SUMMARY: The Permitted Equipment Guideline has been developed to provide information to University personnel operating various types of equipment to complete job tasks. As an employer, the University is responsible for addressing the requirements of the MIOSHA (Michigan Occupational Safety & Health Administration) regulations. Information from several regulations has been consolidated into this Guideline to meet the requirements for appropriate employee training, safe operation, and permitting. The EH&S procedure to obtain permits is included.

SCOPE: This Guideline applies to all employees and contractors utilizing University owned or leased Permitted Equipment. Equipment used for non-agricultural, material handling, maintenance and construction operations are covered. Examples include aerial work platforms, mobile equipment, powered industrial trucks, and tractors.


DEFINITIONS: Aerial work platforms – equipment that is designed and manufactured to raise personnel to an elevated work position on a platform supported by scissors, masts, or booms.

Designated Evaluator/Trainer – a University of Michigan employee who has been appointed by the department to conduct training in the safe use of Permitted Equipment. Trainers will have experience, skill and knowledge in operating Permitted Equipment, and have a valid permit issued by the University.
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.

OHS – Occupational Health Services Clinic
The University’s occupational health clinic providing support and services for medical surveillance activities and injury and illness treatment.

Permitted Equipment – University owned or leased equipment defined as an aerial work platform, mobile equipment, powered industrial trucks or tractors.

Permitted Operator - University of Michigan employee or approved contractor who has been issued a permit by EH&S to operate Permitted Equipment.

Powered Industrial Trucks- mobile, power driven vehicles used to carry, push, pull, lift, and 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.

University Medical Surveillance Coordinator - the EH&S employee responsible for coordinating the permit process for EH&S and the medical surveillance program.

RESPONSIBILITY:

Deans, Directors, and Department Heads
• Designate and empower supervisors who will be responsible for the implementation of the Permitted Equipment Guideline.
• Designate an adequate number of evaluators/trainers to train departmental employees in the safe use of permitted equipment.
• Assign resources to support the implementation of this Guideline.

Supervisors
• Provide information to EH&S and the Designated Evaluator/Trainer regarding employees who have the potential of operate Permitted Equipment and therefore must comply with the requirements of this Guideline.
• Implement all aspects of this Guideline by assuring the following: all operators including University employees and/or contractors 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
equipment.

**Designated Evaluators/Trainers**
- Be knowledgeable in the operation and types of Permitted Equipment in their department; be familiar with all safety principles applicable to their operation; provide evaluation and training to employees as required; and complete and submit the necessary paperwork to EH&S for the permitting process.

**Permitted Operators**
- Comply with this guideline and operate Permitted Equipment in accordance with the training received.
- Report to your supervisor any job-related injury or illness, questions on health and safety, or any unsafe or unhealthy working conditions.
- Report to your supervisor any impairment of the physical qualifications needed to operate equipment.
- Carry the issued permit with you at all times during operation of Permitted Equipment.

**EH&S**
- Maintain records of training and physical qualifications of all operators and designated trainers.
- Issue permits to trained operators.
- Review and revise this guideline as necessary.

**PROCEDURES:**

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

Contractors using University-provided Permitted Equipment during the course of their job duties must be accompanied by a University permitted operator or pursue the permit process.

1. Contact the University Medical Surveillance Coordinator at 615-2140.

2. Download the [training package](#) (Appendix A)

The forms should be printed by the Designated Evaluator/Trainer and includes:

- Permit Equipment Operators’ Training Instructions
- Physical Qualification form
- Written permit test
- Daily Inspection Checklist
- Performance test instructions and score sheet
3. When EH&S 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. The Medical Surveillance Coordinator will notify the Supervisor if follow-up by the Occupational Health Services Clinic is required.

4. The Designated Evaluator/Trainer will conduct the training and administer the written and performance tests.

5. Upon completion of all portions of the training and testing, the Designated Evaluator/Trainer will complete and return all of the necessary documentation to the EH&S Medical Surveillance Coordinator.

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 for distribution. All operators must carry their permit during working hours and make it available upon request to department management, EH&S staff, and MIOSHA representatives.

7. Permits are valid for 3 years from the date of issuance. EH&S will maintain a database of all Permitted Operators and notify the Designated Evaluator/Trainer 60 days prior to permit expiration and initiate the permit renewal process.

Permit Renewal
1. Permits will be renewed every 3 years, as noted above.

2. The Renewal Package will be sent to the Departmental Evaluator/Trainer for completion for each Permitted Operator. See Appendix B.

3. The Renewal Package consists of:
   - Renewal Evaluation form
   - Physical Qualification form
   - Copy of the valid State of Michigan driver’s license

4. The Designated Evaluator/Trainer will complete and mail or fax the all of the necessary documentation to the Medical Surveillance Coordinator at EH&S.

5. The permit will be issued and mailed, as noted above in the Initial Permit section.
Refresher Training
Refresher training is required of the operator if the operator 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.

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.

TECHNICAL SUPPORT:
All referenced guidelines, regulations, and other documents are available through EH&S (7-1142).

ATTACHMENTS:
- Appendix A - UM Training Package - Permitted Equipment Operator’s Training Instructions, Physical Qualification Form, Written Permit Test, Daily Inspection Checklist and Performance Test
- Appendix B - Permit Renewal Package - Renewal Evaluation Form and Physical Qualification Form