



## Department of Public Safety & Environmental Health

**Subject: Operator Permit Requirements for Operating Permitted Equipment**

**Date: May 15, 2006**

**Revision: 01**

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### SUMMARY

All operators of Permitted Equipment are required to have a permit issued by the Department of Public Safety & Environmental Health's Environment Health & Safety (EHS) Manager validating they have received appropriate training in the safe operation of the equipment. This document describes the procedures in issuing the permit. Training information is included in the appendices.

### SCOPE

This guideline applies to all operators of Permitted Equipment used for non-agricultural, material handling, maintenance, and construction operations; including aerial work platforms, mobile equipment, powered industrial trucks, and tractors.

### REFERENCE REGULATIONS

[Aerial Work Platform, MIOSHA Construction Safety Standard, Part 32.](#)

[Mobile Equipment, MIOSHA Construction Safety Standard, Part 13.](#)

[Powered Industrial Trucks \(Michigan Occupational Safety & Health General Industry Standard, Part 21\).](#)

[Tractors, MIOSHA General Industry Standard, Part 22.](#)

### DEFINITIONS

*Aerial work platforms* - equipment that has a primary function of elevating personnel, together with their tools and necessary materials, on a platform that is mechanically positioned. Examples include vehicle-mounted devices such as: extension boom aerial devices, aerial ladders, actuating boom aerial devices and vertical towers, manually propelled elevating work platforms, boom-supported elevating work platforms, and self-propelled elevating work platforms.

*Designated Trainer* - University of Michigan-Dearborn (UMD) employee who has been designated by his/her department to conduct training in the safe use of equipment. Trainers will have experience, skill, and knowledge in operating the Permitted Equipment, and have a valid permit issued by the University.



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*Mobile Equipment* - material-handling equipment used for such tasks as earthmoving, excavating, lifting, and hauling (other than powered industrial trucks). Examples include scrapers, loaders, crawler or wheel tractors, bulldozers, off-highway trucks, backhoes, and graders.

*Permitted Equipment* - University owned or leased equipment defined as an aerial work platform, mobile equipment, powered industrial trucks or tractor.

*Permitted Operator* - a University of Michigan-Dearborn employee who has been issued a permit by EHS to operate Permitted Equipment.

*Powered Industrial Truck* - a mobile, power driven vehicle used to carry, push, pull, lift, stack, or tier material. Examples include forklift trucks, high/low trucks, motorized hand trucks, industrial tractors, motorized hand rider trucks, and platform trucks.

*Tractor* - a 2- or 4- wheel drive vehicle with engine power greater than 20 horsepower.

### **RESPONSIBILITY**

#### Deans, Directors, and Department Heads

Ensure an environment where supervisors and other departmental personnel are encouraged to follow this guideline.

Designate an adequate number of trainers to train departmental employees in the safe use of permitted equipment.

#### Supervisors

Implement all aspects of this guideline by assuring the following: all University operators have received medical clearance, proper training, and have been issued a permit before operating the Permitted Equipment; all equipment is in proper working condition; and all operators perform a visual inspection before operating the equipment.

All employee injuries or illnesses are to be reported to Business Affairs within 24 hours of the incident via the [Work ~ Connection report form](#).



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### Designated Trainers

Be knowledgeable in the operation of Permitted Equipment in their unit; be familiar with all safety principles applicable to their operation; and provide training to employees as required.

### Operator

Comply with this guideline and operate Permitted Equipment in accordance with the training received.

Report any job-related injuries or illnesses, questions on health and safety, or any unsafe or unhealthy working conditions to your supervisor.

Report any impairment of any physical qualification needed to operate equipment to your supervisor.

Carry issued permit with you at all times during operation of Permitted Equipment.

### Public Safety & Environmental Health

Maintain records of training and physical qualifications of all operators and designed trainers.

Issue permits to trained operators.

Review and revise this guideline as necessary.

## **PROCEDURES**

### Initial Permit

When an employee is assigned to operate Permitted Equipment by their supervisor, the following steps will be followed to obtain a permit.

