

# FORKLIFT TRUCK LEARNER WORKBOOK

## TRAINER'S MARKING GUIDE WITH MODEL ANSWERS

TLILIC0003

Licence to operate a forklift truck



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# Learning and Practical Tasks

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If you can, have your students train with other learners. Learning is more powerful when you and your learners share ideas and experiences. Below is a brief explanation of how you can use the training tasks in this workbook. Please advise your students if they are to fill in tasks on their own at home or wait until they are in the training room with you.



## Theory training tasks

These tasks help the learner understand the underpinning knowledge to safely operate a forklift. To help them complete these tasks the learner can use the Information Book and speak to other learners and you, the licensed operator/trainer.



## Thinking questions

Thinking questions train your learner to think for themselves. For example, the Information Book does not directly state the answer.



## Practical training tasks

These tasks help the learner acquire the practical skills to safely operate a forklift. The tasks use high-risk equipment or machinery. Only a licensed operator/trainer can supervise the learner's practical training tasks.



## Review

At the end of each element in the workbook, the learner gets to review their training. The review gives the learner a chance to talk with classmates and you about what they learned. Sharing their learning experiences with others helps them learn.



## Review questions

You'll find the review questions on the Trainer's Resource CD. Give the questions to the learner toward the end of training to determine if they understand the information they have covered. You can ask your learner to fill in these questions alone or as a group.



## Review—practical tasks

The practical tasks handout is on the Trainer's Resource CD. There is one task for each element and the learner should do all tasks under your supervision.

# What is a forklift truck?

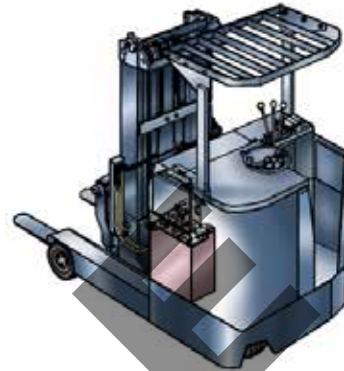
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A forklift is a powered industrial truck used to lift and move loads. It has a mast and an elevating load carriage with a pair of fork arms or other load-holding parts.

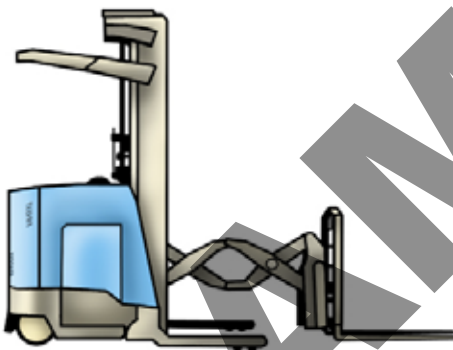
As you can see below, there are different types of forklifts. The most common forklift is the counterbalance truck.



**Counterbalance forklift truck**



**Reach truck  
(non-counterbalance) forklift**



**Double-deep reach truck**



**Truck mounted forklift truck**



**Rough terrain forklift truck**



**Articulated narrow aisle forklift truck**

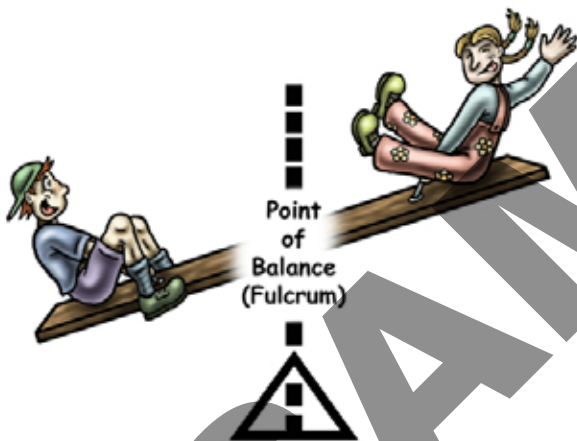
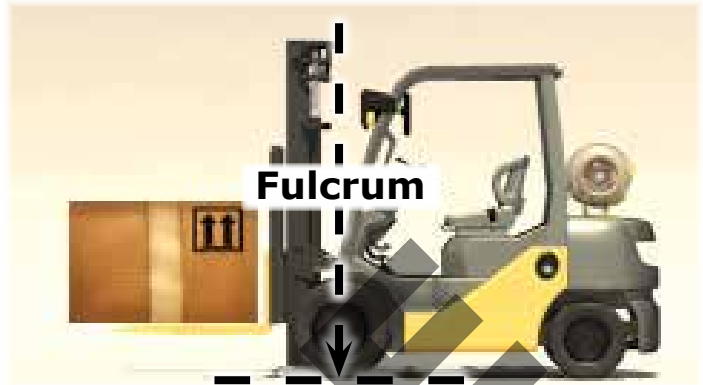
# Basic forklift concepts

