



STATE OF NEW YORK  
DIVISION OF MILITARY AND NAVAL AFFAIRS  
**NEW YORK NAVAL MILITIA**  
330 OLD NISKAYUNA ROAD, LATHAM, NEW YORK 12110

NYNMINST 3501.4

**22 February 2022**

NEW YORK NAVAL MILITIA INSTRUCTION 3501.4

Subj: MATERIAL HANDLING EQUIPMENT (MHE) OPERATOR QUALIFICATION

Ref: (a) 29 CFR 1910.178; OSHA Forklifts  
(b) National Safety Compliance Training Booklet - Forklift Safety  
ISBN: 978-1-61946-623-4

Encl: (1) Personal Qualification Standard (PQS) for Material Handling  
Equipment Operator  
(2) NYNM FORM 1505 Material Handling Equipment Operator License

1. Purpose. This instruction promulgates the qualifications to become designated as a Material Handling Equipment Operator, and includes the Personnel Qualification Standard (PQS) for members to attain this designation.

2. Discussion. A qualified Material Handling Equipment Operator is an individual who has demonstrated the minimum standards and ability to operate material-handling equipment (i.e. forklifts) safely and efficiently. In accordance with references (a) and (b), this program will:

a. Ensure that each forklift operator is competent to operate a forklift safely, as demonstrated by the successful completion of the training and evaluation specified below.

b. Prior to permitting a service member to operate a forklift (except for training purposes), supervisors shall ensure that each operator has successfully completed this or equivalent training

c. Trainees may operate a forklift only:

(1). Under the direct supervision of persons who have the knowledge, training, and experience to train operators and evaluate their competence; and

(2). Where such operation does not endanger the trainee or other service members.

d. Training shall consist of a combination of formal instruction, practical training, and evaluation of the operator's performance in the workplace.

e. Training program content. Forklift operators shall receive initial training in the following topics, except in topics that the

unit command can demonstrate are not applicable to safe operation of the forklift in the workplace.

(1). Forklift-related topics:

- (a) Operating instructions
- (b) Warnings and precautions for the types of forklift the operator will operate
- (c) Differences between the forklift and the automobile.

(2). Forklift controls and instrumentation:

- (a) Where they are located, what they do, and how they work.
- (b) Engine or motor operation.
- (c) Steering and maneuvering.
- (d) Visibility (including restrictions due to loading).
- (e) Fork and attachment adaptation, operation, and use limitations.
- (f) Vehicle capacity.
- (g) Vehicle stability.
- (h) Any vehicle inspection and maintenance that the operator will be required to perform.
- (i) Refueling and/or charging and recharging of batteries.
- (j) Operating limitations.
- (k) Any other operating instructions, warnings, or precautions listed in the operator's manual for the types of vehicle that the service member is being trained to operate.

(3). Workplace-related topics:

- (a) Surface conditions where the vehicle will be operated.
- (b) Composition of loads to be carried and load stability.
- (c) Load manipulation, stacking, and unstacking.

(d) Pedestrian traffic in areas where the vehicle will be operated.

(e) Narrow aisles and other restricted places where the vehicle will be operated.

(f) Hazardous locations where the vehicle will be operated.

(g) Ramps and other sloped surfaces that could affect the vehicle's stability.

(h) Closed environments and other areas where insufficient ventilation or poor vehicle maintenance could cause a buildup of carbon monoxide or diesel exhaust.

(i) Other unique or potentially hazardous environmental conditions in the workplace that could affect safe operation.

3. Action. Service members seeking to become designated as a Material Handling Equipment Operator under this instruction must complete the requirements found in enclosure (1), including passing a final qualification examination.

a. Performance Qualifications Standards. Enclosure (1) includes those member items that must be completed prior to qualification. Qualification Signatories are those personnel whose experience and qualification make them eligible to approve the performance of a candidate.

b. MHE check ride. The requirement for the demonstration check ride ensures that the individual member is fully capable of safely operating material handling equipment. A designated qualifier must observe the performance of the member to become certified.

c. Upon satisfactory completion of PQS and check ride, a certificate of completion and appropriately completed MHE license (NYNM FORM 1505) is issued to the member. See enclosure (2). A record of the accomplishment will be forwarded to the member's component headquarters for personnel record entry.

  
W. T. SMITH

**Personal Qualification Standard for Material Handling Equipment Operator**

**Trainee Name:**

**PURPOSE:** This qualification program is designed to cover basic forklift operations, including loading, unloading, tiering, getting on and off, and driving (forward, reverse, turns).

**ACTIONS:** Complete the below tasks under qualified supervision. Upon completion of the task list, conduct a qualification check ride of MHE in order to be certified as Material Handling Equipment Operator.



ITEM NUMBER	PHASE	TASK	SIGNED	DATE
1	Fundamentals/Systems	Demonstrate proper procedures for getting on/off MHE		
2	Fundamentals/Systems	Demonstrate location and purpose of control levers and pedals		
3	Fundamentals/Systems	Conduct pre-operational inspection		
4	Fundamentals/Systems	Demonstrate understanding of nomenclature		
5	Fundamentals/Systems	Demonstrate proper safety procedures while operating		
6	Fundamentals/Systems	Demonstrate understanding of capacity plate information		
7	Fundamentals/Systems	Demonstrate purpose of a ground guide		
8	Fundamentals/Systems	Demonstrate awareness of required clearances above, behind, forward, and on each side of MHE		
9	Operations	Conduct turning maneuvers in both forward and reverse		
10	Operations	Demonstrate safe speed		
11	Operations	Demonstrate proper loading and unloading procedures		
12	Operations	Demonstrate proper parking of MHE in confined area		
13	Operations	Demonstrate proper control of forks		
14	Operations	Demonstrate proper operation of MHE when handling pallets		
15	Operations	Demonstrate loading - to lift pallet		
16	Operations	Demonstrate unloading - to place pallet		
17	Operations	Demonstrate proper control of mast, including left and right turns, tilt, and up/down features		

**FINAL CERTIFICATION:**

\_\_\_\_\_ has completed all tasks and satisfactorily conducted a Material Handling Equipment check ride, and is certified for independent forklift operations.

\_\_\_\_\_/\_\_\_\_\_  
Signature and Name of Qualified Examiner / Date of Certification

New York Naval Militia MHE Operator License  
 NYNM FORM 1505

New York Naval Militia MHE Operator License		New York Naval Militia MHE Operator License		
Name of Operator	Name of Issuing Official	Date of Examination/Re-examination	Name of Examiner	Exam Location
	Official Code Number			
Signature of Operator	Signature of Issuing Official			
Operator Title/Position	Date of Issue			
<p>The above named Operator meets the OSHA standards of 29 CFR 1910.178(l)(1), and has been certified to operate Material Handling Equipment (MHE) by the New York State Naval Militia, a component of the New York State Division of Military &amp; Naval Affairs.            Re-examinations are required every three years.</p>				
<p>NYNMFORM 1505 (11/20) Front            Substitute NAVFAC 11240/10</p>		<p>NYNMFORM 1505 (11/20) Reverse            Substitute NAVFAC 11240/10</p>		
				

The two-sided paper copy is sized and folded to fit into a member's wallet.