SHIELDSPHERE

Forklift Evaluations

scored on the truck, certified for three years

How to evaluate a forklift operator on the equipment they actually drive, sign and complete the evaluation, issue a wallet card, bring in old paper certifications, and stay ahead of every expiry, in line with 29 CFR 1910.178(l). Written for safety managers, supervisors and the evaluators who do the work.

USER GUIDE – FOR EVERYDAY USERS | VERSION 1.0 | SCREENS CAPTURED NOVEMBER 2026

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> ShieldSphere's Forklift Evaluations module records the practical operator evaluation required by 29 CFR 1910.178(l) and tracks each certification. Evaluators score a checklist for each truck type on a named forklift, sign, and complete it. A Yes certifies the operator for three years, with a wallet card, expiry flags and reminders.

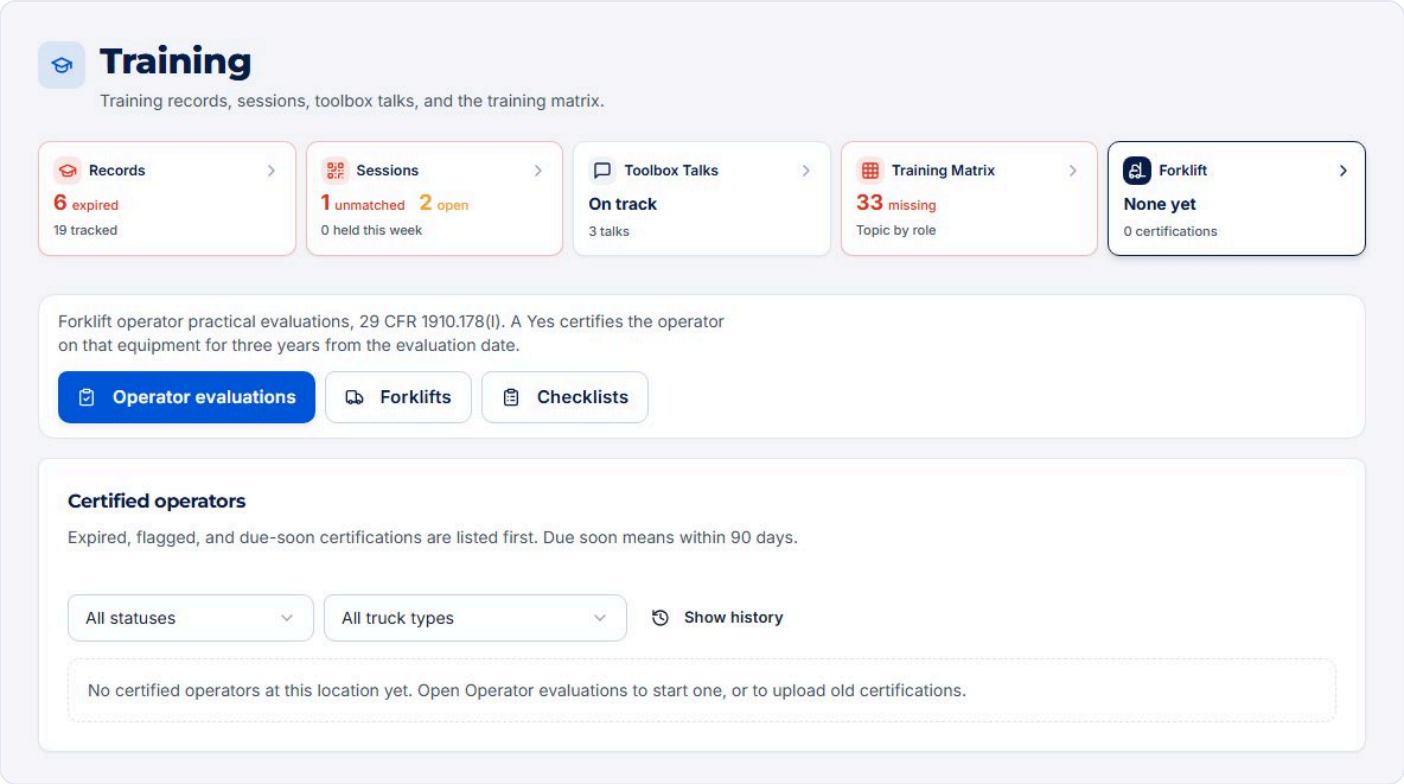
1 What Forklift Evaluations does

Classroom training is only half of operator certification. The other half is watching the operator drive, scoring what you see, and keeping the record.

This module is that second half. An evaluator picks the operator and the forklift, scores a checklist for that type of truck, answers whether the operator is qualified, and signs. The evaluation locks, a certification starts, and ShieldSphere tracks it to its expiry and sends reminders before it lapses.