## Point of balance (fulcrum)

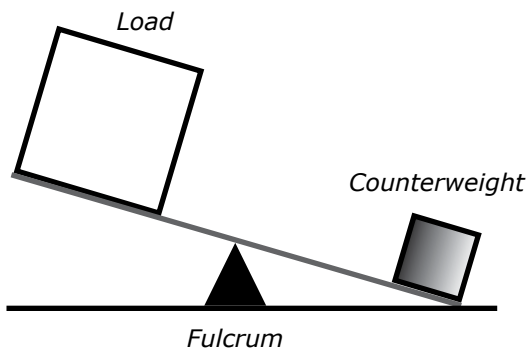
The most common forklift is the counterbalance type.

This means they carry the load on the front mounted tynes and use all the weight behind the front wheels to counterbalance the load.

The point of balance on a forklift is called the fulcrum. Think of it as a vertical line through the axle of the front wheel, where the line meets the ground.



Think of a counterbalance forklift truck as being like a see-saw. If you put too much weight on one end it tips over.



All the weight behind the point of balance acts as a counterweight.

# Plan Work



**Trainers please note:**

**The answers in this book are in no way conclusive and are to be used as a guide only. Use your own knowledge and experience to correct the variation of answers that may be given by learners.**



# Theory Training Task 1

Performance Criterion: 1.5

a) Give examples of hazards you should look for **before** you begin work.

## Above head height

Answer my include:

- powerlines
- overhead pipes
- trees
- buildings
- clearance height
- other obstructions

## Ground level to eye level

- other equipment
- machines
- people and pedestrians
- things in the path of travel
- blind corners
- enclosed or poorly ventilated spaces
- dimly lit areas
- other obstructions

## Ground level (and below)

- if the surface is stable and level
- if the surface is strong enough to support the weight of the forklift and loads
- if cables have been left lying around
- for spills or wet surfaces
- for any debris or rubbish
- drain/pit lids
- service covers/trenches
- loading dock edges



b) Tick any of these hazards you may have come across in past or present workplaces.

**Trainers: encourage your learners to place a tick beside hazards they have seen in their past or present places of employment.**

