

OSHA Forklift Certification Checklist (2025 Edition)

A comprehensive step-by-step guide to ensure your business remains fully compliant with OSHA's Powered Industrial Trucks Standard (29 CFR 1910.178). Perfect for safety managers, HR professionals, and operations leaders.

SECTION 1: DETERMINE WHO NEEDS CERTIFICATION

Properly identifying who requires forklift certification is the foundation of OSHA compliance. Many organizations fall short by underestimating who qualifies as a “forklift operator.”

- ☐ Identify all employees who operate powered industrial trucks (PITs), including forklifts, pallet jacks, order pickers, and reach trucks.
- ☐ Include full-time, part-time, seasonal, and temporary workers in this audit. OSHA does not differentiate by employment status.
- ☐ Cross-reference job descriptions and actual duties—many operators perform tasks beyond their job titles.
- ☐ Review departments regularly to catch changes in responsibilities or new hires who require certification.

Why It Matters: Misclassification puts the company at risk. Non-certified operators represent a major liability in case of injury or inspection.

SECTION 2: ADMINISTRATIVE COMPLIANCE

A compliant safety system includes proper documentation, internal policies, and visibility. OSHA inspectors will ask to see written evidence—not just verbal claims.

- ☐ Maintain a written forklift safety policy that outlines training requirements, operation procedures, and recertification timelines.
- ☐ Post OSHA-compliant safety signage and operational rules prominently in all areas where forklifts are used.
- ☐ Use a centralized tracking system or software to monitor each operator's certification status and expiration date.

- ☐ Schedule and automate renewal reminders. Certification lapses are a major red flag in inspections.
- ☐ Maintain a comprehensive training log for each employee, including dates, instructor names, equipment used, and outcomes.

Pro Tip: Digitize your admin workflow with compliance software. Paper files are prone to loss, and spreadsheets can be error-prone.

SECTION 3: TRAINING REQUIREMENTS

Training isn't just a formality—it's a core OSHA mandate. Your forklift operator training program must cover both **general safe operating practices** and **site-specific hazards**.

Required Components:

- ☐ **Formal Instruction:** This can be delivered via online courses, videos, or classroom lectures. Make sure the content aligns with OSHA's regulation.
- ☐ **Practical Training:** Instructors should demonstrate the operation of equipment and allow trainees hands-on experience in a controlled setting.
- ☐ **Performance Evaluation:** A qualified evaluator must observe the operator's performance and sign off on their ability to use equipment safely.

OSHA Mandated Topics:

- ☐ Truck operation instructions, warning labels, and safety precautions
- ☐ Differences between PITs and standard automobiles
- ☐ Instrumentation, steering, braking, and control systems
- ☐ Refueling, battery charging, and maintenance basics
- ☐ Load handling, stacking, unstacking, and stability principles
- ☐ Operational limitations and visibility restrictions
- ☐ Environmental factors such as ramps, inclines, surface types, and pedestrian zones
- ☐ Safety procedures for specific work conditions (e.g., cold storage, loading docks)
- ☐ Company-specific protocols and hazard zones

Common Mistake: Some companies use generic training that fails to address their unique environment. Tailoring your content is not optional—it's required.

SECTION 4: EVALUATION + CERTIFICATION

Certification is the moment when an operator is officially approved—but only if done correctly.

- ☐ Conduct a performance evaluation on the exact equipment the employee will be using. Evaluating a worker on a sit-down forklift does not certify them to use a stand-up reach truck.
- ☐ The evaluation must be conducted by a qualified trainer—not a peer, friend, or team lead without training authority.
- ☐ Each operator must receive a **dated certificate of successful completion**—this document must include name, evaluation date, trainer signature, and equipment type.
- ☐ Store certification records in a centralized, retrievable archive. OSHA inspectors may request historical data on demand.

Tip: Maintain an equipment matrix—listing which employees are certified for which models of equipment.

SECTION 5: RECERTIFICATION + TRIGGERS

Many companies miss OSHA's recertification windows—and it's a costly mistake.

- ☐ Reevaluate and retrain every 3 years. This is a federal requirement, regardless of whether any incidents have occurred.
- ☐ Provide immediate retraining if any of the following triggers occur:
 - ☐ The operator is observed operating a PIT in an unsafe manner
 - ☐ The operator is involved in a forklift-related accident or near miss
 - ☐ The operator is assigned a different type of PIT or a new working environment

Best Practice: Conduct “rolling” recertification quarterly to prevent everyone expiring at once.



SECTION 6: DOCUMENT RETENTION

When OSHA comes knocking, documentation is your legal shield.

- ☐ Maintain digital or physical records of training for at least 3 years.
- ☐ Each record should include:
 - Employee name and ID
 - Type of training provided
 - Training date(s)
 - Instructor's full name and qualification
 - Equipment used
 - Evaluation result
- ☐ Organize documents by location and department so they're easy to retrieve.

Security Tip: Cloud-based systems ensure data isn't lost to hardware failures, fire, or personnel turnover.



SECTION 7: EQUIPMENT & SITE-SPECIFIC SAFETY

Even with certified operators, unsafe equipment or working conditions can lead to major violations.

- ☐ Perform a pre-operation inspection at the beginning of every shift. Use a standardized checklist.
- ☐ Common inspection items include:
 - Tire condition
 - Brake function
 - Warning lights and alarms
 - Horn and backup alarm
 - Fluid levels
 - Load backrest
 - Seatbelt function
- ☐ Immediately tag and remove any PIT from service if it fails inspection.
- ☐ Maintain maintenance records, service logs, and repair histories.

Important: OSHA expects that you not only perform inspections—but can prove you did.



SECTION 8: BONUS – EMPLOYEE SAFETY CULTURE

Compliance is the floor—not the ceiling. Companies that cultivate a strong safety culture outperform in risk mitigation and employee engagement.

- ☐ Conduct monthly safety meetings, refreshers, or toolbox talks focused on forklift best practices.
- ☐ Empower employees to report safety concerns anonymously or through dedicated channels.
- ☐ Encourage near-miss reporting to prevent future accidents.
- ☐ Recognize and reward safe behavior to build a culture of accountability.
- ☐ Involve leadership in walk-throughs and public commitment to safety.

Culture Wins: When operators feel ownership of safety—not fear—they make better decisions in real time.



TAKE THE NEXT STEP

If you're managing more than a few operators or sites, manual compliance tracking will eventually break.

CertifyMe.net automates everything:

1. Certification tracking
2. Renewal alerts
3. OSHA-ready documentation
4. Role-based dashboards

No spreadsheets. No panic when inspectors show up.

Disclaimer: This document is for informational purposes only and does not constitute legal advice. Always refer to official OSHA documentation and consult with legal or compliance professionals for full regulatory guidance.