



## DRIVER TRAINING DOCUMENTATION CHECKLIST (Part 1)

TERMINAL: \_\_\_\_\_ Driver \_\_\_\_\_  
Trainee: \_\_\_\_\_ (Please Print Name) Emp #: \_\_\_\_\_

### Terminal Responsibility

Please initial/ID#

**Trainee** **Instructor**

- |   |       |       |
|---|-------|-------|
| 1. Complete all HR Documents .....  | _____ | _____ |
| 2. Complete DOT required road test .....                                      | _____ | _____ |
| 3. Complete DOT required physical .....                                       | _____ | _____ |
| 4. Complete On-line Courses as assigned .....                                 | _____ | _____ |
| First test between day 3 and day 5. Three test opportunities allowed. ....    | _____ | _____ |
| 5. Discuss CTCO Safety & Security Plan – HMR Required .....                   | _____ | _____ |
| 6. Issue and discuss proper usage of PPE .....                                | _____ | _____ |
| 7. Discuss and demonstrate proper Pre/Post Trip Insp Procedure and DVIR ..... | _____ | _____ |
| 8. Discuss and demonstrate trailer configurations .....                       | _____ | _____ |
| 9. Discuss, demonstrate, and practice product hose usage .....                | _____ | _____ |
| 10. Discuss CTCO dispatch/paperwork .....                                     | _____ | _____ |
| 11. Discuss, demonstrate, and practice ELD/TMW usage .....                    | _____ | _____ |
| 12. Supervised loading/unloading .....  | _____ | _____ |
| 13. Supervised driving .....  | _____ | _____ |
| 14. Discuss customer expectations .....                                       | _____ | _____ |
| 15. Discuss, demonstrate, and practice CTCO policies and procedures .....     | _____ | _____ |

**After the safety department training, the trainee will be released to the home terminal for continued field training.**

- |  |       |       |
|--|-------|-------|
| 1. Written evaluation and sign off from primary trainer .....                            | _____ | _____ |
| 2. Written evaluation and sign off from secondary trainer (when available) .....         | _____ | _____ |
| 3. TM/VPO will administer, grade, discuss results of CTCO "Training Completion" test.... | _____ | _____ |
| 4. Properly prepared check sheet will be sent to SAO with "Training Completion" test ... | _____ | _____ |

Terminal Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

New Hire Trainee Signature: \_\_\_\_\_ Date: \_\_\_\_\_



## DRIVER TRAINING DOCUMENTATION CHECKLIST (Part 2)

TERMINAL: \_\_\_\_\_ Driver \_\_\_\_\_  
Trainee: \_\_\_\_\_ Emp #: \_\_\_\_\_  
(Please Print Name)

Safety Department Responsibility	Please initial/ID#	
	Trainee	Instructor
1. A review of CTCO policies and procedures (gap analysis) .....	_____	_____
2. "Will it fit" Written Test.....	_____	_____
3. Discuss, demonstrate, and practice fire extinguisher usage .....	_____	_____
4. Compliance – Safety – Accountability program, Smith Defensive Driving program.....	_____	_____
a. Classroom .....	_____	_____
b. Tanker Video.....	_____	_____
c. On-the-Road Driving .....	_____	_____

**After the safety department training, the trainee will be released to the home terminal for continued field training.**

- |  |       |       |
|--|-------|-------|
| 1. Written evaluation and sign off from primary trainer .....                            | _____ | _____ |
| 2. Written evaluation and sign off from secondary trainer (when available) .....         | _____ | _____ |
| 3. TM/VPO will administer, grade, discuss results of CTCO "Training Completion" test.... | _____ | _____ |
| 4. Properly prepared check sheet will be sent to SAO with "Training Completion" test ... | _____ | _____ |

Terminal Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

New Hire Trainee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Safety Supervision Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Memo

**To:** All locations, Management, Safety Supervisors

**From:** Barry Detlefsen, V.P. Safety

**CC:**

**Date:** December 1, 2016 (revised 6-01-2019)

**Re: Training procedures**

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This memo will provide guidance on "New hire training procedures". CTCO transport driver training will be presented in three phases known as:

1. Field training presented by terminal managers, certified driver trainers, non-certified driver trainers, and shop personnel,
2. Safety department training presented by a member of the Safety department,
3. Final evaluation and test conducted by trainers, terminal manager and/or area VP of Operations (VPO).

The three training phases will be documented by preparing the "Driver Training Documentation Checklist". This memo will provide guidance on the completion of the three training phases.

## **FIELD TRAINING**

Item 1. "Complete all HR documents". This item will include the preparation of all required documents and issuance of an employee number. Additional topics to be covered:

1. Insurance programs overview
2. Employee leave benefits: vacation, holiday, bereavement, jury, military
3. Employee performance benefits: 90 day probationary period, safety bonus programs, retention program
4. Other benefits: sign on bonus, referral bonus, college tuition, workers compensation, unemployment compensation.

