Crane and Rigging Pre-Mobilization Training Checklist Rev 0 · Nov 2026

Employer self-assessment of training, testing, evaluation and records, completed for each worker before mobilizing to a project site.

Complete one checklist per worker before that worker mobilizes to a project site. Fill in the record header, complete Part A for everyone, then complete the Part B section for each role the worker will perform. A worker assigned more than one role (for example, rigger and signal person) needs every matching section. Part C covers state, local and owner rules. Part D records the gaps and the release decision.

This checklist helps an employer confirm that required training, testing, evaluation and records exist and are on file. It does not train, qualify, certify or authorize anyone. Training, evaluation and documentation remain the employer's responsibility. Items summarize US federal OSHA rules (29 CFR 1926 and 1910) and ASME/ANSI consensus standards; check each against the current text of the standard and your contract before relying on it.

Basis codes

Code	Meaning	How to treat it
M	Federal OSHA regulation	Legally mandatory where the rule applies
S	ASME/ANSI “shall”	Mandatory when adopted by contract, owner spec, state rule or company policy; widely treated as the industry minimum
R	ASME/ANSI “should”	Recommended practice
P	Industry practice or employer program	Good practice; not required by OSHA or ASME

Items marked (V) cite an ASME/ANSI provision summarized from secondary sources. Verify the wording against your licensed copy of the standard.

Status: tick C = complete and evidence seen on file, G = gap (list it in Part D), NA = does not apply to this worker's assignment (note why in Part D). Write the reviewer's initials and date in the last column. On paper, print only the role sections that apply.

Rule of thumb: every card, certification and periodic evaluation should remain valid through the planned end of the assignment, and records the standard says must be “available at the worksite” should travel with the worker or be accessible on site from day one.

Employee and assignment record

Field	Entry
Employer	
Employee name	
Employee ID	
Project / site	
Site jurisdiction (federal OSHA, state plan, city)	
Owner or contract requirements (e.g., USACE EM 385-1-1, DOE-STD-1090, owner spec)	
Work type (construction 29 CFR 1926 / general industry 29 CFR 1910)	
Planned mobilization date	
Planned assignment end date	
Equipment the worker will use (type, make, model, capacity, configuration)	
Language(s) the worker was tested in	
Reviewer name and title	
Review date	

Roles assigned for this project (tick each and complete its Part B section)

	Role		Role
☐	B1 Crane Operator	☐	B6 Lift Director
☐	B2 Qualified Rigger	☐	B7 Assembly/Disassembly Director
☐	B3 Signal Person (incl. dedicated power-line spotter)	☐	B8 Operator Evaluator / Operator Trainer
☐	B4 Lift Crew Member	☐	B9 Rigging Hardware Inspector
☐	B5 Load Handling Equipment User		

Part A. Every person on the lift team

Complete for every worker, whatever the role.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
A1	Trained to recognize and avoid unsafe conditions and in the regulations that apply to the work environment	M · 1926.21(b)(2)	Training roster, orientation or toolbox record	☐	☐	☐	

A blank form for your own program. Filling it in does not qualify, certify or train anyone. Training and qualification are the employer’s responsibility. Check the cited regulation or standard for exact wording.

