**Loader Backhoe Frequently Asked Questions**

**How often do I need loader backhoe training?**

OSHA requires loader backhoe training for loader backhoe operators–on that there is no question. Where confusion exists is how often operators need loader backhoe refresher training or recertification. Outside of the initial safety training class, it is common to see companies set recertification at every three years. We are one of them.  And here’s why:

As far as this 3-year loader backhoe training certification goes, OSHA regulations are very specific when it comes to forklifts and a couple other pieces of equipment. However, on everything else they are not so clear. They just state the employer must regularly provide safety training for their aerial lift operators. Following industry best practices, we’ve adopted this 3-year term in order to help employers comply with the general standard of regularly providing and proving loader backhoe training. Ultimately, it is up to the employer to determine how frequently their loader backhoe  operators need to be trained. Many of our customers require it more often, annually even. Others may stretch it out a bit. In working with OSHA, though, it is our experience that they like to see employers adopt the strictest standard when the regulations are not clear. For instance, we know of companies that didn’t train every three years and were reprimanded by OSHA for not offering additional training more often. It is not uncommon for OSHA to refer to the forklift standard as the pattern by which training should be carried out for other pieces of equipment. On a side note, OSHA is slowly but surely making training requirements specific for other pieces of equipment so there are no gray areas. Mobile cranes and aerial lifts, for instance, are all undergoing potential changes to the regulations that will reference training specifically.

So, with that in mind, we sayloader backhoe operators must be re-evaluated every three years to determine if they are still competent enough to operate. We also state that this every-three-year loader backhoe evaluation is the maximum time that should be allowed to pass before an operator receives loader backhoe recertification. According to OSHA, there are several instances that will require additional loader backhoe training and observation before the three year period is up:

* Loader backhoe operator is observed in an accident or a near miss
* Loader backhoe operator received a poor evaluation or is observed driving in a dangerous manner
* The loader backhoe operator is assigned to drive a different type of loader backhoe or the workplace has changed significantly enough to require additional loader backhoe training (such as being transferred from operating a loader backhoe used to hoist signs to a loader backhoe used for trimming trees).

**I’ve received loader backhoe training. Can I operate a 360 excavator?**

Not necessarily. OSHA requires loader backhoe operators to receive loader backhoe training for each type of backhoe. On this term, “type,” there is much confusion. Generally speaking, by “type” OSHA means loader backhoe vs. dragline excavator vs. compact digger vs. 360 excavator, etc.

If you have received loader backhoe training and have always operated a John Deere loader backhoe, but then are asked to operate a CAT loader backhoe, you should be just fine to operate under the same training certification received previously. Keep in mind though, controls can differ greatly from brand to brand, so in some cases you may need additional instruction or a quick refresher training to make sure you are clear on what each control does.

At the end of the day, if you were operating an excavator and there was an excavator accident and OSHA came to investigate only to discover that you had received training specific to loader backhoes but not excavators, then you’d be liable. You can’t really train too much.

**I’ve operated loader backhoes for 20 years. Do I need to take a class, a written exam, and a practical exam still? Or can I just take a written test?**

No matter how long you’ve been on the job, OSHA requires loader backhoe training, a loader backhoe written exam, and a practical loader backhoe evaluation. There is no way around it. This goes for other types of loader backhoes too. The extent of the classroom loader backhoe training can be adapted by the instructor according to student needs. The written exam proves mental competency and understanding of the safety principles taught. And the practical evaluation proves the loader backhoe operator not only understands but is capable of operating the machine safely.

**I received loader backhoe training at a different job. Do I need to be trained again by my new employer?**

This is a common question, especially among laborers-for-hire who may sub out from job to job. Technically, it is your current employer who is responsible for saying whether or not you have been trained specifically for the type of loader backhoe and job. If you bring a loader backhoe certificate or wallet card to your new employer, they do not have to accept it. It is their right to require you to take their own training class. This is because if there is an accident, they will likely be responsible and need to prove to OSHA that they trained you on loader backhoe operations.

**Can you explain loader backhoe certification? Who can train, evaluate, and certify operators?**

This, above all, causes a lot of confusion. Bottom line, OSHA states that employers are responsible to train their employees. Generally speaking, there are three ways they can do this:

* Train employees in-house with their own program
* Hire a 3rd party to train the employees (on-site or off-site)
* Use another company’s materials or online classes to train employees

In terms of using a 3rd part of a safety training companies materials (like our loader backhoe training kits on CD or our loader backhoe online training class) OSHA does not recognize one company over another. They simply state that ‘training needs to occur’ and ‘here are the things a loader backhoe operator should be trained on.’