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Training → Forklift tab
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Forklift Evaluations is the **Forklift** tab inside the Training module for each location. The tab itself shows a count of certifications that are expired and due soon. It belongs to the Training module, so if you cannot see it, ask your ShieldSphere contact to switch Training on. For classroom training, toolbox talks and the requirements matrix, see the Training guide and the Training Sessions guide. The forklift wallet card is the same card that guide describes, and this guide shows where evaluations feed it.



> **The Forklift tab, before any evaluations.** Three buttons open everything else. Once operators are certified, the list fills in, with expired, flagged and due-soon certifications first.

The three buttons at the top open everything else:

Operator evaluations

Start a new evaluation, upload an old certification, bulk upload several, and resume drafts. Admins also see Evaluators here.

Forklifts

The list of forklifts at this location. Every evaluation names the unit the operator was evaluated on.

Checklists

The checklists evaluators score. Use the built-in ones, or build, copy or import your own.

2 Words you'll see

WORD	WHAT IT MEANS
Evaluation	One operator, evaluated on one or more truck types, with one signature. A draft until it is completed.
Truck type	The kind of equipment, such as a sit-down counterbalance forklift, reach truck or telehandler. Each type has its own checklist.
Forklift (unit)	A specific truck in your fleet. Each is also an asset in Assets.
Evaluated on / Also covered	The unit the operator was actually tested on, and any similar units of the same truck type the evaluation also covers.
Checklist	The sections and items an evaluator scores. Scored 1 Poor, 2 Average, 3 Good, 4 Excellent, or N/A.
Qualified (Yes or No)	The evaluator's decision on each truck type. A Yes certifies the operator. A No is recorded and issues no certification.
Certification	The result of a Yes: one operator, one truck type, valid for three years from the evaluation date.
Externally documented	A certification brought in from an old paper record rather than evaluated in ShieldSphere.
Current, Due soon, Expired, Re-evaluation required	The certification states you will work with. Due soon means within 90 days of expiry.
Superseded, Voided	History only. These appear when you choose Show history and never count as current.

3 Who can do what

WHO	WHAT THEY CAN DO
Owners and admins	Everything: conduct and record evaluations, upload old certifications, amend, flag, manage forklifts and build checklists for every location. Only admins see the **Evaluators** button.
Members who are evaluators	Conduct and record evaluations, upload old certifications, amend and flag. An admin makes someone an evaluator.
Other members	View evaluations and certifications. They can create checklists for locations they can access, as the Checklists dialog says.
Viewers and employees	View only. Their Operator evaluations dialog says to ask an admin to make them a forklift evaluator.

1 Make someone an evaluator (admins)

Select **Operator evaluations**, then **Evaluators**. The dialog notes that OSHA requires evaluations to be done by people with the knowledge, training and experience to train operators and evaluate their competence. Owners and admins are always evaluators. For each member, select **Make evaluator** or **Remove evaluator**.

> **CHOOSE EVALUATORS DELIBERATELY**
>
> Every evaluator attests, at the point of signing, that they have the knowledge, training and experience to evaluate operators. Only grant the role to people for whom that is true.

4 Set up forklifts and checklists

Add your forklifts

An evaluation cannot be completed until it names the forklift the operator was evaluated on, so add your trucks first.

1 Open Forklifts and add a unit

Select **Forklifts**, then **Add forklift**. Enter the **Name or unit number** (for example, *Forklift 3*), the **Truck type**, the **Make**, the **Model**, and optionally the **Serial number**. Each forklift you add is also an asset, so it appears in Assets with its QR checks; see the Assets guide.

2 Reuse trucks already in Assets

If your Assets list already holds something that looks like a forklift but has no truck type, it appears under **Already in Assets**. Select **Add to fleet** instead of entering it again.

3 Keep the list honest

Use **Out of service** and **Back in service** for a truck that is down for repair. Use **Retire** for one that has left the fleet; retired units are listed under **Retired** and can come back with **Back in service**. A unit that is out of service cannot be chosen for a new evaluation.

Choose or build checklists

Select **Checklists** to see every checklist evaluators can use here. Each row shows its truck type, whether it is **Built-in**, **Org-wide** or **This location**, and whether it is **Published**, **Draft** or **Archived**. ShieldSphere ships built-in checklists you can use as they are. Some standard truck types have no built-in checklist yet, and for those the New evaluation form says they are for old certification upload only until you build one.

1 Start a new checklist

Select **New checklist**. Under **Start from** choose **Blank**, **Copy a checklist** or **Import a file**. If you can create both kinds, choose **Every location (org-wide)** or **This location only**. Give it a **Checklist name**, which prints as the title of the evaluation record, and choose the **Equipment type**. You can add your own equipment type here, or under **Equipment types** in the Checklists dialog, for equipment such as a tow tractor.

