

## Permitted Equipment Guideline

Revision Date: 04/09/2025

**Applies To:** University of Michigan (U-M) employees, contract vendor labor, volunteers, artists, and outside contractors utilizing U-M owned or leased Permitted Equipment. Permitted Equipment covered in this guideline is used for non-agricultural, material handling, maintenance and construction operations. Examples include but are not limited to: aerial work platforms, mobile equipment, powered industrial trucks, tractors and overhead cranes. Overhead Crane requirements are located in a separate EHS guideline - “Crane, Hoist and Sling Safety.”

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## Permitted Equipment Guideline

The Permitted Equipment Guideline was developed to provide information related to U-M employees, contract vendor labor, volunteers, artists, and outside contractors operating various types of equipment to complete job tasks. As an employer, the University is responsible for addressing the requirements of the MIOSHA regulations. Information from several regulations has been consolidated into this Guideline to meet the requirements for employee training, safe operation, and permitting. Procedures to obtain permits are also included in this guideline.

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## ***Related Permitted Equipment Guideline Documents***

- U-M Training Packet
  - Permitted Equipment Operators' Training Instructions and Performance Test Trainer's Instructions
  - Permitted Equipment Operators' Request Form
  - Permitted Equipment Test (written permit test)
  - Permitted Equipment: Daily Inspection Checklist
  - Performance Test for Permitted Equipment
- Permit Renewal Package
  - Permitted Equipment Operators Request Form

## ***Additional Resources***

All referenced guidelines, regulations, and other documents are available in Appendix A of this document.

EHS approved Equipment Training Companies:

- [Skyworks LLC](#)
- [United Rental](#)
- [Bell Forklift](#)

## **Responsibilities**

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### ***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 or contract with an EHS approved Equipment Training Company listed above.
- Assign resources to support the implementation of this Guideline.

### ***Supervisors***

- Provide information to EHS and the Designated Evaluator/Trainer regarding employees who have the potential to 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 a proper training evaluation 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 and experienced in the operation and types of Permitted Equipment in their department.
- Be familiar with all safety principles applicable to their operation; provide evaluation, training and testing to employees as required.

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- Administer the Permitted Equipment test and review the answers with the employee to assure knowledge of equipment.
  - Complete and submit the necessary paperwork to EHS for the permitting process (Permitted Equipment Operators Request Form, Performance Test for Permitted Equipment, Permitted Equipment Test).

### ***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 restrictions that could interfere with the operation of permitted equipment.
- Always carry the issued permit with you during operation of Permitted Equipment.

### ***EHS, F&O Training Department and Athletics (Authorized Permitting Departments)***

- Maintain records of training and permits of all operators and designated trainers.
- Issue permits to trained operators.
- Contact departmental supervisors 60 days prior to permit expiration to initiate the renewal process.
- Review and revise this guideline as necessary (EHS only).

## **Obtaining a Permit**

When an employee or contract vendor labor is assigned to operate Permitted Equipment by their supervisor, the following steps shall be followed to obtain a permit.

1. The Designated Evaluator/Trainer downloads and prints the U-M Training Package. The Training Package includes the following documents:
  - [Permitted Equipment Operators' Training Instructions and Performance Test Trainers' Instructions](#)
  - Permitted Equipment Operators' Request Form
  - [Written permit tests \(aerial lift, forklift, tractor, and walkie\)](#)
  - [Daily Inspection Checklist](#)
  - [Performance Test \(Score Sheet\)](#)
2. The Designated Evaluator/Trainer conducts the training and administers the written and performance tests including review of the written responses to assure knowledge of safe equipment operation.
3. Upon completion of all portions of the training and testing, the Designated Evaluator/Trainer completes and returns all of the necessary documentation, including the Permitted Equipment Request Form to the EHS Program Administrator at ([EHS-PermitEquip@umich.edu](mailto:EHS-PermitEquip@umich.edu)). Exception: The Facilities and Operations Training Department and Athletics track and issue their own permits.
4. Additionally, please provide basic driver's license information including state of issuance, expiration date and any restrictions. A copy of the license is not needed.
  - a. If the employee or contract vendor labor requesting the permit does not have a valid driver's license, the request can be denied.

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5. If training is conducted by an EHS approved outside vendor, training certificates need to be sent to the department that will issue the permit.