1. Contact EHS (3-4914).
2. A training package will be sent to the Supervisor or Designated Trainer of the department/unit. The training package will include:
  - + Tracking Sheet
  - + Daily Inspection Checklist
  - + Physical Qualification form
  - + Written permit test
  - + Performance test instructions and score sheet
  - + A copy of the MIOSHA standard that applies to the specific permitted equipment



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3. Upon receipt of the completed physical qualification form and copy of the valid State of Michigan driver's license; EHS will determine if the physical requirements of the standard have been met or require follow-up. EHS will notify the employee's supervisor if follow-up by MWorks is required.
4. The Designated Trainer will conduct the training and administer the written and performance exams.
5. Upon completion of all portions of the training and testing, the Designated Trainer will complete and mail the tracking sheet, written test, performance test and any other necessary documentation to EHS.
6. If all the information is correct and the employee satisfactorily completes the testing requirements, the permit will be issued and mailed to the department. All operators must carry their permit with them during working hours and make it available upon request to department management, Public Safety & Environmental Health, or MIOSHA representatives.
7. Permits are valid for three (3) years from the date of issuance.

### Refresher Training

Refresher training is required of the operator if s/he is observed or reported: performing unsafe operation; involved in an accident or near-miss incident; evaluation indicates need; a different type of equipment is introduced; or, workplace conditions change.

### Permit Renewal

A permit will be renewed every three (3) years. The renewal will consist of a satisfactorily completed performance test and a physical qualification form (with a valid Michigan driver's license attached), and other documentation as required by MIOSHA or Public Safety & Environmental Health.

### Revoking a Permit

Each permit issued remains the property of the University and as such can be revoked at any time for non-compliance of this guideline and/or other justifications as determined reasonable by the University.



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### ATTACHMENTS

[Appendix A](#) - University of Michigan-Dearborn Training Package (Permitted Equipment Specific Operator's Policy & Training Instructions, Daily Inspection Checklist, Physical Qualification Form, Renewal Evaluation of Operator Performance)

## **APPENDIX A**

### **PERMITTED EQUIPMENT OPERATORS POLICY & TRAINING INSTRUCTIONS**

#### **General Requirements**

All employees who operate permitted equipment must be trained and issued a University permit validating they received appropriate training in the safe operation of equipment. When an employee is assigned to operate Permitted Equipment contact Public Safety & Environmental Health (EHS) at 3-4914 and a training packet will be sent to the supervisor or designated trainer of the department/unit. Examples of permitted equipment include but are not limited to the following:

- Forklift trucks
- High/low trucks
- Motorized hand trucks
- Industrial tractors
- Motorized hand rider trucks
- Platform trucks
- Scrapers
- Loaders
- Crawler/wheel tractors
- Bulldozers
- Backhoes
- Graders
- Extension boom aerial devices
- Actuating boom aerial devices & vertical towers
- Manually propelled elevating work platforms
- Boom-supported elevating work platforms
- Self-supported elevating work platforms
- 2- or 4- wheel drive greater than 20 horsepower

University employees are qualified to operate permitted equipment when they have participated in the medical clearance program, received training, and completed a written examination and performance test for the specific equipment they will be using. Upon successful completion of the above, the employee will be issued a permit by Public Safety & Environmental Health indicating the type of device s/he is authorized to operate.

#### **Training Procedures**

Each department that uses permitted equipment will appoint at least one designated trainer to train employees who will operate permitted equipment. The trainer must be a supervisor or other person who possesses the necessary skill and who by knowledge, training and experience, has demonstrated the ability to provide this training and to deal with problems that may arise in the course of operating permitted equipment.

The training at a minimum must consist of:

- Review of owners manual and MIOSHA Standard for the permitted equipment
- Review of daily inspection (attached checklist should be posted in the workplace)
- Hands-on operation of the equipment

At the conclusion of the training, the employee must be administered the written test. After completion of the written exam, the employee will undergo a performance test. Instructions and guidance on administering performance test is included in the training package. The trainer will score the employees performance on the blue score sheet attached.

*Upon completion of the training and testing, the trainer will fill out the tracking sheet and mail the tracking sheet, written exam, and performance test results to EHS. The written exam will be scored by EHS and the results returned to the department. EHS will also evaluate the results of the performance test.*

### **Medical Clearance**

When EHS receives the completed physical qualification form and copy of the valid State of Michigan driver's license, a determination will be made if the physical requirements of the standard have been met or require follow-up. EHS will notify the employee's supervisor if follow-up by MWorks is required.