Part B1. Crane Operator

Operators of mobile, crawler, tower and overhead cranes. Under 29 CFR 1926 an operator needs both a certification (or license) and a documented employer evaluation before operating. A card alone is not enough.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B1.1	Holds a valid certification or license: state/local license where required, accredited testing organization, or audited employer program	M · 1926.1427(a),(c)-(e)	Copy of card or license	☐	☐	☐	
B1.2	Certification matches the equipment type (or type and capacity) the worker will run on this project	M · 1926.1427(d)	Card category vs. equipment list	☐	☐	☐	
B1.3	Certification is no more than 5 years old and will not lapse before assignment end	M · 1926.1427	Expiry date	☐	☐	☐	
B1.4	Certification included a written test and a practical test	M · 1926.1427(j)	Testing organization or audit record	☐	☐	☐	
B1.5	Runs only equipment with manuals and load charts in the language they were tested in	M · 1926.1427(h)	Test language noted on card	☐	☐	☐	
B1.6	Employer evaluation completed on the equipment and tasks assigned (skills, safety devices, operational aids, configuration)	M · 1926.1427(f)	Signed evaluation	☐	☐	☐	
B1.7	Evaluation record shows operator name, evaluator name and signature, date, and make, model and configuration	M · 1926.1427(f)	Evaluation form	☐	☐	☐	
B1.8	Evaluation record will be available at the worksite (paper or electronic)	M · 1926.1427(f)	Copy packed or site access confirmed	☐	☐	☐	
B1.9	Re-evaluated if this project's equipment needs substantially different skills from past evaluations	M · 1926.1427(f)	New evaluation, or note why not needed	☐	☐	☐	
B1.10	Trained in safe operation of the equipment, friction-crane boom practice and the manufacturer's emergency procedures	M · 1926.1430(c)	Training record	☐	☐	☐	
B1.11	Trained on power-line safety (1926.1408(g) topics)	M · 1926.1430(a)	Training record	☐	☐	☐	
B1.12	Trained in tag-out and start-up procedures	M · 1926.1430(f); 1926.1417(f),(g)	Training record	☐	☐	☐	
B1.13	Operator-in-training: trainer assigned, continuous monitoring planned, and restricted tasks (power lines, personnel hoisting, multi-crane lifts, lifts over shafts, cofferdams or tank farms) excluded	M · 1926.1427(b)	OIT log and trainer assignment	☐	☐	☐	
B1.14	Any retraining was followed by a new employer evaluation	M · 1926.1427(b)(5)	Retraining and re-evaluation record	☐	☐	☐	
B1.15	General industry: on the employer's designated operator list for overhead, gantry, crawler, locomotive or truck cranes	M · 1910.179(b)(8); 1910.180(b)(3)	Designation list	☐	☐	☐	
B1.16	Sideboom, derrick and ≤2,000 lb equipment: trained under that equipment's own section	M · 1926.1427(a)(2); 1926.1436, .1440, .1441	Training record	☐	☐	☐	
B1.17	Qualified by written and practical exam specific to the crane type; employer documents it	S · ASME B30.5 (V)	Qualification file	☐	☐	☐	
B1.18	Familiarized with the specific crane's controls, manual, load charts and configuration before operating it	S · ASME B30.5 (V)	Familiarization checklist (each new model or configuration)	☐	☐	☐	
B1.19	Physical criteria met (vision, depth and color perception, hearing, no condition causing sudden loss of control)	S/R · ASME B30.5 (V)	Fitness clearance (kept separate from training file)	☐	☐	☐	
B1.20	Overhead and underhung crane operators trained and qualified per the volume's operator training chapter	S · ASME B30.2; B30.17 (V)	Training and qualification record	☐	☐	☐	

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Part B2. Qualified Rigger

OSHA sets no test format for riggers, so the employer must be able to show the basis for calling someone qualified. ASME B30.5 asks for evidence of a written and practical exam.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B2.1	Employer determination that the rigger meets the "qualified person" criteria (degree, certificate or professional standing, or extensive knowledge, training and experience) and has shown ability to solve rigging problems	M · 1926.1401	Written determination with its basis	☐	☐	☐	
B2.2	Passed a written exam on hardware selection and use, standard hitches, load weight, center of gravity, sling angles and loading, load movement, and rigging inspection	S · ASME B30.5 (V)	Exam result	☐	☐	☐	
B2.3	Passed a practical exam on the same subjects	S · ASME B30.5 (V)	Practical evaluation record	☐	☐	☐	
B2.4	Employer has formally designated the person as a qualified rigger	S · ASME B30.5 (V)	Designation record	☐	☐	☐	
B2.5	Trained in the Subpart CC requirements that apply to the rigger's duties	M · 1926.1430(d)	Training record	☐	☐	☐	
B2.6	Trained in sling selection, inspection, cautions to personnel, environmental effects and rigging practices	S · ASME B30.9 (V)	Training record	☐	☐	☐	
B2.7	Trained in rigging hardware selection, inspection, cautions, environmental effects and rigging practices	S · ASME B30.26 (V)	Training record	☐	☐	☐	
B2.8	Trained to inspect rigging before each shift and remove defective gear from service	M · 1926.251(a)(1)	Training record	☐	☐	☐	
B2.9	If the rigger will do the daily sling inspection: designated by the employer as the competent person for it	M · 1926.251(a)(6); 1910.184(d)	Designation list	☐	☐	☐	
B2.10	Steel erection: specific training in multiple-lift rigging procedure and hazards	M · 1926.761(c)(1)	Training record	☐	☐	☐	
B2.11	Will rig loads hooked, unhooked or guided by workers in the fall zone (confirms qualified rigger status is needed)	M · 1926.1425(c)(3)	Lift plan or JHA role assignment	☐	☐	☐	
B2.12	Will rig during crane assembly or disassembly (confirms qualified rigger status is needed)	M · 1926.1404(r)(1)	A/D plan role assignment	☐	☐	☐	
B2.13	Any rigging helper not yet qualified is assigned to work under direct supervision of a qualified rigger	S · ASME B30.5 (V)	Supervisor assignment	☐	☐	☐	
B2.14	Qualification measured against the ANSI/ASSP A10.42 knowledge and performance criteria	R · A10.42 (V)	Qualification file	☐	☐	☐	
B2.15	Third-party rigger certification held (optional; supports but does not replace employer determination)	P	Card copy and expiry	☐	☐	☐	

