



CDF Training LLC

Powered Mobile Equipment & Forklift Safety Workbook

Course: OSHA PME & Forklift Safety

Company: CDF Training LLC

Participant Name: _____

Date: _____ **Location:** _____

How This Workbook Works

1. **Watch the training video first.**
2. Use this workbook to **check your understanding** and think through real situations.
3. Complete **all sections** before your CDF Training instructor arrives.
4. Bring this workbook with you for the **written test and practical evaluation.**

This workbook reinforces what you've already learned. It is **not** the final exam.

Section 1 – Course Outcomes & Operator Responsibilities

(Relates to slides: Course Outcomes, Knowledge of Rules & Safe Practices)

Quick Reminder

- You are responsible for **knowing and following** forklift/PME rules.
- Safe operation protects **you, your coworkers, and equipment.**

Workbook Activity 1

1. In your own words, why is **PME / forklift safety** important to you?
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-



2. Circle **all** that are operator responsibilities:

- a) Knowing safe operating procedures
- b) Choosing when to follow rules
- c) Reporting unsafe conditions
- d) Performing pre-use inspections

My choices: _____

3. Write one thing you will **personally do every shift** to operate more safely:

Section 2 – Authorized vs. Certified

(Relates to slide: Authorized vs Certified)

Quick Reminder

- **Training + Evaluation + Employer Authorization** = you can operate at that site.

Workbook Activity 2

1. Fill in the blanks:

To operate PME/forklifts at work I must be _____, _____, and _____.

2. True or False:

Once I pass this course, I can operate any forklift anywhere I want.

True False

3. Who has the final say on whether you're allowed to operate equipment at your job site?



Section 3 – General Safety Rules & Guidelines

(Relates to slides: General Safety Rules & Guidelines)

Quick Reminder

- No **horseplay**.
- No operating under the **influence of drugs or alcohol**.
- Follow **site rules, signage, and speed limits**.

Workbook Activity 3

Put an **X** beside the behaviors that are **NOT allowed**:

- Racing another operator
- Using the seat belt
- Letting someone ride on the forks
- Reporting near-misses
- Driving while angry or distracted
- Driving at a walking speed

From the list above, write down **two unsafe behaviors** you have seen or could imagine happening:

1. _____
 2. _____
-

Section 4 – Hazard Assessment & Housekeeping

(Relates to slides: Hazard Assessment & Control, Industry Incidents, Housekeeping, Onsite Hazards & Working Conditions)

Quick Reminder

- Look for hazards **before** you start driving.
- Good housekeeping reduces **struck-by, slip, trip, and fall** incidents.



Workbook Activity 4

1. List **three hazards** you might encounter where you work or will work:
 - Ground/Surface Hazard: _____
 - Pedestrian/Traffic Hazard: _____
 - Visibility/Lighting Hazard: _____
2. Circle which one is the **highest risk** in your opinion and explain why:

3. Write **one housekeeping action** that would immediately improve safety in your work area:

Section 5 – Powerlines & Electrical Hazards

(Relates to slides: Affected Powerlines, Forklift Electrical Hazards)

Quick Reminder

- Forks, masts, and booms can **conduct electricity**.
- Maintain required **clearance** from powerlines and overhead hazards.

Workbook Activity 5

1. Write down the **minimum clearance** you must keep from powerlines (from the video/slides):
Clearance: _____
2. Check the boxes that could be electrical hazards for forklifts/PME:
 - Low overhead powerlines
 - Metal door tracks
 - Overhead sprinkler pipes
 - Raised dump bodies near lines



3. If your equipment contacts a powerline, what should you do **first** (if it's safe to remain)?
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Section 6 – Escaping an Electrified Area

(Relates to slide: Escaping Area Affected by Electricity)

Quick Reminder

- Only exit the machine if you are told to **and** staying inside is more dangerous (e.g., fire).
- To exit: **jump clear**, land with feet together, then shuffle/hop away.

Workbook Activity 6

Fill in the blanks with the correct word:

1. When exiting, you should (**jump / step**) clear so your body is not touching the machine and ground at the same time.
 2. You should land with your **feet** _____ to reduce step potential.
 3. You should (**run / shuffle or hop**) away from the machine.
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Section 7 – Battery Safety & Refueling Basics

(Relates to slides: Battery Safety Procedures, Safety Precautions, Compressed Gas Forklifts)

Quick Reminder

- Charge and refuel in **approved, ventilated areas**.
- No **smoking, sparks, or open flames**.
- Wear proper **PPE** when handling batteries.



Workbook Activity 7

1. Circle all that apply for **battery charging areas**:

- a) Good ventilation
- b) Sparks and open flames allowed
- c) Eye/face protection available
- d) Acid spill kit available

My choices: _____

2. For **propane or other gas forklifts**, list two safe practices during cylinder change or refueling:

- _____
- _____

3. True or False: It's okay to leave the engine running while quickly "topping off" fuel.

True False

Section 8 – Communication & Sharing the Workspace

(Relates to slides: Communication, Sharing the Workspace)

Quick Reminder

- Use your **horn, eye contact, and signals**.
- Never assume pedestrians see or hear you.

Workbook Activity 8

1. At intersections and blind corners, what **two things** should you always do?

- _____
- _____



2. Match the action to the correct person (write O for Operator, P for Pedestrian, B for Both):

- Look both ways before crossing travel paths
- Use the horn at intersections
- Make eye contact when possible
- Stay out of marked forklift-only lanes

3. Describe a time (real or imagined) when communication could prevent a serious incident:

Section 9 – Surfaces, Slopes & Ramps

(Relates to slides: Surfaces & Slope)

Quick Reminder

- Wet, muddy, icy, or loose surfaces affect **traction and stopping distance**.
- Follow rules for **traveling up and down ramps** with and without loads.

