



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 (VISUAL, FUNCTIONAL):			
		Checks the Operator's Manual	
		Wears PPE	
		Chassis & Frame	
		Protective Structures (FOPS/ROPS)	
		Lights	
		Forks/Attachments	
		Capacity Plate/Other Labels	
		Boom (if Applicable)	
		Hoses/Cables/Chains	
		Fall Protection Gear	
		Tires/Wheels	
		Mast	
		Hydraulic Components	
		Engine Compartment	
		Fluid Levels	
		Battery	
		Mirrors	
		Fire Extinguisher	
		Controls	
		Emergency Reverse Button (if Applicable)	
		Horn	
		Brake	
		Other Levers & Pedals	
OPERATIONS:			
		Mounts & Dismounts Correctly	
		Checks Surroundings Before Operation	
		Demonstrates Proper Stacking & Unstacking Procedures	
		Loads & Unloads Correctly	
		Maintains a Safe Speed	
		Turns Slowly	
		Proper Reverse Operations	
		Demonstrates Knowledge of Safe Slope or Incline Operations	



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		Body Remains Inside the Vehicle	
		Uses Seatbelt (if Applicable)	
		Raises & Lowers Fork or Attachment Safely	
		Demonstrates Knowledge of Worksite Hazards	
		Yields to Loaded Units	
		Safe Operations Around Pedestrians	
ADDITIONAL/POST-SHIFT:			
		Dismounts the Machine Correctly	
		Parks the Machine in a Safe Location	
		Charge the Battery if Needed	

Supervisor/Trainer Name & Signature

Date