

# **MAT-001ILT: Lift-N-Tow Hitch Attachment Operator Training**

Facilitator Guide

Version 2.0



# MAT-001SOJT: Lift-N-Tow Hitch Attachment Operator Safety

# FACILITATOR GUIDE

## Welcome

Thank you for facilitating MAT-001SOJT: Lift-N-Tow Hitch Attachment Operator Safety training. This course is designed to equip forklift operators with the knowledge and confidence to operate a forklift equipped with the Lift-N-Tow hitch attachment to transport heavy loads with precision and control. This facilitator guide will provide you with the information you need to deliver course content.

## Course Materials

All course materials can be found in the Admin Console under MAT - Materials Management & Warehouse > MAT-001SOJT Lift-N-Tow Hitch Attachment Operator Safety.

Instructional Material	Name	File Type
eLearning (Prerequisite)	MAT-001WBT: Lift-N-Tow Hitch Attachment Operator Safety eLearning	SCORM
Instructor-Led Training	MAT-001ILT: Lift-N-Tow Hitch Attachment Operator Safety Training	Event
Skill Assessment	MAT-001SOJT: Skill Assessment	Challenge
Job Shadow	MAT-001SOJT: Job Shadow	Challenge
Facilitator Guide	MAT-001ILT Facilitator Guide	Resource
Slideshow	MAT-001ILT Slideshow Presentation	Resource
Exit Survey	MAT-001SOJT Learner Exit Survey	Guide

## Course Objectives

By the end of this training, learners will be able to operate a forklift equipped with the Lift-N-Tow hitch attachment to transport heavy loads across an industrial facility with precision and control.

- Determine whether the Lift-N-Tow hitch attachment is in acceptable working condition using the pre-use inspection checklist.
- Securely install the Lift-N-Tow hitch attachment onto a 12k forklift.

- Transport a heavy load by driving a forklift equipped with the Lift-N-Tow attachment.
- Safely detach the Lift-N-Tow hitch attachment from the forklift.
- Properly store the Lift-N-Tow hitch attachment in the appropriate location after use.

## Preparation

### *Classroom Materials*

- 1 x Forklift
- 1 x pair of signal wands
- 1 x red tag
- 1 x Lift-N-Tow Hitch Attachment
- 1 x pen per participant
- 1 x wheel chock
- 1 x iPad with Driveroo app installed

### *Classroom Set-Up*

1. Reserve the following pieces of equipment for the duration of the class time:
  - a. Forklift
  - b. Lift-N-Tow hitch attachment
  - c. MP-75/600 unit
2. Identify a safe and pedestrian-free area in the yard to demonstrate and practice maneuvering the vehicle.
3. Determine the route that you want to take during both demonstration/practice and assessment. Communicate this with the warehouse supervisor ahead of time.
4. Ensure the Lift-N-Tow hitch attachment storage area is clear of obstructions (if applicable).
5. Ensure participants have a current Driveroo account to access the Lift-N-Tow attachment. Reach out to Teresa Ponce to add attendees to the app.
6. L&D will validate that all scheduled participants have taken and passed the Lift-N-Tow Hitch Attachment Operator Safety eLearning.

## Training Best Practices

1. **Review the Facilitator Guide notes:** Read through the FG notes carefully ahead of the session, annotating as needed to avoid any surprises, prepare anecdotes, and anticipate any questions or points of confusion.
2. **Take time to physically and mentally prepare:** Arrive 30-minutes prior to the class start time to ensure the classroom is properly set-up and you have time to mentally prepare before learners arrive.
3. **Create an inviting atmosphere:** Warmly greet learners and display both enthusiasm and a sincere interest in their success. Recognize all input and encourage participation.

4. **Bring the enthusiasm:** Your attitude and approach to the training sets the tone for your audience. If you deliver with confidence, positivity, and enthusiasm, your audience will tend to match that energy.
5. **Move with purpose:** Moving around the room cultivates attention and engagement.
6. **Read the room:** Pay attention to learners' body posture and non-verbal communication. As a facilitator, you will want to be scanning the room as you present to engage your learners. You may want to take breaks earlier if the group seems burnt out or push the break if the group is actively interested.
7. **Stay on track:** Avoid diverting to other topics or discussions outside of the presentation. Occasionally check the clock to ensure you are moving at the right pace. Allow learners time to ask questions.
8. **Maintain high standards:** People will perform when you give them a benchmark to reach. Make it clear that participation is non-negotiable, that they are here to learn a critical skill and meet specific performance objectives. If you notice off-track behavior, leverage an appropriate strategy (e.g., pause and wait, close the proximity between you and the learner, ask a question, ask for their attention by name, take a break, etc.) to get the learners back on track. Finally, if they fail to meet the mark, you are not obligated to give them a pass.

