

# **ServiceBoss International, Inc.**

## **APPENDIX A**

### **TRAINING DOCUMENTATION**

# ServiceBoss International, Inc.

## APPENDIX A Training Documentation

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# ServiceBoss International, Inc.

## POLICY STATEMENT

### New Hire Safety Orientation

The safety director, or a designated competent person, will ensure that all new hires are aware of the accessibility of our safety program and, through interactive discussion or practical demonstration, be assured that the new hire understands the safety policies and procedures that pertain to the actual work the new hire will perform.

Further, each new hire will read (or have explained) the contents of our employee handbook and sign the Employee Acknowledgement form which states:

I have read and understand the contents of this Employee Handbook.

I will, to the best of my ability, work in a safe manner and follow established work rules and procedures.

I will ask for clarification of safety procedures of which I am not sure **prior** to performing a task.

I will report to the job site supervisor or competent person any unsafe acts or procedures and will ensure they are addressed and resolved before continuing work.

I understand that the complete safety program is located at:

RR 1 Box 232 Route 407  
Dalton, PA 18414

and is available for my review.

It will be explained to all new hires that safety training and safety performance is an on-going process. Depending on circumstances, training will take the form of some or all of the following: safety meetings, on-the-job instruction, formal and informal training.

Lastly, all new hires will be informed of the importance of our inspection and enforcement policies and procedures.

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Safety Director

**Certificate of Training**  
**With Training Synopsis**

# ServiceBoss International, Inc.

## CERTIFICATE OF TRAINING

I certify the below listed person(s) have received interactive training by a competent person in the subject matter initialed below. All appropriate standards are available to our personnel. The prime training directive is found in 29 CFR 1926.21, Title: Safety training and education, paragraph (b)(2): "The employer shall instruct each employee in the recognition and avoidance of unsafe conditions and the regulations applicable to his work environment to control or eliminate any hazards or other exposure to illness or injury." Training, at a minimum, includes all items required by appropriate standard.

Initials of Trainer	Date	Subject
		All subjects contained in our Safety Program.
		Control of Hazardous Energy - Lockout/Tagout *Signature of Trainer: _____
		Exposure Control for Bloodborne Pathogens and Other Infectious Materials *Signature of Trainer: _____
		Fall Protection - *Signature of Trainer: _____
		Hazard Communication *Signature of Trainer: _____
		Permit-Required Confined Space Entry *Signature of Trainer: _____
		Personal Protective Equipment - General
		Personal Protective Equipment – Hearing *Signature of Trainer: _____
		Personal Protective Equipment - Respiratory *Signature of Trainer: _____
		Forklifts Trainer: _____ Evaluation Date: _____
		Scaffolds & Ladders
		Steel Erection Activities Qualified Trainer: _____
		Multiple Lift Procedures Qualified Trainer: _____
		Connector Procedures Qualified Trainer: _____
		Controlled Decking Zone Procedures Qualified Trainer: _____
		Other: _____

**Note: The trainer for each subject listed above is both qualified and competent in the subject matter.**

\_\_\_\_\_  
(Employee Name - Print)

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\_\_\_\_\_  
(Employee Signature)

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\_\_\_\_\_

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\_\_\_\_\_

Safety Director

\_\_\_\_\_  
(Initials)

See following three pages for training synopsis.

ServiceBoss International, Inc.

TRAINING APPENDIX A

## **TRAINING SYNOPSIS:**

### **Control of Hazardous Energy - 29 CFR 1910.147**

A complete understanding of the purpose and function of the energy control program and the knowledge and skills required for the safe application, usage, and removal of the energy controls. The training shall include the following:

- a. Each authorized employee will receive training in the recognition of applicable hazardous energy sources, the type and magnitude of the energy available in the workplace, and the methods and means necessary for energy isolation and control.
- b. Each affected employee will be instructed in the purpose and use of the energy control procedure.
- c. All other employees whose work operations are or may be in an area where energy control procedures may be utilized, will be instructed about the procedure, and about the prohibition relating to attempts to restart or reenergize machines or equipment which are locked out or tagged out.
- d. When tagout systems are used, employees will also be trained in the following limitations of tags: 1) tags are essentially warning devices affixed to energy isolating devices, and do not provide the physical restraint on those devices that is provided by a lock; 2) when a tag is attached to an energy isolating means, it is not to be removed without authorization of the authorized person responsible for it, and it is never to be bypassed, ignored, or otherwise defeated; 3) tags must be legible and understandable by all authorized employees, affected employees, and all other employees whose work operations are or may be in the area, in order to be effective; 4) tags and their means of attachment must be made of materials which will withstand the environmental conditions encountered in the workplace; 5) tags may evoke a false sense of security, and their meaning needs to be understood as part of the overall energy control program; and 6) tags must be securely attached to energy isolating devices so that they cannot be inadvertently or accidentally detached during use.

NOTE: Control of Hazardous Energy Training must be certified and kept up to date. The certification must include the employee's name and dates of training.

