

PIT Operator Evaluation Guide



This guide is built around what actually predicts whether an operator passes your evaluation and performs on Day 1.

From **our T3s, who have certified 73,000+ operators**, and **Certified Master Safety Trainer Guy Snowdy**, we've assembled a real world guide for key PIT operator assessment areas.

8 Assessment Areas

1 Equipment-Specific Familiarity

Can the operator locate and correctly operate the controls on your specific truck type – not just “a forklift”? SD propane, reach trucks, EPJs, and turret trucks all operate differently. Familiarity with one doesn't transfer automatically.

Under OSHA 29 CFR 1910.178(l)(3), certification is employer-specific and equipment-specific – an operator certified on a sit-down counterbalanced truck is not automatically qualified to operate a stand-up reach truck or order picker. A supervisor walking someone through the controls doesn't constitute training, and certainly not certification.

2 Pre-Shift Inspection

This is the most preventable audit issue on the floor. Operators who skip or rush the pre-shift inspection create compliance exposure and incident risk before the shift even starts. **A qualified operator knows the inspection cold and takes it seriously.**

3 Load Handling and Stability

Understanding the stability triangle isn't optional; it's a critical foundation. An operator who doesn't know the load limits of the equipment they're operating is a liability. This should be demonstrated, not assumed from a resume.

Forklift rollovers are the leading cause of PIT fatalities, accounting for 22–25% of all forklift-related deaths, and the majority involve operators who were either untrained on stability principles or simply ignored them under production pressure. Turning with an elevated load is one of the most common fatal mistakes.

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Data Plate Comprehension

The data plate tells the operator everything they need to know about safe load capacity. Operators who can't read or interpret it correctly are operating blind. It's a basic check that reveals a lot.

Attachments like clamps and sideshift change a truck's rated capacity and most operators don't know that. An operator using a clamp attachment who is applying the truck's base capacity rating is overloading the equipment without realizing it. The data plate, and how attachments modify it, should be explicitly verified during evaluation.

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Situational Awareness

Does the operator actively manage their environment, such as pedestrian traffic, blind corners, ramps, and dock edges, or are they focused only on the load? Awareness is a behavior, and it shows immediately during validation.

Pedestrian collisions are the second leading cause of forklift fatalities. Over 20% of forklift accidents involve an employee or pedestrian being struck. The behaviors that prevent them—horn use at intersections, slowing at blind corners, yielding right-of-way, traveling in reverse when a load blocks forward vision—are observable during evaluation. An operator who doesn't do these things in a controlled validation setting won't do them under production pressure either.

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SOP Task Alignment

Generic forklift training doesn't account for your specific workflows. Operators need to understand the task at hand not just how to operate equipment in the abstract.

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Coachability During Evaluation

How an operator responds to feedback during validation predicts how they'll perform on your floor. Do they accept correction and adjust? Or do they get defensive? Coachability is one of the strongest predictors of long-term success and retention.

OSHA's own standard reinforces this: refresher training is required when an operator is observed operating unsafely, which means the ability to receive and act on correction isn't just a soft skill, it's built into the compliance framework. An operator who resists feedback during evaluation is telling you something about what happens when no one is watching.

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Documentation Readiness

Can the operator's certification be produced, verified, and defended if asked? Records that exist but can't be located are nearly as problematic as records that don't exist at all.

OSHA 29 CFR 1910.178(l)(6) is explicit on what must be documented: operator name, training date, evaluation date, and the name of the person who performed the training or evaluation. An OSHA compliance officer may speak directly with your operator to gauge the effectiveness of training, meaning "we did it" isn't a defense. The documentation has to exist, and the operator has to demonstrate the training actually worked.