Performance Criterion: 1.7

## Choose the right forklift truck

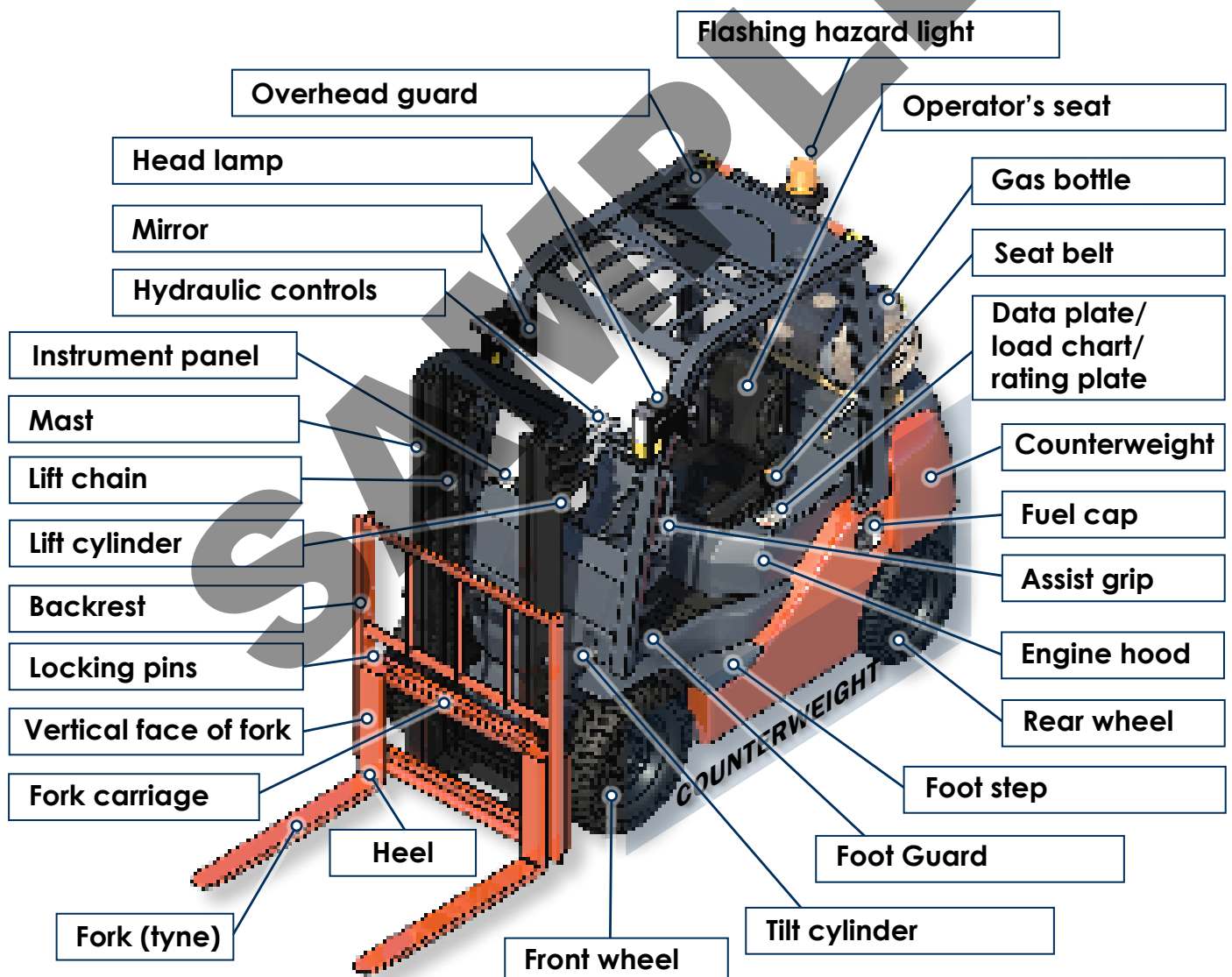
There are different types of forklift trucks. Depending on the job and the work area you may need to use a certain type of forklift truck. It's important to use the right type of forklift truck.



## Theory Training Task 17

Performance Criterion: 1.7

Label the common parts shown on the diagram below of a counterbalance forklift truck.







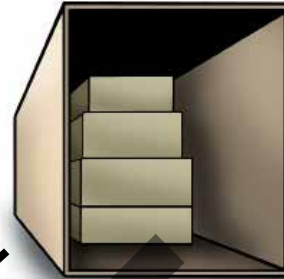
# Theory Training Task 20

Performance Criterion: 1.2, 1.3

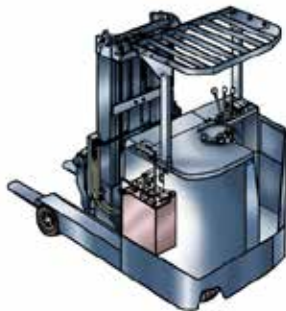
- a) Draw a line to match the forklift truck with the work area you think it is best suited for.



A four wheel drive (4WD) forklift



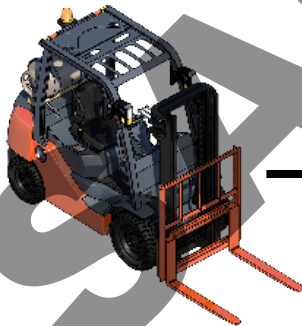
Enclosed space



A battery (electric) powered forklift



Elevated load destination



LPG powered forklift



Indoor work area



Telehandler or reach truck



Rough terrain





## Theory Training Task 29

Performance Criterion: 1.7

What do these safety signs mean? Draw lines to the matching information.



Emergency information sign. Tells you where to find exits, first aid facilities and equipment. First aid.

Regulatory sign – mandatory. You must do this. Wear the appropriate PPE.

Danger sign. Warns you of hazards that can harm you. Talk to the electricity company and ask them to isolate the electricity.