2 Or import one you already have

With **Import a file**, choose **PDF or photo** (read by AI, word for word, up to 4 MB), **Spreadsheet** (an .xlsx or .csv with a Section column and an Item column, with a **Download the template** button), or **Paste text**. A draft is created with the items it found. Check every item before you publish.

3 Edit the draft and publish

In the builder, use **Add section** and **Add item**, and the arrows to reorder. You can edit the final qualification statement. The scoring scale is fixed at 1 Poor to 4 Excellent, or N/A. **Preview as evaluator** shows what the evaluator will see. **Save draft** keeps your work and **Publish** makes it available to evaluators. A checklist needs a name, an equipment type, at least one section, and items in every section before it can be published.

4 Change one later

A published checklist is read-only. Select **Edit as new version** to work on the next version, or **Archive** to stop offering it for new evaluations. Archived checklists are kept for the evaluations that used them. A built-in checklist offers **Copy to customize**.

5 Run an evaluation

Starting an evaluation needs a connection. Once it is started, scoring autosaves, and it keeps working if the signal drops: the top of the page then reads **Offline. Saved on this device, will retry.** Signing and completing need a connection again.

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Forklift → Operator evaluations → New evaluation
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1 Pick the operator and the forklifts

Choose the **Operator** from the roster. Under **Forklifts**, tick the unit the operator is evaluated on. To cover similar forklifts with the same evaluation, tick more units of the same truck type: the first is marked **Evaluated on** and the rest **Also covered**, and you can switch which is which with **Evaluated on this one instead**. To evaluate on a different truck type, tick a unit of that type. If a truck type has more than one checklist, a **Checklist for** menu lets you choose. No forklifts yet? Evaluators can use **Add a forklift** in the same form.

2 Set the dates and start

Enter the **Training date** and the **Evaluation date**. Neither can be in the future, and you can change both while the evaluation is a draft. Select **Start evaluation**.

3 Score each truck type

There is a tab for each truck type on the evaluation. For each checklist item, tap 1 Poor, 2 Average, 3 Good, 4 Excellent, or N/A. An item scored 1 (Poor) needs a note saying what the operator did. A section for **Additional Comments and Recommendations** follows the items.

4 Answer the qualification statement

For each truck type, choose **Yes** or **No**. If any item is scored 1, ShieldSphere shows a warning and asks you to confirm before it accepts a Yes: you can still answer Yes if, in your judgment, the operator is qualified, and the decision is yours. A No is recorded on the evaluation and issues no certification for that truck type.

5 Attest and sign

Under **Evaluator attestation and signature**, tick the box confirming you have the knowledge, training and experience to evaluate operators. Enter your **Evaluator name** and **Evaluator title**, draw your signature, and select **Save signature**. If you change anything after signing, you are asked to sign again. The person who completes the evaluation is the one who signs it.

6 Complete it

A panel lists what is **Still to do**, such as unscored items, a missing forklift, or a missing signature. When it reads **Ready to complete**, select **Complete evaluation**. The evaluation locks, and each truck type answered Yes starts a certification.

> **EDITED SOMEWHERE ELSE AT THE SAME TIME?**
>
> If another person changed the same draft, a banner offers **Discard my changes and reload** or **Keep my changes**. Read the message before you choose.

> **DISCARD IS PERMANENT**
>
> **Discard draft** deletes the draft and all its scores. Drafts you start and do not finish stay under **Drafts in progress** in the Operator evaluations dialog, where **Resume** reopens them.

6 Bring in old certifications

Operators evaluated before ShieldSphere, or by someone outside it, still need to be tracked. Upload their paper certification and the module creates an **Externally documented** record with a certification that expires three years after the date of service.

One at a time

1 Open the form

Select **Operator evaluations**, then **Upload old certification**. Choose the **Operator** and tick the **Truck types the operator was found qualified on**.

2 Enter the dates and evaluator

Enter the **Date of service**, which is recorded as both the training date and the evaluation date. If the paper shows two different dates, select *The record shows different training and evaluation dates*. Enter the **Evaluator / Trainer (as written on the form)**, and optionally their title and any comments. You can attach a copy of the old form as a PDF or photo (a PDF must be under 4 MB).

Many at once

1 Set the defaults, then add the files

Select **Bulk upload**. Enter the **Evaluator / Trainer (for all rows)**, optionally a title, and the **Truck types for new rows**. Then choose files, drop PDFs and photos onto the box, or use **Take a photo**. You can add up to 50 files at a time.

2 Check every row

Each file becomes a row. If the file name contains an operator's name and a date, such as *Jane Smith 2023-05-14.pdf*, ShieldSphere suggests them. It suggests an operator only when every part of the name is in the file name and only one employee fits. Check each suggestion, pick any operator it could not match, and confirm the truck types and date. A row needs an operator, at least one truck type, and a date that is not in the future.

