

Forklift Driver Competency Review

Practical assessment of forklift operator competency and site authorisation

Employee: _____ Date: _____

Job Title: _____ Assessor: _____

Forklift Type: _____ Forklift ID: _____

Location: _____

1. Driver Authorisation

Confirm that the driver meets the organisation's requirements to operate a forklift on site.

- ☐ Holds a current forklift certificate — certificate renewed every 3 years
- ☐ Has written approval from the employer to operate a forklift on this site
- ☐ Holds a current Class F endorsement

Comments:

2. Pre-Start Inspection

The driver demonstrates that they can correctly inspect the forklift before use.

- ☐ Tyres / wheels
- ☐ Forks and fork locking devices
- ☐ Mast, chains and lifting components
- ☐ Hydraulics / leaks
- ☐ Steering
- ☐ Brakes
- ☐ Seatbelt / restraint
- ☐ Warning devices / horn
- ☐ Lights / beacon / reverse alarm
- ☐ Battery / fuel system
- ☐ Guards and overhead protection
- ☐ Load capacity / data plate
- ☐ General condition

Can the driver identify defects that would require the forklift to be taken out of service? ☐ Yes ☐ No

Comments:

3. Forklift Knowledge

The driver can explain or demonstrate their understanding of:

- ☐ Forklift load capacity and load centre
- ☐ Forklift stability principles
- ☐ Safe travelling speed

- ☐ Visibility limitations
- ☐ Travelling with a load
- ☐ Fork height when travelling
- ☐ Safe operation on ramps and slopes
- ☐ Pedestrian interaction and exclusion areas
- ☐ Safe parking and isolation
- ☐ What to do if the forklift is unsafe
- ☐ What to do following an incident or near miss

Assessment / comments:

4. Practical Driving Assessment

Starting & General Operation

- ☐ Conducts appropriate pre-start check
- ☐ Uses seatbelt / restraint correctly
- ☐ Starts and stops smoothly
- ☐ Maintains appropriate speed
- ☐ Maintains good observation
- ☐ Uses horn / warning devices appropriately
- ☐ Maintains safe clearance from structures and equipment

Manoeuvring

- ☐ Controls steering appropriately
- ☐ Reverses safely
- ☐ Checks blind spots
- ☐ Uses mirrors where fitted
- ☐ Maintains awareness of pedestrians
- ☐ Negotiates corners safely
- ☐ Operates safely in confined areas

5. Load Handling

- ☐ Approaches load squarely
- ☐ Positions forks correctly
- ☐ Fully engages the load where appropriate
- ☐ Checks load stability
- ☐ Keeps load within rated capacity
- ☐ Lifts and lowers smoothly
- ☐ Travels with load at a safe height
- ☐ Places load safely and securely
- ☐ Does not exceed forklift or load limitations

6. Workplace-Specific Operation

The driver demonstrates competence in the actual workplace environment.

- ☐ Understands site traffic routes
- ☐ Understands pedestrian controls

- ☐ Understands designated forklift areas
- ☐ Understands loading / unloading areas
- ☐ Understands warehouse / racking requirements
- ☐ Understands site-specific hazards
- ☐ Can safely operate around other vehicles and equipment
- ☐ Understands relevant emergency procedures

Workplace-specific observations:

7. Emergency / Abnormal Situations**What would you do if the forklift develops a fault?**

What would you do if a load becomes unstable?

What would you do if a pedestrian enters the operating area?

What would you do following a forklift incident?

8. Overall Competency & Actions

Assessment Area	Competent	Further Training	Not Competent
Pre-start inspection	☐	☐	☐
Forklift knowledge	☐	☐	☐
General driving	☐	☐	☐
Manoeuvring	☐	☐	☐
Load handling	☐	☐	☐
Workplace operation	☐	☐	☐

Overall Outcome

- ☐ Competent – authorised to operate
- ☐ Competent with conditions / additional supervision
- ☐ Further training required
- ☐ Not competent – do not operate until reassessed

Restrictions / additional controls:

Training or corrective actions required:

Reassessment date: _____

9. Sign-Off

Assessor

Name: _____

Signature: _____

Date: _____

Driver

I have participated in this competency review and understand any requirements or restrictions identified above.

Name: _____

Signature: _____

Date: _____

Guidance

This review should be completed by a person who is suitably experienced and competent to assess the operator. It should be used alongside the organisation's forklift training, authorisation and site-specific requirements.

Disclaimer

This Forklift Driver Competency Review is provided by Winsland as a general assessment aid only. The person conducting the assessment and the business using this form remain responsible for ensuring the assessment is appropriate to the forklift, operator, tasks and workplace, and for verifying that all relevant hazards and competency requirements have been addressed. Completion of this form does not, by itself, establish legal compliance or guarantee that an operator is competent in every circumstance. The form should be reviewed and adapted as necessary for the site and equipment. To the maximum extent permitted by law, the author and its directors, employees and contractors give no warranty that this checklist is complete or suitable for any purpose. They are not liable in contract, tort (including negligence), under statute or otherwise for any loss, damage or liability arising from its use.