Item 2. "Complete DOT required road test". The item will include the administration of a road test by a CTCO representative of the applicant/trainee. Proper documentation of the road test must be prepared and submitted for inclusion in the trainee's driver qualification file.

Item 3. "Complete DOT required physical". The item will include the scheduling and completion of a physical examination and drug/alcohol screen of the applicant/trainee. Proper documentation of the examination and screening must be prepared and submitted for inclusion in the trainee's driver qualification file.



Item 4. "Complete on line courses as assigned". Beginning on day 1, the trainer will begin coaching and preparing the trainee for the on line courses. The TM will issue the online training invitations to the trainee. The trainee will begin the online training courses on day 3 and no later than day 5. Each course offers three examination opportunities. The trainee will be allowed one exam opportunity within a 24-hour period. Any trainee that fails an exam should be coached and counseled prior to attempting the next exam opportunity. The trainee must pass all on line courses in order to progress forward in training and fulfill probation requirements for permanent employment. There is no provision to compensate a trainee for HM course completion, as his/her regular duty time will be utilized.

Item 5. "Discuss CTCO Safety and Security Plan". The trainer will cover proper safety and security of hazardous materials and cargo tank motor vehicles. Points to be covered are:

1. Following procedures at local loading facilities
2. Proper placarding and marking of cargo tank motor vehicles
3. Proper preparation of HM shipping paper prior to leaving loading facility
4. Driving established routes while under dispatch
5. No unattended cargo tank motor vehicles while loading, unloading, stopping or parking
6. Situational awareness at all times
7. How to contact CTCO management and first responders in the event of a transportation emergency.

Item 6. "Issue and discuss proper usage of PPE". The trainee will be issued any required PPE equipment that is utilized while conducting CTCO transport driver duties. The PPE equipment may include but not limited to such items as: headgear, eye protection, breathing apparatus, specific uniform clothing accessories, gloves, and footwear. Each market that we serve has specific requirements for PPE. Only the specific items required within the trainee's market area would be issued. The trainer will provide guidance on the usage, care and upkeep of all items issued or needed.

Item 7. "Discuss and demonstrate proper Pre/Post Trip Inspection Procedure and DVIR". The trainer will instruct the trainee on the proper methods and best practices of completing pre/post trip inspection of a cargo tank motor vehicle. The Volvo power unit video will be shown at this time to familiarize the trainee with the specifics of operating a Volvo power unit. The trainer will instruct the trainee on local best practices on how to obtain minor maintenance during business hours and after hours. The trainer will instruct the trainee on the preparation and submission of a paper or electronic DVIR (driver/vehicle inspection report).

Item 8. "Discuss and demonstrate trailer configurations". The trainer will discuss and demonstrate the usage and operational steps on the specific semi-trailers assigned to the local terminal. The discussion and demonstration will cover such topics but not limited to:

1. Air operated and cable operated systems
2. DOT spec place locations
3. Cargo tank capacities and how to determine capacities
4. Loading capacities for legal weight distribution
5. Air suspension and spring suspension
6. Service equipment securement methods and requirements

7. Placard/markings.
8. Product identification markers and usage
9. Inlet/outlet controls
10. Location, usage and marking of emergency shut off levers
11. Fire extinguisher location, mounting, and inspection.

Item 9. "Discuss, demonstrate, and practice product hose usage". The trainer will discuss, demonstrate and require the trainee to demonstrate the ability and proficiency to perform the following hose handling steps:

1. Set up proper safety barrier using a minimum of 5 orange cones.
2. Unload a product hose and a vapor hose using proper weight lifting techniques
3. Unload and correctly connect "drop gun" fittings to vapor and product at customer location
4. Correctly connect hoses to "drop gun" fittings.
5. Correctly drain and disconnect all hoses and fittings
6. Load and stow all service equipment using proper weight lifting techniques.

Item 10. "Discuss CTCO dispatch/paperwork". The trainer will instruct the trainee on the workflow processes of the dispatch system at the local terminal location. Items to be covered but not limited to are:

1. Discuss local DVIR and RODS (record of duty status) procedures
2. How the dispatcher builds and assigns daily work to the drivers
3. How to obtain pull point numbers and information
4. Preparation of Bill of Lading and manifest documents
5. Usage, preparation and purpose of "I certify..." form
6. Where to turn in expense related receipts (fuel, non-revenue form, etc.).

Item 11. "Discuss, demonstrate and practice ELD/TMW usage". The trainer will instruct the trainee on proper usage of the onboard electronic logging device. This will include navigation within the TMW load dispatch program. The trainee will be given the CTCO Electronic Logging Device (ELD) Operator instruction booklet as a reference tool.

