



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):			
		Knows where to find operator's manual	
		Illustrates knowledge and understanding of all applicable rules and guidelines	
		Completes thorough pre-shift inspection according to operator's manual	
GENERAL OPERATIONS:			
		Stands with both feet firmly on operating platform	
		Keeps both hands on operating controls	
		Keeps entire body within the operating area	
TRAVELING:			
		Remains aware of surroundings at all times	
		Travels smoothly, without sudden stops or starts	
		Slows down and proceeds with caution around blind corners and walkways	
		Sounds horn when needed	
		Yields to pedestrians and obey all traffic rules	
		Understands how to operate all controls (control handle, side buttons etc.)	
		Uses the buttons on the side of the tugger to move it slowly to assist in hooking up carts	
COUPLING:			
		Lifts handle and steers in reverse for coupling	
		Engages bullnose and locks pin	
		Releases handle and secondary lock	
PARKING:			
		Parks in an appropriate location (away from emergency routes, exits, ramps, etc.)	
		Uses proper battery charging process, as outlined by the manufacturer	
		Chocks wheels if parked on inline	

Supervisor/Trainer Name & Signature

Date