

## **OPERATING ELECTRIC PALLET JACKS SAFELY**

This easy-to-use Leader's Guide is provided to assist in conducting a successful presentation. Featured are:

**INTRODUCTION:** A brief description of the program and the subject that it addresses.

**PROGRAM OUTLINE:** Summarizes the program content. If the program outline is discussed before the video is presented, the entire program will be more meaningful and successful.

**PREPARING FOR AND CONDUCTING THE PRESENTATION:** These sections will help you set up the training environment, help you relate the program to site-specific incidents, and provide program objectives for focusing your presentation.

**REVIEW QUESTIONS AND ANSWERS:** Questions may be copied and given to participants to document how well they understood the information that was presented. Answers to the review questions are provided separately.

### **INTRODUCTION**

Electric pallet jacks, often called pallet trucks, are designed for lifting and transporting palletized materials over relatively short distances. They come in many different types and styles and are vital to daily operations in today's industry. Even though they seem simple to use, they can be very dangerous when used by an untrained operator or in an unsafe manner. This program discusses how to safely operate electric-powered pallet jacks so operators can deliver their loads while avoiding injury and property damage.

Topics include pre-operational inspection, driving and handling characteristics, lifting, moving and placing loads, avoiding incidents involving pedestrians, traveling on sloped surfaces and working on loading docks.

### ***PROGRAM OUTLINE***

#### **BACKGROUND**

- Electric pallet jacks, often called pallet trucks, are designed for lifting and transporting palletized materials over relatively short distances.
- There are two common types of pallet trucks: the walker, or walkie as it sometimes called, is designed for the operator to walk ahead or behind the truck while operating the controls; and, the rider truck, also known as a walkie-rider, allows the controls to be operated from either the floor or from the operator's platform on the vehicle.
- While there are many types of makes and models of pallet trucks, most share the following features: directional and speed controls, lift and lower buttons, a t-bar support handle, horn, battery, pallet forks, load wheels, steering tires and brake controls.
- Rider trucks will also be equipped with a rider platform.

#### **THE T-BAR SUPPORT HANDLE**

- A common safety feature found on many pallet trucks is the reverse switch found on the T-bar. This safety device helps protect operators from being pinned between the truck and a solid object.
- When pressure is applied to the reverse switch, the truck will reverse direction and move away from the operator.
- The T-bar handle also acts as an emergency brake. When the handle is moved to a complete vertical or horizontal position, the truck will stop moving. This stops the truck in the event the operator loses grip on the handle or falls to the ground.

#### **OPERATOR TRAINING**

- While a powered pallet jack may seem small compared to a forklift or reach truck, it is still considered a powered industrial truck and is capable of causing property damage and injury. Like all powered industrial trucks, specific training and authorization are required before use.

- Your company will provide you with specific training for the type of pallet truck you will be operating. This training includes the function of all operating controls, the driving and handling characteristics of the vehicle and how to read and understand the information found on the data plate.
- You will also receive hands-on training so you may become familiar with the operation of the pallet truck in the environment in which it will be operated.
- It is important to understand that each type of powered industrial truck requires specific training. Being trained on a pallet jack does not allow you to operate a forklift and operating a forklift does not qualify you to operate a pallet jack.

### **PRE-OPERATIONAL INSPECTION**

- As a trained and authorized operator, it is your responsibility to use this equipment safely. The first step towards safe use is conducting a pre-operational inspection.
- Before use, take a good look all around the vehicle. Remove any items that may have been left on the pallet truck, such as tools, drinks or other debris.
- During the inspection, look for any fluid leaks, cracked or broken parts or anything that looks out of place. Pay special attention to the wheels, tires and forks.
- Make sure that the load back rest extension and other safety devices are attached and in good working condition. This includes all warning labels, which must be in place and legible.
- Test all control functions for proper operation. Raise and lower the forks, test the forward and reverse controls, the horn as well as the various braking controls and the emergency reverse button located on the T-bar.
- During the pre-operational inspection, verify the presence of the vehicle's data plate and make sure it is legible. The data plate provides important information, such as the make and model of the vehicle and its maximum capacity.
- Other information specific to your make and model of pallet truck can be found in the operator's manual, which must remain with the vehicle at all times.
- If your inspection reveals any problem or defect with the truck, do not use it. Mark the vehicle out of service and report the situation to your supervisor.