# Lift-N-Tow Hitch Attachment Operator

Version 2.0

MOXION



## **Explain**

Welcome to **Lift-N-Tow Forklift Hitch Attachment Operator** training.

This course is mandatory for all employees whose role requires them to operate the Lift-N-Tow hitch attachment.

## **Do**

Take attendance in WorkRamp.

# Getting Acquainted

## Meet your instructor and classmates

- Name
- Role
- Time at Moxion
- Expectations for the course



## Ground Rules

- Respect each other
- Choose a positive attitude
- Listen for understanding
- Be prepared and ready to engage
- Encourage and provide space for everyone to participate.
- Silence cell phones.

## Do

Introduce yourself as the instructor. State:

- Name
- Role
- Time at Moxion
- Expectations for the course

Allow each participant to introduce themselves one at a time, sharing their name, role, time, and expectations.

Review the logistics of the day and state any rules or behaviors that you expect from the group. For example, you may want to:

- Encourage active participation in discussions and activities.
- Explain that side topics or questions that require a long explanation will be placed in a parking lot for follow-up during or after the course.

# Safety Orientation



## Earthquake

- Drop
- Cover
- Hold On



## Fire

- Exits, escape routes, evacuation plan
- Compliant fire extinguisher



## Medical Emergency

- First aid/CPR
- 911/share location
- AED



## COVID-19

- Handwashing/masking
- Cal/OSHA + County regulations



## Psychological Safety

- Care for each other
- Look out for one another
- Welcome new ideas

Report all incidents (near hit, high potential, first aid, injury, illness) to EHS and your site supervisor.

## Do

### Review:

- Location address
- Nearest emergency exits
- Location of nearest AED and fire extinguisher

## Explain

In the event of an **earthquake**, find a sturdy piece of furniture like a table or desk then duck, cover, and hold. If a **fire** breaks out at your location, find and use the nearest fire extinguisher. [*Explain where the nearest fire extinguisher is located relative to the training room.*] If the fire is too large to maintain with a fire extinguisher, pull the nearest fire alarm, call 9-1-1, and evacuate the building. Be sure to meet first responders when they arrive on scene. In the event of a **medical emergency**, know who in your vicinity can perform first aid and CPR and who will call emergency services. [*Ask the group if anyone is first aid, CPR, and/or AED certified.*] We are still living through the **COVID-19** pandemic, so be sure to stay home if you're feeling ill, test if you have symptoms or if you suspect you've been exposed, and practice regular handwashing. Finally, be sure to report all near hits, injuries, or illnesses immediately to both me and your supervisor.

# Moxion Principles



## Stay Safe

Safety always comes first, no compromises



## Offer Transparency

In our communication and process; be honest with yourself and others



## Show Respect

Respect each other and our differences



## Demonstrate Ownership

Accountability and stewardship



## Bias for Action

Act with intention and towards results



## Be Bold

Act with purpose and moxie. Drive innovation

## Explain

This training supports our first Moxiple, Stay Safe, by ensuring you are equipped with the knowledge and skills to operate our equipment.

# Course Overview

- ✓ Part 1 : eLearning
  - Part 2 : Structured On-the-Job Training
  - Part 3 : Skill Assessment
- 

## Learning Objectives

By the end of this on-the-job training, you will be able to operate a forklift equipped with the Lift-N-Tow Super Duty hitch attachment in outdoor settings.

### Do

Review the content on the slide.

## 01

# About the Lift-N-Tow

By the end of this section, you will be able to:

- Explain why we use the Lift-N-Tow hitch attachment at Moxion Power
- Identify the parts of the Lift-N-Tow hitch attachment
- Recall what safety precautions you must take when operating the attachment

## Do

Review the learning objectives on the screen.