Fire sign. Used for putting out fires.

Regulatory sign – restriction. Speed limit is 50 km/h.

Hazard sign. Warns you of dangerous materials. Read the MSDS for the material.

# Conduct Routine Checks



**Trainers please note:**

**The answers in this book are in no way conclusive and are to be used as a guide only. Use your own knowledge and experience to correct the variation of answers that may be given by learners.**

Performance Criterion: 2.6

## Do a visual check

Before you use a forklift truck, do a visual check to make sure there aren't any problems. You or a workmate could be injured or killed if you have an accident caused by a faulty forklift.



## Theory Training Task 31

Performance Criterion: 2.6

- a) What is the purpose of a daily inspection checklist?

**To keep a record of maintenance and faults of a forklift truck.**

- b) List any three (3) checks that would be listed on a daily inspection checklist.

**Trainer's: This answer covers an extensive list. Please use your discretion when correcting this question.**



## Theory Training Task 32

Performance Criterion: 2.6

It is important to do a **visual check before** using a forklift truck. Place a tick next to the things you should be checking to ensure it is safe to use.

- For any leaks
- The colour of the forklift
- Safety devices are fitted and not damaged
- The seat is made out of comfortable leather
- Data plate is fitted and readable
- There is no Danger Tag attached
- Logbook and manuals are available
- That snacks are onboard in case you get hungry
- Any damage





## Theory Training Task 33

Performance Criterion: 2.6

Look at the diagram below. Describe the **structural checks** you would make and what you would look for when completing a visual check of the forklift.

The diagram shows a side view of a forklift with several callout boxes pointing to specific parts. Each box contains a list of checks to perform on that part. A large 'DRAFT' watermark is visible across the center of the image.

**Part name:**  
Mast assembly

**Check for:**  
Damage  
Leaks  
Lift and tilt system is okay

**Part name:**  
Forks/attachments

**Check for:**  
Damage  
Security  
Data plate

**Part name:**  
Hydraulic cylinders

**Check for:**  
Damage  
Leaks/cracks, bent rams  
Hoses & connections

**Area:**  
Under forklift

**Check for:**  
Damage  
Leaks  
Attached debris

**Part name:**  
Tyres

**Check for:**  
Damage/wear  
Pressure  
Wheel nuts fitted and tight



## Theory Training Task 46

Performance Criterion: 2.4

What important safety measures should you take when recharging batteries?

- **Use PPE - a face-shield and rubber gloves**
- **Charge in a well-ventilated area**
- **Do not smoke near the battery**



## Theory Training Task 47

Performance Criterion: 2.3

a) List things to check for in the gas system of a forklift truck.

- **The general condition of the system**
- **The security of the cylinder**
- **The pressure relief valve is positioned at the top**
- **The tank is still in date**
- **The compliance plate**

b) What do you think could happen if a faulty gas bottle is left in use?

**It could leak gas or explode.**



# Practical Training Task 3

Element 2 — Conduct Routine Checks - Performance Criterion 2.6, 2.8



**Trainers: Please advise your learners that this section MUST be performed under either your supervision or that of a licensed operator.**

Some students may be able to complete this section within their own workplace if properly supervised.

Complete a pre-start up check. See if you can find faults or damage on the forklift truck and mark the column on the right with the following symbols:

[✓] = OK    [✗] = Action needed    [NA] = Not applicable

Check load-capacity plate is fitted, legible and correct.	
Inspect forks for any signs of damage.	
Check tyres, belts and look for any leaks under the truck.	
Check mast and hydraulic cylinders, look for any leaks.	
Check all fluids: oil, transmission, hydraulics, battery, fuel, coolant...	
Gas bottle (if app) security, hose connections and gauge.	
Check condition and adjustment of seat and belt.	

Now start up the forklift truck.

Check all pedals and controls for smooth operation.	
Check brakes and parking brake for proper operation.	
Check lights, horn and reversing beeper.	
Any other visible damage or defects. List details:	

Chapter 2: Competent

Not yet competent

Signature (licensed operator/trainer) ..... Date.....