### **Exposure Control for Bloodborne Pathogens or Other Infectious Materials - 29 CFR 1910.1030**

An accessible copy of the regulatory text and an explanation of its contents; a general explanation of the epidemiology and symptoms of bloodborne diseases; an explanation of the modes of transmission of bloodborne pathogens; an explanation of the employer's exposure control plan and the means by which the employee can obtain a copy of the written plan; an explanation of the appropriate methods for recognizing tasks and other activities that may involve exposure to blood and other potentially infectious materials; an explanation of the use and limitations of methods that will prevent or reduce exposure including appropriate engineering controls, work practices, and personal protective equipment; information on the types, proper use, location, removal, handling, decontamination and disposal of personal protective equipment; an explanation of the basis for selection of personal protective equipment; information on the hepatitis B vaccine, including information on its efficacy, safety, method of administration, the benefits of being vaccinated, and that the vaccine and vaccination will be offered free of charge; information on the appropriate actions to take and persons to contact in an emergency involving blood or other potentially infectious materials; an explanation of the procedure to follow if an exposure incident occurs, including the method of reporting the incident and the medical follow-up that will be made available; information on the post-exposure evaluation and follow-up that the employer is required to provide for the employee following an exposure incident; an explanation of the signs and labels and/or color coding requirements; and an opportunity for interactive questions and answers with the person conducting the training session.

NOTE: The person conducting the training shall be knowledgeable in the subject matter covered by the elements contained in the training program as it relates to the workplace that the training will address.

### **Fall Protection - 29 CFR 1926.503**

Training must enable each employee to recognize the hazards of falling and explain the procedures to be followed in order to minimize these hazards. Specific training will include: 1) the nature of fall hazards in the work area; 2) the correct procedures for erecting, maintaining, disassembling, and inspecting the fall protection systems to be used; 3) the use and operation of guardrail systems, personal fall arrest systems, safety net systems, warning line systems, safety monitoring systems, controlled access zones, and other protection to be used; 4) the role of each employee in the safety monitoring system when this system is used; 5) the limitations on the use of mechanical equipment during the performance of roofing work on low-sloped roofs; 6) the correct procedures for the handling and storage of equipment and materials and the erection of overhead protection; and, 7) the role of employees in fall protection plans.

NOTE: The latest certification of training must be maintained and include the name of the employee trained, the date(s) of training, and the signature of the competent person who conducted the training or the signature of the employer.

### **Forklifts - 29 CFR 1910.178 (See Powered Industrial Trucks, below)**

## **Hazard Communication - 29 CFR 1926.59**

Employee training shall include at least: methods and observations that may be used to detect the presence or release of a hazardous chemical in the work area (such as monitoring conducted by the employer, continuous monitoring devices, visual appearance or odor of hazardous chemicals when being released, etc.); the physical and health hazards of the chemicals in the work area; the measures employees can take to protect themselves from these hazards, including specific procedures the employer has implemented to protect employees from exposure to hazardous chemicals, such as appropriate work practices, emergency procedures, and personal protective equipment to be used; and, the details of the hazard communication program including an explanation of the labeling system and the material safety data sheet, and how employees can obtain and use the appropriate hazard information.

## **Permit-Required Confined Space Entry - 29 CFR 1910.146**

Training will be provided so that all employees whose work is regulated by 29 CFR 1910.146 acquire the understanding, knowledge, and skills necessary for the safe performance of the duties assigned under this standard. Training will be given to each affected employee: a) before the employee is first assigned duties under this standard; and, b) whenever there is a change in permit space operations that presents a hazard about which an employee has not previously been trained. The training shall establish employee proficiency in the duties required by this standard and shall introduce new or revised procedures, as necessary, for compliance with 29 CFR 1910.146.

NOTE: Training must be certified and the certification must contain each employee's name, the signatures or initials of the trainers, and the dates of training. The certification shall be available for inspection by employees and their authorized representatives.

## **Personal Protective Equipment [General] - 29 CFR 1926.28 & 29 CFR 1910.132**

Each such employee shall be trained to know at least the following: when PPE is necessary; what PPE is necessary; how to properly don, doff, adjust, and wear PPE; the limitations of the PPE; and, the proper care, maintenance, useful life and disposal of the PPE. Each affected employee shall demonstrate: 1) an understanding of the training specified above and, 2) the ability to use PPE properly, before being allowed to perform work requiring the use of PPE.

## **Personal Protective Equipment [Hearing] - 29 CFR 1926.52 & 29 CFR 1910.95**

The effects of noise on hearing; the purpose of hearing protectors, the advantages, disadvantages, and attenuation of various types, and instructions on selection, fitting, use, and care; and the purpose of audiometric testing, and an explanation of the test procedures.

## **Personal Protective Equipment [Respiratory] - 29 CFR 1910.134**

Training will ensure that each employee can demonstrate knowledge of at least the following: a) why the respirator is necessary and how improper fit, usage, or maintenance can compromise the protective effect of the respirator; b) what the limitations and capabilities of the respirator are; c) how to use the respirator effectively in emergency situations, including situations in which the respirator malfunctions; d) how to inspect, put on and remove, use, and check the seals of the respirator; e) what the procedures are for maintenance and storage of the respirator; f) how to recognize medical signs and symptoms that may limit or prevent the effective use of respirators; and, g) the general requirements of 29 CFR 1910.134 including Appendix D.

## **Powered Industrial Trucks - 29 CFR 1910.178**

If the employee was hired:                      The initial training and evaluation of that employee must be completed:

Before December 1, 1999

By December 1, 1999.

After December 1, 1999

Before the employee is assigned to operate a forklift.

**Allowed exception to required training:** If an operator has previously received training in a topic specified below, and such training is appropriate to the truck and working conditions encountered, additional training in that topic is not required if the operator has been evaluated and found competent to operate the truck safely.