# How We Use the Attachment

Use cases:

**Transport MP-75/600 around industrial settings**



**Load or unload MP-75/600 onto freight truck**



## Do

At Moxion, there are two primary reasons we use the Lift-N-Tow:

1. To transport MP-75/600 units around industrial settings, like the Richmond factory or customer yards
2. To load or unload MP-75/600 units onto flatbed freight trucks during shipping and receiving

The Lift-N-Tow attachment is key to helping us create a safe working environment. It allows us to move our 12,000+ pound units with more precision and control than a standard tugger while offering greater visibility and increased efficiency.

# Operator Requirements

In order to operate a forklift with the Lift-N-Tow hitch attachment, you must:



Hold a current Class 5 Forklift certificate issued by Moxion Power



Use and comprehend forklift hand signals



Take and pass all parts of this certification program



Obtain supervisor approval

## Do

Review the requirements on the screen.

Module 1: About the Lift-N-Tow

# PPE Requirements

- Hard hat or bump cap
- Safety gloves
- Safety shoes
- Safety glasses
- High-visibility safety vest



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## Do

Review the PPE requirements on the screen.

# Speak up for Safety

Apply these tips and best practices to ensure safe operation:

- **Tip # 1:** Exercise Your Stop Work Authority
- **Tip # 2:** Travel Backwards
- **Tip # 3:** Use a Spotter
- **Tip # 4:** Avoid Modifications/Repairs
- **Tip # 5:** Tag out faulty equipment
- **Tip # 6:** Turn on the Lights

## Do

Go through each tip, elaborating and providing anecdotes, as relevant.

## 02

# A Step-by-Step Tutorial

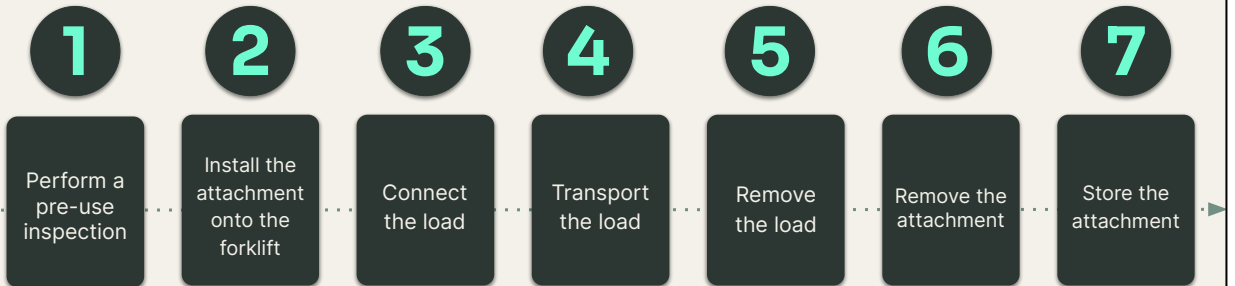
By the end of this module, you will be able to:

- Determine whether the Lift-N-Tow hitch attachment is in acceptable working condition using the pre-use inspection checklist.
- Securely install the Lift-N-Tow hitch attachment onto a 10k forklift.
- Transport a heavy load by driving a forklift equipped with the Lift-N-Tow attachment.
- Safely detach the Lift-N-Tow hitch attachment from the forklift.
- Properly store the Lift-N-Tow hitch attachment in the appropriate location after use.

### Do

Review the learning objectives on the screen.

## Process Steps: A High-Level Overview



### Explain

These are the steps we're going to review then go outside and do in a few minutes. As we review each step, please make sure to ask any clarifying questions to ensure you feel comfortable and confident before starting.

### Do

Review the high-level steps listed on the slide.

Module 2: A Step-by-Step Tutorial

# Perform a Pre-use Inspection

Perform a pre-use inspection prior to use in Driveroo.

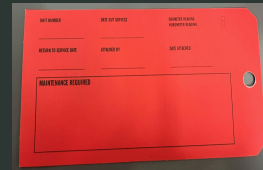
## Your responsibilities:

- Inspect all checklist items
- Validate good condition
- Sign off in Driveroo



## Reporting an Issue:

- Tell your supervisor immediately
- Red tag the attachment



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## Explain

Prior to each use, inspect the Lift-N-Tow to ensure it is in serviceable and safe condition using the pre-use inspection checklist to ensure it is in safe operating condition and to account for all necessary components.

You can find the pre-use inspection checklist in Driveroo.

## Ask

Who has experience using Driveroo?

