

TRI-ENERGY SERVICES LTD.

Forklift Operator Competency Assessment

Per Powered Mobile Equipment Policy — Operator Training & Operator Responsibilities (Page 136)

Worker Name: _____	Employee ID: _____
Date: _____	Site / Location: _____
Equipment Type: _____	Unit / Asset #: _____
Make / Model: _____	Year: _____
Experience (Yrs / Mo): _____	☐ Initial ☐ Recertification
Assessor Name: _____	Assessor Position: _____

SECTION A - Operator Training Requirements

Confirm each requirement from the Operator Training section of the policy before the worker is authorized to operate a forklift.

Yes No	Requirement	Comments
☐ ☐	Is trained on in-house training to safely operate the equipment.	
☐ ☐	Has demonstrated competency in operating the equipment to a competent worker designated by Tri-Energy Services Ltd.	
☐ ☐	Is trained to perform all inspections on the equipment.	
☐ ☐	Is trained with proper fueling procedures.	
☐ ☐	Is familiar with the equipment's operating instructions, including manufacturer specifications.	
☐ ☐	Is instructed on taking into account the conditions of the workplace.	
☐ ☐	Is authorized by Tri-Energy Services Ltd. to operate the equipment.	

SECTION B - Operator Responsibilities

Confirm the worker understands and agrees to the following operator responsibilities.

Yes No	Requirement	Comments
☐ ☐	Reports to Tri-Energy Services Ltd. any conditions affecting the safe operation of the equipment.	
☐ ☐	Operates the equipment safely.	
☐ ☐	Maintains full control of the equipment at all times.	
☐ ☐	Uses seat belt and other safety equipment.	
☐ ☐	Ensures that passengers use seat belts and other safety equipment.	
☐ ☐	Keeps the cab/floor free of materials, tools, or other objects that could interfere with the operation of the controls or create a tripping or other hazard.	

SECTION C - Practical Forklift Skills Evaluation

Evaluation Rating: A = Acceptable, U = Unacceptable. Mark each attempt column; use N/A where a step does not apply, and note details under Trainer Comments below.

Requirement	1st Attempt	2nd Attempt	3rd Attempt	N/A	Comment
Equipment Pre-Use Inspection					
Inspects work area for hazards and obstructions.					
Enters and exits the equipment using three points of contact.					
Checks tires/wheels for wear, damage, and correct inflation.					
Tests horn for proper function.					
Tests lights and warning beacons for proper function.					
Checks battery condition and connections (electric units).					
Checks controls and gear shift for smooth, correct operation.					
Inspects the lift system: forks, mast, chains, cables, and load limit switches for damage.					
Checks brake fluid and radiator fluid levels.					
Checks steering for proper function.					
Inspects hydraulic system for leaks.					
Inspects fuel system for leaks (combustion units).					
Inspects overhead guard for damage.					
Confirms gauges are present and functioning.					
Confirms capacity/data plate is attached, legible, and matches attachment/load rating.					
Confirms operator's manual is present on the equipment.					
Checks seat belt condition and function.					
Propane units only: confirms tank is locked down and free of rust, corrosion, or damage.					
Checks engine oil level.					
Checks transmission fluid level.					
Confirms nameplates, labels, and safety markings are in place and legible.					
Inspects exhaust system for sparks or flames.					
Confirms equipment is clean and free of trash, excess oil, and grease.					
Sets park brake before dismounting after inspection.					
Controls and Gauges					
Identifies and explains all gauges, indicators, and switches.					

Requirement	1st Attempt	2nd Attempt	3rd Attempt	N/A	Comment
Understands correct use and location of the data plate.					
Understands the function of all operating controls.					
Start-Up Procedure					
Adjusts seat and fastens seat belt.					
Visually confirms the area is clear of personnel before starting.					
Confirms transmission/directional control is in neutral before starting.					
Starts engine / powers on per manufacturer procedure.					
Performs park brake and service brake function test.					
Completes pre-use inspection log.					
Basic Operating Procedures					
Moves forward and reverse with full control.					
Steers smoothly at a speed appropriate to conditions.					
Performs a shoulder check / uses mirrors before reversing.					
Sounds horn at intersections, doorways, and blind corners.					
Maneuvers safely in confined areas and around pedestrians.					
Maintains a safe travel speed at all times.					
Load Handling					
Understands the maximum rated lifting capacity and load centre.					
Approaches the load squarely and adjusts forks for balance.					
Raises the load and tilts the mast back to cradle it.					
Travels with forks/load carried low and mast tilted back.					
Travels safely with a load on a grade or ramp.					
Places and retrieves loads safely, including at height.					
Shutdown Procedure					
Parks in a designated safe area.					
Lowers forks fully to the ground.					
Neutralizes controls.					
Sets park brake.					
Fueling and Battery Charging					
Shuts off engine/motor before fueling or connecting charger.					

Requirement	1st Attempt	2nd Attempt	3rd Attempt	N/A	Comment
Keeps a fire extinguisher accessible nearby.					
Follows safe fueling / charging practices.					
Cleans up any spills immediately.					

TRAINER COMMENTS

OVERALL ASSESSMENT

Evaluation Results: ☐ Successful ☐ Unsuccessful - Further training required

SIGN-OFF

Worker Name and Signature: _____ Date: _____

Assessor Name and Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____