Forklift operators shall receive initial training in the following topics if applicable to our circumstances: a) operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate; b) differences between the truck and the automobile; c) truck controls and instrumentation: where they are located, what they do, and how they work; d) engine or motor operation; e) steering and maneuvering; f) visibility (including restrictions due to loading); g) fork and attachment adaptation, operation, and use limitations; h) vehicle capacity; i) vehicle stability; j) any vehicle inspection and maintenance that the operator will be required to perform; k) refueling and/or charging and recharging of batteries; l) operating limitations; m) any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the employee is being trained to operate; n) surface conditions where the vehicle will be operated; o) composition of loads to be carried and load stability; p) load manipulation, stacking, and unstacking; q) pedestrian traffic in areas where the vehicle will be operated; r) narrow aisles and other restricted places where the vehicle will be operated; s) hazardous (classified) locations where the vehicle will be

operated; t) ramps and other sloped surfaces that could affect the vehicle's stability; u) closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust; and, v) other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation. Each operator will be made aware of the requirements of 29 CFR 1910.178.

NOTES: Trainees may operate a forklift only:

- a. Under the direct supervision of persons who have the knowledge, training, and experience to train operators and evaluate their competence; and
- b. Where such operation does not endanger the trainee or other employees.

Training will consist of a combination of formal instruction (e.g., lecture, discussion, interactive computer learning, video tape, written material), practical training (demonstrations performed by the trainer and practical exercises performed by the trainee), and evaluation of the operator's performance in the workplace.

All operator training and evaluation shall be conducted by persons who have the knowledge, training, and experience to train forklift operators and evaluate their competence.

Certification. The employer will certify that each operator has been trained and evaluated as required above. The certification shall include the name of the operator, the date of the training, the date of the evaluation, and the identity of the person(s) performing the training or evaluation.

### **Scaffolds & Ladders - 29 CFR 1926.454 & 29 CFR 1926.1060**

**Ladders (and Stairways):** Training, as necessary, will enable each employee to recognize hazards related to ladders and stairways and the procedures to be followed to minimize these hazards. Training will include, as applicable: 1) the nature of fall hazards in the work area; 2) the correct procedures for erecting, maintaining, and disassembling the fall protection systems to be used; 3) the proper construction, use, placement, and care in handling of all stairways and ladders; and, 4) the maximum intended load-carrying capacities of ladders.

**Scaffolds:** Training will enable those who perform work on scaffolds to recognize the hazards associated with the type of scaffold being used and to understand the procedures to control or minimize those hazards. The training shall include the following areas, as applicable: 1) the nature of any electrical hazards, fall hazards and falling object hazards in the work area; 2) The correct procedures for dealing with electrical hazards and for erecting, maintaining, and disassembling the fall protection systems and falling object protection systems being used; 3) the proper use of the scaffold, and the proper handling of materials on the scaffold; 4) the maximum intended load and the load-carrying capacities of the scaffolds used; and, 5) any other pertinent requirements that apply to our operations.

NOTE: Those employees who are involved in erecting, disassembling, moving, operating, repairing, maintaining, or inspecting a scaffold will be trained to recognize any hazards associated with the work in question. The training shall include the following topics, as applicable: 1) the nature of scaffold hazards; 2) the correct procedures for erecting, disassembling, moving, operating, repairing, inspecting, and maintaining the type of scaffold in question; 3) the design criteria, maximum intended load-carrying capacity and intended use of the scaffold; and, 4) any other pertinent requirements that apply to our operations.



# **Certificate of Retraining**

## **With Retraining Synopsis**

# ServiceBoss International, Inc.

## CERTIFICATE OF RETRAINING

I certify the below listed person(s) have received interactive retraining by a competent person in the subject matter initialed below. All appropriate standards are available to our personnel. The prime training directive is found in 29 CFR 1926.21, Title: Safety training and education, paragraph (b)(2): "The employer shall instruct each employee in the recognition and avoidance of unsafe conditions and the regulations applicable to his work environment to control or eliminate any hazards or other exposure to illness or injury." Retraining, at a minimum, will include all items required by appropriate standard.

Initials of Trainer	Date	Subject
		All subjects contained in our Safety Program.
		Control of Hazardous Energy - Lockout/Tagout *Signature of Trainer: _____
		Exposure Control for Bloodborne Pathogens and Other Infectious Materials *Signature of Trainer: _____
		Fall Protection - *Signature of Trainer: _____
		Hazard Communication *Signature of Trainer: _____
		Permit-Required Confined Space Entry *Signature of Trainer: _____
		Personal Protective Equipment - General
		Personal Protective Equipment – Hearing *Signature of Trainer: _____
		Personal Protective Equipment - Respiratory *Signature of Trainer: _____
		Forklifts Trainer: _____ Evaluation Date: _____
		Scaffolds & Ladders
		Steel Erection Activities      Qualified Trainer: _____
		Multiple Lift Procedures      Qualified Trainer: _____
		Connector Procedures      Qualified Trainer: _____
		Controlled Decking Zone Procedures Qualified Trainer: _____
		Other: _____

**Note: The trainer for each subject listed above is both qualified and competent in the subject matter.**

\_\_\_\_\_  
 (Employee Name - Print)

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\_\_\_\_\_  
 (Employee Signature)

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Safety Director

(Initials)

**See following three pages for training synopsis.**

## Retraining Synopsis

### Control of Hazardous Energy - 29 CFR 1910.147

- a. Retraining shall be provided for all authorized and affected employees whenever there is a change in their job assignments, a change in machines, equipment or processes that present a new hazard, or when there is a change in the energy control procedures.
- b. Additional retraining shall also be conducted whenever a periodic inspection under paragraph (c)(6) of this section reveals, or whenever the employer has reason to believe that there are deviations from or inadequacies in the employee's knowledge or use of the energy control procedures.
- c. Retraining shall reestablish employee proficiency and introduce new or revised control methods and procedures, as necessary.

