



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		
SUPPORTING STRUCTURE:			
		Welds, Bolts	
ROTATING SYSTEM:			
		Bull & Pinion Gear	
		Swing Brakes	
		Hydraulic Drive Motor	
BOOM:			
		Welds, Stress, Distortion	
		Hinge Pin	
		Boom Cylinders, Pins	
		Wear Pads	
		Telescopic Operation	
		Tip Section, Sheaves	
		Angle/Radius Indicator	
		Anti-Two-Block System	
WINCH SYSTEM:			
		Wire Rope Condition	
		Rope Reeving	
		Mounting Bolts	
		Brakes	
		Functional Operation	
HYDRAULIC SYSTEM:			
		Pump Performance	
		Control Functions	
		Control Markings	
		Hydraulic Leaks, Fluid Level	
		Hose Condition	
LOAD BLOCK:			
		Sheaves	
		Pins	
		Hook, Swivel	

Supervisor/Trainer Name & Signature

Date