



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):			
		Checks manual/maintenance chart	
		Fuel, oil, coolant (internal combustion engine)	
		Battery, charge level & power	
		Tires, rims, & lug nuts	
		Warning devices, lights	
		Hydraulics, fluid levels and component leaks	
		Operator's cab & controls	
		Labels, cap, plates, operator's manual	
		Mirrors, glass	
		Seat	
		Chassis & operator's compartment	
		Forks, mast & components	
		Fire extinguisher	
OPERATIONS:			
		Horn	
		Operator controls	
		Test all hydraulic	
		Breaks, pedals	
		Steering	
		Seatbelt	
		Forks	
		Lights	
		Fueling with diesel, gasoline, or propane	
		Charging or changing battery	
		Engaging and disengaging loads	
ADDITIONAL/POST-SHIFT:			
		Mounting & dismounting	
		Seatbelts	
		Parking	
		Reverse travel	
		Safe maneuvering	
		Proper lifting a load	

Supervisor/Trainer Name & Signature _____

Date _____