Part B3. Signal Person

Hand and radio signal persons and dedicated power-line spotters. The worker must be qualified before giving any signal, and the record must list each signal type.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B3.1	Qualified through a third-party qualified evaluator (portable) or the employer's own qualified evaluator (not portable to another employer)	M · 1926.1428(a)(1)-(2)	Third-party card or employer assessment	☐	☐	☐	
B3.2	If qualified by another employer's evaluator: re-qualified by this employer or a third party	M · 1926.1428(a)(2)	New assessment	☐	☐	☐	
B3.3	Passed an oral or written test AND a practical test	M · 1926.1428(c)(5)	Test results	☐	☐	☐	
B3.4	Tested on the signal types used (Standard Method hand signals where applicable), basic equipment operation and limits including load swing, stopping and boom deflection, and 1926.1419-.1422 and .1428	M · 1926.1428(c)(1)-(4)	Test content or answer sheet	☐	☐	☐	
B3.5	Qualification record lists each signal type qualified for (hand, radio, voice, other) and matches the signals planned on this project	M · 1926.1428(a)(3)	Qualification record	☐	☐	☐	

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#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B3.6	Qualification record will be available at the site	M · 1926.1428(a)(3)	Copy packed or site access confirmed	☐	☐	☐	
B3.7	If not already meeting 1428(c): trained in those areas before testing	M · 1926.1430(b)	Training record	☐	☐	☐	
B3.8	No open removal: if past actions showed the worker no longer met the requirements, retraining and reassessment are complete	M · 1926.1428(b)	Removal, retraining and reassessment record	☐	☐	☐	
B3.9	Dedicated power-line spotter: meets the full signal person qualification	M · 1926.1401 (dedicated spotter)	Signal person qualification record	☐	☐	☐	
B3.10	Qualified in standard signals and basic crane operation and limitations by oral/written and practical exam, and trained in signalperson responsibilities	S · ASME B30.5 (V)	Qualification file	☐	☐	☐	
B3.11	General industry work: qualification recorded even though 29 CFR 1910 has no signal-person rule	P · ASME B30	Qualification record	☐	☐	☐	
B3.12	Radio signaling: trained on the site radio procedure (dedicated channel, voice protocol, loss-of-communication stop)	P · 1926.1420	Training record	☐	☐	☐	