## Explain

We will have a chance to practice shortly.

If any items fails to pass inspection, you are responsible for reporting the issue and tagging out the device. Use the red “out of service” tags available in the Warehouse office or at the EHS desk area.

# Install the Attachment



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## Explain

After validating that the attachment is in good working condition, you can then proceed to install the attachment onto the forklift.

## Do

Play the video with no audio.

As the video plays, call out each sub-step:

1. Adjust the forks
2. Insert the forks into the attachment
3. Wrap the safety chains around the forklift
4. Secure the hook

## Ask

What questions do you have about this step?

# Transport the Load

## Moving the Unit

- Be vigilant
- Sound the horn
- Obey the speed limit (2 MPH)
- Use a spotter

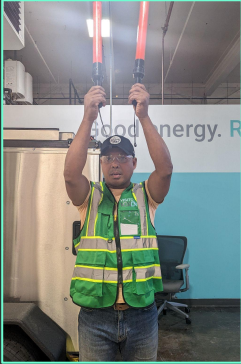
## Traveling on an Incline

- Reverse up/down inclines
- Turn slowly, avoid 90-degrees
- Raise the forks
- Avoid inclement weather

## Do

Review the safety requirements for each scenario.

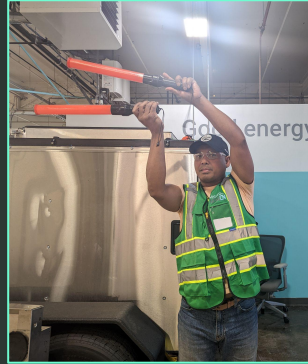
# Hand Signals



Back



Right



Left



Stop

## Explain

We use four different hand signals to direct operators.

## Do

Demonstrate each signal.

# Safety Precautions



Before the load is raised, make sure slings, chains, or straps are properly secured.

Accelerate and decelerate slowly.

Forklift operator should be watchful of the load at all times, especially when it is in motion.

Never raise or carry the load higher than necessary.

Never exceed the rated capacity of any part of the lifting system.

Never allow anyone to ride on the attachment or load being carried.

## Do

Review the tips and best practices listed on the slide. You may read these aloud, ask participants to read them aloud, and/or elaborate with real-world anecdotes to drive home key messages.

## 03

## On-the-Job Training

In a few moments, we will step into the factory for hands-on training. To prepare, we must first:

- Review the skill assessment success criteria.
- Submit your skill assessment in Moxion Academy.
- Ensure you have a Driveroo account.

### Explain

To pass this course and earn operator certification, you need to pass a skill assessment and a job shadowing task. You also need to make sure you have access to Driveroo, our fleet management application. We'll take a look at all three of these requirements before heading outside.

# Skill Assessment

**1** Click the path.

**Assignments**

In Progress Overdue Completed Archived

**Lift-N-Tow Hitch Attachment Operator Safety Training**

Assigned May 29, 2024

3 tags

2 trainings

4 trainings

This course is mandatory for all employees whose role requires them to operate the Lift-N-Tow...

Start

**Human Trafficking & Modern Slavery**

Due Jun 28, 2024

3 tags

2 trainings

These trainings reflect our dedication to maintaining an ethical and responsible business...

Start

**2** Click Skill Assessment.

**Lift-N-Tow Hitch Attachment Operator ...**

4.5 hours

RESUME

- MAT-001WBT: Lift-N-Tow Hitch Attach... 30m
- MAT-001HLT: Lift-N-Tow Hitch Attachm... 2h
- MAT-001SOJT: Skill Assessment** 30m
- MAT-001SOJT: Job Shadow 15m

**ABOUT THIS PATH**

This course is mandatory for all employees whose role requires them to operate the Lift-N-Tow Hitch attachment.

**3** Click Submit.

**MAT-001SOJT: Skill Assessment**

- Review the skill assessment criteria on the right.
- Read the question and use the feedback to assess your performance. Each skill is auto-graded.
- After entering a passing score, you will be directed to approve a badge with the skill on the Lift-N-Tow Hitch attachment in an audience area independently.
- After you are ready to get started, select the Submit button.

Meet with a supervisor to proceed to complete this Challenge. After click 'Submit' below.

SUBMIT

## Explain

In order for me to provide you with a skill assessment today, you need to enable the Skill Assessment by clicking Submit. Open WorkRamp on your laptop or mobile device, then follow the steps here.

