

## Driver Orientation Checklist

Read the attached instructions. Use this form to record relevant training information for employees who drive for work purposes. Keep a copy of the completed checklist in the employee’s orientation records.

|  |  |
|--|--|
| Employee name  | Position   |
| Date hired   | Date of orientation                                  |
| BC driver’s licence #  | Class <span style="float: right;">Expiry date</span> |
| Restrictions   | Endorsements   |
| Driver’s licence – other jurisdiction  |  |
| Driver’s abstract reviewed    Yes <input type="checkbox"/> No <input type="checkbox"/> | Date on driver’s abstract                            |
| Person(s) providing orientation  |  |
| Supervisor’s name  | Contact info   |

| Review job-related driving hazards <i>(examples below)</i> | Comments | Trainer Initials | Worker Initials |
|--|----------|------------------|-----------------|
| <input type="checkbox"/> Distractions                      |          |                  |                 |
| <input type="checkbox"/> Intersections                     |          |                  |                 |
| <input type="checkbox"/> Aggressive driving                |          |                  |                 |
| <input type="checkbox"/> Seatbelt use                      |          |                  |                 |
| <input type="checkbox"/> Impairment / fatigue              |          |                  |                 |
| <input type="checkbox"/> Reversing                         |          |                  |                 |
| <input type="checkbox"/> Parking                           |          |                  |                 |
| <input type="checkbox"/> Pedestrians / cyclists            |          |                  |                 |
| <input type="checkbox"/> Hurrying                          |          |                  |                 |
| <input type="checkbox"/> Complacency                       |          |                  |                 |
| <input type="checkbox"/> Road / weather conditions         |          |                  |                 |
| <input type="checkbox"/> Other                             |          |                  |                 |
|  |          |                  |                 |
|  |          |                  |                 |
|  |          |                  |                 |
|  |          |                  |                 |

| Review safe driving policies and procedures                     | Comments | Trainer Initials | Worker Initials |
|---|----------|------------------|-----------------|
| <input type="checkbox"/> Worker rights and responsibilities     |          |                  |                 |
| <input type="checkbox"/> General driving rules                  |          |                  |                 |
| <input type="checkbox"/> Distracted driving                     |          |                  |                 |
| <input type="checkbox"/> Fitness for duty                       |          |                  |                 |
| <input type="checkbox"/> Vehicle inspection                     |          |                  |                 |
| <input type="checkbox"/> Vehicle maintenance                    |          |                  |                 |
| <input type="checkbox"/> Load securement                        |          |                  |                 |
| <input type="checkbox"/> Working (driving) alone                |          |                  |                 |
| <input type="checkbox"/> Preventing violence                    |          |                  |                 |
| <input type="checkbox"/> Check-in procedure                     |          |                  |                 |
| <input type="checkbox"/> Parking practices                      |          |                  |                 |
| <input type="checkbox"/> Using employee-owned vehicles for work |          |                  |                 |
| <input type="checkbox"/> Journey management                     |          |                  |                 |
| <input type="checkbox"/> Incident reporting                     |          |                  |                 |
| <input type="checkbox"/> Winter driving                         |          |                  |                 |
| <input type="checkbox"/> Other                                  |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |
|   |          |                  |                 |



| Familiarize driver with work vehicle |                            | Comments | Trainer Initials | Worker Initials |
|--------------------------------------|----------------------------|----------|------------------|-----------------|
| <input type="checkbox"/>             | Adjusting driver's seat    |          |                  |                 |
| <input type="checkbox"/>             | Mirror adjustment          |          |                  |                 |
| <input type="checkbox"/>             | Blind spots                |          |                  |                 |
| <input type="checkbox"/>             | Operating vehicle controls |          |                  |                 |
| <input type="checkbox"/>             | Operating transmission     |          |                  |                 |
| <input type="checkbox"/>             | Trailer practices          |          |                  |                 |
| <input type="checkbox"/>             | Emergency, first aid kit   |          |                  |                 |
| <input type="checkbox"/>             | Fire extinguisher          |          |                  |                 |
| <input type="checkbox"/>             | Additional equipment       |          |                  |                 |
| Fuelling                             |                            |          |                  |                 |
| Emergency procedures                 |                            |          |                  |                 |
| Hazardous materials                  |                            |          |                  |                 |
| Personal Protective Equipment        |                            |          |                  |                 |
| Vehicle documentation                |                            |          |                  |                 |
| Using pool vehicles                  |                            |          |                  |                 |
| Other                                |                            |          |                  |                 |
|                                      |                            |          |                  |                 |
|                                      |                            |          |                  |                 |
|                                      |                            |          |                  |                 |

Date for ride-along assessment

Date for follow-up meeting

Driver / employee signature

Supervisor / employer signature



## Instructions for Completing Driver Orientation Checklist

These instructions identify key discussion topics and explain the steps managers and supervisors should apply when they use the Driver Orientation Checklist to orient an employee to the driving components of their new job. Make notes about what was shared and discussed, questions that arise and any items that require follow-up. Keep a copy of the completed checklist in the employee's file to document the orientation.