Part B4. Lift Crew Member

Tag-line handlers, helpers, spotters and anyone else working in the crane work area, plus anyone who will be hoisted. Part A items A6 and A7 also apply. Briefings happen on site, so this section confirms the worker is trained and knows the briefings are required.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B4.1	Trained on power-line hazards and procedures if the work may be near power lines	M · 1926.1430(a); 1926.1408(g)	Training record	☐	☐	☐	
B4.2	Trained in tag-out and start-up procedures if authorized to start, energize or operate equipment controls	M · 1926.1430(f)	Training record	☐	☐	☐	
B4.3	Understanding of the training was evaluated	M · 1926.1430(g)(1)	Quiz, demonstration or sign-off	☐	☐	☐	
B4.4	Will serve as a dedicated power-line spotter: complete Part B3	M · 1926.1401	Part B3 complete	☐	☐	☐	
B4.5	Trained on fall-zone and tag-line practice (stay out from under the load, hands off the load until it is controlled, use tag lines where needed)	M · 1926.1425 (fall zone); P (tag lines)	Training record	☐	☐	☐	
B4.6	Knows that anyone on the crew may signal an emergency stop and that the operator must obey it	S · ASME B30.5 (V)	Training record	☐	☐	☐	
B4.7	Will be hoisted on a personnel platform: aware the pre-lift meeting is required before the trial lift and for each newly assigned worker	M · 1926.1431(m)	Training record; meeting planned	☐	☐	☐	
B4.8	Will work on a multiple-crane lift: aware the lift director's plan review meeting is required	M · 1926.1432(b)(2)	Meeting planned	☐	☐	☐	
B4.9	Will work on assembly or disassembly: aware of the required A/D crew briefing on tasks, hazards and hazardous positions	M · 1926.1404(d)	Briefing planned	☐	☐	☐	
B4.10	Trained to attend and take part in the pre-lift meeting for the lift category (standard or critical)	R · ASME P30.1 (V)	Training record	☐	☐	☐	

Part B5. Load Handling Equipment User

Users of hoists, jacks, rollers, air casters, gantries, winches, below-the-hook devices, forklifts, telehandlers and side booms. OSHA's only training rule for most non-crane equipment is general hazard instruction (item A1); forklifts and telehandlers have a full training, evaluation and certification rule.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B5.1	Equipment types the worker will use on this project are recorded in the header	P	Header complete	☐	☐	☐	
B5.2	Forklift / telehandler: formal (classroom) and practical training completed	M · 1910.178(l)(1)-(3) via 1926.602(d)	Training record	☐	☐	☐	
B5.3	Forklift / telehandler: workplace performance evaluation completed before operating	M · 1910.178(l)(2)	Evaluation record	☐	☐	☐	

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#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B5.4	Forklift / telehandler: employer certification shows operator name, training date, evaluation date and trainer/evaluator identity	M · 1910.178(l)(6)	Certification record	☐	☐	☐	
B5.5	Forklift / telehandler: evaluation is less than 3 years old and will stay current through assignment end	M · 1910.178(l)(4)	Evaluation date	☐	☐	☐	
B5.6	Forklift / telehandler: refresher and re-evaluation done after any unsafe operation, accident, near miss, poor evaluation, new truck type or changed conditions	M · 1910.178(l)(4)	Refresher record	☐	☐	☐	
B5.7	Forklift / telehandler: trained on the truck type(s) used on this project	M · 1910.178(l)(3)	Training record by truck type	☐	☐	☐	
B5.8	Forklift or telehandler configured to hoist and lower with a winch or hook and move a suspended load horizontally: it is covered by the crane rules; complete Part B1 for the operator	M · 1926.1400(c)(8)	Equipment configuration; Part B1 complete	☐	☐	☐	
B5.9	Sideboom operators trained per 1926.1430(c); equipment rated 2,000 lb or less trained per 1926.1441	M · 1926.1440; .1441	Training record	☐	☐	☐	
B5.10	Jacks, rollers, air casters and hydraulic gantries: trained and competent	S · ASME B30.1 (V)	Training record	☐	☐	☐	
B5.11	Overhead (underhung) and lever hoists: trained, including setting a means of communication before operating when signals are needed	S · ASME B30.16; B30.21 (V)	Training record	☐	☐	☐	
B5.12	Winches: trained and qualified	S · ASME B30.7 (V)	Training record	☐	☐	☐	
B5.13	Below-the-hook devices (spreader bars, lifting beams, clamps, magnets, vacuum lifters): trained in use per manufacturer	S · ASME B30.20 (V)	Training record	☐	☐	☐	
B5.14	Personnel lifting systems: trained and aware the pre-lift meeting is required	S · ASME B30.23 (V)	Training record	☐	☐	☐	
B5.15	Trained on the manufacturer's operating limits for each hoist used	M · 1926.554(a)	Manual on site; training record	☐	☐	☐	
B5.16	Knows that lift planning and pre-lift meetings apply to all load handling equipment, not only cranes	R · ASME P30.1 (V)	Training record	☐	☐	☐	

