

Forklift Operation JHA

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Learning and planning resource. Adapt with the people doing the work, verify actual controls and follow required authorization. This document supplies no completed field inspections, signatures or work approval.

Work and worksite

Fictional example: a trained, evaluated operator uses a sit-down electric counterbalanced forklift with standard forks to move secured pallets of packaged construction supplies from ground-level staging to a designated indoor storage bay. Travel is over a level finished slab with a controlled pedestrian crossing. The example excludes telehandlers, suspended loads, personnel lifting, truck-trailer entry, ramps, and loose rebar mesh. Those activities require different equipment and task decisions.

- Confirm the truck identity, data plate, fork configuration, load weight and center, battery condition, and manufacturer instructions for this configuration.
- The route includes a blind corner, a doorway, and a shared crossing that must be controlled before movement; record who manages that interface.
- Floor support, overhead clearance, destination capacity, pallet condition, and load restraint remain items for actual verification.
- Operator training must address this truck type and the workplace. Construction operator-training requirements under 1926.602(d) match 1910.178(l).

Actual project records needed: Location, crew and responsible people; equipment models and instructions; permits/releases; emergency arrangements; actual checks and approvals.

Task | Hazard | Control | Verification

Choose the truck and authorize the operator

Hazard: A truck or operator suited to a different load or environment is used; the actual load exceeds configured capacity.

Control: The employer verifies relevant training and workplace evaluation. Match the identified pallet, load center, lift height, and attachments to the data plate and instructions. Obtain an approved handling method for uncertain loads.

Verification: Record truck/configuration and operator authorization; verify load information rather than estimating by appearance.

Reasoning: A capacity number is meaningful only with the configuration and load geometry to which it applies.

Inspect the truck and prepare the route

Hazard: Brake or steering defects prevent stopping; a floor opening, obstruction, or low doorway causes collision or instability.

Control: Use the manufacturer pre-use inspection and function checks. Remove unsafe equipment from service. Walk the route, clear obstructions, verify supporting surfaces and clearances, and separate pedestrian access before driving.

Verification: The operator reports defects and the supervisor confirms route restrictions and crossing arrangements are in place.

Reasoning: Inspection addresses the machine while the route check addresses the conditions in which it must work.

Engage and stabilize the pallet

Hazard: A damaged pallet breaks, forks puncture adjacent material, or an off-center load falls during pickup.

Control: Approach squarely with forks adjusted for the load. Engage as far under the load as practicable without striking material beyond it. Follow the truck instructions for lifting and tilt; stop if the pallet, restraint, or balance is unsatisfactory.

Verification: Verify pallet integrity, fork engagement, load restraint, and nearby clearance before lifting clear.

Reasoning: A load that remains on the forks initially may still be unstable during braking or turning.

Travel through the controlled route

Hazard: The truck strikes a pedestrian, rear swing contacts a fixed object, or a raised load destabilizes the truck.

Control: Use the designated route at a speed permitting a controlled stop. Keep the load at the manufacturer travel position, reduce speed before turns, and look in the travel direction. Use horn and required communication at blind interfaces; stop when the path or agreed spotter signal is lost.

Verification: Confirm the crossing is held clear, the intended direction provides visibility, and nobody is inside the truck/load clearance zone.

Reasoning: A horn warns of movement; separation and a confirmed clear route prevent competing movements.

Position and place the load

Hazard: The pallet falls from inadequate support or someone is crushed between the load and the bay structure.

Control: Keep people out of the placement area and away from the mast. Stop the truck before controlled positioning, confirm support and clearance, and lower onto a stable prepared position. Withdraw only after the load is supported and forks can clear without dragging it.

Verification: Check the actual placement surface and final stability before releasing the area to pedestrians.

Reasoning: Destination preparation is part of lifting safety, not a task to solve while the load is elevated.

Park and hand over

Hazard: An unattended truck rolls or raised forks become a strike hazard; an unreported defect affects the next operator.

Control: Park in the designated position, lower forks, neutralize controls, set the parking brake, and shut down before leaving. Manage keys or access under the site procedure. Record defects; battery charging follows its separate equipment-specific procedure.

Verification: Verify the parked truck is stable, does not obstruct exits or fire equipment, and any unsafe condition is isolated.

Reasoning: The move is complete only when the load and the equipment are left in controlled conditions.

Pause and reassess

- Reassess for loose mesh, long loads, attachments, ramps, dockboards, uneven ground, or a different truck.
- Stop for damaged pallets, unknown load data, pedestrians inside the route, equipment defects, or lost visibility.

Correct the condition, revise the analysis, communicate the change and obtain required authorization before restarting.

Improve the control

Needs improvement: Pedestrians: be alert.

More useful: Separate the travel route and control the crossing; stop whenever pedestrian separation is lost.

Needs improvement: Load: do not overload.

More useful: Confirm load weight, center, attachment, and lift height against the truck data plate before pickup.

Decisions that change the analysis

The pallet blocks forward visibility. What should be decided?

Select a travel direction and control method that provide a clear view while meeting the equipment and route requirements. Stop until that method is established; a spotter is not permission to drive blind.

The next load is loose rebar mesh. Can the crew continue?

Pause. Establish an approved load-support and restraint method, verify capacity and protrusion hazards, and revise the analysis before handling it.

References and adaptation

OSHA 1926.602: Construction material-handling equipment

<https://www.osha.gov/laws-regs/regulations/standardnumber/1926/1926.602>

OSHA 1910.178: Powered industrial trucks

<https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.178>

OSHA forklift eTool: Load handling

<https://www.osha.gov/etools/power-industrial-trucks/operating-forklift/load-handling>

OSHA forklift eTool: Traveling and maneuvering

<https://www.osha.gov/etools/power-industrial-trucks/operating-forklift/traveling-maneuvering>

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This original walkthrough was informed by review of uploaded examples, then rewritten for the stated fictional scenario using current primary references. It does not reproduce a source document or its approval record.

Walkthrough and draft builder: <https://www.toddjeromejenkins.com/jha-jsa-examples/forklift-operation-jha>