Item 12. "Supervise unloading/loading". During ride along sessions, the trainer will instruct the trainee on proper loading procedures at the loading facilities within the work area. The trainee will be scheduled to attend and complete required on-site training and certification provided by the loading facility operator. The trainer will instruct the trainee on proper unloading procedures at numerous customer locations within the work area. Additional items to cover but not limited to are:

1. How to identify correct locations
2. How to check Texas Underground Storage Tank Registration Certificate
3. How to obtain and read a Veedor Root printout



4. How to "stick" a tank and check for water in the tank
5. What to do when water is discovered within the tank
6. How to "do the math" and determine if product will fit
7. How to transfer the product by using hoses and/or pump equipment
8. How to determine ending stick readings.
9. How to check for empty compartments prior to loading and after unloading
10. What to do if storage tanks are not marked
11. The importance of stop work authority.

Item 13. "Supervised driving" The trainer will instruct the trainee on defensive driving techniques and correct operation of a cargo tank motor vehicle. The trainee will show proficiency and experience in operating a large commercial motor vehicle. The trainer will offer coaching on the three Smith driving fundamentals known as "SPACE for the vehicle, VISIBILITY for the driver, and TIME to make decisions". This will serve as introductory information to the full Smith system training that will be presented by the safety supervisor. The trainer will instruct and coach the trainee on confined space maneuvering techniques.

Item 14. "Discuss customer expectations". The trainer will instruct the trainee on specific instructions and procedures that the customers within the market area expect us to comply to. Emphasis will be given to the concepts of CTCO business image, professionalism and respect to others at all times.

Item 15. "Discuss, demonstrate and practice CTCO policies and procedures". Throughout the trainee's schedule of training days, the trainer will repeatedly discuss, demonstrate and explain the importance of knowing and following the established procedures and best practices of this company. Topics to be discussed and demonstrated are:

1. Green/Red cone policy and usage
2. "Diesel first" when unloading
3. Vapor connections will be made when available
4. Full uniforms will be worn (shirt/trouser, approved headgear)
5. Usage of a cell phone is prohibited while performing a safety sensitive function (product loading, product unloading). A hands free cell phone device may be used while driving.
6. Stick measurements are required.

These are major procedures that must be discussed and demonstrated. Adapt the discussion to also cover local procedures that are used within the market area.

## **Safety Department training**

The safety supervisor, terminal manager and/or VPO should agree on a time frame to assign the trainee to a session with the safety supervisor. Consideration should be given to minimizing travel expenses and making maximum usage of everyone's time. Allowing for local travel time, the safety supervisor's training session may begin on Day 1 at 12 noon and end at 5pm. Day 2 may begin at 8am and end at 5pm. Trainees would be released to return to their local terminal at that time. The 13-hour time slot allotted will provide ample time and opportunity for the safety supervisor to present required DOT subjects and complete Smith system driver training.

Item 1. "A review of CTCO policies and procedures". The safety supervisor will facilitate a discussion and comprehensive review of the policies and procedures learned at the field location. The review will serve as a "gap analysis" with the safety supervisor filling in any missing topics.

Item 2. "Will it fit" written test. The safety supervisor will administer and grade the "Will it fit" written test. Tips to confirm complete unloading. Coach and correct when necessary.

Item 3. "Discuss, demonstrate, and practice fire extinguisher usage". The safety supervisor will facilitate instruction on fire extinguisher usage. Topics to be covered are:

1. Types and classifications of fire: A, B, C, K
2. Types and sizes of fire extinguishers
3. How to remove the extinguisher from the vehicle mount
4. How to check the extinguisher for proper pressure
5. When and where to place extinguisher while unloading
6. Proper technique: P-pull, A-aim, S-squeeze trigger, S-Sweep the fire.

Item 4. "Compliance-Safety-Accountability" presentation

"Tanker" video

"Smith Defensive Driver Training". The safety supervisor will facilitate the Smith system defensive driver program. The module will include class room presentations and "on the road" driving exercises.

## Final Evaluation

At the conclusion of the training session with the safety supervisor, the trainee will return to his/her home station. CTCO policy states that all transport drivers will receive a minimum of 10 days training. There are two exceptions to this rule:

1. A recent graduate of an approved CDL finishing school will receive a minimum of 30 days training.
2. The VP of Safety (VPS) can make exception to the minimum 10-day rule. An example for this exception is a trainee that has previous fuel hauling experience. As training begins, this trainee demonstrates a high level of proficiency in fuel delivery procedures. The terminal manager may make written request to the VPS for exception to the 10-day rule on this basis.

At a time mutually agreeable to the trainee, terminal manager, trainers and VPO, the terminal manager will schedule an opportunity for a second trainer to evaluate the trainee for proper work performance. After the second evaluation is complete, and all parties agree, the trainee will complete the "Training Completion Test". The terminal manager or VPO will grade and counsel the trainee on the results of the test. A signed "Driver Training Documentation Checklist", a signed "Training Completion Form", and the original "Training Completion Test" will be forwarded to San Antonio for the file.