# Skill Assessment

Reviewers	Scorecard Preview	Connecting the Load:	Removing the Load:
<b>Reviewers</b> Veasna San <a href="#">Modify Reviewers</a>	<b>Scorecard Preview</b> <span style="float: right;"><b>Passing Score: 100%</b></span> Pre-Use Inspection: Used Driveroo app to inspect each item on the checklist. <span style="float: right;">1 Point</span>  Pre-Use Inspection: Correctly indicated whether attachment passed/failed inspection. <span style="float: right;">1 Point</span>  Pre-Use Inspection: Correctly explained what to do if an issue discovered (red tag). <span style="float: right;">1 Point</span>  Installing the Attachment: Put on a seatbelt before starting forklift. <span style="float: right;">1 Point</span>  Installing the Attachment: Adjusted forks before approaching attachment, as needed. <span style="float: right;">1 Point</span>  Installing the Attachment: Inserted forks into attachment until fully seated. <span style="float: right;">1 Point</span>  Installing the Attachment: Wrapped safety chains around forklift carriage two times. <span style="float: right;">1 Point</span>  Installing the Attachment: Hooked safety chain to attachment in downward position. <span style="float: right;">1 Point</span> 	Connecting the Load: Removed latch pin and opened pintle hook. <span style="float: right;">1 Point</span>  Connecting the Load: Approached trailer slowly and head-on. <span style="float: right;">1 Point</span>  Connecting the Load: Raised forks to secure ball in lunette ring. <span style="float: right;">1 Point</span>  Connecting the Load: Closed the pintle hook and reinserted latch pin. <span style="float: right;">1 Point</span>  Connecting the Load: Secured safety chains. <span style="float: right;">1 Point</span>  Connecting the Load: Raised the trailer to ensure adequate clearance before transport. <span style="float: right;">1 Point</span>  Transporting the Load: Gave pedestrians the right-of-way when applicable. <span style="float: right;">1 Point</span>  Transporting the Load: Sounded horn when driving in reverse or approaching blind corners. <span style="float: right;">1 Point</span>  Transporting the Load: Did not exceed 2 MPH. <span style="float: right;">1 Point</span>  Removing the Load: Lowered forks slowly until trailer jack rested on ground. <span style="float: right;">1 Point</span>  Removing the Load: Chocked both sides of the unit trailer's wheel. <span style="float: right;">1 Point</span> 	Removing the Load: Removed latch pin and opened pintle hook. <span style="float: right;">1 Point</span>  Removing the Load: Disconnected safety chains. <span style="float: right;">1 Point</span>  Removing the Load: Decoupled attachment from trailer's lunette ring. <span style="float: right;">1 Point</span>  Removing the Load: Backed up to safe location. <span style="float: right;">1 Point</span>  Removing the Load: Sounded horn when driving in reverse. <span style="float: right;">1 Point</span>  Removing and Storing Attachment: Lowered forks so attachment rested on ground. <span style="float: right;">1 Point</span>  Removing and Storing Attachment: Removed safety chains. <span style="float: right;">1 Point</span>  Removing and Storing Attachment: Slowly backed out to remove forks from attachment. <span style="float: right;">1 Point</span> 

## Explain

- These are the steps you will be assessed on.
- It is pass/fail. If you don't pass the first time, you will have an opportunity to make a second attempt.

## Do

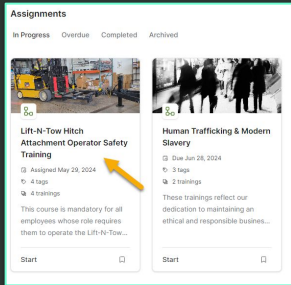
Review the scorecard to ensure that the whole class is aware of how they will be assessed. Answer any questions that surface.

## Option

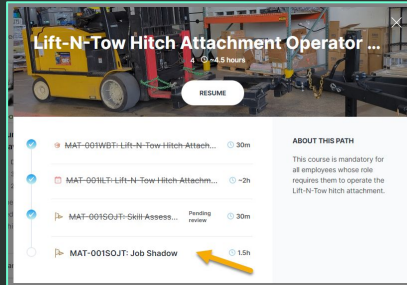
It may be easier to share your screen so you can zoom in on items.

