Forklifts, Loading Areas and Pedestrian Separation

TOPIC 09 / WRITTEN LESSON



Distinguish awareness, operator training/evaluation and workplace traffic controls.

Separate the learning records

Forklift operator preparation includes formal instruction, practical workplace/equipment training and an operating evaluation. The employer must document the applicable training and evaluation. A general educational completion certificate is not permission to operate alone.

Review the actual equipment and site

Compare prior training evidence with the truck, attachments, loads and conditions that will be encountered. Previous training does not remove the current employer's site-specific responsibilities. Use appropriately knowledgeable trainers and evaluators, and check current evaluation/refresher triggers and required intervals under the rule.

Include everyone exposed

Traffic planning also concerns pedestrians, deliveries, blind locations, access and communication. A trained operator does not make an uncontrolled shared route safe automatically. Use competent site planning, protective arrangements and clear instructions for workers and visitors.

Keep this meeting within awareness

Use a document or tabletop traffic example. Do not operate a truck, move a load or demonstrate maneuvers through this kit. A changed truck, attachment, route or unsafe event requires the appropriate review before assuming an earlier decision still covers the work.

Forklifts, Loading Areas and Pedestrian Separation

TOPIC 09 / INSPECTION AND EVIDENCE



What an inspector may review

- Formal, practical and evaluation evidence
- Actual truck/site conditions and required training updates
- Documented employer authorization process
- Pedestrian and delivery exposure controls

Records and evidence to locate

- Operator training/evaluation record
- Trainer/evaluator identities and dates
- Actual equipment/site and refresher-review record
- Traffic-risk observations and control verification

Typical gaps to correct

- A generic card treated as the complete training process
- Missing operating evaluation or site-specific instruction
- Pedestrians exposed despite a posted traffic slogan

Worked example - fictional Harbor Supply

A new Harbor worker brings a generic forklift completion card. The site has a different truck and a busy pedestrian crossing.

The employer reviews applicable prior instruction, completes the required practical site/equipment work and evaluation, and documents its authorization. It separately assesses pedestrian exposure. The meeting uses a tabletop example and does not put the worker on the truck.

Forklifts, Loading Areas and Pedestrian Separation

TOPIC 09 / FACILITATOR KIT



Before the meeting

Choose a relevant, safe example; check the current rules and site procedure. Review open hazards, recent investigations and the prevention program. Arrange language or accessibility support.

0-3

State the topic, review previous corrective actions, and invite worker observations without retaliation.

3-10

Use the lesson and the worked example. Ask workers to identify the exposure, the control and the responsible person.

10-17

Compare fictional training evidence with a site sketch. Identify missing training/evaluation questions and one pedestrian-control verification task without operating equipment.

17-20

Use the teach-back questions. Record actual attendees and topics, assign actions and a verification date. This 20-minute agenda is a suggested teaching plan, not a universal meeting-frequency rule.

Teach-back discussion

- Which element is formal, practical or evaluation?
- Who authorizes the operator here?
- How are pedestrians protected at the actual crossing?

Use actual attendees and topics in the meeting record. Do not enter private medical details here or treat a fictional exercise as proof of a real correction.

Official references

L&I forklift training requirements

WAC 296-863: powered industrial trucks

Forklifts, Loading Areas and Pedestrian Separation

TOPIC 09 / FILLABLE WORKPLACE EXERCISE



Use the fictional example first. Keep real personnel and medical records in your approved secure systems.

Site / department / task

Actual observation and evidence reference

Workers consulted / language needs

Existing control and observed gap

Protective action and responsible person

Due date / verification method

What changed / remaining concern / follow-up date

Explain it back

Which element is formal, practical or evaluation?

Who authorizes the operator here?

How are pedestrians protected at the actual crossing?