



Forklift Operator Training

Forklifts can present many different hazards for your employees. The Occupational Safety and Health Administration (OSHA) requires you to ensure that each employee who uses a forklift knows how to operate it safely. A general description of training requirements is provided here. For more details, visit [osha.gov](https://www.osha.gov).

What training does OSHA require?

OSHA requirements allow you to tailor a training program to your workplace and the specific types of powered industrial trucks that you use. Training programs for forklift operators must include:

- A combination of formal instruction (e.g., lecture, discussion, interactive computer learning, video and written material)
- Practical training (demonstrations and exercises performed by the trainee)
- Evaluation of the operator's performance

The program must include the general safe forklift principles, safety hazards that forklifts can create and safety requirements of the OSHA standard on powered industrial trucks. OSHA provides a list of training topics that you can include, such as:

- Vehicle capacity and stability
- Operating instructions
- Vehicle inspection and maintenance requirements
- Load manipulation, stacking and unstacking
- Pedestrian traffic
- Operating in narrow aisles and restricted places
- OSHA's forklift standard for your industry

Who can train, evaluate and certify forklift operators?

OSHA requires that the person providing training and evaluation have the "knowledge, training and experience" to educate operators and evaluate their competence. **A qualified trainer** is a person who by possession of a recognized degree, certificate or professional standing, or who by knowledge, training and experience, has demonstrated the ability to train and evaluate industrial truck operators. It's your responsibility to determine who is qualified. OSHA does not require accreditation of the trainer, stating that trainers and evaluators with different backgrounds can achieve the level of ability necessary to teach and evaluate trainees. This can be the employer, an employee or an outside training source, such as a training consultant or a manufacturer's representative. The employer must have evidence that any outside sources have been trained in the required program topics.

How often must training be given?

Each operator must be evaluated once every three years. Conduct refresher training when a forklift operator:

- Is observed operating the vehicle unsafely,
- Has been in an incident or near-miss,
- Receives an evaluation revealing unsafe operation of a vehicle, or
- When there are changes in the workplace or type of truck the operator will be driving.

What records or documentation must employers keep?

OSHA does not require an operating license for forklift operators. However, after the training, you must certify that your forklift operators have received proper training and can safely operate a forklift. This written certification must include:

- Name of the operator
- Date of the training
- Date of the evaluation
- Name of the person(s) who conducted the training and evaluation

It is a violation of federal law for anyone under 18 years of age to operate a forklift or for anyone over 18 years of age who is not properly trained and certified to do so. See 29 C.F.R. § 570.58 [2023].

How long must employers keep certification records?

Certification records for each operator must be kept for three years from the date the training occurred. Employers who evaluate operators more frequently may retain the most recent certification.

Training resources

Here are a few resources available to assist you with forklift operator training:

- **OSHA:** [osha.gov/powerful-industrial-trucks/resources](https://www.osha.gov/powerful-industrial-trucks/resources)
- **National Safety Council:** [nsc.org/safety-training/workplace](https://www.nsc.org/safety-training/workplace)
- **Safety training videos:** Summit policyholders and agents have access to an extensive library of videos, including videos on forklift safety. To request access, email SafetyResourceRequest@summitholdings.com. [Videos provided through JER HR Group LLC, dba Training Network, a Summit vendor.]

If you have questions, please reach out to Summit's Loss Prevention team at 1-800-282-7648.

All information in this document is from the following OSHA web article: "Powered Industrial Trucks (Forklift) eTool." Occupational Safety and Health Admin. [OSHA], U.S. Dept. of Labor, [osha.gov/etools/powerful-industrial-trucks/training](https://www.osha.gov/etools/powerful-industrial-trucks/training) [Accessed 10/25/23].



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