# Interested in Indoor Operator Certification?

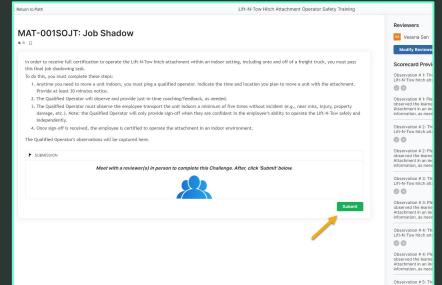
**1** Click the path.



**2** Click Skill Assessment.



**3** Click Submit.



## Explain

Once you have passed the skill assessment, you are cleared to operate the Lift-N-Tow outdoors. To operate indoors, you need to complete the Job Shadow portion. For those of you who need indoor certification, please enable the Job Shadow scorecard by clicking Submit now. Open WorkRamp on your laptop or mobile device, then follow the steps here.

# Job Shadow for Indoor Operation

The screenshot shows a 'Reviewers' section with a reviewer named 'Veasna San' and a 'Modify Reviewers' button. Below is a 'Scorecard Preview' with a 'Passing Score: 100%'. It lists three observations, each worth 1 point, with a 'Pass' status and a feedback prompt: 'Please indicate the time, date, and location that you observed the learner successfully operating the Lift-N-Tow Hitch Attachment in an indoor setting. List any additional observations or information, as needed.'

Observation	Points	Status
Observation # 1: The learner safely and independently operated the Lift-N-Tow hitch attachment in an indoor environment.	1 Point	Pass
Observation # 2: The learner safely and independently operated the Lift-N-Tow hitch attachment in an indoor environment.	1 Point	Pass
Observation # 3: The learner safely and independently operated the Lift-N-Tow hitch attachment in an indoor environment.	1 Point	Pass

## Explain

For participants whose role requires them to operate the Lift-N-Tow hitch attachment indoors, they will need to participate in and pass a final job shadowing step:

1. Anytime you need to move a unit indoors, you must ping a qualified operator (Veasna).
2. The qualified operator observes and provides just-in-time coaching/feedback, as needed.
3. Qualified Operator must observe the employee transport the unit indoors a minimum of five times without incident (e.g., near miss, injury, property damage, etc.). Note: the Qualified Operator will only provide sign-off when they are confident in the employee's ability to operate the Lift-N-Tow safely and independently.
4. Once sign-off is received, the employee is certified to operate the attachment in an indoor environment.

## Do

Review the scorecard to ensure that the whole class is aware of how they will be assessed during the job shadow.



## On-the-job training

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### Explain

Now we're ready to head to the floor for some hands-on training. Make sure you have on your PPE.

### Demonstration and Scoring

1. Demonstrate each phase.
  - a. Pre-Use Inspection
    - i. Show how to launch Driveroo and find the attachment.
    - ii. Inspect the unit and talk through decisions out loud.
    - iii. Explain that if you find an issue, you need to red tag it. Show red tag. Explain where these can be found.
  - b. Installing Attachment
    - i. Perform each step and talk through decisions.
    - ii. Have each participant practice wrapping the chains. Redirect as needed.
  - c. Connecting the Load
    - i. Perform each step and talk through decisions.
    - ii. Ask participants to tell you what they recall from the eLearning, when appropriate:
      1. "After I insert the ball in the lunette ring, what's my next step? Why is this important?"
      2. "Why do I need to raise the trailer up before traveling? What could happen?"
  - d. Transporting the Load

- i. Perform each step and talk through decisions.
    - ii. Though we will not have participants load onto a freight truck, we still want them to practice traveling on an incline, if possible. Demonstrate this here.
  - b. Removing and Storing Attachment
    - i. Perform each step and talk through decisions.
2. Provide participants with time to practice each step one at a time.
3. Once ready, assess participants using the Skill Assessment checklist in Moxion Academy. Use your mobile device for this work.
  - a. Launch WorkRamp.
  - b. Navigate to Company > Review.
  - c. Select the scorecard for the individual performing the task.
  - d. Observe each step as the participant performs it.
  - e. Tick off the appropriate response (Yes/No), as applicable.
  - f. Once finished, click the Submit button.
  - g. If necessary, provide participants who failed the first test with specific feedback and have them try again when ready. **Note:** You may use your discretion to determine whether they need to complete the entire assessment again or whether they just need to retake one phase.