

TRAINING TOOL



# Driver Learning Record

DRIVING THE FUTURE



# Driver Learning Record

The Driver Learning Record is a tool that can be used to monitor and document the on-the-job skills development of a new driver following the attainment of a Commercial Driver's License (CDL). Ideally, new drivers are assigned to a senior driver/mentor who is deemed to have the knowledge and skill required to demonstrate the proper performance of the skills and assess the driver's performance of the competencies as they are performed. The Driver Learning Record is an ongoing assessment tool that is used to determine the strengths and abilities of the driver as well as the skill areas that require additional attention, training and development.

## DRIVER AND ASSESSOR RESPONSIBILITIES

The driver and the assessor (e.g. senior driver, coach/mentor/assessor, trainer) each have responsibilities associated with the Driver Learning Record.

### Driver Responsibilities:

- To always have the learning record with him/her to allow assessor the opportunity to provide sign-off when competencies are performed.

### Assessor Responsibilities:

- To objectively provide assessment of the performance of competencies in the spirit of enhancing the skills and knowledge of the driver.
- To routinely assess and observe their student driver on a regular basis to provide real-time sign-offs (i.e. the learning record should not be completed at one sitting).

## RATING SCALE

The following rating scale should be used to objectively assess the driver's performance of the competency.

1	2	3	4
<b>Novice</b>	<b>Functional</b>	<b>Competent</b>	<b>Master</b>
driver appreciates the value and need for the competency	driver has partially acquired the competency	driver has fully acquired the competency	driver has mastered the competency
<b>Implication:</b> Significant further development is needed; tasks cannot be performed	<b>Implication:</b> Support and guidance are still needed	<b>Implication:</b> Completes work tasks independently	<b>Implication:</b> Able to mentor others

Because the Driver Learning Record is intended to be used during the learning phase following licensure, the target rating for each competency should be 2 (Functional) to 3 (Competent).

**1**

Personal Development, Workplace Relationships and Team Skills	Rating	Assessor Initials
Awareness		
Utilizes personal hygiene habits that positively affect workplace relationships.		
Speaks clearly and professionally to fellow workers, supervisors, dispatchers and workplace operations staff.		
Effectively approaches supervisors to help resolve workplace difficulties, and knows the process to be followed if the difficulties are not resolved.		
Complies with workplace practices, procedures and policies that workers must follow when dealing with internal contacts such as coworkers, supervisors, customers and suppliers, and external contacts such as other motorists, officials, media and the public.		
Complies with workplace practices, procedures and policies for interacting with people including police, enforcement personnel, the media, general public, other motorists, etc.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

## 2

Dependability and Administrative Task Completion	Rating	Assessor Initials
<b>Workplace Compliance</b>		
Receives, understands and follows written and verbal instructions from supervisors, dispatchers and other workplace staff.		
Reviews and understands documented job task analyses and hazard assessments.		
Adopts and consistently follows standard workplace protocols when using phones, radios, computers, on-board systems, written forms of communication, etc.		
Composes and delivers written information and messages relating to workplace activities.		
Follows workplace practices, procedures and policies when releasing sensitive information about an operation, vehicle, trips, routes or cargo.		
<b>Document Processing</b>		
Legibly completes all workplace forms needed to establish and sustain employment.		
Converts imperial and metric measurements using tables, mathematical formulas, or conversion programs.		
Completes basic data-entry, form-filling and online search tasks.		
Proficiently uses a calculator or computer.		
Confirms all required vehicle and cargo documents are valid and correct. These documents include items such as permit books, vehicle registration, insurance, bills of lading, etc.		
Legibly records information onto, tracks and manages cargo related documents such as way-bills.		
Confirms that cargo matches related documents – and identifies any areas requiring clarification, changes, adjustment or planning.		
Proficiently uses workplace-specific electronic tools such as communication, tracking and video event recording devices, customer-specific data-entry devices, etc.		
Calculates and records information needed for fuel tax reports.		



