

Forklift Operator Evaluation

Based on 29 CFR 1910.178(l) · forkliftdrill.com

One form per operator and truck type. Mark each observed check: Yes = done correctly, No = needs training, N/A = does not apply on this truck or site.

TRAINING AND EVALUATION RECORD

Operator name	Employer / site
Truck type evaluated (e.g. sit-down counterbalance, stand-up reach, order picker)	Truck make / model / unit ID
Formal instruction completed on (date) and by	Practical training completed on (date) and by
Evaluation date	Evaluator name and title

A. INSPECTION BEFORE USE

#	Check	Yes	No	N/A
1	Examines the truck before use and reports defects; does not use a truck with a safety defect			
2	Finds the data plate and states the rated capacity and load center			
3	Checks forks, carriage, mast and chains for cracks, bends or damage			
4	Checks tires and wheels			
5	Checks for fluid leaks and for fuel level or battery charge			
6	Tests horn, lights, alarms and gauges			
7	Tests service brake, parking brake and steering			
8	Confirms seat belt or operator restraint and overhead guard are in place			

B. STARTING AND CONTROLS

#	Check	Yes	No	N/A
9	Mounts and dismounts safely and fastens the seat belt where fitted			
10	Uses each control smoothly and can explain what it does on this truck			

C. TRAVELING

#	Check	Yes	No	N/A
11	Looks in the direction of travel; travels in reverse when the load blocks the forward view			
12	Keeps a safe speed; slows and sounds the horn at intersections, corners and blind spots			
13	Keeps arms, legs and head inside the operator area			
14	Keeps a safe distance from other trucks; yields to pedestrians			
15	On grades, drives loaded with the load upgrade and empty with the forks downgrade; does not turn on a grade			
16	Crosses dock plates, tracks and rough floors with care; checks that trailers are secured before entering			

D. HANDLING LOADS

#	Check	Yes	No	N/A
17	Checks the load weight against the rated capacity before lifting			
18	Sets fork spread for the load; forks fully under; load centered and stable			
19	Lifts and lowers smoothly, tilts back to stabilize, and travels with the load low			
20	Stacks and unstacks squarely; no one stands or passes under raised forks			
21	Handles only stable, safely arranged loads and secures unstable ones			

E. PEDESTRIANS AND THE WORKPLACE

#	Check	Yes	No	N/A
22	Follows site traffic rules, marked aisles and speed limits			
23	Carries no passengers; lifts people only on an approved platform under site procedure			
24	Names the site's specific hazards, such as narrow aisles, hazardous locations or poor ventilation			

F. PARKING, REFUELING AND CHARGING

#	Check	Yes	No	N/A
25	When leaving the truck: forks fully lowered, controls neutral, power off, brakes set; wheels blocked on an incline			
26	Parks in an authorized place, clear of exits, fire equipment and aisles			
27	Refuels or charges only in the designated area, with the engine off and no open flame or smoking			

RESULT AND CERTIFICATION

☐ Competent to operate this truck type	Notes
☐ Needs more training. Refresher by (date):	
Evaluator signature and date	Operator signature and date
Certified by (employer representative), signature and date	Next evaluation due (no later than 3 years after the evaluation date)

Certification record under 29 CFR 1910.178(l)(6): operator name, date of training, date of evaluation, and the identity of the person(s) performing the training or evaluation. Re-evaluate at least every three years, and give refresher training and a new evaluation after unsafe operation, an accident or near miss, a poor evaluation, a different truck type, or a workplace change. Free template from forklifttraining.com. Not affiliated with or endorsed by OSHA. Not legal advice; adapt it to your trucks and site.