

**Issue Date:** October 22, 2007  
**Review Date:** New  
**Revision Date:** New

**Doc. No:** OHS-4.6.10  
**Approved By:** V.P. Admin & Finance  
**Page:** 1 of 5

---

## 1.0 PURPOSE

The purpose of this procedure is to establish the requirements of training for lift truck operators and to ensure safety for personnel who utilize and/or work around lift trucks.

## 2.0 SCOPE

This procedure applies to all personnel and departments that operate lift trucks at the University of Windsor.

## 3.0 DEFINITIONS

*JHA:* Job Hazard Analysis

*OHS:* Occupational Health & Safety

*SOP:* Safe Operating Procedure

## 4.0 RESPONSIBILITIES

*Managers / supervisors or equivalent* are responsible for:

- ensuring all employees who utilize a lift truck will be certified to CSA B335-04 and receive a lift truck medical examination
- identifying hazards associated with the job
- developing SOP where required, with guidance from Health & Safety, and ensure all workers are trained and follow the SOP
- ensuring daily safety inspections are being performed and all unsafe items are addressed immediately
- ensuring inspections and planned maintenance are performed on the lift truck
- maintaining records of lift truck inspections and maintenance

*Health & Safety* is responsible for:

- assisting departments in implementing their Lift Truck Safety Procedure as per Section 6.0 below
- reviewing the Lift Truck Safety Procedure to ensure that all aspects of legislation, standards, and policies are being met
- arranging lift truck training, midterm and medical evaluations
- maintaining records of training

*Lift Truck Drivers* are responsible for:

- attending lift truck certification and midterm evaluation as required
- attending a lift truck medical examination as required
- following SOP when driving lift truck
- completing daily safety inspection prior to using lift truck

## 5.0 REFERENCE DOCUMENTS

Ontario Occupational Health and Safety Act

Ontario Regulation for Industrial Establishments, O. Reg. 851/90

Ontario Ministry of Labour: Guideline for the Safe Operation and Maintenance of Powered Lift Trucks

**Issue Date:** October 22, 2007  
**Review Date:** New  
**Revision Date:** New

**Doc. No:** OHS-4.6.10  
**Approved By:** V.P. Admin & Finance  
**Page:** 2 of 5

---

Canadian Standards Association (CSA) Standard B335-04: Safety Standard for Lift Trucks

Job Hazard Analysis (OHS-3.1.1a)

Accident / Incident Investigation Report

OHS-4.6.10a Lift Truck Operator Medical Evaluation

SOP 001 Lift Truck (Propane)

SOP 002 Lift Truck (Battery)

## **6.0 PROCEDURE**

Safety is one of the most important aspects of a lift truck driver's training program. A safety minded operator protects both themselves and others and eliminates the risk of danger to the truck and load as well as to other equipment, material and structures. The University of Windsor will adhere to all applicable legislated standards with regards to lift truck use and maintenance.

No employee of the University of Windsor is to operate a lift truck without expressed authorization of the management of the University of Windsor and without being deemed competent by management.

The University of Windsor's Lift Truck Safety Procedure is composed of the following elements:

### **Hazard Identification**

A Job Hazard Analysis (JHA) will be completed for lift truck operations, which will identify all hazards associated with the job and the controls in place to eliminate or minimize them. Both lift truck operators and their supervisors will be involved in the JHA evaluation. JHAs are filed in the appropriate departments and are reviewed by Health & Safety. JHAs will be reviewed every 3 years, or as changes to the job occur.

All accidents, incidents, and near misses will be recorded on the Accident/Incident Investigation Report. Accident and injury data is analyzed monthly by Health & Safety.

Hazards specific to the use of lift trucks will also be covered in lift truck operator training. Hazards to be considered for JHA evaluations and training include:

- Collisions
- Traps
- Falls
- Falling loads
- Overturning (tipping)
- Vehicle failure
- Unauthorized use
- Fire, explosion & spills
- Maintenance hazards
- Health hazards (poor ergonomics, combustion gases, noise, vibration, environmental conditions)

### **Operating Environment**

All lift trucks owned or leased by the University of Windsor will conform to CSA Standard B335-04 and will be equipped with an operator restraint system (seatbelt).

Lift trucks will be used only in areas with adequate ventilation and lighting.

**Issue Date:** October 22, 2007  
**Review Date:** New  
**Revision Date:** New

**Doc. No:** OHS-4.6.10  
**Approved By:** V.P. Admin & Finance  
**Page:** 3 of 5

---

Permanent aisles shall be clearly marked where applicable. Floors, permanent aisles and passageways shall be kept clear of all obstructions.

Overhead and side clearances shall be adequate to permit lift truck operations safely. Low clearances will be identified with warning signs.

Where possible, all efforts shall be made to keep pedestrian traffic separate from lift truck operations.

### **Lift Truck Selection**

#### *New and/or Modified Equipment*

Selection on lift trucks must be based on the following:

- Hazards identified in the operating area
- Fire and explosion risks
- Capacity of the lift truck (including load centre), based on the size, weights and heights loads are expected to be raised
- Atmospheric risks (ie. carbon monoxide control for internal combustion engines)
- Layout of the workplace (clearances from equipment and people)
- Ergonomic factors
- Internal combustion engines are prohibited from areas that may have explosive concentrations of dusts, gases or vapours, or where exhaust gases might accumulate and cause a hazard

Selection of lift trucks must be made in consultation with the Purchaser, Health & Safety, and the appropriate department Manager / Supervisor.

The specifications determined by the manufacturer will be used in establishing training, maintenance, and service programs.