NOTE: Control of Hazardous Energy Training must be certified and kept up to date. The certification must include the employee's name and dates of training.

### Exposure Control for Bloodborne Pathogens or Other Infectious Materials - 29 CFR 1910.1030

- a. At least annually.
- b. When changes such as modification of tasks or procedures or institution of new tasks or procedures affect the employee's occupational exposure. The additional training may be limited to addressing the new exposures created.

NOTE: The person conducting the training shall be knowledgeable in the subject matter covered by the elements contained in the training program as it relates to the workplace that the training will address.

### Fall Protection - 29 CFR 1926.503

When it is determined that an affected employee who has already been trained does not have the understanding and skill required by the initial training. Circumstances where retraining is required include, but are not limited to, situations where: 1) changes in the workplace render previous training obsolete; 2) changes in the types of fall protection systems or equipment to be used render previous training obsolete; or, 3) inadequacies in an affected employee's knowledge or use of fall protection systems or equipment indicate that the employee has not retained the requisite understanding or skill.

NOTE: The latest certification of training must be maintained and include the name of the employee trained, the date(s) of training, and the signature of the competent person who conducted the training or the signature of the employer.

### Forklifts - 29 CFR 1910.178 (See Powered Industrial Trucks, below)

### Hazard Communication - 29 CFR 1926.59

Whenever a new physical or health hazard the employees have not previously been trained about is introduced into their work area.

### Permit-Required Confined Space Entry - 29 CFR 1910.146

- a. Before there is a change in assigned duties;
- b. Whenever there is a change in permit space operations that presents a hazard about which an employee has not previously been trained;
- c. Whenever there is reason to believe either that there are deviations from the permit space entry procedures required by paragraph (d)(3) of 29 CFR 1910.146 or that there are inadequacies in the employee's knowledge or use of these procedures.

NOTE: Training must be certified and the certification must contain each employee's name, the signatures or initials of the trainers, and the dates of training. The certification shall be available for inspection by employees and their authorized representatives.

## **Personal Protective Equipment [General] - 29 CFR 1926.28 & 29 CFR 1910.132**

When there is reason to believe that any affected employee who has already been trained does not have the understanding and skill required. Circumstances where retraining is required include, but are not limited to, situations where:

- a. Changes in the workplace render previous training obsolete; or
- b. Changes in the types of PPE to be used render previous training obsolete; or
- c. Inadequacies in an affected employee's knowledge or use of assigned PPE indicate that the employee has not retained the requisite understanding or skill.

## **Personal Protective Equipment [Hearing] - 29 CFR 1926.52 & 29 CFR 1910.95**

Annually.

## **Personal Protective Equipment [Respiratory] - 29 CFR 1910.134**

Annually and when the following situations occur:

- a. Changes in the workplace or the type of respirator render previous training obsolete;
- b. Inadequacies in the employee's knowledge or use of the respirator indicate that the employee has not retained the requisite understanding or skill; or
- c. Any other situation arises in which retraining appears necessary to ensure safe respirator use.

## **Powered Industrial Trucks**

Every three (3) years or when the operator:

- a. Has been observed to operate the vehicle in an unsafe manner.
- b. Has been involved in an accident or near-miss incident.
- c. Has received an evaluation that reveals that the operator is not operating the truck safely.
- d. Is assigned to drive a different type of truck and/or a condition in the workplace changes in a manner that could affect safe operation of the truck.

## **Scaffolds & Ladders - 29 CFR 1926.454 & 29 CFR 1926.1060**

**Ladders (and Stairways):** As necessary. Observation of employee use of ladders (and stairways) will be used to determine if additional training is necessary.

**Scaffolds:** When there is reason to believe that an employee lacks the skill or understanding needed for safe work involving the erection, use or dismantling of scaffolds, retraining will be given so that the requisite proficiency is regained. Retraining is required in at least the following situations: 1) where changes at the worksite present a hazard about which an employee has not been previously trained; 2) where changes in the types of scaffolds, fall protection, falling object protection, or other equipment present a hazard about which an employee has not been previously trained; and, 3) where inadequacies in an affected employee's work involving scaffolds indicate that the employee has not retained the requisite proficiency.

# Training Cards

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

\_\_\_\_\_  
(Name)  
Has demonstrated, this date, an understanding of our Safety Program and will work in a safe manner and follow established work rules and procedures.  
Certificates of training are located at our main office:  
RR 1 Box 232 Route 407  
Dalton, PA 18414  
\_\_\_\_\_  
(Date) \_\_\_\_\_  
Safety Program Administrator

# Forklift Instruction Guide

# FORKLIFT INSTRUCTION GUIDE

## PREFACE

This guide has been prepared to ensure that the training requirements contained in 29 CFR 1910.178, *Forklifts*, are met.

Prior to training, the Program Administrator should make a hazard assessment of truck operations and identify real or potential areas of concern such as:

**a. physical layout:**

1. are aisles sufficiently wide?
2. are there “blind” spots?
3. are other personnel kept clear of truck operations?
4. are dock plates & chocks in good repair?
5. are stacked items the proper height?
6. are fuel storage/battery charging areas properly maintained with appropriate fire extinguishers?
7. is the atmosphere in which the truck will operate appropriate?

