



# 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**



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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 or the needs of your employees and company.

SATISFACTORY?		TASK	REMARKS
YES	NO		
PRE-SHIFT (VISUAL, FUNCTIONAL):			
		Evaluation of site for Confined Space locations	
		Set up barriers	
		Obtains necessary permits	
		Comprehensive knowledge or duties for	
		Supervisor	
		Attendant	
		Entrant	
OPERATIONS:			
		Thorough inspection of necessary PPE	
		Complete inspection of full body harness	
		Thorough inspection of lanyards & retrieval lines	
		Established comprehension of respirator inspection & use	
		Checks tank pressure	
		Changes filters or cartridges	
		Checks straps & face shield	
		Examines all parts of ventilation system	
		Checks for explosion proof lighting	
ADDITIONAL/ POST-SHIFT:			
		Knows permissible hazard levels (O <sub>2</sub> , L.F.L, Toxicity)	
		Dons proper PPE including respiratory protection if needed	
		Selects appropriate monitor	
		Performs bump test or re-calibration	
		Tests for hazards in correct order	
		Tests at various levels within the space	



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	Acquires representative sample from the space	
	Determines need for ventilation	
	Periodically conducts atmospheric monitoring	
	Documents readings	
	Complete Tri-pod set-up	
	Legs properly pinned	
	Chain tightened & secured	
	Construct retrieval system	
	Construct retrieval line	
	Attach retrieval line to fixed point	
	Establish adequate lighting	
	Conducts isolation of space	
	Lockout/Tagout	
	Double block & bleed	
	Blinding/blanking	
	Proper Ventilation	
	Verify atmospheric conditions by recheck	
	Selects & uses PPE correctly	
	Check & communicate understanding of hazards in permits	
	Safely & correctly enters space	
	Maintains communications	
	Demonstrates what to do if unauthorized worker enters work area	
	Operates selected retrieval system correctly	
	Checks all entrants have left the space	
	Permit cancelled	
	Equipment cleaned & returned	

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

\_\_\_\_\_  
Date