### **Safety Inspections**

#### *Pre-use of a lift truck*

All lift trucks will be inspected by the service provider prior to first use at the University of Windsor, or after any modifications are performed on the lift truck. This inspection will confirm that the lift truck's lifting capacity is as specified. Copies of the inspection reports will be filed in the respective departments.

#### *Daily safety inspections*

Daily pre-shift safety inspections are performed by the operator prior to operating the lift truck, using *The Checker Inspection Checklist #2-001*. Any item designated as unsafe is to be reported to the Manager / Supervisor's attention immediately. The Manager / Supervisor will take the lift truck out of service (using proper lock out procedures) and make arrangements to have the items corrected prior to the truck being returned for regular use. The inspection books must be kept on or near the truck, with the copy forwarded to the department Manager / Supervisor. The completed inspection sheets will be retained for one year.

#### *Annual service inspections*

An annual inspection of each lift truck, including its lifting capacity, will be performed by a competent person or service provider designated by the Department Manager. Any items found for repair or replacement shall be corrected prior to the lift truck being returned for regular use.

The inspection will be performed in accordance with the manufacturer's recommendations for preventive maintenance.

Records of inspections are retained by the department Managers for a minimum of 2 years.

**Issue Date:** October 22, 2007  
**Review Date:** New  
**Revision Date:** New

**Doc. No:** OHS-4.6.10  
**Approved By:** V.P. Admin & Finance  
**Page:** 4 of 5

---

### **General Safety Practices**

Managers / Supervisors of lift truck drivers will ensure that the drivers are trained in and follow the SOP for the operation of lift trucks. The SOP for the operation of lift trucks is available on the Health & Safety website ([www.uwindsor.ca/safety](http://www.uwindsor.ca/safety)). All lift truck operators shall be trained in these procedures (reference Lift Truck Certification Training section 6.5 below).

### **Certification Training**

#### *Lift Truck Operator Qualifications*

Lift truck operators must successfully complete lift truck certification training and pass a lift truck operator medical evaluation prior to operating a lift truck. Operators will be given a mid-term evaluation eighteen months after completion of the training. These qualifications will be outlined in the lift truck operator's job description.

Lift truck operators shall not operate a lift truck while taking medication or substances that could adversely affect vision, perception, and mental or physical abilities that are necessary to maintain the safe operation of the lift truck.

Lift truck drivers of propane-powered lift trucks will also receive Propane Handling Safety training as part of the lift truck certification. Similarly, lift truck drivers of battery-operated lift trucks will receive safety training for battery handling (SOP 002 Lift Truck (Battery)).

#### *Lift Truck Trainer Qualifications*

Lift truck trainers used at the University of Windsor shall be qualified as per CSA standard B335-04. Health & Safety will review trainer qualifications and course content prior to selection to ensure compliance to the standard.

#### *Lift Truck Certification / Re-certification*

Managers / Supervisors will ensure that all lift truck operators will be certified in both theoretical and practical components of CSA Standard B335-04, which includes instruction on legislation and standards, the University of Windsor's policies and procedures, and the lift truck manufacturer's manual. Health & Safety will review the lift truck trainer's training program to ensure these topics are covered.

New lift truck operators will be trained within their probationary period.

Lift truck operators will be re-certified every 3 years at a minimum.

Copies of the training attendance, evaluation scores, and licences will be forwarded to Health & Safety. Evaluations will be filed in the employee's personal file.

Upgrade training will be provided to operators when equipment is new and/or modified, the operating conditions change in the work environment, legislation changes have occurred, or deficiencies have been identified in the operator's knowledge or abilities.

#### *Lift Truck Training Evaluations*

Lift truck trainees will be evaluated on two components: their knowledge of the theory instruction and their practical skills. Trainees must achieve at least 75% to successfully pass the evaluations.

#### *Mid-Term Evaluations*

All lift truck operators will be evaluated 18 months after the completion of their certification or re-certification. Mid-term evaluations will be set up by Health & Safety. Mid-term evaluation scores will be forwarded to the Health & Safety and the evaluation will be filed in the employee's personal file. Lift truck drivers that fail the mid-term evaluation will be sent for re-training.

**Issue Date:** October 22, 2007  
**Review Date:** New  
**Revision Date:** New

**Doc. No:** OHS-4.6.10  
**Approved By:** V.P. Admin & Finance  
**Page:** 5 of 5

#### *Lift Truck Medical Evaluation and Requirements*

Managers / Supervisors will ensure that all lift truck operators pass a medical examination prior to operating a lift truck. The medical will be documented on form OHS-4.6.10a (Lift Truck Operator Medical Evaluation), and will include vision, hearing, and physical requirements, in accordance to CSA B335-04 s.4.10.

Lift truck medicals will be conducted in conjunction with lift truck certification, every 3 years at a minimum. Medicals will be coordinated through Health & Safety and records will be retained by Human Resources in the employee's personal file.

#### **Maintenance and Repair Procedures**

Planned maintenance and inspections will be conducted as per the manufacturer's specifications. Only trained and authorized personnel shall maintain, repair, adjust, and inspect lift trucks. Maintenance, repairs and inspections will be performed in accordance with CSA B335-04 by the designated service provider.

Managers / Supervisors shall ensure that authorized personnel have easy access to manufacturer's operating manuals to certify safe use and proper maintenance of all lift trucks.

Records will be kept on-site by the Department Manager for a minimum of 2 years, and by the service provider for the life of the vehicle.

## **7.0 REVISION HISTORY**

<b>Date</b> (yyyy/mm/dd)	<b>Revision</b>