When we do live training or offer loader backhoe training online, people often assume we are the ones certifying the trainees. This is not true for any training company. We are simply assisting the employer by providing live loader backhoe training or the loader backhoe training materials needed to help them loader backhoe certify their employees.

**How do I take the loader backhoe practical evaluation if I take loader backhoe training online?**

The online loader backhoe training class covers OSHA’s requirements for the classroom portion. Many employers prefer online training because they know exactly what loader backhoe training the operator will receive. In live classes, the training sometimes varies. A written exam is included at the end of our online training courses. After the loader backhoe class and exam are finished, you and your safety managers will have immediate access to a practical evaluation checklist. This can be printed off and used by your supervisor to help him or her evaluate you on the loader backhoe. When done, they can sign it and file it with your exam. This will satisfy OSHA’s requirements for loader backhoe certification.

**Is it okay to rig a load to the bucket?**

Most likely, yes. Most buckets have lifting eyes or other designated attachment points. If not, there are other approved ways of attaching chain slings. But you should always refer to your operator’s manual just to make sure and then follow any specific manufacturer instructions. Also, before lifting with a loader backhoe, you need to inspect the machine, any attachments being used, and all rigging gear. Rigging gear needs to be load rated and have legible capacity tags. You also need to make sure the loader backhoe capacity is rated to handle the weight of the load, including any dynamic forces brought on by wind or travel during a pick and carry, and that you use the appropriate load charts to plan the lift. Overloading the machine can seriously damage the machine and lead to loader backhoe tip over. Remember that the capacity of a loader backhoe will be highest when it is closest to the machine. Make sure the machine is on a stable surface, that any potential hazards or holes have been barricaded, and that you travel slowly. If you are lowering a trench shield into a trench stay back from the trench edge as far as possible. You also need to receive training specific to lifting a load, rigging, and loader backhoe hand signals, as well as any mobile crane hand signals that apply. This training must also cover how to read and understand loader backhoe load charts.

**If I am using the loader backhoe to hoist a load like a crane, does it fall under the OSHA crane standard? Do I need to receive rigger signalperson training?**

According to OSHA 1926.1400, OSHA’s standard on Cranes and Derricks in Construction, which was updated in July 2014, “power shovels, loader backhoes, wheel loaders, backhoes, loader backhoes, and track loaders” are excluded. “This machinery is also excluded when used with chains, slings or other rigging to list suspended loads.”

However, there are some states that have stricter regulations and do treat loader backhoes like cranes. Whether it is considered a crane or not, though, is a moot point. Employers are responsible for administering loader backhoe training to their employees specific to the equipment and the job. That means if you are going to be using a loader backhoe to hoist a load—like a trench shield—then you need to receive training regarding hoisting with the loader backhoe, rigging, and signaling.

**Is it okay to pick and carry a load with a loader backhoe?**

Yes, like RT Cranes and Crawler Cranes, a loader backhoe is typically approved to pick and carry a load (refer to your operator’s manual to make sure for the type you are operating). No matter the machine, though, moving with a load can be dangerous as it is susceptible to tip over. Always align the boom with the forward direction of the loader backhoe and maintain this position when turning. Turn only when necessary, at the slowest speed possible, and at a wide turning radius. Keep the load as close the ground and as close to the loader backhoe as possible. The use of taglines can help keep the load from swinging, thus affecting the stability and capacity. Never leave the cab with the load suspended and use a signalperson if lowering it into a trench beyond your line of sight.

**My trainee scored 80% on the exam. Did he pass or fail?**

Contrary to popular belief, OSHA does not dictate what a passing score entails. That is ultimately up to the employer whose responsibility it is to certify, or authorize, their employee to operate a loader backhoe. If you want to pass him at 80%, fine. But what if a question or two among the 20% missed could lead to an accident or death? Is it worth it? Our recommendation is that you always go over any missed questions with your trainees—even if they just missed one. Once they understand the principle missed, have them write their initials by the correct answer. That way, you are protecting them and those around them from potential accidents in the future.