**b. personal protective equipment (PPE):**

1. are PPE requirements identified?
2. is PPE available and its use enforced?

**c. trucks:**

1. are trucks properly inspected and maintained?
2. are owner’s/operator’s manuals available?

**d. operations:**

1. are vehicles being operated in a safe manner?



The Program Administrator or the designated competent (by training or experience) person who will conduct the training should understand the underlining reason for instruction and evaluation is to provide a safe work environment for the truck operator.

While it is not **legally** necessary to provide re-training on truck and work related topics if an operator has had training in those topics, for ease and consistency, we will provide the same **initial** training for all operators. This would include new, experienced, hires.

Initial training should consist of three distinct phases:

- a. interactive, formal training.
- b. practical training.
  1. This will include demonstrations performed by the trainer and practical exercises performed by the trainee.
- c. evaluation.
  1. This is an actual evaluation of the operator's performance in the workplace conducted by the Program Administrator or a designated competent person.

Forklift training must be certified.

# FORKLIFT TRAINING

## Materials needed:

- a. Our Forklift Program.
- b. 29 CFR 1910.178, *Powered Industrial Trucks*.
- c. The Owner's/Operator's Manual for our truck(s).
- d. Forklift Daily Check List.
- e. Forklift Quiz and Quiz Explanations.
- f. Answer Sheets, paper & pencils.

## Procedure:

- a. Use the following formal training as a guide to ensure all major topics are covered.
  1. The items in *italics* are notes to the instructor.
  2. Prior to teaching, fill in the blanks on pages:
- b. Encourage questions and group discussion. Identify and solve problems with the help of the employees.
- c. Administer the written (multiple-choice) quiz.
- d. Self-grade the quizzes using the Quiz Explanations as a starting point for discussion.

NOTE: How personnel do on the quiz is less important than their understanding of the material after answers are explained and discussed. Satisfy yourself that information pertinent to our truck operations -- especially safety information -- is retained by the operators.

## INTRODUCTION

We are committed to safety and providing a work environment that is free of recognized hazards. That same commitment is expected of all our employees.

As part of our continuing effort to provide a safer workplace for our employees, we have developed a training program for our forklift operators.

Forklifts are an indispensable asset allowing us to move materials efficiently within our facility. However, because of their size, weight, power, and restricted visibility, these trucks present a potential hazard if improperly used. Only trained and authorized personnel will operate our industrial trucks.

This training will be interactive which means, to the extent possible, a dialogue will be established between all of us present. Not only are questions welcome, but real life examples of difficulties experienced with truck operations are encouraged. All of us will benefit by discussing these problems and finding solutions.

References for this training include:

- a. Our Forklift Program.
- b. 29 CFR 1910.178, Forklifts, upon which our program is based. This will be readily available for our operators to review and they are encouraged to read it.
- c. The Owner and/or Operator Manuals for our trucks.

All of the above references are readily available for review at any time. Just ask.

## **WHY IS TRAINING NEEDED?**

***Ask if anyone can answer that question. Try to get a discussion going to keep up interest and activity in the training.***

Because of their power, weight; size, restricted visibility, and, often, high center of gravity, operation of industrial trucks takes skill and attention to detail. One moment of inattention can lead to a major mishap in an instant. Additionally, the load presents potential hazards if not properly secured, balanced, and/or properly placed on the truck.

***Ask if anyone has heard of a truck accident or mishap (not necessarily at this facility). More than likely, someone would have heard about a truck falling off a dock edge, through a trailer floor, or hitting an object or person. What about falling loads?***

While many safety features are designed into forklifts such as seat belts, lights, fire extinguishers, audible alarms, etc., accidents still happen and they are generally the result of operator error.

There is a general agreement that training for all persons (including part-time, seasonal, and temporary employees) who operate forklifts will significantly reduce the above accident and injury rate.

## **THE TRUCKS**

Forklifts are designed to move items quickly, safely, and cleanly. As a point of interest, forklifts include: fork trucks; tractors; platform lift trucks; motorized hand trucks; and other specialized industrial trucks powered by electric motors or internal combustion engines.

Generally, trucks are powerful and nimble with many safety features built into them. However, each type of truck has its limitations which could include stability, capacity, and visibility both with and without a load.

***Ask if anyone has had a problem with stability, capacity or visibility.***

To get an idea of the value of forklifts, in a typical factory, 40% of all activity involves material handling. In a warehouse operation, material handling approaches 100% of the activity.

***Ask if anyone knows the percentage of truck activity in our facility. The number is approximately: \_\_\_\_\_%.***

## **RULES REGARDING INDUSTRIAL TRUCKS**

1. No person shall operate one of our trucks without written authorization.
2. No riders are allowed unless:
  - a. the truck is specifically designed for such use.
  - b. the rider is authorized for the performance of a job.
3. Unsafe acts will result in the revocation of your authority to operate a truck and retraining will be required.
4. At the beginning of each shift, the operator will inspect the truck using our Forklift Daily Check List.

***Go over the Check List and answer all questions related to its use.***

- a. Safety deficiencies will be noted on the Check List and the truck will not be used until they are corrected.
- b. No truck will be operated with safety defects.
- c. If cosmetic damage will not stop operations.

