Employer training and evaluation packet

A competent person is the result of excellent training.

Use this packet to organize actual equipment-specific practical training, familiarization, observed evaluation and employer authorization after the employee completes the knowledge course. The employer may arrange qualified internal or external instruction and remains responsible for the operating assignment.

Complete the records in sequence

1. Identify the operator, trainer, equipment and workplace.
2. Review the matching manual and complete machine familiarization.
3. Inspect the equipment, assess the workplace and establish rescue arrangements.
4. Provide demonstrations and supervised practical exercises in safe conditions.
5. Observe performance, correct deficiencies and record the evaluation.
6. Document employer authorization, limitations and follow-up.

Record events that actually occurred. Do not sign blank checklists. The online completion record and these practical-training records serve different purposes. Keep both with the employer learning and safety records.



Original Tribune teaching illustration: machine identification and manual review.

People, equipment and assignment

Operator name / employee identifier

Employer / site / department

Practical trainer name and relevant qualifications

Evaluator name and relevant qualifications

Manufacturer / model / serial number / fleet ID

Matching operator manual number / revision / serial range

Assigned tasks / work locations / equipment configuration

Training and evaluation date(s)

Review the employee's prior training and experience, identify gaps for this equipment and workplace, and plan enough supervised practice to demonstrate safe performance.

Prior instruction reviewed / gaps requiring instruction

Machine familiarization record

Use the actual machine and its matching manual. Explain and demonstrate each applicable item; have the operator locate or perform it. Mark items only after checking them.

Manual location, model identification and operating restrictions	Not checked
Platform capacity and any restricted operating envelope	Not checked
Ground/platform selector, enable devices and directional controls	Not checked
Emergency stops, auxiliary power and emergency-lowering arrangement	Not checked
Alarms, interlocks and the model-specific required responses	Not checked
Fall-protection anchorages and approved connecting arrangements	Not checked
Access gate, entry/exit, platform conduct and prohibited uses	Not checked
Permitted travel configurations, surface and slope limits	Not checked
Inspection, function tests, shutdown and security	Not checked
Rescue controls access and designated ground assistance	Not checked

Unresolved items / equipment-specific limits / required follow-up

Trainer and operator confirmation / signatures and date

Pre-use inspection and function tests

Complete before use as required by the matching manual. This checklist supports the manufacturer's complete procedure; use additional rows or attachments for machine-specific items. Stop use for unsafe defects.

Unit identity, readable manuals, decals and inspection status	Not checked
Boom, welds, pins, retainers, cylinders and structural condition	Not checked
Platform floor, guardrails, access gate and designated anchorages	Not checked
Tires, wheels, fasteners and required tire specification	Not checked
Hoses, cables, guards, covers, fluid levels and visible leaks	Not checked
Power source, battery/fuel condition and safe charging/refueling needs	Not checked
Ground controls and emergency functions tested as instructed	Not checked
Platform controls, enable devices and direction indicators tested	Not checked
Alarms, interlocks and other protective devices tested as instructed	Not checked
No unauthorized modifications or obstructed safety devices	Not checked

Unit ID / date / shift / inspector

Defect description, prevention of use, notification and release reference

Workplace risk assessment

Visit the work location and travel route. Assess the ground and supporting structure, reach, load, electrical and overhead exposure, traffic, weather, power source and emergency access. Communicate the controls before work and reassess changed conditions.

Task / location / selected machine / assessment date

Ground, slabs, covers, slopes, route and support assessment

Electrical/overhead hazards and verified controls/separation

Traffic, public exposure, other equipment and exclusion zones

Occupants, tools, materials, accessories and capacity verification

Weather, visibility, ventilation or atmospheric restrictions

Responsible persons / communicated controls / reassessment triggers

Task-specific rescue plan

Establish and communicate the plan before elevation. Use the actual manufacturer instructions and suitably trained responders. Plan for power failure, a medically incapacitated occupant, entrapment, instability, electrical contact and fall-protection rescue as applicable.

