



# OBSERVATION FORM



As employer, it is your responsibility to ensure your operators receive training specific to the equipment and gear they will be using, as well as the situation in which that equipment will be used. The training presentation and written exam satisfies the requirements for classroom training. But to be in complete compliance, regulations dictate that operators/workers must also pass a practical examination administered by a qualified trainer.

This is the employer's opportunity to observe trainees in a controlled environment in order to assess whether they have successfully applied the principles from the classroom instruction.

While regulations do not specifically outline the extent of such an observation, you should take ample time to observe the trainee practicing the tasks they will be performing on the work site. At the very least, this should include carrying out a pre-shift inspection as well as other basic principles that govern safe operations or work practices.

If any voice and hand signals are required as part of the job, the trainee should also demonstrate an understanding of these signals and their corresponding functions.

To assist with this responsibility, we have provided a general form you may use when administering the practical examination. Feel free to modify this guide to create one more specific to your employee, equipment, worksite, or job needs.

## HOW TO USE IT:

- 1 Simply **OBSERVE** the trainee's competency based on the modules included.
- 2 Follow the list, **CHECKING THE BOX** to indicate whether they satisfactorily performed each task.
- 3 When done, **SIGN AND FILE** this form along with the examination record and certificate.

**WORK SAFE, STAY SAFE**



# OBSERVATION FORM

EMPLOYEE'S NAME: \_\_\_\_\_ TOPIC/EQUIPMENT: \_\_\_\_\_

EVALUATOR'S NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

The purpose of the evaluation form is to aid the evaluator in assessing the worker's competency to safely apply in the field the principles learned in the classroom. Items may be added or deleted depending on the working environment and the needs of your employees and company.

SATISFACTORY?		TASK	REMARKS
YES	NO		
PRE-SHIFT INSPECTION			
		Fluids, fuels, filters, battery	
		Tracks, tires, and wheels	
		Chassis and frame	
		Boom and attachments	
		Hydraulic components	
		Fire extinguisher	
		Warning labels, capacity plates, op. manual	
		Operator's compartment and controls	
OPERATIONAL CHECK:			
		Operator controls	
		Steering	
		Brakes	
		Warning devices, lights	
		Hydraulic functions	
		Outriggers and stabilizers	
OPERATING THE MACHINE:			
		Mounts and dismounts machine safely	
		Plans for operating around site hazards	
		Maintains control of load	
		Demonstrates safe maneuvering in obstacle course	
		Demonstrates understanding of stability/slope travel	
		Operates safely around pedestrians, other machines	
		Parks properly	
		Loads and unloads on ramps and trailers	
		Dons and doffs correct PPE appropriately	
		Fuels or recharges machine properly	

\_\_\_\_\_  
Supervisor/Trainer Name & Signature

\_\_\_\_\_  
Date