automatically approve this packet or replace the actual training, evaluation and applicable standards.