# Shift Load



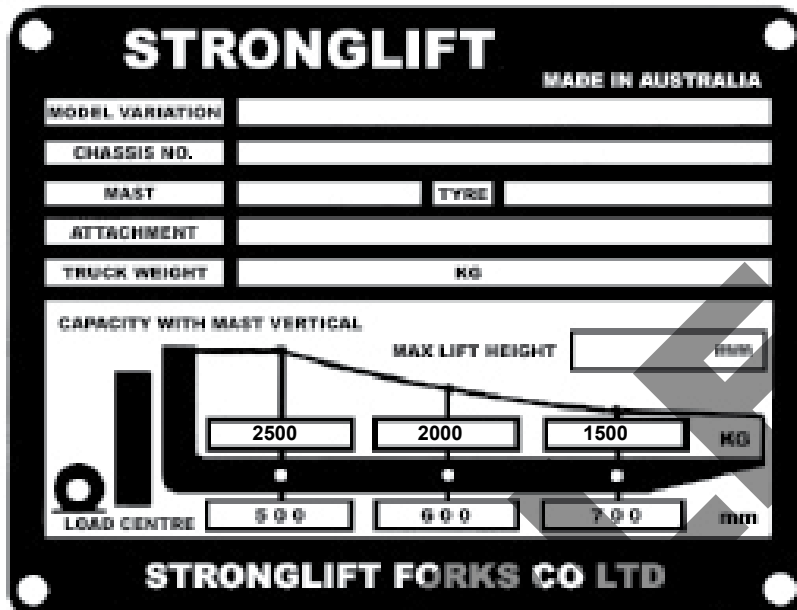
**Trainers please note:**

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# Theory Training Task 61

Performance Criterion: 1.3, 3.1

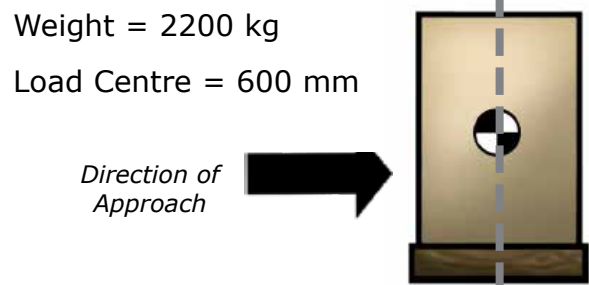


Data plate

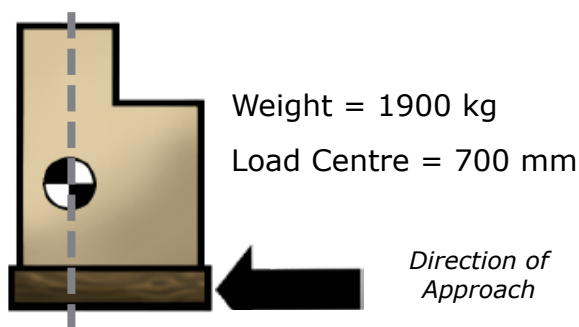
Look at the data plate picture above.  
Work out if the four loads shown below can be lifted.



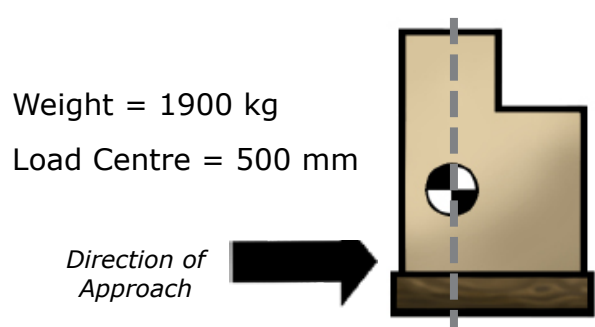
1. Yes



2. No



3. No



4. Yes



# Theory Training Task 70

Performance Criterion: 3.2

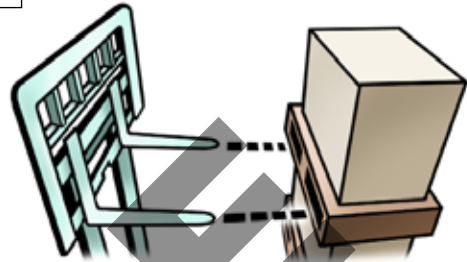
Place a number in each box to show the correct order in which you would **pick up** a load.

5



Check the area behind you is clear.

2



Raise or lower the forks to enter the pallet. Mast is vertical.

