



SUPERIOR BAY MARINE OF ALABAMA



WHEELHOUSE PERSONNEL TRAINING & EVALUATION PACKET

Captain / Relief Captain / Pilot Program

1 EMPLOYEE INFORMATION

Employee Name: _____ Position: _____ ☐ Captain ☐ Relief Captain ☐ Pilot

Vessel/Towboat: _____ Assigned Route/Waterway: _____

Hire Date: _____ Review Period: _____

Evaluator/Trainer: _____ MMC / Endorsement Verified: _____

Start Hitch: _____ End Hitch: _____

2 PROGRAM OVERVIEW

- 1 Vessel, TSMS and Wheelhouse Orientation
- 2 Pre-Assignment Safety and Operational Training
- 3 30-Day Practical Qualification and Observation
- 4 Performance Evaluation and Role Recommendation

3 PURPOSE / INSTRUCTIONS

This packet documents vessel-specific orientation, operational training, practical skill sign-offs, and performance evaluations for wheelhouse personnel. It is intended to confirm safe performance, sound judgment, and readiness for the assigned company role.

Company qualification does not replace any required USCG credential, medical certificate, route endorsement, radar endorsement, TOAR, or other legal requirement.

4 INITIAL ASSIGNMENT

Assigned Captain/Trainer: _____

Assigned Vessel: _____

Assigned Route/Area: _____

Training Start Date: _____

Expected Review Date: _____

5 EMPLOYEE ACKNOWLEDGMENT

I acknowledge that I have received this Wheelhouse Personnel Training & Evaluation Packet and agree to participate fully in the company qualification process for the assigned role, vessel, and operating area.

Employee Signature / Date

Trainer Signature / Date





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Vessel Orientation & Pre-Assignment Training Checklist

TOPIC / TASK	DATE TRAINED	TRAINER INITIALS	EMPLOYEE INITIALS	COMMENTS
A. DOCUMENTS, CREDENTIALS & COMMAND				
1. Verify applicable MMC and route endorsement				
2. Verify medical certificate and radar observer status				
3. Review COI, TSMS, standing orders and vessel limits				
4. Review chain of command and call-out criteria				
5. Review TVR/logbook and watch-change requirements				
6. Casualty, unsafe-condition and near-miss reporting				
B. WHEELHOUSE & NAVIGATION EQUIPMENT				
1. Steering, propulsion controls and alarms				
2. Radar/ARPA setup, tuning and operating limitations				
3. AIS operation, inputs and limitations				
4. Chartplotter/ECDIS/paper charts, as applicable				
5. Compass, depth sounder and position verification				
6. VHF radios and internal communication systems				
7. Navigation lights, day shapes and sound signals				
8. Backup steering and emergency control locations				
C. EMERGENCY & CREW SAFETY				
1. Emergency duties, fire and flooding response				
2. Person-overboard response and recovery				
3. Loss of steering or propulsion response				
4. Collision/allision, grounding and tow-breakaway response				
5. Pollution, security, fatigue and distraction controls				
D. PRE-UNDERWAY & TOW SAFETY				
1. Navigation assessment and intended route review				
2. Weather, visibility, current, river stage or tide review				
3. Tow configuration, dimensions, draft and securing				
4. Air draft, bridge/lock clearances and route restrictions				
5. Steering, propulsion and navigation-equipment tests				
6. Deck crew communications and lookout assignment				
7. Required records, notices and pre-departure briefing				

INSTRUCTIONS:

Complete the applicable items before the employee assumes independent wheelhouse duties on the assigned vessel or route. Enter N/A only when an item does not apply and explain any restrictions or additional training in the comments column.