Part B6. Lift Director

The person who directly oversees the lift (also called person-in-charge or lift supervisor). Federal OSHA sets a qualification only for multiple-crane lifts. ASME B30.5-2025, effective about 30 December 2026, adds lift director qualification criteria; projects running past that date should meet them now.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B6.1	Trained in the Subpart CC requirements that apply to lift director duties	M · 1926.1430(d)	Training record	☐	☐	☐	
B6.2	Multiple-crane lifts: meets both competent and qualified person criteria, or is a competent person assisted by named qualified persons	M · 1926.1432(b)(1)	Designation and basis	☐	☐	☐	
B6.3	Trained to review the multiple-crane plan in a meeting with every worker involved	M · 1926.1432(b)(2)	Training record	☐	☐	☐	
B6.4	Trained to agree signals and voice communication in advance with the operator and signal person	M · 1926.1419(c); 1926.1421	Training record	☐	☐	☐	
B6.5	Trained in ASME lift director responsibilities: confirm lift needs and crane suitability, confirm personnel are qualified and understand roles, hold the pre-lift briefing, control the work area, stop unsafe work	S · ASME B30.5 (V)	Training record	☐	☐	☐	
B6.6	Demonstrated knowledge of site and weather hazards, personnel roles and qualifications, crane characteristics and limits, rigging equipment, signaling, power lines, special lifts and applicable regulations	S · ASME B30.5-2025, from ~30 Dec 2026 (V)	Written exam or documented assessment	☐	☐	☐	
B6.7	Demonstrated ability to set traffic and access controls, place personnel, read, write and do arithmetic, read load charts, and read and discuss lift plans	S · ASME B30.5-2025, from ~30 Dec 2026 (V)	Practical assessment record	☐	☐	☐	
B6.8	Trained to verify the lift category, review and carry out the lift plan, and run the pre-lift meeting and post-lift review	R · ASME P30.1 (V)	Training record	☐	☐	☐	

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#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B6.9	Employer has designated the worker as a lift director for this project	P	Designation record	☐	☐	☐	
B6.10	Jurisdiction check done: NYC registration, Washington qualification or owner requirements (Part C)	M where they apply	Part C complete	☐	☐	☐	

Part B7. Assembly/Disassembly Director

The person directing crane assembly and disassembly, or tower crane erection, climbing and dismantling. OSHA requires this person to meet both competent and qualified person criteria, or to be a competent person assisted by qualified persons.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B7.1	Meets both competent and qualified person criteria, or is a competent person assisted by named qualified persons; a one-person A/D crew must meet both	M · 1926.1404(a)	Designation and basis	☐	☐	☐	
B7.2	Trained in the Subpart CC requirements that apply to A/D director duties	M · 1926.1430(d)	Training record	☐	☐	☐	
B7.3	Understands the A/D procedures for the specific crane models and configurations on this project	M · 1926.1404(b)	Procedures reviewed; model list	☐	☐	☐	
B7.4	Trained to review procedures immediately before starting unless already applied to the same type and configuration	M · 1926.1404(c)	Training record	☐	☐	☐	
B7.5	Trained to brief the crew on tasks, hazards and hazardous positions before starting and whenever tasks or personnel change	M · 1926.1404(d)	Training record	☐	☐	☐	
B7.6	Trained on the A/D hazards OSHA lists: site and ground conditions, blocking, boom and jib support, pin removal, component weights, wind and others	M · 1926.1404(e)-(q)	Training record	☐	☐	☐	
B7.7	Knows A/D must follow manufacturer procedures or employer procedures developed by a qualified person	M · 1926.1403; 1926.1406	Training record	☐	☐	☐	
B7.8	Knows A/D rigging must be done by a qualified rigger, and qualified riggers are assigned	M · 1926.1404(r)(1)	Crew list with Part B2 complete	☐	☐	☐	
B7.9	Tower cranes: trained on erecting, climbing and dismantling rules, including the pre-erection inspection	M · 1926.1435	Training record	☐	☐	☐	
B7.10	A/D performed per manufacturer instructions under a designated qualified person	S · ASME B30.5; B30.3 (V)	Designation record	☐	☐	☐	
B7.11	Jurisdiction check done: Washington A/D director qualification and tower crane permit, or owner requirements (Part C)	M where they apply	Part C complete	☐	☐	☐	