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Dependability and Administrative Task Completion, CON'T	Rating	Assessor Initials
Regulatory Compliance		
Maintains a complete, legible, and accurate driver's daily log (in a written or electronic format) that fully complies with the regulations.		
Carries daily logs that apply to the preceding 14 days, whenever operating a commercial vehicle requiring the driver to carry a log.		
Retains and submits daily logs as required by the regulations and according to workplace practices, procedures and policies.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

**3**

Service to Shippers/Receivers	Rating	Assessor Initials
Maintains personal appearance and behavior that positively affect the employer's corporate image.		
Speaks clearly and professionally to staff at shipper and customer locations.		
Listens to and conveys messages from shippers and customers.		
Receives and conveys negative messages and/or complaints in a polite and professional manner.		
Seeks appropriate help when accessing an unfamiliar location or facility.		
Uses appropriate Personal Protective Equipment properly and as required, inside or outside of every workplace, shipper facility and customer facility.		
Avoids revealing any sensitive information about their operation, vehicle, trips, routes or cargo.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

## 4

Planning and Problem Solving	Rating	Assessor Initials
Accesses reliable information about weather and road conditions, before and during a trip.		
Identifies special requirements relating to the vehicle, load, routing or commodity.		
Avoids traveling to an unfamiliar location without first confirming facilities and preferred routes.		
Calculates when they can begin to drive, and how many hours are available for driving.		
Calculates trip durations to determine arrival times and plan departure times.		
Calculates route and trip distances.		
Prepares a route plan, or identifies a predetermined route plan, that considers vehicle size and weight.		
Accesses information and reference tables such as those related to vehicle weights and dimensions.		
Accesses reliable and up-to-date maps and electronic route information.		
Accesses reliable information about commercial vehicle routes, road construction, road closures, height clearances, weight restrictions, permit requirements, etc.		
Plans ahead and knows where work breaks can be taken.		
Identifies, locates and accesses service facilities, rest areas, and emergency refuge locations as necessary.		
Estimates fuel consumption rates, and estimates how far a vehicle can travel on a particular quantity of fuel.		
Identifies and locates suitable fuel sources, and purchase fuel according to workplace practice, procedures and policies.		
Calculates actual and allowable axle weights.		
Identifies and prepares for common problems and challenges, such as packing cold weather attire and equipment when necessary.		



**4** con't

Planning and Problem Solving, CON'T	Rating	Assessor Initials
Adjusts trip plans or work plans when encountering unanticipated changes.		
Carries necessary first aid supplies, and understands personal limitations in administering first aid.		
Operates basic emergency equipment such as a fire extinguisher, safety warnings (triangles, flares), spill kits, etc.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

## 5

Use and Care of Equipment	Rating	Assessor Initials
Identifies the purpose, importance and proper condition of vehicle related documents such as vehicle registration, insurance, program registry, fuel tax reporting, permits, etc.		
Confirms that every commercial vehicle being operated displays valid evidence that regulatory periodic inspections and workplace-specific inspections have been conducted.		
Checks level of operating fluids including fuel, engine oil, engine coolant, power steering oil, windshield washer, diesel exhaust fluid (DEF), etc. – and tops up when necessary.		
Regularly checks basic vehicle components, such as drive belts, hoses, tires, etc.		
Proficiently uses some basic hand tools (if company policy permits)		
Completes minor vehicle repair such as: repair minor electrical connection problem, replace lamp, gladhand seal or wiper blade, reset circuit breaker, etc. (if company policy permits)		
Practices engine warm-up and cool-down procedures that are appropriate for conditions, following manufacturer recommendations and in accordance with workplace practices, procedures and policies.		
Identifies defective conditions and damage on most vehicle components and systems, according to company practices, procedures and policies.		
Reports vehicle damage, defects, completed repairs and any other condition that may require maintenance, correction or review.		

**5**

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Use and Care of Equipment, CON'T	Rating	Assessor Initials
Proficiently operates portable or on-board cargo heating equipment.		
Proficiently operates different types of trailer coupling devices.		
Understands the nature of the content, and locates vehicle owner and operator manuals as needed.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

**6**

Daily Inspection Requirements	Rating	Assessor Initials
Continuously monitors vehicle condition according to NSC 13 Schedule 1 while driving or otherwise being responsible for the vehicle, and updates the inspection report as required.		
Records on an inspection report every minor defect found during an inspection or while operating a vehicle, and reports the minor defect according to workplace practices, procedures and policies.		
Immediately records on an inspection document and reports every major defect found during an inspection, or while operating a vehicle, and immediately stops operating the vehicle.		
Maintains a vehicle's out-of-service status whenever a major defect is identified, until the condition is corrected.		
Conducts regular en-route and post-trip vehicle inspections according to workplace practices, procedures and policies.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