If all the information is correct and the employee satisfactorily completes the testing requirements, the authorizing department (EHS, The Facilities and Operations Training Department or Athletics) issues and mails the permit for distribution.

All operators must carry their permit during working hours and make it available upon request to department management, EHS staff, and MIOSHA representatives.

Permits are valid for 3 years from the date the documentation is initially completed by the operator and evaluator. For renewal guidance, please see the Permit Renewal section below. The authorizing department will maintain a database of all Permitted Operators and notify the Supervisor within 60 days prior to permit expiration and initiate the permit renewal process.

Direct all technical and administrative questions to the EHS Permitted Equipment Administrator [EHS-PermitEquip@umich.edu](mailto:EHS-PermitEquip@umich.edu) or call the EHS direct phone at (734) 647-1143.

## Outside Contractors and other Non-U-M Individuals Using U-M Equipment

U-M has identified that occasionally outside contractors, vendors, volunteers and artists request the use of U-M owned/leased permitted equipment like aerial work platforms, forklifts, or tractors. Outside contractors etc. may use U-M permitted equipment under the following conditions:

1. Only U-M owned equipment may be used by outside contractors, vendors, volunteers, and artists. U-M leased or rented equipment may not be used by these individuals.
2. These individuals must have permission to use the permitted equipment from the U-M owner or controlling entity (department, group or area). The U-M controlling entity may refuse the request. Note: Michigan Medicine does not allow use of U-M owned or leased permitted equipment to be used by outside contractors.
3. These individuals must obtain a valid U-M Permit for operating the permitted equipment. Valid training and permits issued by other entities can be submitted by outside contractors to EHS for review. If acceptable, a U-M permit will be issued.
4. The user shall complete, sign, and return the "Equipment Use Waiver and Indemnification Agreement-User" located in Appendix A to the U-M controlling entity contact.
5. An authorized signer from the outside contractor company shall also complete, sign and return the "Equipment Use Waiver and Indemnification Agreement-Company" located in Appendix A to the U-M controlling entity contact. This is not required for volunteers.

## Permit Renewal

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Permits must be renewed every 3 years.

1. The authorizing department will notify the supervisor of a Permitted Equipment Operator within 60 days prior to permit expiration to initiate the permit renewal process.
2. The Designated Evaluator/Trainer downloads the Permitted Equipment Request Form and completes the form for each Permitted Operator.

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- a. The Permitted Equipment Renewal Request Form can also be completed and submitted via the [online form](#) provided on the EHS website. Exception: The Facilities and Operations Training Department and Athletics will track and issue their own renewal permits.
  3. The Designated Evaluator/Trainer completes and sends the necessary documentation to **the authorizing department**.
  4. The EHS Permitted Equipment Administrator or other authorizing department issues and mails the permit for distribution, as noted in the Obtaining a Permit section.

## Refresher Training

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Refresher training is required if:

- The operator is observed or reported to have performed unsafe operation or been involved in an accident or near-miss incident;
- An evaluation indicates a need;
- A different type of equipment is introduced or workplace conditions change for the operator.

## Revoking a Permit

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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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## Appendix A: Referenced Regulations and Documents

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- [Aerial Work Platforms](#), MIOSHA Construction Safety Standard, Part 32
- [Aerial Work Platforms](#), MIOSHA General Industry Safety Standard, Part 58
- [Mobile Equipment](#), MIOSHA Construction Safety Standard, Part 13
- [Powered Industrial Trucks](#), MIOSHA General Industry Safety Standard, Part 21
- [Tractors](#), MIOSHA General Industry Standard, Part 22
- [Equipment Use Waiver and Indemnification Agreement](#)-User
- [Equipment Use Waiver and Indemnification Agreement](#)-Company

## Glossary of Terms

Term	definition
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.
Contractor Vendor Labor	Third party contractors utilized by the University to augment the regular and temporary workforce, to provide service and receive daily direction from a U-M employee.
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.
Occupational Health Services Clinic (OHS)	The University's occupational health clinic providing support and services for medical surveillance activities and injury and illness treatment.
Outside Contractor	An individual affiliated with a third party employer separate from the University, performing work for the University and receives daily direction from a non-U-M employee.
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, contract vendor labor or outside contractor who has been issued a permit by EHS or other U-M entity 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.

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Permitted Equipment Administrator	The EHS employee responsible for coordinating the permit process for EHS.
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