Part B8. Operator Evaluator / Operator Trainer

People who evaluate crane operators under the employer-evaluation rule, train operators-in-training, or assess signal persons or forklift operators. OSHA sets no training rule for evaluators, but the employer must be able to show the basis for each designation.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B8.1	Crane operator evaluator: is an employee or agent of the employer and has the knowledge, training and experience to assess operators	M · 1926.1427(f)	Designation with basis (resume, certifications, experience)	☐	☐	☐	
B8.2	Evaluator's experience covers the equipment types and configurations to be evaluated on this project	P	Basis record	☐	☐	☐	
B8.3	Knows each evaluation record needs operator name, evaluator name and signature, date, and make, model and configuration	M · 1926.1427(f)	Blank evaluation form ready	☐	☐	☐	
B8.4	Operator trainer: employee or agent with knowledge, training and experience to direct the trainee; no tasks that detract from monitoring; line of sight and communication (direct communication for tower cranes)	M · 1926.1427(b)(4)	Trainer designation	☐	☐	☐	
B8.5	Signal person evaluator (employer's own): employed by the signal person's employer and has demonstrated competence in assessing signal persons against 1926.1428	M · 1926.1401; 1926.1428	Evaluator designation	☐	☐	☐	
B8.6	Forklift trainer/evaluator: has the knowledge, training and experience to train operators and evaluate competence	M · 1910.178(l)(2)(iii)	Trainer designation	☐	☐	☐	

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#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B8.7	Audited employer certification program: tests developed by an accredited organization or approved by an independent certified auditor; audit within 3 months of start and at least every 3 years; records kept 3 years	M · 1926.1427(e)	Audit reports	☐	☐	☐	
B8.8	Practical operating exams administered or observed by a designated or qualified person	S · ASME B30.5 (V)	Evaluator designation	☐	☐	☐	
B8.9	Accredited practical examiner status (NCCCO, NCCER or similar): a useful benchmark, not required for employer evaluations	P	Examiner accreditation	☐	☐	☐	
B8.10	Washington sites: meets the state's qualified evaluator definition (Part C)	M where it applies	Part C complete	☐	☐	☐	

Part B9. Rigging Hardware Inspector

People who inspect slings, rigging hardware, below-the-hook devices and hoists, and take damaged gear out of service. OSHA requires a competent person designated by the employer but sets no exam or card, so the designation and its basis are the key records.

#	Verify	Basis	Evidence on file	C	G	NA	Initials / date
B9.1	Designated by the employer as the competent person for daily sling inspection	M · 1926.251(a)(6); 1910.184(d)	Designation list	☐	☐	☐	
B9.2	Trained to inspect rigging before each shift and during use, and to remove defective gear from service	M · 1926.251(a)(1)	Training record	☐	☐	☐	
B9.3	Trained on OSHA removal criteria: wire rope broken wires, wear and corrosion; synthetic web sling burns, melting, cuts, stitching and fittings	M · 1926.251(c)(4)(iv); 1926.251(e)(8)	Training record	☐	☐	☐	
B9.4	Trained on alloy steel chain sling periodic inspection (at least every 12 months) and the month-of-inspection record	M · 1926.251(b)(6); 1910.184(e)(3)	Training record	☐	☐	☐	
B9.5	Knows the rules for hooks with no manufacturer rating (2x test and record) and custom lifting accessories (marked and proof tested to 125%)	M · 1926.251(f)(2); 1926.251(a)(4)	Training record	☐	☐	☐	
B9.6	Trained on personnel platform proof testing (125% at each jobsite and after repair) if platforms are used	M · 1926.1431(j)	Training record	☐	☐	☐	
B9.7	Trained on initial, frequent and periodic inspection and removal criteria for slings, rigging hardware and hooks	S · ASME B30.9; B30.26; B30.10 (V)	Training record per gear type	☐	☐	☐	
B9.8	Trained on below-the-hook device inspection by service class, records and load test after repair	S · ASME B30.20 (V)	Training record	☐	☐	☐	
B9.9	Trained on hand chain and lever hoist inspection and removal criteria (hook, load chain, brake)	S · ASME B30.16; B30.21 (V)	Training record	☐	☐	☐	
B9.10	Designated by the employer for periodic inspections where the ASME volumes call for a designated person	S · ASME B30 series (V)	Designation list	☐	☐	☐	
B9.11	Completed supervised inspections and a documented competency check before designation	P	Competency record	☐	☐	☐	
B9.12	Knows the site's color-code or tagging scheme and how to tag out rejected gear	P	Training record	☐	☐	☐	
B9.13	Training covers the gear types on this project (e.g., synthetic round slings, wire rope, chain, shackles, spreader beams, plate clamps)	P	Training record vs. gear list	☐	☐	☐	

