

**WORKER BEING EVALUATED:** \_\_\_\_\_

**EVALUATOR:** \_\_\_\_\_

**LOCATION:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

This evaluation form can be used as a demonstration or knowledge-based competency of a worker’s understanding of a Swivel. It can be used by either Workers or Employers to assess their knowledge.

The ASME B30.26 Standard has been used for reference when compiling this evaluation. ASME B30.26 states that the Swivel Manufacturer specifications must also be referenced to provide specific information required for the Selection, Inspection, Limitations and Use.

<b>EMPLOYER</b>	<b>YES</b>	<b>NO</b>
READ THE CAPITALIZED WORDS, can the Employer successfully explain and complete the following.		
1) <b>COMPLIANCE TO STANDARDS</b> THE EMPLOYER TO VERIFY THE SWIVEL IS COMPLIANT TO A STANDARD. Compliance to a standard should be confirmed in the manufacturer’s specifications, <i>generally the ASME B30.26 standard in North America.</i>		
2) <b>DESIGN FACTORS</b> DOES THE EMPLOYER KNOW THE DESIGN FACTOR ASSOCIATED WITH THE SWIVEL BEING USED. This is the point it will break above its rated load. <i>ASME B30.26 states 5:1 minimum.</i>		
3) <b>MANUFACTURERS SPECIFICATIONS</b> THE EMPLOYER MUST HAVE THE MANUFACTURERS SPECIFICATIONS READILY AVAILABLE. The only way a worker can be assessed is if they have been given the manufactures specification for the product being evaluated on, as manufactures specifications differ. <i>This information will provide the worker its limitations, use and inspection requirements.</i>		
4) <b>PERIODIC INSPECTIONS</b> THE EMPLOYER IS RESPONSIBLE TO ENSURE THAT THE SWIVEL HAS HAD A PERIODIC INSPECTION. These are the inspections required by the ASME B30.26 standard that the employer must ensure are completed. <i>At a minimum annually.</i>		
5) <b>STORAGE</b> THE EMPLOYER IS RESPONSIBLE TO ENSURE PROPER SWIVEL STORAGE WHEN NOT IN USE. Storage is important to stop or reduce possible damage to the swivel whether it be mechanical, chemical or temperature related. <i>What is your company’s storage policy?</i>		

<b>SWIVEL KNOWLEDGE</b> Evaluator to READ THE CAPITALIZED WORDS and see if the worker can successfully explain the following.	<b>COMPETENT</b>	<b>NEEDS COACHING</b>
6) <b>MANUFACTURERS SPECIFICATIONS</b> DOES THE WORKER HAVE ACCESS TO THE MANUFACTURERS SPECIFICATIONS? The worker knows that manufacturers specification are available, where they are located and why they are to be used.		
7) <b>DESIGN FACTORS</b> DOES THE WORKER KNOW THE DESIGN FACTOR ASSOCIATED WITH THE SWIVELS BEING USED? The worker states the minimum required design factor for swivels. <i>ASME B30.26 states 5:1.</i>		
8) <b>PERIODIC INSPECTIONS</b> CAN THE WORKER VERIFY THAT THE SWIVEL HAS HAD A PERIODIC INSPECTION? These are the annual inspections required by the employer to complete. <i>As stated in the ASME B30.26 standard.</i>		
9) <b>MARKINGS - MANUFACTURER</b> SHOW ME THE MANUFACTURERS NAME MARKING ON THE SWIVEL. The manufacturer's name or trademark must be marked on the swivel. <i>This may be an actual name, but in some cases is a trademark, abbreviation or logo.</i>		
10) <b>MARKINGS – RATED LOAD OR SIZE</b> SHOW ME THE RATED LOAD OR SIZE MARKING ON THE SWIVEL. Either the rated load or size must be marked on the swivel. Rated load is usually marked with WLL “working load limit” followed by a number and unit that can be US or Metric, <i>E.g. 2200 lbs or maybe 1000 kg.</i> Size is usually marked in inches or mm's, <i>E.g. ¾” or maybe 20mm.</i>		
11) <b>MARKINGS - GRADE</b> SHOW ME THE GRADE MARKING ON THE SWIVEL. The grade must be marked on the swivel if it is used to identify the rated load. <i>Grade will affect the swivels strength and its temperature rating.</i>		
12) <b>TEMPERATURES</b> ASK THE WORKER WHAT THE TEMPERATURE RANGE FOR THE SWIVEL IS FROM THE MANUFACTURER. AND HOW CAN THE WORKER VERIFY THIS? The worker knows extreme temperatures can affect the swivel, ASME B30.26 states not below -40C or above 204 C. <i>The worker must confirm with the manufacturer as they may differ.</i>		

<b>SWIVEL APPLICATION</b> Evaluator to READ THE CAPITALIZED WORDS and see if the worker can successfully explain the following.	<b>COMPETENT</b>	<b>NEEDS COACHING</b>
13) <b>REMOVAL CRITERIA</b> HAVE THE WORKER INSPECT THE SWIVEL AND TELL YOU REASONS TO REMOVE THE SWIVEL FROM SERVICE. 1. Missing or illegible identification, 2. Indications of heat damage, 3. Excessive pitting or corrosion, 4. Bends, twists, distortion, stretching, cracks or breaks, 5. Excessive nicks or gouges, 6. 10% reduction of original dimensions, 7. Evidence of unauthorized welding or modification, 8. Lack of the ability to freely rotate when not loaded, 9. Loose or missing nuts, bolts, cotter pins, snap rings, or other fasteners and retaining devices. <i>Manufacturer will give specific criteria and must be referenced.</i>		
14) <b>LOAD ROTATION</b> IF USING SWIVELS TO LIFT A LOAD THAT MAY ROTATE HAVE THE WORKER TELL YOU THE SWIVELS RESTRICTIONS. The worker knows swivels are positioning hardware and are not intended to be rotated under load. <i>Manufacturer will give specific criteria and must be referenced.</i>		
15) <b>SIDE LOADING</b> IF USING A SWIVEL CREATES A SIDE LOADING OF THE SWIVEL HAVE THE WORKER TELL YOU HOW THIS AFFECTS THE SWIVEL. The worker knows that swivel cannot be used for angular loading, the swivel must always be in-line loaded. <i>The worker must confirm with the manufacturer as they may differ.</i>		

<b>16) STORAGE</b> HAVE THE WORKER TELL YOU WHERE THE SWIVEL IS KEPT WHEN NOT IN USE. Storage is important to stop or reduce possible damage to the swivel whether it be mechanical, chemical or temperature related.		
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**COMMENTS:**

**SIGNATURE OF WORKER BEING EVALUATED:**

X \_\_\_\_\_

**SIGNATURE OF EVALUATOR:**

X \_\_\_\_\_