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	
		Chassis & Frame	
		Protective Structures (ROPS)	
		Warning & Capacity Labels	
		Tires & Rims	
		Hydraulics (If Applicable)	
		Fuel System (As Applicable)	
		• Battery	
		• Gas	
		• Propane	
		Fluids	
		Engine	
		Mirrors & Glass	
		Lights	
		Tow Hitch	
		Interior Checks	
		Cab Floor	
		Seat & Seatbelts	
		Controls	
		Steering & Drivability	
		Backup Alarm	
		Brakes	
		Parking Brake	
		Speed Control	
		Horn	
		Fire Extinguisher	
OPERATIONS:			
		Understands Stability & Balance	
		• Works Within Machine's Weight Capacity	
		• Knows or Can Find the Machine's Tipping Capacity	

		• Safely Traverses Grades	
		• Load Stability	
		• Demonstrates Safe Operations with a Trailer	
		Mounts & Dismounts Safely	
		Uses Proper Lifting Techniques	
		Uses Seatbelts When Appropriate	
		Loads & Carries Cargo in a Safe Manner	
		Demonstrates Safe Dump Bed Operations (Where Applicable)	
		Ensures Passengers Ride Safely (In a Seat & With Seatbelt Fastened, Where Applicable)	
		Demonstrates What to do if Employee Enters the Work Area	
		Demonstrates What to do When Encountering Other Vehicles	
		Drives an Appropriate Speed	
		Sets Parking Brake & Puts Vehicle in Neutral When Parking	
		Loads Vehicle on a Trailer Correctly (When Applicable)	
		Generally, Operates in a Safe Manner, Without any Horseplay	
ADDITIONAL:			

_____   _____

Supervisor/Trainer Name & Signature   Date