## 7

Cargo Handling and Care	Rating	Assessor Initials
Calculates and records cargo weight when necessary.		
Operates cargo handling equipment in the proper manner, and only when fully trained and authorized.		
Handles and loads cargo carefully, and confirms that all cargo is properly packaged, unitized, arranged and secured inside facilities and vehicles.		
Uses cargo seals, pin locks and similar vehicle security devices according to company practices, procedures and policies.		
Ensures that, in cases where cargo needs to be unitized, individual articles of cargo remain adequately secured into larger articles of cargo.		
Inspects cargo and methods used to secure the cargo before driving, to confirm everything is properly secured to comply with the regulations, and according to workplace practices, procedures and policies.		
Ensures that cargo secured to the vehicle structure is properly distributed and arranged, and that any required blocking, bracing or friction mat is adequate, properly positioned and securely in place.		
Confirms proper methods and devices have been used to secure cargo, are in good condition, and are in the proper locations.		
Inspects cargo and related articles at specific intervals during the trip to ensure everything remains properly secured to comply with the regulations, and according to workplace practices, procedures and policies.		
Inspects the condition and integrity of tiedown devices, and adjusts tiedowns as necessary to keep cargo secure during transport.		
Carefully tracks cargo and related documents during each trip; identifies any discrepancies between cargo documents and the cargo being transported.		
Calculates changing cargo weight when needed and verifies compliance with vehicle weight regulations.		



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**Cargo Handling and Care, CON'T**

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

## 8

Off Road Tasks and Maneuvers	Rating	Assessor Initials
Determines before leaving the driver's seat that the vehicle is secured by the vehicle's parking brake, wheel chocks or suitable blocks.		
Properly enters and exits the cab or vehicle cargo area, maintains 3-point contact, and avoids the risks of improperly climbing onto or jumping from equipment.		
Proficiently adjusts overall vehicle length, 5th wheel position and axle positions as required, accounting for the vehicle's overhang, trailer swing, and the rules governing vehicle weights and dimensions.		
Checks and/or adjusts air suspension settings and controls, axle spacing, and 5th wheel position (tractor-trailer only)		
<b>Loading Dock</b>		
Opens cargo doors when needed before backing.		
When in a loading dock, confirms that all cargo handling equipment and devices have been returned to their proper place.		
Checks or removes vehicle restraints and other loading dock devices.		
Observes signals and other warning devices used around loading docks.		
<b>Backing &amp; Parking</b>		
Proficiently backs into and properly aligns with loading docks.		
Proficiently backs 30 metres in a straight line in a path that provides 15 cm clearance on either side at the vehicle's widest point, door or mirror.		
Minimizes backing activity by driving forward, driving around the block, or finding a different approach whenever possible.		
Plans ahead to ensure backing is always done in the safest manner.		
Exits the vehicle and checks the intended path for clearances, obstructions and hazards as often as necessary, before and during backing. Rechecks the path whenever delays could allow conditions to change.		

**8** con't

**Off Road Tasks and Maneuvers, CON'T**

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_



**9**

Review of On-Road Safe Driving Record (solo driving history)	Rating	Assessor Initials
Immediately recognizes and responds to an unexpected situation in which vehicle weight or height is greater than what is permitted to operate on a particular road or highway.		
Complies with specific requirements for using toll routes and bridges.		
Respects local bylaws restricting vehicle loading and unloading activities, parking and idling.		
<b>Additional for tractor-trailer</b>		
Plans how to approach a turn, and takes a different route whenever a safe turn may not be possible.		
Proficiently turns tractor-trailers from a laneway onto a two-lane street.		
Performs U-turns with a tractor-trailer according to company practices, procedures and policies. Proficiently completes a U-turn only where legally permitted, when necessary and after assessing all hazards.		

Assessor Notes:

Driver Notes:

**Date of Final Sign-off on Module:**

Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_

**10**

Fuel Consumption	Rating	Assessor Initials
Uses auxiliary power units and “shore power” according to workplace practices, procedures and policies.		
Idles the engine as little as possible, and only when and where permitted.		
Sets up and operates vehicle to minimize fuel consumption. Minimizes the gap between tractor and trailer where possible and allowed.		
Uses fuel types, vehicle technology, fuel additives, etc., according to workplace practices, procedures and policies. Purchases fuel based on workplace practices, procedures and policies that reflect price, etc.		

Assessor Notes:

Driver Notes:

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Signature of Assessor: \_\_\_\_\_

Signature of Driver: \_\_\_\_\_