### **DRIVING & HANDLING CHARACTERISTICS**

- Operating a pallet jack safely requires an awareness of its unique driving and handling characteristics. These vehicles operate quite differently from automobiles or other types of powered industrial trucks.
- Pallet jacks can be driven with the load leading or trailing,
- When operating with the forks trailing, the steering wheels are located in the front of the vehicle. This allows the truck to turn sharply, cutting corners abruptly.
- When this is the case, a wide turn is required to avoid collision.
- When operating with the forks leading, the steering wheels are in the back of the truck. This also allows sharp turning to either side; however, the rear end will now swing wide to the outside of a turn.
- When this is the case, keeping the truck tight to the inside of the turn is required to avoid collisions.
- Because the pallet truck can accelerate and turn abruptly, you should avoid sudden, extreme movements.

- Make a point to start, stop, turn and brake in a smooth, controlled manner. This includes coming to a complete stop before changing direction.
- Smooth, careful operation is required to avoid property damage and injury when operating powered pallet jacks.

### **LIFTING LOADS SAFELY**

- When lifting a load, first make sure it is within the truck's capacity. If you are unsure about the weight of a load, don't hesitate to ask for assistance.
- Before moving a load, it must be centered on a pallet and stable. Off-center loads or loads that are unstable may fall when moved.
- These types of loads must be reconfigured so they are centered on the pallet and may need to be secured before moving.
- Before lifting a pallet, make sure both forks are completely under the pallet and the pallet is resting against the back stop.
- Lifting a load with the forks partially under the pallet can cause damage to the pallet and spill the load.
- Understand that the forks are raised using a scissor-like action that lowers the load-bearing wheels and raises the forks. If these wheels contact a lower support board of the pallet while lifting, the pallet can be torn apart.
- To avoid damage to the truck, pallet or load, you must pay attention and use caution when placing your forks and lifting a load.

### **TRAVELING WITH & PLACING A LOAD**

- Before traveling with a load, make sure you know where you are going. Inspect your route for obstructions or hazards before proceeding with the pallet truck.
- Do not raise or lower the load while in motion. This can affect the stability of the truck and load as well as damage the floor and pallet should the load begin scraping across the floor while still in motion.
- Before moving, lift the load a few feet off the floor and then proceed to your destination.
- When placing a load, come to a complete stop before lowering the pallet.

### **PARKING A PALLET TRUCK**

- When parking your pallet truck, only park in approved areas. Never park in front of emergency equipment, in aisle ways or in front of exits.
- When parking any type of powered industrial truck, including a pallet truck, you must lower your forks, place the vehicle in neutral and apply the parking brake.
- Many pallet trucks automatically return to neutral and apply the brake when the T-bar controls are released; check the operator's manual if you are unsure.
- If you are going to be out of sight from your truck or more than 25 feet away, you must also remove the key if it has one or disconnect the battery connector to prevent unauthorized use.

### **WALKING WITH A PALLET JACK**

- When using a walkie type truck, walk ahead of the truck and just to the side. Walking with the load trailing allows good visibility and reduces the chances of a collision.

- Of course, there are many situations where you must walk behind the truck with the load leading. When this is the case, keep both hands on the controls and proceed cautiously.
- Be aware that the forks stick out beyond the load further than it may seem. Be extra cautious when approaching objects with the load leading in this manner.
- Whether walking ahead or behind the pallet truck, always travel at a normal walking pace and stay alert for pedestrians and other vehicles.

### **AVOIDING INCIDENTS INVOLVING PEDESTRIANS & OTHER VEHICLES**

- When approaching intersections, blind corners or aisle ways, stop and sound your horn; this will alert pedestrians and other vehicle operators of your presence. Always remember that pedestrians have the right of way.
- When following other trucks, maintain a three-truck distance between trucks; this allows room to maneuver and stop if needed. Following too closely is a sign of careless operation and can quickly lead to an incident.
- Before moving your pallet truck, make sure the area is clear of personnel and be sure to look behind you before backing up.
- Raising and lowering the forks creates a hazard for pedestrians as well. Not only can a foot be easily crushed when the forks are lowered, the scissor action created by raising or lowering the load wheels creates a dangerous pinch point that must be avoided.
- Never drive a pallet truck directly toward a pedestrian who is standing in front of a solid object such as a wall or bench.

### **PROTECTING YOURSELF & OTHERS FROM INJURY**

- When operating a rider truck, be sure to keep your hands and feet inside the operating area. Allowing hands and feet to protrude beyond the frame of the truck can lead to serious injury as the truck passes near fixed objects or other vehicles.
- Operators should not leave the rider's platform until the truck has come to a complete stop. Stepping off too soon can lead to twisted ankles, knees or other injuries.
- No matter what type of pallet truck you operate, make sure your hands and feet are free of oil, grease or other slippery substances.
- As a trained and authorized operator, it is your responsibility to prohibit any riders from your truck.