## **METHODS TO AVOID MAJOR INDUSTRIAL TRUCK HAZARDS**

***Ask if anyone can identify a major category of truck accidents which result in injury.***

The major categories are:

- a. physically hitting a person/object with the truck or load.
- b. having a load fall and hit the operator or other person.
- c. having the truck tip and crush the operator or other person.
- d. fire or explosion during refueling/recharging.

***Ask what procedures might prevent these accidents.***

## HITTING A PERSON/OBJECT

- a. Never drive up to a person standing in front of a fixed object.
- b. When possible, stay within delineated travel lanes or aisles.
- c. Be seen and/or heard.
- d. Ensure that adequate lighting is available.
- e. Maintain a clear view of travel. If the load blocks or restricts your view, drive with the load trailing (backwards).
- f. Slow down, sound horn, and do not pass where vision is restricted.
- g. Operate the truck at speeds that will allow it and the load to be stopped in a safe, smooth, manner.
- h. Be aware of floor conditions. Remove loose objects in the travel lanes. Slow down on wet or slippery floors.
- i. Of course, stunt or reckless driving is prohibited.
- j. Be aware of the height of the truck and, if equipped, its mast and load. Carelessness can damage ceiling, lights, pipes, etc..
- k. Never allow anyone to stand or pass under an elevated portion of any truck at any time.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## FALLING LOADS

- a. Know your load -- do not "overstack". Because practically all loads lifted or hauled by a forklift are not secured to the truck, ensure the load is properly stacked. Cartons generally should be interlaced or banded.
- b. If lifting a load or pallet, get the forks (or other engaging means) as far under the load as possible.
- c. Travel with the load in the lowest position for stability as well as prevention of hitting objects overhead. If using forks, tilt the load backward for stabilization.
- d. Do not exceed the truck's rated capacity or stack loads too high.
- e. Do not make "jerky" movements such as slamming the brakes or high speed turns.

- f. A load backrest extension will reduce the possibility of part of the load falling rearward.
- g. When using a fork lift, the forks may be tilted forward only for picking up or setting down a load.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## **TIPPING**

Tipping or falling off an edge (or dock) is a preventable accident by following the guidelines below. If your truck tips, keep your body and limbs within the safety of the cage. Wear a seat belt if the truck is so equipped.

- a. Stay within travel lanes.
- b. If entering a trailer, ensure:
  - 1. the trailer brakes are engaged.
  - 2. the trailer is secured from movement by means of chocks and/or a locking mechanism.
  - 3. the tractor is either shut off or removed from the trailer.
  - 4. the trailer is squared up with the dock opening and dock plates are secure.
  - 5. the trailer floor is capable of supporting the forklift and its load.
  - 6. the lighting within the trailer is adequate.

**NOTE:** Falling off a dock edge because a trailer has moved is invariably a serious accident. Do not count on the tractor-trailer driver to lock his brakes or even trust that his brakes work. Physically check and ensure the trailer into which you are taking your forklift is securely against the dock. If possible, the trailer should be actually attached to the dock, but in all cases, it should be chocked.

- c. Travel with the load in the lowest possible position and avoid sharp turns at higher speeds as well as abrupt truck movements.
- d. Be aware of the surface on which you are traveling -- its traction, ability to hold weight, slope, and surface.

**Ask if anyone has had this type of accident. If yes, discuss what would prevent a reoccurrence.**

## **FIRE/EXPLOSION DURING REFUELING/RECHARGING**

Refueling accidents are not common experiences, however should they occur, they would be sudden and possibly catastrophic. Follow the manufacturer's owner's manual and local fire laws.

- a. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
- b. An appropriate (B:C) fire extinguisher must be readily available.

**Ensure that refueling/recharging procedures are clearly understood.**

**Conduct an interactive discussion on the appropriate truck-related and workplace-related topics listed below.**

**For example, you could start each subparagraph below with, "Do you understand ....?"**

### **TRUCK-RELATED TOPICS**

- a. Operating instructions, warnings, and precautions for the types of truck the operator will be authorized to operate.
- b. Differences between the truck and the automobile.
- c. Truck controls and instrumentation: where they are located, what they do, and how they work.
- d. Engine or motor operation.
- e. Steering and maneuvering.
- f. Visibility (including restrictions due to loading).
- g. Fork and attachment adaptation, operation, and use limitations.
- h. Vehicle capacity.
- i. Vehicle stability.
- j. Any vehicle inspection and maintenance that the operator will be required to perform.
- k. Refueling and/or charging and recharging of batteries.
- l. Operating limitations.
- m. Any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the employee is being trained to operate.

## **WORKPLACE-RELATED TOPICS**

- a. Surface conditions where the vehicle will be operated.
- b. Composition of loads to be carried and load stability.
- c. Load manipulation, stacking, and unstacking.
- d. Pedestrian traffic in areas where the vehicle will be operated.
- e. Narrow aisles and other restricted places where the vehicle will be operated.
- f. Hazardous (classified) locations where the vehicle will be operated.
- g. Ramps and other sloped surfaces that could affect the vehicle's stability.
- h. Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.
- i. Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

Lastly, remind all personnel that the reference materials are readily available for their use and that should a safety concern develop, it will be resolved before proceeding with work.

## **PRACTICAL TRAINING**

### **Materials Needed:**

- a. A “Demonstration of Operational Skills” form for each trainee.
- b. A forklift.
- c. The Forklift Daily Check List.
- d. Typical items to be moved, placed, or lifted.