Location / task / unit / access route for responders

Designated trained ground responder and backup / contact methods

Emergency-control locations, manual reference and access arrangements

Foreseeable emergencies and approved response/rescue methods

Required trained personnel, equipment and outside assistance

Emergency services / utility / site contacts and precise site address

Plan briefing/practice completed by / date / signatures

Supervised practical training log

The qualified trainer demonstrates the required skills, then supervises the trainee's practice with suitable equipment and a controlled area. Stop unsafe action immediately, explain the correction and provide additional practice.

Review manual, decals, unit identity and permitted use	Not observed
Perform the walk-around, pre-use inspection and function tests	Not observed
Select PPE and the specified fall-protection arrangement	Not observed
Inspect the workplace, travel route and supporting surface	Not observed
Enter/exit safely and operate controls with correct orientation	Not observed
Travel, steer and position within permitted configurations	Not observed
Plan swing/clearance, loading and platform work safely	Not observed
Communicate and maintain protection for others	Not observed
Identify emergency controls and explain the rescue plan	Not observed
Park, stow, secure and report defects	Not observed

Dates / duration / location / machine / trainer / supervised practice details

Corrections and additional practice assigned

Observed performance evaluation

Evaluate demonstrated performance on the assigned equipment and representative tasks. A knowledge-test score is supporting evidence, not a substitute for observing the skills. An unsafe action requires intervention and follow-up.

Identifies correct manual, restrictions and controls without guessing	Not observed
Detects inspection defects and handles an unsafe unit correctly	Not observed
Assesses site, route, surface, capacity and overhead/electrical hazards	Not observed
Selects and uses the required fall-protection system correctly	Not observed
Demonstrates safe access, control orientation and permitted movement	Not observed
Maintains clearances, communication and protection for others	Not observed
Explains and demonstrates applicable emergency functions safely	Not observed
Parks/secures equipment and reports problems	Not observed

Overall result: satisfactory for defined scope OR retraining/reassessment required

Deficiencies / corrective instruction / reassessment evidence

Operator / evaluator names, signatures and date; unit and location

Employer authorization and limitations

The employer reviews the completed training, familiarization and evaluation records, confirms outstanding items are resolved, and documents the permitted assignment. Do not authorize tasks or equipment outside the demonstrated scope.

Operator / employer / authorization date

Authorized manufacturers, models, configurations and unit IDs

Permitted work locations and tasks

Operating limitations, restrictions and required supervision

Knowledge instruction / familiarization / practical evaluation record references

Follow-up, reassessment triggers and employer review policy

Employer representative name, title, signature and date

Incident, change and retraining review

Review training after unsafe operation, an incident, newly identified hazards, a different lift type or other performance/equipment changes. Consider inactivity and the employer safe-use policy. Determine the actual instruction, practice and reassessment needed.

Review trigger / date / operator / equipment

Observed facts, incident/near-miss details or changed conditions

Immediate protective actions and equipment status

Targeted instruction and supervised practice provided / dates / trainer

Reassessment observations, outcome and unresolved restrictions

Employer/evaluator review, authorization decision, signatures and date

References and record completion

These are original Tribune employer forms based on the training topics and public safety guidance below. They are not OSHA forms. Use the applicable current regulations, employer procedures and the exact manufacturer manual for each actual assignment.

OSHA 29 CFR 1926.453 - Aerial lifts

https://www.osha.gov/laws-regs/regulations/standardnumber/1926/1926.453

OSHA aerial lift eTool

https://www.osha.gov/etools/scaffolding/aerial-lifts

OSHA Using Aerial Lifts fact sheet

https://www.osha.gov/sites/default/files/publications/AERIAL_LIFTS.pdf

OSHA 29 CFR 1910.67

https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.67

Genie operator training pathway

https://www.genielift.com/en/support/training

JLG theory, practical training and evaluation

https://www.jlg.com/en/directaccess/what-type-of-mewp-training-do-you-need

Genie safe-use plan guidance

https://www.genielift.com/docs/default-source/default-document-library/en/genie-safe-use-plan-guidance---2019.pdf?sfvrsn=f43a0ff9_2

Genie machine familiarization

https://www.genielift.com/en/aerialpros/familiarization-what-is-it-and-why-is-it-important

Keep complete, accurate records with any supporting inspection, repair, training and evaluation attachments. Provide the employee the operating limitations and the contact for questions. Revisit the plan when equipment, work or performance changes.