6



Move the forklift clear of the rack/stack and lower the load to correct travel height.

1



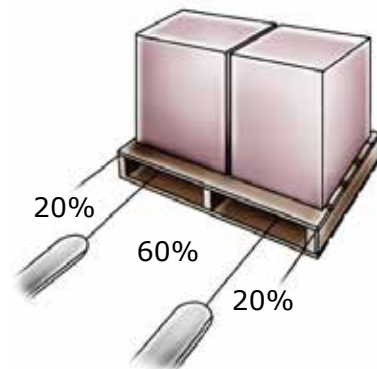
Position the forklift so you are directly in front of the load.

4



Keep the mast vertical.

3



Enter the pallet without scraping anything.



# Theory Training Task 73

Performance Criterion: 3.4

Look at the **incorrect forklift use** over the following pages and answer the questions.

- a) This driver has decided to try and turn around whilst on a ramp. What is likely to happen?

**The forklift could become unstable and tip over.**

.....  
.....  
.....



- b) This driver has a flat tyre. If he keeps driving with it this way what could happen?

**The forklift might tip over as it is now unstable.**

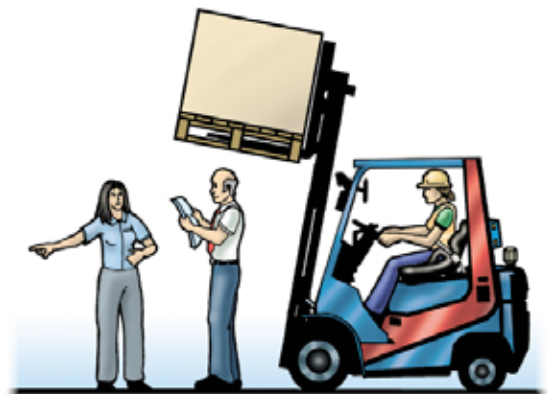
.....  
.....  
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- c) This load is being raised over people. What could happen?

**The load could fall on them.**

.....  
.....  
.....

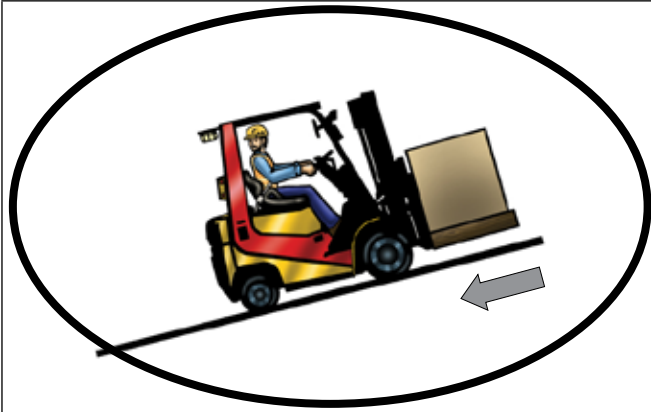




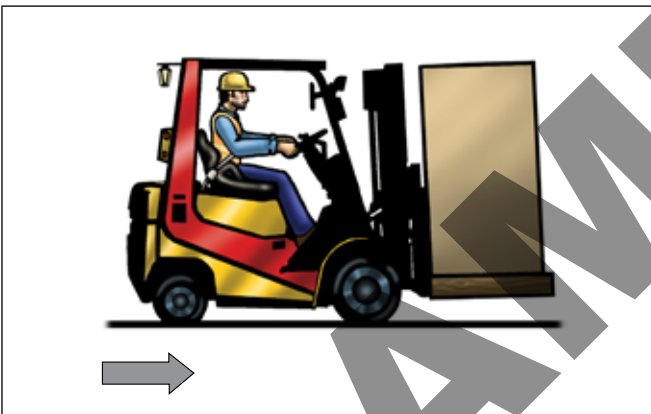
# Theory Training Task 76

Performance Criterion: 3.4

Place a circle around the **correct way** to move a load.