ADDITIONAL NOTES / RESTRICTIONS:

Trainer Signature / Date

Employee Signature / Date





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WHEELHOUSE PERSONNEL TRAINING & EVALUATION PACKET

30-Day Wheelhouse Qualification Program

1 EMPLOYEE INFORMATION

Employee Name: _____ Vessel/Towboat: _____ Position: _____
Trainer/Evaluator: _____ Assigned Route/Area: _____ Review Date: _____

2 PRACTICAL SKILLS TRAINING CHECKLIST

LEGEND: NT = Not Trained AS = With Assistance
S = Under Supervision Q = Qualified

SKILL / TASK	STATUS (NT, AS, S, Q)	DATE	TRAINER INITIALS	COMMENTS
A. PILOTHOUSE RESOURCE MANAGEMENT				
1. Conduct complete watch turnover and review standing orders				
2. Apply call-out criteria and notify the Captain/management				
3. Prioritize workload and maintain situational awareness				
4. Use lookouts and clear closed-loop communications				
5. Control distractions and manage fatigue risk				
B. NAVIGATION & WATCHSTANDING				
1. Apply Inland/International Rules of the Road, as applicable				
2. Complete navigation assessment and route plan				
3. Use radar/ARPA for target tracking and collision avoidance				
4. Cross-check AIS, chartplotter/ECDIS and visual information				
5. Evaluate weather, visibility, current, river stage or tide				
6. Navigate at night, in restricted visibility and traffic areas				
C. VESSEL & TOW HANDLING				
1. Get underway and land safely under normal conditions				
2. Handle the light boat and tow as assigned				
3. Back, flank, turn and stop with proper control				
4. Conduct safe meeting, passing and overtaking maneuvers				
5. Account for bank cushion, suction, wind and current effects				
6. Manage tow dimensions, draft, air draft and clearances				
7. Supervise tow work and deck communications				
D. COMMUNICATIONS & DOCUMENTATION				
1. Use proper VHF and internal communication procedures				
2. Communicate with locks, bridges, terminals and traffic				
3. Complete required TVR/logbook and watch entries				
4. Report voyage changes, hazards, incidents and deficiencies				
E. EMERGENCY & ABNORMAL OPERATIONS				
1. Respond to steering or propulsion failure				
2. Respond to navigation-equipment or communication failure				
3. Direct person-overboard response and recovery				
4. Respond to fire, flooding, grounding, collision or allision				
5. Respond to tow breakaway, spill or security threat				

3 PRACTICAL SIGN-OFF

Captain/Trainer Overall Comments: _____

30-Day Recommendation (select one): ☐ Continue Training ☐ Satisfactory Progress ☐ Additional Instruction Needed

Captain/Trainer Signature

Date





SUPERIOR BAY MARINE OF ALABAMA



WHEELHOUSE PERSONNEL TRAINING & EVALUATION PACKET

Performance Evaluation & Role Qualification Recommendation

1 EMPLOYEE INFORMATION

Employee Name: _____

Evaluation Date: _____

Vessel/Towboat: _____

Review Period: _____

2 PERFORMANCE EVALUATION

1 = Unsatisfactory 2 = Needs Improvement 3 = Meets Expectations
4 = Above Expectations 5 = Excellent

EVALUATION FACTOR	1	2	3	4	5	COMMENTS
Leadership / Command Presence	☐	☐	☐	☐	☐	
Safety Judgment	☐	☐	☐	☐	☐	
Regulatory / TSMS Compliance	☐	☐	☐	☐	☐	
Rules of the Road	☐	☐	☐	☐	☐	
Navigation Assessment / Voyage Planning	☐	☐	☐	☐	☐	
Vessel Handling	☐	☐	☐	☐	☐	
Tow Handling	☐	☐	☐	☐	☐	
Radar / Electronic Navigation	☐	☐	☐	☐	☐	
Situational Awareness / Lookout	☐	☐	☐	☐	☐	
Pilothouse Resource Management	☐	☐	☐	☐	☐	
Communications	☐	☐	☐	☐	☐	
Emergency Response	☐	☐	☐	☐	☐	
Documentation / Logkeeping	☐	☐	☐	☐	☐	
Crew Supervision / Training	☐	☐	☐	☐	☐	
Fatigue Management / Conduct	☐	☐	☐	☐	☐	
Overall Readiness	☐	☐	☐	☐	☐	

3 ROLE QUALIFICATION RECOMMENDATION

☐ Qualified - Captain

☐ Qualified - Relief Captain

☐ Qualified - Pilot

☐ Continue Under Observation / Training

☐ Additional Vessel / Route Training Required

☐ Not Qualified at This Time

4 RESTRICTIONS / COACHING NOTES

5 SIGNATURES

Evaluator Signature / Date

Port Captain / Manager Signature / Date

Employee Signature / Date

