



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:

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|---|---|
| 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):			
		Perform a Pre-Shift Inspection	
		Change or Charge Battery as Needed	
		Inspect Pallets Before Use	
		Read & Understand the Operator's Manual	
		Understand the Capacity Limit & Demonstrate Understanding of it in Relation to Loads Carried	
		Have the Employee Find the Weight of the Load	
		Have the Employee Correctly Examine PPE, & Demonstrates how to Put it on	
OPERATIONS:			
		Observe the Employee Stack Boxes on the Pallet & Properly Secure it, is it Stacked Well?	
		Observe the Employee Properly Engage a Load	
		Observe the Employee Properly Raise & Lower the Load	
		Observe the Employee Travel Properly with the Load (Push, Pull)	
		Have the Employee Point Out Objects That Could be a Hazard Along the Path of Travel	
		Have the Employee Set Up Barricades or Cones Along the Path of Travel	
		Have the Employee Act as a Spotter & Use a Spotter	
		Have the Employee Demonstrate What to do in Case of a Tip Over or Accident	
		Ensure Employee Honks Horn When Rounding Corners, Backing Up or Before Going Through Intersections or Across Aisles	
		Observe Employee Stowing the Jack for Later Use	



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		Observe the Employee Temporarily Parking the Jack While Unloading the Pallet	
		Have the Employee Demonstrate What Steps to Take When Handling Hazardous Materials	
		Ensure the Employee Knows What to do in Case of an Accident or Emergency	
		Observe them Stowing the Jack for Later Use	

Supervisor/Trainer Name & Signature

Date