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 or the needs of your employees and company.

SATISFACTORY?		TASK	REMARKS
YES	NO		
PRE-SHIFT (VISUAL, FUNCTIONAL):			
		Evaluation of site for confined space locations	
		Sets up barriers	
		Obtains any permits necessary for work	
		Posts permits at the job site	
		Comprehensive knowledge or duties for	
		Supervisor	
		Attendant	
		Entrant	
EQUIPMENT INSPECTION:			
		Thorough inspection of necessary PPE	
		Complete inspection of full body harness	
		Thorough inspection of lanyards & Retrieval lines	
		Establishes 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	
ATMOSPHERIC MONITORING & VENTILATION:			
		Knows permissible hazard levels (O2, 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	
		Acquires representative sample from space	
		Determines need for ventilation	

OBSERVATION FORM

		Set-Up of proper ventilation	
		Periodically conducts atmospheric monitoring	
		Documents readings	
OPERATIONS:			
		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	
		Tools	
		Equipment being worked on	
		Wire & Cables	
		No unauthorized individuals in work zones	
ENTRANCE & EXIT:			
		Selects & uses PPE correctly	
		Check & communicates understanding of hazards in permits	
		Safely & Correctly enters space	
		Maintains communication	
		Demonstrates what to do if unauthorized worker enters work area	
		Operates selected retrieval system correctly	
		Checks all entrants have left the space	
		Permit cancelled	
		Tools & Equipments	
		Any LOTO devices	
		Barriers & Signs	
		Tools properly stored	
		LOTO devices removed	
		PPE properly stored	
PRE-EXCAVATION:			
		Soil classification, Inspection	
		Protective system installed	
		Access/Egress Set-up	
		Utilities – Call, Demarcation	

OBSERVATION FORM

		Protective system inspection	
		Inspect: Walls	
		Inspect: Pins, Bars	
		Inspect: Hydraulics, Hoses, Connections	
		Warning labels, Capacity tags	
DURING OPERATIONS:			
		PPE	
		List potential hazards	
		Barricade, Cone set-up	
		Spoil pile, Etc. Distance from the edge	
		Water Removal	
POST-EXCAVATION:			
		Protective system uninstall	
		Equipment removal, stowing	
		Backfilling	
		Fill out damage report	
POLE TOP WORK:			
		Forms & Permits completely filled out	
		Selects proper PPE	
		Inspects PPE	
		Dons PPE Correctly	
		Body Belt	
		Safety Strap	
		Gaffs & Climbers	
		Demonstrates ability to properly inspect pole	
		Demonstrates safe work practices	
		Minimum approach distances	
		Grounding practices	
		Confirms lines are deenergized (if applicable)	
		Understand when & how to use tag lines	
		Loading & Hauling poles	
		Installing & Removing lines	
		Strand inspection	
		Uses insulated tools & Equipment	
		Tree trimming practices (if applicable)	
		Safely work with & around portable power sources	
		Inspects equipment after use	
		Stores equipment properly	
		Understands what to do when damage is noted	
		Illustrates proper rescue procedures	

OBSERVATION FORM

PRE-SHIFT KEY OFF INSPECTION:			
		Check that operator's manual is present, in good condition, legible	
		Check that decals & warning labels are present & legible	
		Checks for oil leaks using gloves & cardboard	
		Checks battery for leaks in fluid. Damaged cables, cracks, corrosion	
		Check all electrical components for damage	
		Check Chassis & mast for damage	
		Check tires for damage or wear	
		Check outriggers for damage	
		Check platform railings, entry, & extending platforms for damage	
		Fill out damage report & lockout/tagout the machine if any damage is concerning	
PRE-SHIFT KEY ON INSPECTION:			
		Test control handle & levers	
		Test emergency stop button	
		Test horn & backup alarm	
		Test sensors	
		Test limited drive speed control	
		Test steering	
		Test brakes	
		Test mast controls up/down function	
		Perform load test	
		Fill out damage report & lockout/tagout the machine if any damage is concerning	
VERTICAL LIFT OPERATION EVALUATION:			
		Performs pre-shift inspections	
		Set outriggers	
		Performs work zone inspection	
		Mounts platform using 3 point method	
		Closes gate & attaches fall protection if required	
		Sounds horn & looks around before backing	
		Checks below before lowering platform	

Supervisor/Trainer Name & Signature Date