

Termite Initial Training

Team Member Name: _____

CHK 2009 Termite Initial Field Training Checklists

Description

This checklist verifies that a new Termite Technician **can perform essential termite service tasks under direct supervision**. It covers baiting system installation and monitoring, conventional and drywood treatments, paperwork and compliance requirements, pretreats, retreatments, equipment operation and calibration, product label application, and inspection procedures.

All items are **verifiable through direct observation** in the field and/or service center. Selected items require **structured observations** and **mandatory comments** to document findings, decisions, or measurements.

Checklist items with a mandatory comment are marked with this symbol: ● .

! Real-Time Verification Required

Checklists must be filled out **in real time** as the team member performs each activity. Do **not** wait until the end of training to complete or upload them.

Evaluator Instructions

Observation Guidelines

- Conduct all observations in the **field, service center, or construction site settings** as outlined in the checklist.
- Ensure the Team Member has all required **tools, PPE, and product labels** before beginning each activity.
- Observe for **safety, accuracy, technique, and compliance with label requirements and Massey protocols**.
- Require the Team Member to **explain the purpose and process** of treatments, equipment use, and documentation — not just perform the steps.
- Verify that all paperwork (e.g., service reports, graphs, renewal inspections) is **completed clearly, accurately, and in compliance** with state and company standards.
- Confirm that all treatments (bait, liquid, foam, drywood, pretreats, retreatments) are performed **according to label specifications, safety requirements, and Massey best practices**.

Manager Responsibilities

- Provide **direct supervision** or assign a qualified trainer and confirm that all objectives were met.
- Validate that the Team Member can:
 - Correctly install and monitor baiting systems.



- Perform conventional and drywood termite treatments safely and effectively.
- Accurately complete termite-related paperwork, graphs, and inspection reports.
- Safely operate and calibrate termite equipment (injector, flow meter, tank system, foam machine, mini mister).
- Identify construction types, termite entry points, and inspection requirements.
- Provide **structured, specific feedback** on performance. Record observations in the **Manager Notes** section, including strengths, improvement needs, and coaching provided.

How to Complete This Checklist

- Print this list and neatly print the name of the trainee on in the provided space above.
- Check off items *as they are demonstrated and completed*.
- Where indicated, enter **mandatory comments** following the instructions given.
 - Write neatly and legibly!
- Scan the completed checklist, along with any required attachments, to a .pdf format.
- Name the file in the following format: Last Name_EmployeeID_Course Number
 - EX: Massey_000000_CHK2009
- Upload the file to the Massy Initial Training Paperwork Upload Portal on Armyant and submit.

Checklist Items

Section 1: Day 1

- Issue Fully Equipped Vehicle.
- Inventory the equipment on the vehicle with the team member.
- Issue a laminated WDO Treatment Field Guide (MS-127)
- Issue a laminated Conventional Treatment with Termidor HE (MS-238).
- Issue Bait Equipment
 - If the team member is going to provide bait services, they have been supplied all the required equipment to provide bait service.
- Issue Inspection Kit
 - The team member has been issued a complete inspection kit and all Inspection tools & equipment.
- Issue PPE

- Ensure the team member has been issued all the required PPE, knows the required PPE to use when performing termiticide treatments and how to maintain PPE.
- Issue WDO Inspection Protocol Manual TB-24
- Issue Equipment for Bath Trap Install and Treatment
 - The team member has been issued the necessary tools for installing access panels and treating bath traps.

Date: _____ **Time:** _____

Section 2: Termite Inspection

Termite Renewal Inspection (REI)

- The Team Member understands the importance of Renewals.
- The Team Member understands the importance of the Renewal Inspection Process.
- The Team Member can independently perform a Renewal Inspection according to Protocol.
- The Team Member has participated in the scheduling of Annual Renewal Inspections.
- The Team Member has participated in the servicing of Annual Renewal Inspections with Manger or Reinspector.
- The Team Member has been taught how to create leads and ask for referrals.

Date: _____ **Time:** _____

Property Construction Inspection

- The Team Member understands likely areas of infestation.
- The Team Member has been shown and understands wall construction.
- The Team Member knows basic wall construction terms.
- The Team Member has been shown how to properly identify monolithic construction by digging a hole next to the foundation in an area away from the garage.
- The Team Member understands key areas for inspection after the walls are finished.
- The Team Member has been shown and can recognize subterranean termite entry points and guidelines into the structure.
- The Team Member has spent time with a manager at construction sites with walls constructed without drywall or insulation.

- The Team Member has spent time with a manager at construction sites with slabs poured but walls not constructed.
- The Team Member has spent time with a manager at construction sites prior to the slab pour.
- The Team Member has been shown how to properly identify stem wall construction by digging a hole next to the foundation in an area away from the garage.

Date: _____ **Time:** _____

WDO Inspection

- The Team Member indicates findings on the graph using the key on the Graphical Analysis.
- The Team Member can complete the WDO Inspection Report.
- The Team Member can accurately measure structures for Bait and Termidor Perimeter treatments.
- The Team Member can draw a detailed graph to scale.
- The Team Member can indicate areas of damage.
- The Team Member can complete the Important Notice part of the graph.

Date: _____ **Time:** _____

Section 3: Bait

Preparation

- Equipment Preparation: Ensure all equipment is available: gas-powered auger, Sentricon stations with:
 - Recruit HD bait
 - handheld scanner
 - probe/long screwdriver
 - measuring wheel
 - small hand rake
 - whisk broom
 - long-handle broom
 - latex gloves
- Customer Communication (Consultation) – Inform customer of arrival and explain installation process.
- Customer Communication (Site Hazards) – Ask customer about buried utilities (water, cable, etc.).