### Driver's licence

- Ask to see the employee's British Columbia driver's licence; ask if you can take a photocopy of it for the company's records.
- Note the [class of driver's licence](#) (e.g. Class 1, 2, 3, 4 or 5); confirm it matches the class of licence that's required for the driving the employee will be assigned.
- Note the date of expiry as a reminder to check the employee renews their licence before it expires.
- Check and record any restrictions noted on the driver's licence, especially the ones that are relevant to the driving they will do for work.
- Check and record any relevant endorsements – e.g. heavy trailer endorsement, house trailer endorsement, etc.
- If the employee has a driver's licence that's not from BC, verify the licence is valid in BC. New BC residents have a grace period of 90 days before they must apply for a BC licence. Learn more at [Moving and your licence](#).

### Driver abstract (or driving record)

- Ask the employee to submit a copy of their current abstract; store it in the company records.
- Record the date the driver's abstract was issued by ICBC. Record and discuss implications of any restrictions or contraventions indicated on the abstract.
- Explain company requirements for employees to immediately report to their supervisor if they receive any penalty points while driving for work, or if they receive any driving prohibition.

### Review driving-related hazards

Tell the employee about:

- **usual** or **typical** hazards that the employee can expect to encounter regularly while driving for work, such as distractions, improper lane changes and speeding
- **high risk** hazards that have a higher probability of contributing to crashes or can increase the severity of a crash, such as dangerous intersections, difficult routes, winter conditions, and
- **unusual** or **unique** hazards that the driver might not normally encounter but may encounter in their new job, such as complex delivery locations, specific vehicle equipment, and strenuous shift rotations

**Note:** If your company has not completed a road safety risk assessment, use [RiskCheck](#) to identify driving-related hazards, assess risks and set priorities.

### Safe driving policies and procedures

Review the policies and procedures employees are expected to apply when they drive for work. Tell the employee where they can access this information (e.g., hard copy, online, etc.). Discuss these topics even if the company does not have written policies or procedures on them.

- Worker rights and responsibilities – refusing unsafe work, etc.
- General driving rules - authorization, seatbelt use, obeying laws, etc.
- Distracted driving
- Fitness for duty / impairment
- Vehicle inspection
- Vehicle maintenance
- Load securement
- Working (driving) alone
- Preventing violence
- Check-in procedure
- Parking practices
- Using employee-owned vehicles for work
- Journey management process
- Incident reporting
- Winter driving

For more on road safety policies and procedures, go to the [Road Safety At Work Tool Kit](#) section.

### Familiarize employee with their work vehicle

Ensure the employee knows how to operate the vehicle(s) they will drive for work. Record training and any items that need follow-up. Topics you'll want to demonstrate include:

- Adjusting the driver's seat
- Operating vehicle controls
- Transmission operation, gear selection
- Safety features – how they work, limitations
- Starting the vehicle
- Proper mirror adjustment
- Blind spots
- Load-carrying capacity
- Trailering practices
- Location and contents of emergency / first aid kit
- Location of fire extinguisher
- Additional equipment (e.g. two-way radio, winch, load securement devices, etc.)

**Tip: Providing the above instructions while completing a vehicle inspection with the employee is an efficient way to help them remember important points.**

### Fuelling

Identify fuelling locations and/or preferred vendors. If your company uses a cardlock or internal fuelling location, go there and teach the employee what to do. Show them how to record fuelling in the vehicle log.

### Emergency procedures

Explain what to do if they are involved in a crash – what to do, who to call and how to report it to the employer.

Learn more at [Be Ready to Act](#).

### Hazardous materials

Identify hazardous materials that are (e.g., gasoline, coolant), or may be, carried in the vehicle. Make sure the employee gets necessary Workplace Hazardous Materials Information System (WHMIS) and Transportation of Dangerous Goods (TDG) training so they understand safe handling practices and emergency measures.

### Personal Protective Equipment

Remind the employee that seatbelts are mandatory whenever they drive. Explain what personal protective equipment (PPE) is to be carried in the vehicle (i.e. at least a hi-vis vest they must wear when they are outside the vehicle and exposed to traffic), including PPE they may require at their destination (work boots, gloves, eye protection, etc.). Discuss proper driving attire (e.g., avoid driving with heavy work boots or high heels and clothing that will restrict their ability to operate the vehicle).

### Vehicle documentation

Show the employee where the vehicle registration and insurance are stored. If it's an employee-owned vehicle, review those papers and get a copy for company records.

### Using pool vehicles

If your company has a pool of work vehicles, explain the process for signing one out. Introduce them to the people they need to know (e.g., fleet manager, administrator, etc.).

### Schedule a ride-along driver assessment

Before assigning an employee any driving tasks, evaluate the employee's driving skills and behaviours to determine whether any additional training is required. Learn more at [Driver Assessment Tool](#).

### Follow-up Meeting

Orienting a new hire involves significant knowledge transfer. It's unlikely they can absorb and retain all of what you will tell them during the initial orientation. Using a stepped approach can help ensure the new hire is not overwhelmed. And, whether you do a single, comprehensive orientation or a series of smaller ones, a new hire will have questions and need clarifications. Agree upon a date and time for a follow-up meeting.