

SAMPLE TRAINING DOCUMENT

Heavy-Duty & Mechanical New Hire Training Guide

WORK AREA	PURPOSE	STATUS
Shop / Field Service	New-hire orientation and qualification	SAMPLE DRAFT

This sample shows a practical onboarding structure. Site-specific hazards, procedures, authorizations and competency requirements must be reviewed and approved by the employer.

1. Hazards and PPE

HAZARDS - WHAT YOU MAY BE DEALING WITH	PPE - CONFIRM BEFORE WORK STARTS
• Moving vehicles and mobile equipment • Stored hydraulic, pneumatic and mechanical energy • Hot surfaces, sharp edges and pinch points • Oils, fuels, solvents and battery hazards • Lifting, suspended loads, noise and slips/trips	• Site-required work clothing and safety footwear • Safety glasses; face shield when required • Task-appropriate gloves • Hearing protection • Hard hat and high-visibility clothing where required • Respiratory or welding PPE as specified

2. Before starting work

☐	Hazards, required PPE and stop-work conditions reviewed.
☐	Emergency exits, muster point, first-aid equipment and fire extinguishers located.
☐	Shop traffic routes, pedestrian areas and equipment movement rules understood.
☐	Employee knows which work requires authorization, supervision or additional training.
☐	Required tools, manuals and manufacturer information are available and suitable for the task.

STOP WORK - DO NOT CONTINUE

Stop if energy is not controlled, guards or supports are missing, lifting equipment is unsuitable, the task is outside your authorization, or conditions differ from the approved procedure. Secure the area and contact the designated competent person.

3. First-week orientation checklist

☐	Meet the team and confirm reporting, scheduling and communication expectations.
☐	Review company rules, fit-for-duty expectations and incident reporting.
☐	Review work-order flow: receive, assess, document, obtain approval and close out.
☐	Learn shop housekeeping, waste handling and spill-response requirements.
☐	Review tool inspection, storage and defective-tool removal process.
☐	Review vehicle, hoist, jack-stand and lifting-device restrictions.
☐	Review lockout, blocking and stored-energy control requirements.
☐	Observe a qualified worker complete a normal service task from start to finish.

4. 30-day training plan

PERIOD	TRAINING FOCUS	COMPLETE
Days 1-3	Orientation, hazards, PPE, emergency response, shop traffic and work-order basics.	☐
Week 1	Tool control, inspections, housekeeping, waste handling and supervised basic service work.	☐
Weeks 2-3	Equipment-specific procedures, energy control, lifting practices and accurate job documentation.	☐
Week 4	Repeat assigned tasks under observation and complete the initial qualification review.	☐

5. Toolbox Meeting Review

Use this section when the employee joins a scheduled formal toolbox meeting during the onboarding period.

☐	Current work, changing conditions and simultaneous activities discussed.
☐	Relevant hazards, controls and required PPE confirmed.
☐	Employee had an opportunity to ask questions or identify concerns.

6. Initial Skills Checklist

A checkmark records completion of the review; it does not authorize work beyond the employee's training, trade scope or employer approval.

TASK / KNOWLEDGE AREA	REVIEW	PRACTICAL CHECK
Pre-work inspection and job setup	☐	☐
Safe tool selection and inspection	☐	☐
Lifting, supporting and blocking equipment	☐	☐
Stored-energy identification and control	☐	☐
Work-order notes and deficiency reporting	☐	☐
Housekeeping, waste and spill response	☐	☐

7. Knowledge check

1. What must you do before working on equipment with stored energy?
2. When must a tool, hoist, jack or lifting device be removed from service?
3. What information must be recorded before a work order is closed?
4. What should you do when the job conditions or equipment do not match the approved instructions?

8. Initial review and sign-off

EMPLOYEE STATUS	FOLLOW-UP
☐ Initial orientation complete	☐ Additional training required
☐ Approved for assigned supervised tasks	☐ Reassessment date set
EMPLOYEE NAME / SIGNATURE	DATE
TRAINER / QUALIFIED PERSON	DATE

This sample does not replace apprenticeship requirements, trade certification, manufacturer instructions, site procedures, permits, supervision requirements or employer authorization.