### **Permits**

EHS will conduct a review of the training materials and completed physical qualification form and valid State of Michigan driver's license. If the employee has successfully completed all parts, EHS will issue a permit to the operator of the permitted equipment. Permits must be renewed every three years. All operators must carry their permit with them during working hours and make it available upon request to department management, Public Safety & Environmental Health, or MIOSHA representatives.

It is the responsibility of each department to assure their permitted equipment is in proper working order and to follow manufacturer's specifications with respect to inspection and maintenance.

Questions regarding Permitted Equipment may be directed to EHS at 3-4914.

# **PERMITTED EQUIPMENT DAILY INSPECTION CHECKLIST**

Each shift, prior to starting your powered industrial truck, check the following items for proper operation (refer to the manufacturer's manual for proper operating parameters):

- Brakes
- Tires
- Steering
- Hydraulics
- Oil level
- Fuel level/battery charge
- Water level
- Instrument controls

Then after starting your truck check:

- Warning lights
- Gauges
- Horn
- Brakes - both service and parking
- Hydraulic control operations

Your truck is unsafe to drive if:

- service/parking brakes do not perform
- fuel system leaks
- excessive lift, drift, or tilt of cylinders or forks
- excessive free play in steering
- excessive hydraulic leaks

*Report any problems to your supervisor immediately!*

University of Michigan -Dearborn  
Public Safety & Environmental Health

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**Physical Qualification Form  
Permitted Equipment Operators**

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Operator's Name \_\_\_\_\_ ID #: \_\_\_\_\_  
(print)

Specific Equipment \_\_\_\_\_ Equipment Location \_\_\_\_\_

I have a valid DOT medical card issued by Oakwood HealthCare or MWorks: expiration date \_\_\_\_\_ **If you have a DOT medical card, skip to signature and date, no driver's license copy needed.**

I certify that I meet the following minimum physical qualifications for operating permitted equipment.

(Check Yes or No for each question)

**Yes      No**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | I have corrected vision that meets the same requirements as those for a valid Michigan driver's license. Evidence of meeting this requirement shall be an attached copy of my Michigan driver's license. |
| <input type="checkbox"/> | <input type="checkbox"/> | I have effective use of all four limbs.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I am of sufficient height to operate the controls and have an unobstructed view over the controls and dashboard of the equipment listed.   |
| <input type="checkbox"/> | <input type="checkbox"/> | I have coordination between eyes, hands and feet.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I am able to hear and understand conversational levels of sound in an ordinary environment.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I am able to understand signs, labels and instructions.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I have known convulsive disorders or episodes of unconsciousness.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I am taking medication that affects perception, vision or physical abilities.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I have known neurological disorders that effect balance or consciousness.  |
| <input type="checkbox"/> | <input type="checkbox"/> | I have sleep disorders, pauses in breathing while asleep, daytime sleepiness and/or loud snoring.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>I will report any impairment of these physical qualifications immediately to my supervisor.</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>I have attached a copy of my Michigan driver's license.</b>   |

Operator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Return test, copy of your Michigan driver's license, and qualification form to:**  
Laura Drabczyk, Public Safety & Environmental Health, 1330 CSS, or FAX (43)6-9161.

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Public Safety & Environmental Health

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**Renewal Evaluation of Operator Performance  
Permitted Equipment Operators**

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**Operator's Name** \_\_\_\_\_ **ID #:** \_\_\_\_\_  
(print)

Specific Equipment \_\_\_\_\_

Equipment Location \_\_\_\_\_

Permit # \_\_\_\_\_

I certify that the operator listed above has operated the indicated equipment in a safe manner and does not require refresher training at this time. The operator has not been involved in any equipment accidents or near miss incidents. The equipment listed has not been modified and the equipment location has not been altered. The operator continues to safely and effectively operate the equipment, including (but not limited to) the following functions:

- Shows familiarity with the controls.
- Obeys all signs
- Yields to pedestrians.
- Maneuvers with load properly.
- Follows proper procedures at both start and finish.

Evaluator Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Return this evaluation with the physical qualification form to:  
Laura Drabczyk, Public Safety & Environmental Health, 1330 CSS, or FAX (43)6-9161.