### **Procedure:**

- a. Establish a protected training area that has been cordoned off to prevent injury to persons not involved with truck training.
- b. Establish stations which are representative of typical operations such as:
  1. lifting, pulling, pushing, stacking materials.
  2. maneuvering in tight spaces, narrow aisles, or blind spots.
  3. entering trailers.



- c. Demonstrate:
  - 1. inspecting the truck.
  - 2. performing the tasks required at each station.
  - 3. fuel/charging the truck.
  - 4. securing the truck as if the shift was completed.
- d. Observe:
  - 1. the trainee performing the above tasks.
  - 2. complete a “Demonstration of Operational Skills” for each trainee.

As with all training, an interactive approach should be taken with the operator being encouraged to ask questions and resolve any safety issues.

## **EVALUATION**

### **Materials needed:**

- a. A Certification of Truck Operator Training Form.
- b. Operator’s Licenses.

**NOTE: The trainee may not be authorized as an operator until an evaluation of performance during actual operations is made by the Program Administrator or a designated competent person.**

**Prior to this certification, all truck operations must be under the direct supervision and observation of a competent person.**

### **Procedure:**

- a. Observe the employee performing actual operations safely in accordance with the training received.
- b. Complete our Certification of Truck Operator Training Form.
- c. Provide a completed Operator’s License to the individual.

# Forklift Quiz

# FORKLIFT

## QUIZ

**Circle the correct answer.**

1. To become an authorized forklift operator, one must:
  - a. read and understand all pertinent information in the Owner's Manual.
  - b. understand the hazards associated with truck operations and how to avoid them.
  - c. demonstrate skills in actual truck operation.
  - d. all of the above.
  
2. Who is allowed to operate an industrial truck?
  - a. Anyone over 25 years of age.
  - b. Anyone who can turn it on.
  - c. One who has demonstrated his/her knowledge and ability to safely operate the truck and has authorization to do so.
  
3. A malfunctioning truck may be used:
  - a. with extreme caution.
  - b. only after being properly repaired by authorized personnel.
  - c. by ground controls only.

4. Trucks should be inspected:
  - a. daily.
  - b. weekly.
  - c. monthly.
  
5. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
  - a. True.
  - b. False.
  
6. Rated load capacities are:
  - a. general guidelines established by the manufacturer.
  - b. must never be exceeded.
  - c. are used to determine fluid levels.
  
7. Industrial trucks are so stable they may be driven on any grade.
  - a. True.
  - b. False.
  
8. Because of the driver protection and the rubber tires, there is no danger if overhead electrical lines are hit by a truck component or load.
  - a. True.
  - b. False.

9. Loads should always be carried as close to the ground as possible to lower the center of gravity.
  - a. True.
  - b. False.
  
10. The surface on which a truck travels should be checked for:
  - a. load bearing capacity.
  - b. traction.
  - c. lack of debris.
  - d. all of the above.
  
11. Primary hazards that present themselves during truck operations include:
  - a. hitting a person/object; falling loads; tipping; and fire/explosion during refueling/recharging.
  - b. flat tires; leaking fuel tanks; and excess debris.
  - c. hazardous atmospheres and excessive noise.
  
12. Accidents involving forklifts result in approximately:
  - a. 90,000 injuries and 100 deaths per year.
  - b. 1,000,000 injuries and 350 deaths per year.
  - c. three (3) billion dollars in property damage per year.

# Forklift Quiz Answer Sheet

# ServiceBoss International, Inc.

## FORKLIFT QUIZ

### ANSWER SHEET

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Date)

**Circle the correct, or best, answer.**

1. a. b. c. d.
2. a. b. c. d.
3. a. b. c. d.
4. a. b. c. d.
5. a. b. c. d.
6. a. b. c. d.
7. a. b. c. d.
8. a. b. c. d.
9. a. b. c. d.
10. a. b. c. d.
11. a. b. c. d.
12. a. b. c. d.

# Forklift Quiz Scoring Sheet



# ServiceBoss International, Inc.

## FORKLIFT QUIZ

### SCORING SHEET

1. d.
2. c.
3. b.
4. a.
5. a.
6. b.
7. b.
8. b.
9. a.
10. d.
11. a.
12. a.

# Forklift Quiz Explanations

## FORKLIFT

### QUIZ EXPLANATIONS

1. To become an authorized forklift operator, one must:
  - a. read and understand all pertinent information in the Owner's Manual.
  - b. understand the hazards associated with truck operations and how to avoid them.
  - c. demonstrate skills in actual truck operation.
  - d. all of the above.**

**The actual standard on which this training is based states, as far as training goes, that a method must be devised to train operators in the safe operation of forklifts. By successfully completing the above tasks, it is our opinion that the goal of zero accidents will be achieved.**

2. Who is allowed to operate an industrial truck?
  - a. Anyone over 25 years of age.
  - b. Anyone who can turn it on.
  - c. One who has demonstrated his/her knowledge and ability to safely operate the truck and has authorization to do so.**

**Improperly used forklifts are potentially very dangerous items of equipment. Therefore, only authorized personnel may operate them. Should an operator be found to be lacking in any of the required skills for safe operation, re-training will be given. Intentional recklessness and/or disregarding safety guidelines will result the operator's authorization being revoked.**

3. A malfunctioning truck may be used:
  - a. with extreme caution.
  - b. only after being properly repaired by authorized personnel.**
  - c. by ground controls only.