Travelling down a ramp

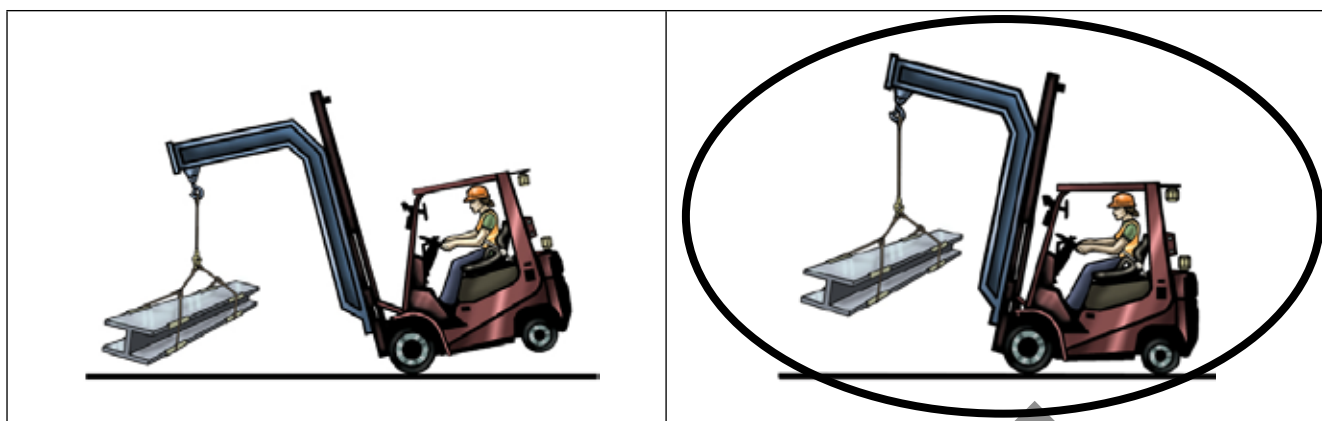


Moving an oversized load



Turning a corner

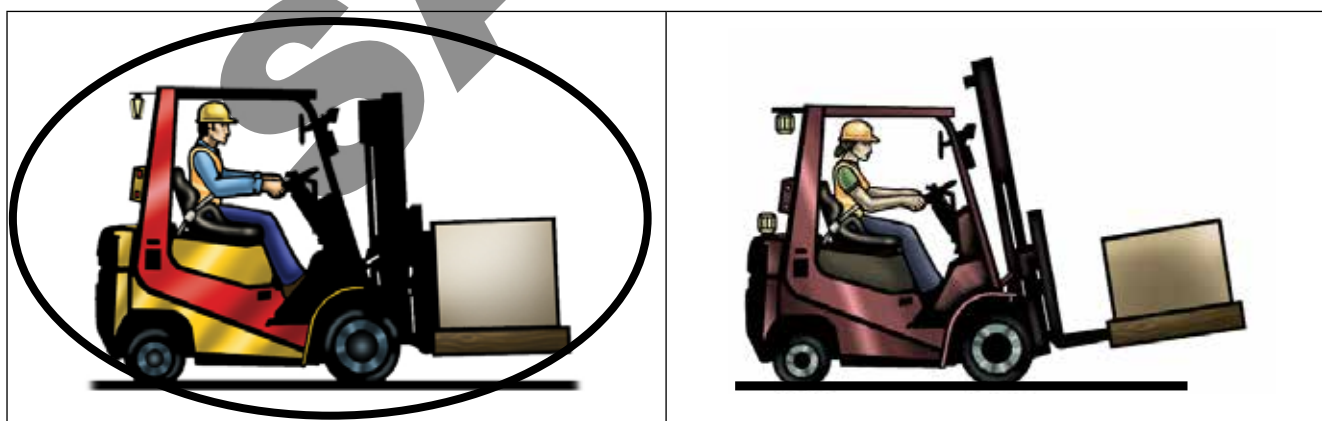
Circle the correct way to move a load....



Using a jib attachment



Transporting bagged goods



Position of the load



# Theory Training Task 82

Performance Criterion: 3.4





a) Circle the correct statement.

Jumping from a tipping forklift truck is dangerous because you could become trapped underneath.

Jumping from a tipping forklift truck is safe because you will be out of the way.



b) Label the important things you must do if the forklift you are driving begins to tip over.

1. 	<b>Lean away from the direction the forklift is tipping.</b> ..... .....
2. 	<b>Hold on to the steering wheel.</b> ..... .....
3. 	<b>Brace your feet.</b> ..... .....
4. 	<b>Remain in the forklift.</b> <b>DO NOT jump.</b> ..... .....