3 Save

Select **Save N records**. Rows save one at a time, so a bad row never blocks the rest. Rows that failed are marked, and you can fix them and save again.

7 Certified operators, flags and wallet cards

The list on the Forklift tab is **Certified operators**. Expired, flagged and due-soon certifications are listed first, so the top of the list is always the work.

STATUS	WHAT IT MEANS
Current	Valid, with more than 90 days left.
Due soon	Expires within 90 days. Book the next evaluation. The operator is still authorized.
Expired	Past its expiry date. The expiry date itself is the last valid day.
Re-evaluation required	Flagged for refresher training and a new evaluation. Not current until a new evaluation passes, however far off the expiry is.

Each row shows the operator, status, truck type, the expiry date with days remaining, who evaluated them and when, and an **Externally documented** badge for imported records. Filter by status (including **Needs attention**) or by truck type. **Show history** adds superseded and voided certifications, which are kept for the record. Status always appears as an icon plus words, never color alone.

Each row has actions:

- **View evaluation** opens the full record of the evaluation behind it.
- **Wallet card** downloads the operator's card for current and due-soon certifications. It names the truck types they are signed off on.
- **Flag** (evaluators only) marks the operator for re-evaluation.
- The reminder menu (evaluators only) chooses who gets the reminder emails.

1 Flag an operator for re-evaluation

Select **Flag** and choose the reason: *Observed operating the truck in an unsafe manner*, *Involved in an accident or near-miss incident*, *Received an evaluation showing unsafe operation*, *Assigned to drive a different type of truck*, or *A change in the workplace could affect safe operation*. Add **Notes** (what happened, and when) and save. The row now reads Re-evaluation required with the reason beneath it.

2 Clear the flag

Run a new evaluation for that truck type and answer Yes. The new certification replaces the flagged one.

An operator's certifications also appear on their own employee profile, in a **Forklift** tab with the same statuses and links.

8 Correct a completed evaluation

Completing locks the evaluation. A mistake is corrected by an amendment, which keeps the original and records who changed what and why.

1 Open the record and select Amend

Open the evaluation with **View evaluation**. Evaluators see an **Amend** button. You can change the header details, scores, comments and the Yes or No result. The truck type cannot be amended, because the scores belong to that type's checklist.

2 Give a reason and save

Select **Save amendment** and answer *Why is this record being corrected?* in your own words. The record then shows **Amended** with an **Amendment history** listing each change, who made it and when.

From the same record, **Evaluation record PDF** downloads a printable copy, and **Wallet card** downloads the operator's card when at least one truck type was answered Yes.

9 Reminders

Reminder emails go out 90, 30 and 7 days before a certification expires, and on the expiry date. Each is sent once for a given expiry date. A new evaluation moves the date and starts the reminders again. Flagged certifications are still reminded, because the operator still needs the evaluation.

The emails go to the person set in the reminder menu on the row (it defaults to the evaluator), plus every owner and admin, except anyone who has turned off training reminder emails. Choose **Reminders: admins only** to send them to owners and admins alone. You can only choose people who can see that location. Old certifications you upload are reminded the same way.

10 Troubleshooting

WHAT YOU SEE	WHAT TO DO
No Forklift tab in Training	Your plan does not include Training. Ask your ShieldSphere contact to switch it on.
"You can view evaluations. To conduct them, ask an admin to make you a forklift evaluator."	Your role is not an evaluator. An admin can grant it under Operator evaluations, then Evaluators.
A forklift is grayed out in New evaluation	It is out of service, or its truck type has no published checklist (the form says "old certification upload only"). Put it back in service, or publish a checklist for that type.

"No forklifts at this location yet"	Add the forklift under Forklifts first, or use Add a forklift in the New evaluation form.
"Starting an evaluation needs a connection"	Reconnect and start again. Scoring can continue offline once the evaluation is open.
Complete evaluation lists things still to do	Each line names the truck type and the problem: unscored items, items scored 1 without a note, an unanswered Yes or No, a missing forklift, the attestation, your name or title, or the signature.

"Signing needs a connection"	Your scores are saved on the device. Sign again once you are back online.
A PDF is "larger than 4 MB"	Save it at a lower resolution or take a photo of the card instead.
A bulk upload row did not match an operator	Matching is deliberately strict so a record never attaches to the wrong person. Pick the operator in the row.
An operator reads Expired but has a new evaluation	Check that the new evaluation was completed and answered Yes for the same truck type. Drafts and No answers do not create a certification.

You answered Yes with a Poor score and want to change it	Use Amend on the completed record and give the reason.
A checklist will not publish	It needs a name, an equipment type, at least one section, and items in every section.

Related guides: Training, Training Sessions and Assets.

ShieldSphere Forklift Evaluations – User Guide. Published at shieldspheresafety.com/guides/forklift-evaluations-user. Screens are illustrative; the written steps are what to follow if the two ever disagree.