

MOBILE EQUIPMENT OPERATOR EVALUATION

Powered industrial trucks (PIT) | Practical workplace observation | Use N/A for tasks not present

OPERATOR NAME _____	EMPLOYEE ID / DEPARTMENT _____
CLIENT / FACILITY _____	WORK AREA / SHIFT _____
EQUIPMENT TYPE / CLASS _____	MAKE / MODEL / UNIT ID _____
TRAINING DATE _____	EVALUATION DATE _____
EVALUATOR NAME _____	EVALUATOR QUALIFICATION / TITLE _____

RATING KEY S = satisfactory without prompting; C = coaching required, then safely re-demonstrated; U = unsatisfactory or unsafe; N/A = not applicable or not observed. Mark only what was directly observed or verified.

EVALUATION METHOD Observe the operator performing typical work on the actual truck and in the actual workplace. Ask questions where needed. A written test alone does not evaluate operating performance.

A. AUTHORIZATION AND PRE-USE READINESS

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
1	Authorization and prior training are appropriate for this truck type, attachment, and workplace.					
2	Locates and interprets the operator manual, data plate/nameplate, rated capacity, and attachment limits.					
3	Completes the required pre-operation and operational inspection; documents defects accurately.					
4	Uses three points of contact; adjusts seat/controls; fastens operator restraint when provided.					
5	Keeps the operator compartment clean and secures loose items before operation.					

B. START-UP, CONTROLS, AND EQUIPMENT RESPONSE

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
6	Starts from a safe condition with parking brake set and directional control in neutral.					
7	Identifies and operates travel, lift, tilt, side-shift, attachment, and emergency controls correctly.					
8	Verifies brakes, steering, horn, alarms, lights, interlocks, gauges, and controls respond normally.					
9	Recognizes abnormal noise, vibration, leak, warning, overheating, or unsafe response and stops work.					

Performance observation - travel and load handling

C. TRAVEL, MANEUVERING, AND PEDESTRIAN CONTROL

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
10	Looks in the direction of travel and maintains a clear view; travels in reverse when the load blocks view.					
11	Keeps forks/load at a safe travel height and uses mast tilt appropriate to the truck and load.					
12	Uses controlled speed; starts, turns, changes direction, and stops smoothly without abrupt movement.					
13	Slows and sounds the horn at blind intersections, doorways, cross aisles, and other required locations.					
14	Yields to pedestrians, maintains clearance, and does not pass anyone standing under elevated forks/load.					
15	Maintains clearance from rack, overhead obstructions, dock edges, fixed objects, and other vehicles.					
16	Negotiates ramps/grades correctly; avoids turning on grades and follows load-orientation rules.					
17	Keeps body within the operator compartment; carries no unauthorized riders; mounts/dismounts safely.					

D. LOAD PICKUP, TRANSPORT, STACKING, AND UNSTACKING

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
18	Confirms load weight, stability, dimensions, and load center are within the truck/attachment capacity.					
19	Centers the truck and load; sets fork spacing and inserts forks fully without damaging pallet or product.					
20	Checks overhead and rear clearance before lifting, tilting, lowering, or backing.					
21	Lifts, tilts, and lowers smoothly; avoids unnecessary elevation and never travels with an elevated load.					
22	Maintains load stability and control during travel; adjusts for long, awkward, or high-center loads.					
23	Squares to the rack/stack, places the load accurately, and avoids contact with rack components.					
24	Fully clears the pallet/rack before turning, raising, or lowering; looks behind and backs out slowly.					
25	Uses attachments only as trained and accounts for attachment weight, capacity, and changed load center.					

Performance observation - workplace tasks, parking, and reporting

E. WORKPLACE-SPECIFIC OPERATIONS

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
26	Before entering a trailer, verifies restraint/chocks, brakes, floor condition, dockboard capacity, and lighting.					
27	Maintains safe clearance at docks and platforms; approaches edges squarely and at controlled speed.					
28	Operates safely in narrow aisles, congested areas, near racking, and where pedestrians may emerge.					
29	Follows site rules for elevators, railcars, outdoor travel, uneven surfaces, and restricted areas when applicable.					
30	Safely handles the representative loads and tasks normally assigned in this work area.					
31	Fuels, changes/handles LPG cylinders, or charges batteries only as trained, using required PPE and controls.					
32	Elevates personnel only under an approved procedure using authorized equipment/platform and controls.					

F. PARKING, SHUTDOWN, AND REPORTING

#	OBSERVED PERFORMANCE	S	C	U	N/A	EVIDENCE / COMMENTS
33	Parks in an authorized location without blocking aisles, exits, fire equipment, traffic, or emergency access.					
34	Fully lowers forks/attachment, neutralizes controls, sets parking brake, and shuts power off.					
35	Removes the key or secures access as required; chocks wheels on an incline when required.					
36	Immediately reports defects, damage, near misses, and unsafe conditions through the site process.					
37	Removes unsafe equipment from service and does not resume operation until properly released.					

CRITICAL SAFETY RULE Any action that creates an immediate serious hazard - including ignoring capacity limits, failing to yield to a pedestrian, bypassing a safety device, unauthorized personnel lifting, or continuing to use unsafe equipment - requires stopping the evaluation and documenting corrective action.

Competency decision, corrective action, and certification record

1. Evaluation outcome

() COMPETENT	All applicable tasks were performed safely and consistently.
() COMPETENT WITH COACHING	Minor gaps were corrected and safely re-demonstrated during this evaluation.
() NOT YET COMPETENT	Operator may not operate this equipment independently until retraining and successful reevaluation.
RESTRICTIONS / LIMITS	
NEXT EVALUATION DUE	_____ (at least once every three years, and after refresher training as required)

2. Coaching, retraining, or corrective action

TOPICS / TASKS REQUIRING ACTION

ACTION / TOPIC	OWNER	DUE DATE	COMPLETED / INITIALS

3. Evaluator certification

CERTIFICATION I certify that I observed this operator's performance on the equipment and workplace conditions identified above, recorded the results accurately, and communicated the final authorization status to the operator and employer.

EVALUATOR SIGNATURE	DATE
_____	_____
OPERATOR SIGNATURE	DATE
_____	_____
SUPERVISOR / AUTHORIZING MANAGER	DATE
_____	_____
TRAINING DATE VERIFIED	EVALUATION DATE VERIFIED
_____	_____

REFERENCE BASIS

OSHA 29 CFR 1910.178 and OSHA Powered Industrial Trucks eTool, Operating the Forklift - Pre-Operation. Use with the equipment manufacturer's operator manual, attachment instructions, and site-specific procedures. This template is not an OSHA-issued form and does not by itself establish compliance.