# Theory Training Task 83

Performance Criterion: 3.4

a) What should you do when the brakes go soft or fail?

**Pull up the handbrake gently to stop, lower the load, and warn people of the danger. Follow the tag out and reporting procedures.**

b) What should you do if your forklift tips over?

- 1. Lean away from the direction the forklift is tipping.**
- 2. Hold on to the steering wheel.**
- 3. Brace your feet.**
- 4. Do not jump from a forklift.**



c) What should you do if your forklift hits powerlines?

- Try and break contact with the powerlines.**
- If you can't break contact stay on the forklift.**
- Jump clear in an emergency (for example, fire).**
- Don't touch the forklift and the ground at the same time.**
- If leaving the forklift, hop or shuffle away.**
- Afterwards, have the forklift checked for damage.**





# Practical Training Task 4

Chapter 3 — Shift Load - Performance Criterion 3.2, 3.5

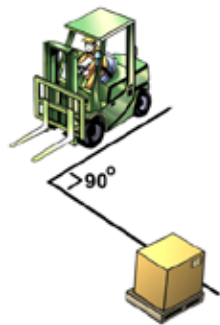


**Learners: This task must be done under the supervision of a licensed operator.**

Please wait for your trainer to advise you before attempting this task.

Make sure all operations are done at a safe speed.

1. Your trainer/licensed operator will provide you with a forklift parked at a right-angle to a load that has been placed on a pallet.



2. Turn and position the forklift truck.



3. Lower the forks and enter the pallet.



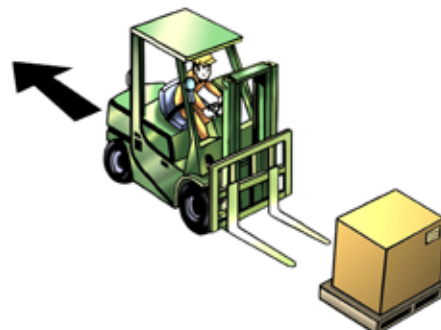
4. Raise the load so the forks are at a safe travel height for that particular load.



5. Lower the load to the ground.



6. Check behind you then exit pallet.

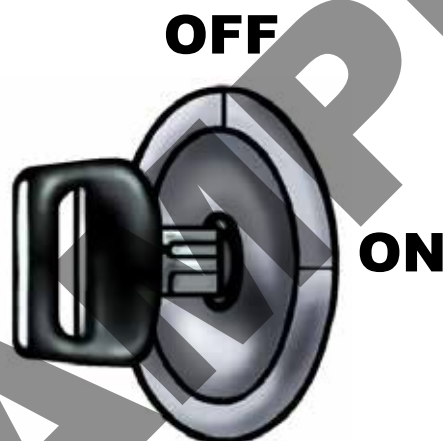


**Element 3: Competent**

**Not yet competent**

Signature (licensed operator/trainer) ..... Date .....

# Shut Down and Secure Forklift Truck



**Trainers please note:**

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# Theory Training Task 87

Performance Criterion: 4.1

Label the shutdown procedures below from 1 to 12 in the correct order you would do them.

<p><b>4</b></p>  <p>Apply hand/parking brake.</p>	<p><b>11</b></p>  <p>If you parked outside, secure the area or lock the gate so unauthorised people can't use the forklift.</p>
<p><b>6</b></p>  <p>Remove the key so unauthorised people can't use the forklift.</p>	<p><b>8</b></p>  <p>Shut off LPG gas cylinder valve (if required).</p>
<p><b>1</b></p>  <p>Park the forklift clear of hazards, in the designated secure area.</p>	<p><b>12</b></p>  <p>Make sure the access ways are clear for easy access to the forklift and worksite.</p>
<p><b>5</b></p>  <p>Turn off engine/power.</p>	<p><b>2</b></p>  <p>Lower the form arms to the ground so they aren't a hazard. Tilt the forks forward and down so they touch the ground.</p>
<p><b>10</b></p>  <p>Update records for forklift truck.</p>	<p><b>9</b></p>  <p>Connect battery to recharger unit (if required).</p>
<p><b>3</b></p>  <p>Correct transmission gear is selected.</p>	<p><b>7</b></p>  <p>Dismount using three (3) points of contact.</p>