

## New Operator Practical Evaluation Forms

We are very pleased to announce the release of a brand new, completely redesigned Operator Practical Evaluation form to take place on **December 5, 2022**. This marks the first time the form has been significantly revised since way back in early 1997, more than twenty-five years ago!

We think you are really going to appreciate the new design, layout and ease of use of the new form. The simplified procedure for completing it means that you, as the evaluator, can keep more of your attention focused on the operator rather than the form during the course of an operational evaluation.

In addition, there is no further need to calculate a score at the end of the evaluation as there are only two possible outcomes; “Competency Demonstrated” or “Additional Training Required.” Either of which can be determined at a glance.

**PRACTICAL EVALUATION: FORKLIFTS**

Trainee Name: \_\_\_\_\_ Equipment Classification/Description: \_\_\_\_\_  
 Trainee Company: \_\_\_\_\_ Make/Model/Unit No.: \_\_\_\_\_  
 Evaluator Name: \_\_\_\_\_  
 Evaluator Company: \_\_\_\_\_ Date: \_\_\_\_\_  
 Work Attachment(s): \_\_\_\_\_

Unit/Make: \_\_\_\_\_

Item	NA	CD	1	2	ATR	AO	NOTES
<b>SECTION A: INSTRUCTIONS</b>							
1. Complete all required inspection properly							
2. Document inspection correctly as required							
3. Obey:							
<b>SECTION B: GENERAL</b>							
4. Assume/Chainsaw use properly							
5. Checks all directions before moving							
6. Maintain close view in the direction of travel							
7. Maintain safe travel speed							
8. Maintain unit capacity							
9. Avoid unneeded contact between unit & surroundings							
10. Properly position work attachment for travel							
11. Emphasize safe pedestrian procedures when moving							
12. Travel on designated roadway							
13. Keep body parts within operating compartments							
14. Exceeds load capacity per unit configuration							
15. Use seatbelt/operator restraint device(s) when properly							
16. Obey due to emergency at all times							
17. Obey:							
<b>SECTION C: WORKING</b>							
18. Position & use up unit properly for conditions							
19. Items loaded while raising/lowering attachments							
20. Sit/stand operational controls properly							
21. Emphasize proper load engagement/disengagement							
22. Avoid unnecessary contact with work attachment elevated							
23. Handle/transport load carefully							
24. Thoroughly check and clearances before moving							
25. Change work attachment properly							
26. Obey:							
<b>SECTION D: POST OPERATION</b>							
27. Refuel/shut down unit properly							
28. Refuel/Charge/maintain unit correctly							
29. Obey:							

Types of Units Used: \_\_\_\_\_ Task Load Count: \_\_\_\_\_

Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_ Trainee Signature: \_\_\_\_\_ Evaluator Signature: \_\_\_\_\_  
 Total Time: \_\_\_\_\_

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“Everybody that has seen or used this form absolutely loves it,” says Ives’ Director of Training, Rob Vetter, who went on to say, “This change has been a long time coming. In fact, various versions of it have been around for years, but we had to be sure we had it right and we really had to make sure it would be an easy transition for trainers before making the jump. The practical evaluation is an extremely important part of the process and, in my personal opinion, the Practical Evaluation form is the most important piece of documentation generated during the entire process of training and qualifying an operator. It’s a huge shift, but it’s clean, simple and efficient. I really think we got all aspects it right.”

Orientation videos offering familiarization with the layout and guidance on the use of each of the three new Operator Practical Evaluation forms, for Forklifts, MEWPs and Earthmovers (loaders) respectively, are available for viewing in the Members section of the Ives website.

Additionally, the affected pages of the equipment inserts in the Trainer’s Manual, are also available for download. These pages include selected pages from Section 3, Practical, Hands-On Training and all of Section 4, Practical Evaluation Methods, in its entirety. In some of the inserts, minor changes unrelated to the new Practical Evaluation form were made and those pages are also included for download.

We’re sure you will enjoy using the new Operator Practical Evaluation and will also appreciate the added level of ease and simplicity it brings to the trainee evaluation and documentation process!

## Related Revisions

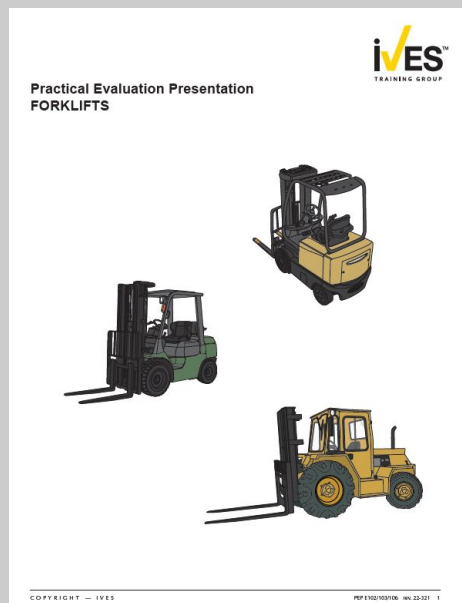
As is usually the case, revisions made to one item often affect another and this one is certainly no exception. The other affected items beyond those mentioned above are:

**1. Operator Requalification Notepads** - As those of you that have used our Notepads for operator refresher/requalification know, Practical Evaluation forms are included within them. In instances where Notepads are shipped with previous versions of the Practical Evaluation forms within them, they will be accompanied by the new versions of the form within the shipment.

**2. Equipment Pre-use Inspection forms** - This form now appears on the back side of the new evaluation forms and, as usual, is also available for free download from our website. The revision to the Pre-use Inspection form is the addition of an area at the bottom to record confirmation of inspection by up to five additional operators that may use the same unit during a shift.

Sample versions of the previous Pre-use Inspection forms that appear in the Digital Training Aids, Operator Reference Manuals and Operator Requalification Study Guides have been updated as well and Spanish-language versions are also on the way.

**3. Operator Lesson Plans** - Several revisions to the lesson plans were made to ensure that all information within them that is related to the practical evaluation form or process harmonize with the new materials.



Be sure to check out the orientation videos available for viewing on our website for a detailed walk-through of the new Practical Evaluation form and remember that you can still use any existing materials you may have on hand as these new revisions do not make previous versions of anything mentioned here obsolete.

IVES Training Group