



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



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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 (KEY OFF INSECTION):			
		Check that operator's manual is present, in good condition, and legible	
		Check that decals and warning labels are present and legible	
		Check for oil leaks using gloves and cardboard	
		Check battery for leaks in fluid, damaged cables, cracks, corrosion	
		Check all electrical components for damage	
		Check chassis and mast for damage	
		Check tires for damage or wear	
		Check outriggers for damage	
		Check platform railings, entry, and extending platform for damage	
		Fill out damage report and lock and tag out machine if any concerning damage	
PRE-SHIFT (KEY ON INSPECTION):			
		Test control handle and levers	
		Test emergency stop button	
		Test horn and backup alarm	
		Test sensors	
		Test limited drive speed control	
		Test steering	
		Test brakes	
		Test mast controls up/down function	
		Perform load test	
		Fill our damage report and lock and tag out machine if any concerning damage	
OPERATIONAL EVALUATION:			
		Performs pre-shift inspections	
		Sets outriggers	
		Performs work zone inspection	
		Mounts platform using 3 point method	



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		Closes gate and attaches fall protection if required	
		Sounds horn and looks around before backing	
		Checks below before lowering platform	

Supervisor/Trainer Name & Signature

Date