Workbook Activity 9

1. On a ramp **with a load**, the load should face:

- a) Downhill
- b) Uphill

My answer: _____

2. On a ramp **without a load**, the forks should generally face:

- a) Downhill
- b) Uphill

My answer: _____



3. List two hazards related to surfaces/slopes where you might work:

- _____
 - _____
-

Section 10 – Docks, Trailers & High-Traffic Areas

(Relates to slides: Docks/High Traffic, Loading & Unloading)

Quick Reminder

- Check that **trailers are secured**, wheels chocked, and dock plates rated.
- Expect **people, pallet jacks, and other traffic** in these areas.

Workbook Activity 10

1. Before driving onto a trailer with a forklift, you must check at least:

- The truck/trailer brakes are set or wheels are chocked
- Dock plate is in place and rated for the total weight
- Floor condition of trailer
- The radio station you want

Cross out the one that does **NOT** belong: _____

2. In your own words, describe why dock edges are so dangerous:

3. Write one specific rule you will follow when operating in high-traffic areas:

Section 11 – Stability & Center of Gravity

(Relates to slides: Center of Gravity)

Quick Reminder

- The machine and load have a **combined center of gravity**.
- When that moves outside the **stability triangle**, tip-over risk goes way up.



Workbook Activity 11

1. Draw a quick triangle below and mark where the **center of gravity** should be for a stable forklift/loader. (You don't have to be an artist.)

Triangle sketch:

2. List two things that **move the center of gravity toward danger**:

- _____
- _____

3. True or False:

If the machine “feels fine,” it’s okay to lift a load above the rated capacity once in a while.

True False

Section 12 – Major Components & Attachments

(Relates to slides: Zoom-Boom Major Components, 10 Major Components, Various Attachments)

Quick Reminder

- You must know your machine’s **major components**.
- Attachments can **change capacity and load center**.

Workbook Activity 12

1. Label these parts (write your answers):

- Structure that protects the operator in a rollover: _____
- Device used to lift/move the load (forks, bucket, etc.): _____
- Part that extends on a zoom-boom/telehandler: _____



2. List two different attachments you saw in the training:

- _____
- _____

3. Why is it dangerous to use an attachment without checking the capacity information?

Section 13 – Load Handling & Situational Awareness

(Relates to slides: Load Handling, Situational Awareness)

Quick Reminder

- Keep the load **low and stable** while traveling.
- Your “situational awareness” is your mental picture of **everything around you**.

Workbook Activity 13

1. Fill in the blanks:

When traveling with a load, keep the forks/attachment about ____ to ____ inches off the ground and tilt the load slightly _____.

2. Check all actions that show good situational awareness:

- Looking ahead and scanning
- Using your phone while driving
- Watching blind spots and mirrors
- Anticipating where pedestrians may appear

3. Scenario: You are backing up with a tall load. You cannot see clearly.

- What should you do before continuing?



Section 14 – Parking, Shutdown & Maintenance

(Relates to slides: Parking, Shutdown and Securing; Maintenance (OEM))

Quick Reminder

- Always **lower the forks/attachment**, set the **parking brake**, and **shut down** properly.
- Maintenance should follow **OEM recommendations**.

Workbook Activity 14

1. Number the steps in the correct order (1–4) for leaving the equipment unattended:

- __ Turn off engine and remove key
- __ Lower forks/attachment to the ground
- __ Set parking brake
- __ Bring machine to a complete stop

2. Why is it unsafe to leave forks or attachments raised when parked?

3. True or False:

It's okay to make small “repairs” or adjustments you're not trained/authorized for if you think it helps.

True False

Section 15 – Pre-Use Inspection & Reporting Deficiencies

(Relates to slides: PME Inspection / Reporting Deficiencies, Pre-Use Procedures, Forklift Inspection Talking Points)

Quick Reminder

- OSHA expects the truck to be **examined before being placed in service**.
- If it's not safe, **tag it out and report it**.



Workbook Activity 15

1. Circle **five** items that must be checked during a pre-use inspection:

- Horn
- Seat belt
- Cup holder
- Forks/attachment condition
- Tires and wheels
- Steering and brakes
- Paint color
- Hydraulic hoses/cylinders

2. If you find a serious defect (e.g., no brakes, cracked forks), what are the **two things** you must do?

- _____
- _____

3. Who do you report equipment defects to at your worksite (job title or name)?

Section 16 – Operator Rights & Final Commitment

(Relates to slides: Operators Rights, Written Exam, Final Assessment Outside)

Quick Reminder

- You have the right to **safe equipment, proper training, and to refuse unsafe work.**
- You will complete a **written exam** and a **hands-on assessment** with CDF Training.



Workbook Activity 16

1. List **two rights** you have as an operator:

- _____
- _____

2. List **two responsibilities** you have as an operator:

- _____
- _____

3. Personal Commitment

Complete this sentence in your own words:

“When I operate PME or a forklift, I commit to...”

Participant Acknowledgment

I confirm that I have watched the PME/Forklift Safety training video and completed this workbook honestly to the best of my ability. I understand that I must still complete a **written exam** and a **practical skills evaluation** with a CDF Training instructor before being authorized to operate equipment at work.

Participant Name (print): _____

Participant Signature: _____ **Date:** _____