***There are two (2) points to this question. One, to emphasis that any truck that is mechanically defective will be taken out of service until repaired, and, two, only authorized maintenance personnel may do the actual repairs. Of course, operators are allowed to replenish fluids as allowed in the Operator's Manual.***

4. Trucks should be inspected:
  - a. daily.**
  - b. weekly.
  - c. monthly.

***There are three (3) main categories of items to inspect on our Forklift Daily Checklist: 1) Visual Overall Truck Condition; 2) Fluids; and 3) Truck Operations. Be sure to check each item indicating that it is O.K., deficient, or not applicable. This inspection checklist is part of our maintenance procedures and will ensure that not only are our trucks safe, they will perform at their expected capacities and lifetimes.***

5. There is absolutely NO SMOKING or open flame during any portion of the refueling/recharging process.
  - a. True.**
  - b. False.

***Refueling propane requires at least an 8B:C rated fire extinguisher and recharging batteries requires immediate access to eye flush and body drenching.***

6. Rated load capacities are:
  - a. general guidelines established by the manufacturer.
  - b. must never be exceeded.**
  - c. are used to determine fluid levels.

***Rated capacities must never be exceeded. Remember, you are dealing with powerful, heavy, expensive machinery capable of serious work. At the least, going beyond truck capacities may damage the truck (or load), and, at the most, you may seriously injure yourself or a fellow employee if something gives way.***

7. Industrial trucks are so stable they may be driven on any grade.
  - a. True.
  - b. False.**

***Forklifts are extremely stable when properly driven, loaded, and operated within its stated limits. Exceeding a truck's limit, such as the grade on which it may be driven, is asking for a sudden, possibly violent, certainly tragic accident.***

8. Because of the driver protection and the rubber tires, there is no danger if overhead electrical lines are hit by a truck component or load.
  - a. True.
  - b. False.**

***This is blatantly false. Any reasonable person would know that there is danger in hitting any object. However, remember not only the driver of the truck is put at risk through careless operations, other persons are as well.***

9. Loads should always be carried as close to the ground as possible to lower the center of gravity.

a. True.

b. False.

***Not only does this lower the center of gravity, it greatly reduces the chance of injury should the load fall. If lowering the load blocks your line of sight, travel with the load trailing.***

10. The surface on which a truck travels should be checked for:

a. load bearing capacity.

b. traction.

c. lack of debris.

d. all of the above.

***Not only is the above an OSHA requirement, it makes good sense. Slow down when traction is poor (a wet floor, for example). Serious accidents can occur when trailer floors fail, dock plates slip, or there is some sort of surface collapse.***

11. Primary hazards that present themselves during truck operations include:

a. hitting a person/object; falling loads; tipping; and fire/explosion during refueling/recharging.

b. flat tires; leaking fuel tanks; and excess debris.

c. hazardous atmospheres and excessive noise.

***One of the main purposes of our training has been to point out the primary hazards involved with forklift operations and the methods and procedures to avoid them.***

12. Accidents involving forklifts result in approximately:
- a. **90,000 injuries and 100 deaths per year.**
  - b. 1,000,000 injuries and 350 deaths per year.
  - c. three (3) billion dollars in property damage per year.

***Ninety thousand injuries and 100 deaths per year is a terrible price to pay for disregarding standard safety procedures. Most accidents are preventable. With a concerted effort by all personnel from the highest levels of management to the newest hire, needless accidents and injuries can be eliminated.***

## **Demonstration of Operation Skills**



# ServiceBoss International, Inc.

## DEMONSTRATION OF OPERATION SKILLS

The truck operator whose signature appears below has demonstrated his/her ability to perform the below listed tasks in a satisfactory manner.

= O.K.

= Not Applicable

A truck walk-around and safety check.

A check of all fluid levels.

A check of horn, lights, brakes, fire extinguisher, etc..

Fueling the truck.

Starting the truck.

Driving around obstacles (such as empty boxes) both in a forward and reverse direction.

Lifting a stack of empty pallets and placing them on another empty pallet.

Securing the truck after use (engaging the parking brake).

Special maneuvers appropriate for job requirements such as ramps, trailer entry, narrow aisles, high reach, etc..

Notes:

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\_\_\_\_\_  
(Operator's Signature)

\_\_\_\_\_  
(Program Administrator's Signature)

\_\_\_\_\_  
(Date)

# **Certification of Forklift Operator Training**

# ServiceBoss International, Inc.

## Certification of Forklift Operator Training

I certify the below listed personnel have received training/refresher training as required by 29 CFR 1910.178, *Powered Industrial Trucks*.

Name(s) of competent person(s) who performed the training:  
(If other than the Program Administrator)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Print Name)

Date(s) of training:

\_\_\_\_\_  
(From)

\_\_\_\_\_  
(To)

<u>NAME</u>	<u>Initial Training</u>	<u>Refresher Training</u>	<u>Evaluation Date</u>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
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_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

\_\_\_\_\_  
(Program Administrator's Signature)

\_\_\_\_\_  
(Date)

# Forklift Operator Cards

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator

\_\_\_\_\_  
(Operator's Name)  
Has demonstrated, this date, the skills & knowledge  
necessary to operate a forklift and is  
**AUTHORIZED TO OPERATE**  
the below  
ServiceBoss International, Inc.  
Forklifts

\_\_\_\_\_  
[Type(s)]                      [Model(s)]

\_\_\_\_\_  
(Date)

Safety Program Administrator