



# 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 <b>OBSERVE</b> the trainee's competency based on the modules included.                         |
| 2 | Follow the list, <b>CHECKING THE BOX</b> to indicate whether they satisfactorily performed each task. |
| 3 | When done, <b>SIGN AND FILE</b> 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):			
		Fuel, oil, coolant, filters, battery	
		Tracks, wheels, pedestal	
		Warning devices, labels	
		Operator's cab and controls	
		Hydraulics (boom, sticks, jib)	
		Hydraulic fluid level and component leaks	
		Magnet, grapple, shear, or other attachment	
		Crosshead adapter	
		Fire extinguisher	
		Load charts, operator's manual	
		Controls	
		Horn, Lights	
		Hydraulic functions	
		Travel	
		Engine	
		Chassis	
		Outriggers	
OPERATIONS:			
		Enters/exits machine safely	
		Wears adequate PPE for the job	
		Maintains load control	
		Deploys stabilizers	
		Maneuvers machine through obstacle course	
		Stows handler for transport	
		Unloads handler from truck safely	
		Navigates away from ground hazards	
		Demonstrates what to do when an employee enters the danger area	
		Understands hand signals	
		Demonstrates how to respond if machine contacts a powerline	

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

\_\_\_\_\_  
Date