Part C. State, local and owner requirements

Federal OSHA is the floor. State plans, cities and project owners can add licensing, registration or qualification rules. Check the project's location and contract before mobilizing.

#	Verify	Roles affected	Evidence on file	C	G	NA	Initials / date
C1	Site is in a state with its own OSHA plan; that state's crane and rigging rules checked	All roles	Note of rule checked	☐	☐	☐	
C2	State or city crane operator license required at this location, and held	Crane Operator	License copy	☐	☐	☐	
C3	Washington (WAC 296-155 Part L): state qualification requirements for lift directors, A/D directors, riggers and signal persons, using qualified evaluators, met	LD, A/D, Rigger, Signal, Evaluator	State qualification record	☐	☐	☐	

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#	Verify	Roles affected	Evidence on file	C	G	NA	Initials / date
C4	Washington tower cranes: prime contractor holds the L&I permit before operation, assembly, disassembly or reconfiguration	A/D Director, Operator	Permit copy	☐	☐	☐	
C5	California (Cal/OSHA Title 8): state signal person and operator certification rules met	Signal Person, Operator	State record	☐	☐	☐	
C6	New York City: lift director is DOB-registered (or a licensed Master Rigger or supervised Master Rigging Foreman)	Lift Director	Registration copy	☐	☐	☐	
C7	Government or owner standard applies (e.g., USACE EM 385-1-1, DOE-STD-1090, owner spec) and its added training, testing or record rules are met	All roles	Contract clause and evidence	☐	☐	☐	
C8	If tablets or phones are not allowed on site, paper copies of records that must be “available at the worksite” are packed	All roles	Paper copies packed	☐	☐	☐	
C9	Contract adopts specific ASME/ANSI editions; items marked S in Part B are treated as mandatory for this project	All roles	Contract clause	☐	☐	☐	

Part D. Gaps, expiry dates and mobilization release

A worker with an open gap on any M item, or on an S item the contract adopts, should not perform that role until the gap is closed. Record every G and NA here.

Gap and NA log

Item #	Gap or reason not applicable	Action to close	Owner	Due date	Closed (initials / date)

Cards and evaluations with expiry dates

Record	Issued by	Number (if any)	Expires	Valid through assignment end? (Y/N)
Crane operator certification or license				
Signal person qualification				
Rigger qualification or certification				
Forklift / telehandler evaluation (3-year)				
Lift director registration or certification				
Other				

Release decision

	Decision
☐	Released to mobilize for all roles ticked above
☐	Released for some roles only. Roles withheld: _____
☐	Not released; gaps must be closed first

Sign-off	Name	Signature	Date
Reviewer			
Employee (acknowledges roles and limits)			
Supervisor or training manager			

Keep this checklist with the worker’s training file. Re-check it when the worker moves to a new project, new equipment or a new role, after any incident or failed evaluation, and before any card expires.

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References

• Federal OSHA: 29 CFR 1926.21, 1926.251, 1926.1400-.1441 (Subpart CC, incl. .1401, .1404, .1419-.1428, .1430-.1432, .1435), 1926.761; 29 CFR 1910.178, 1910.179, 1910.180, 1910.184 (osha.gov/laws-regs).

• ASME: B30.5 (2021 in effect; 2025 edition effective ~30 Dec 2026), B30.1, B30.2, B30.3, B30.7, B30.9, B30.10, B30.16, B30.17, B30.20, B30.21, B30.23, B30.26; P30.1-2024. ANSI/ASSP A10.42-2000 (R2017).

• State and local: Washington WAC 296-155 Part L (WSR 25-24-087; tower crane permits WSR 25-22-085); Cal/OSHA Title 8 §5001.3; NYC DOB lift director registration.

• Requirement summaries: liftrolesreference.org (data as of 15 Nov 2026).

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