



AmTrust North America  
An AmTrust Financial Company

# Safety Zone

## Understanding Forklift Certification

There is a good deal of confusion about what is required under the [OSHA Forklift Operator Training Rule, 29CFR 1910.178](#). Business owners are told they must “certify their forklift operators,” but many aren’t sure how to accomplish this. This resource, which does not take the place of reading and understanding the OSHA standard on Powered Industrial Trucks, specifically deals with the required training and evaluation of forklift drivers and operators of similar equipment.

OSHA refers to forklifts and similar material handling equipment as “Powered Industrial Trucks,” often abbreviated “PIT(s).” In general, if it’s motorized and handles materials (other than earth moving equipment), it is considered a PIT and requires specific training. For example, a motorized pallet jack is considered a PIT; a skid-steer loader is not.

## Complying with the Federal OSHA Forklift Operator Training Rule

There are six basic steps to help comply with the standard:

1. OSHA requires that the trainer have “knowledge, training and experience.” The employer can appoint an experienced staff member to conduct the training if they possess the requisite skills. Additionally, those with relevant degrees or professional standing, forklift manufacturers, equipment service providers, local organizations such as safety councils or private consultants with the necessary expertise may all qualify to fit the role of trainer and evaluator.
2. The trainer must cover all required training content as outlined by OSHA (see the Three Major Categories of Training in the section below).
3. The training must be a combination of formal instructions (i.e., lecture and video), practical (i.e., hands-on demonstration and exercises on equipment) and an operator performance evaluation.
4. The *employer* is required to make certification of training and competence, not an outside “expert.” Once training has been completed, the trainer must record each trainee’s name, training date, evaluation date, and trainer’s name.
5. An evaluation of each operator’s performance must be conducted every three years.
6. Refresher training is required if there is a deficiency noted in the safe operation of the truck. This includes: an incident of unsafe driving, an accident or near miss event, an evaluation that shows unsafe driving or change in the workplace that could affect safe driving, or other changes such as new equipment or driving other types of trucks.

## Three Major Categories of Training

Three major categories of training are required, including:

1. General forklift topics such as balance, load stability, differences between PIT and automobile operations and more, as well as the requirements of the standard itself.

2. Specific training pertaining to the actual PITs that the trainee will be operating.
3. Specific training pertaining to the facility in which the trainee will be operating the PIT, such as ramps, traffic lanes, pedestrian traffic patterns, storage methods, hazardous conditions, and others.

The required training program content is specified in the standard, and Appendix A provides material that can be used as actual course content for the general PIT training. Additionally, training content for the type(s) of PIT used at the employer's facility can be obtained from the manufacturer, equipment supplier or online sources. Specifics about the individual facility itself are best developed by the employer.

***\*Please note the above information is intended to provide your organization a place to start when conducting forklift training and complying with the OSHA Forklift Operating Standard. This article is not intended to provide authoritative answers in OSHA compliance. To ensure OSHA compliance, please reference the full [OSHA Standard](#) and all [FAQ's](#).***

Additional resources pertaining to PIT operator training and related topics can be found at the following links:

**PIT – Forklifts** - <https://www.osha.gov/SLTC/powerindustrialtrucks/index.html>

**Developing a Training Program for PIT Operators** - [https://www.osha.gov/dte/library/pit/develop\\_trng.html](https://www.osha.gov/dte/library/pit/develop_trng.html)

**Sample PIT Operator Training Program Outline** - [https://www.osha.gov/dte/library/pit/trg\\_outline.html](https://www.osha.gov/dte/library/pit/trg_outline.html)

**Sample Performance Test for Forklift Operators** - <https://www.osha.gov/dte/library/pit/test.html>

**PIT Operator Training for General Industry** - [https://www.osha.gov/dte/library/pit/genind\\_pc.html](https://www.osha.gov/dte/library/pit/genind_pc.html)

**OSHA's PIT – Operator Training (PowerPoint)** - <https://www.osha.gov/dte/library/pit/ppt/index.html>

For additional resources, including streaming videos and other safety and risk management subjects, visit the AmTrust Loss Control website: <https://amtrustfinancial.com/loss-control>

AmTrust maintains this article as a service for its customers. This information is intended to give you a place to start when finding information about a particular safety question. This article is not intended to provide authoritative answers to safety and health questions. Before using the information here, the accuracy and appropriateness of the information to your specific situation should be verified by a person qualified to assess all the factors involved.

This article contains hyperlinks to information created and maintained by other public and private organizations. Please be aware that we do not control or guarantee the accuracy, relevance, timeliness or completeness of this outside information. Further, the inclusion of pointers to particular items in hypertext is not intended to reflect their importance, nor is it intended to endorse any views expressed or products or services offered by the author of the reference or the organization operating the site on which the reference is maintained.

**CONTACT INFO:**

PHONE: 888.486.7466 ext. 363275

WEB: [www.amtrustnorthamerica.com](http://www.amtrustnorthamerica.com)

EMAIL: [AskLC@amtrustgroup.com](mailto:AskLC@amtrustgroup.com)

**MAILING ADDRESS:**

AmTrust North America  
2605 Enterprise Road, Suite 290  
Clearwater, FL 33759