### **TRAVELING ON SLOPED SURFACES**

- When traveling up or down a sloped surface, keep the load uphill. This maximizes the stability of your truck and load.
- When using a walkie truck, be sure to stand to the side—never in front—of the vehicle while on the slope.
- Never turn or travel at an angle while on an incline. This may cause the load to fall or the load to tip over.

### **WORKING ON LOADING DOCKS**

- Loading docks feature tight quarters, lots of traffic and materials combined with pallet trucks and forklifts entering and leaving trailers or railcars. Caution must be used at all times.
- Before entering any trailer with a powered pallet jack, you must make sure the trailer's brakes are set and its wheels are chocked.

- Inspect all bridge plates and dock boards before use. They must be properly secured to the dock and trailer, be in good condition and be of sufficient capacity before crossing.
- If the trailer is not supported by a cab, then a jack stand must be used to support the trailer. A trailer's landing gear alone is not enough.
- Inspect the flooring of any trailer or railcar for defects such as cracks, holes, rotten wood and other weaknesses.

## **PREPARE FOR THE SAFETY MEETING OR TRAINING SESSION**

Review each section of this Leader's Guide as well as the videotape. Here are a few suggestions for using the program:

Make everyone aware of the importance the company places on health and safety and how each person must be an active member of the safety team.

Introduce the videotape program. Play the videotape without interruption. Review the program content by presenting the information in the program outline.

Copy the review questions included in this Leader's Guide and ask each participant to complete them.

Make an attendance record and have each participant sign the form. Maintain the attendance record and each participant's test paper as written documentation of the training performed.

### **Here are some suggestions for preparing your videotape equipment and the room or area you use:**

Check the room or area for quietness, adequate ventilation and temperature, lighting and unobstructed access.

Check the seating arrangement and the audiovisual equipment to ensure that all participants will be able to see and hear the videotape program.

Place or secure extension cords to prevent them from becoming a tripping hazard.

## **CONDUCTING THE PRESENTATION**

Begin the meeting by welcoming the participants. Introduce yourself and give each person the opportunity to become acquainted if there are new people joining the training session.

Explain that the primary purpose of the program is to discuss how to safely operate electric pallet jacks so operators can avoid injuries to themselves and co-workers as well as damage to company property.

Introduce the videotape program. Play the videotape without interruption. Review the program content by presenting the information in the program outline.

Lead discussions about specific hazards at your facility that pallet jack operators must be able to recognize and control to avoid injuries and property damage.

After watching the videotape program, the viewer will be able to explain the following:

- What to look for during a pre-operational inspection of an electric pallet jack;
- How to safely lift, travel and place a load;
- How to prevent operator and pedestrian injuries and damage to other vehicles and property;
- How to properly travel on sloped surfaces;
- What precautions must be taken when working on loading docks.

**OPERATING ELECTRIC PALLET JACKS SAFELY**  
**REVIEW QUIZ**

Name \_\_\_\_\_ Date \_\_\_\_\_

*The following questions are provided to check how well you understand the information presented during this program.*

1. If you have been trained and authorized to operate a forklift, you are automatically qualified to operate an electric pallet jack.
  - a. true
  - b. false
  
2. A pallet jack's operator's manual must remain with the vehicle at all times.
  - a. true
  - b. false
  
3. What is the first thing you should do when preparing to lift a load with a pallet jack?
  - a. make sure it is secure on the pallet
  - b. make sure it is within the truck's weight capacity
  - c. make sure both forks are completely under the pallet
  
4. Loads should not be raised or lowered while the pallet jack is in motion.
  - a. true
  - b. false
  
5. When following other trucks, maintain a \_\_\_\_\_ distance between vehicles.
  - a. one-truck
  - b. two-truck
  - c. three-truck
  
6. The only time you should drive your pallet truck directly toward a pedestrian standing in front of a solid object is when you are sure you have ample time to stop or turn before reaching him.
  - a. true
  - b. false
  
7. Regardless of whether you are traveling up or down a sloped surface, you should keep the load downhill.
  - a. true
  - b. false
  
8. If a trailer you intend to enter with a pallet jack is not supported by a cab, a jack stand must be used for support.
  - a. true
  - b. false

**OPERATING ELECTRIC PALLET JACKS SAFELY**  
***ANSWERS TO THE REVIEW QUIZ***

1. b

2. a

3. b

4. a

5. c

6. b

7. b

8. a