Date: _____ **Time:** _____

Site Evaluation and Measurement



- Structure Measurement Verification: Use measuring wheel to determine linear footage around structure (include attached wooden structures, exclude concrete slabs).
- Structure Measurement Manager Notification: Verify measurement against sales graph; report discrepancies over 5% to manager.
- Station Planning (Spacing): Plan station placement every 8-10 feet, within 4-6 feet of foundation unless obstructed.
- Station Planning (Hot Spots): Identify areas encouraging termite foraging (thermal shadows, moisture, borders).

Date: _____ **Time:** _____

Baiting Program Install

- The Team Member knows the policy of always using the handheld when installing stations.
- The Team Member knows where to auger a hole to minimize the chance of damage to buried utilities and irrigation lines.
- The Team Member has been shown auger safety and knows the proper grip and stance to reduce the chance for injury.
- The Team Member has been taught how to safely use the gas-powered auger to install stations.
- Station Installation (Placement): Begin at right of front door; proceed counterclockwise every 8-10 feet.
- Station Placement (Hot Spots): Place strategically; avoid pooling, direct sun, lawn equipment paths.
- Auguring Holes: Use gas auger to create holes slightly deeper than station length; probe risky areas by hand to avoid utilities.
- Station Installation: Install flush with ground, soil ring visible, cap level with soil.
- Station Scanning: Scan first station (right of front door) and continue counterclockwise in sequence.

Date: _____ **Time:** _____

Post-Installation

- Site Cleanup (Ground): Replace/smooth disturbed ground cover or grass.
- Site Cleanup (Soil): Clean soil from sidewalks, porches, and other affected areas.



- Customer Debriefing: Explain number/placement of stations, review warranty and service agreement, secure signature.

Date: _____ **Time:** _____

Monitoring & Maintenance

- The Team Member has participated in all aspects of bait monitoring.
- The Team Member has been taught how to complete the Subterranean Termite Baiting Report.
- The Team Member can use the handheld scanner.
- The Team Member can recognize when a Recruit HD bait device must be replaced or left in the station.
- The Team Member can locate bait stations located around the property.
- Customer Communication (Pre-Service): Notify customer before service.
- Annual Monitoring (Inspection): Inspect/service bait stations, log with scanner.
- Annual Monitoring (Bait Replacement): Replace bait where >1/3 consumed.
- Annual Monitoring (Misc. Maintenance): Replace damaged caps; ensure stations flush with ground.
- Customer Communication (Post-Service): Summarize findings, actions taken, and recommendations.

Date: _____ **Time:** _____

Section 4: Conventional/Drywood Termite

Conventional Treatment / Extended Protection Treatment

- The Team Member can leave a patch smooth and unobtrusive.
- The Team Member knows drill hole spacing.
- The Team Member understands and can complete and place the treatment sticker.
- The Team Member knows how to properly complete the WDI Service Report.
- The Team Member has participated in all aspects of a Termidor treatment from beginning to end.
- The Team Member understands and can safely drill abutting slabs.
- The Team Member has been shown the proper drilling grip and stance to prevent injury.

- The Team Member knows that a GFI must be used when drilling and is able to properly attach and use the ground fault interrupter (GFI).
- The Team Member knows which extension cord to use for drilling.
- The Team Member understands and can rod the soil for stem walls.
- The Team Member understands all the treating rods and tips and what they are used for during a treatment.
- The Team Member understands and can treat abutting slabs.
- The Team Member knows product quantities to apply to each hole.
- The Team Member has been shown how mix concrete patch cement that matches concrete surfaces.
- The Team Member knows to use a shop vac to clean drill dust.
- The Team Member has been taught and is able to measure the treatable LF.
- The Team Member understands and can complete all specifications of a liquid soil treatment to slab foundations
- The Team Member understands and can complete all specifications of a liquid soil treatment to crawl spaces
- The Team Member has been taught and is able to calculate the required volume of mixed termiticide for a new conventional Termidor treatment or EPT.
- The Team Member understands and is able to dig a proper trench.
- The Team Member can use a flow meter and understands what Total 1 and Total 2 are used for.
- The Team Member understands and can treat the soil in a trench.

Date: _____ **Time:** _____

Drywood Termite Spot Treatment

- The Team Member knows the required dosage for treating galleries, mud tunnels, carton nests, etc.
- The Team Member can treat kick holes and/or drilled pilot holes.
- The Team Member can neatly patch access holes with spackling, caulk, and wood putty.
- The Team Member knows the treatable sites allowed by the Termidor Dry label.



Date: _____ **Time:** _____

Drywood Termite Spot Treatment cont.

- The Team Member has been taught how to treat galleries with Termidor Dry.
- The Team Member has been taught how to properly use the Termidor Dry applicator.
- The Team Member has been taught how to treat galleries with Termidor foam.
- The Team Member has been taught how to inspect for and identify drywood termite kick holes and damage.

Date: _____ **Time:** _____

Paperwork

- The Team Member understands the importance and significance of accurate documentation on the termite technician daily summary report.
- The Team Member has been shown and can properly complete the termite technician daily summary report (front and back).

Pretreats

- The Team Member observes and participates in liquid soil pretreats.
- The Team Member observes and participate in bait pretreats.
- The Team Member observes Bora-Care pretreats.

Date: _____ **Time:** _____

Retreatments

- The Team Member understands how to use Termidor Dry and Termidor foam as Drywood termite retreatment methods.
- The Team Member can read and follow instructions on the Termite Protection Evaluation Report.
- The Team Member has participated in all aspects of a Drywood termite retreatment.
- The Team Member understands the minimum specifications for retreatment.
- The Team Member has participated in all aspects of a subterranean termite retreatment.

Date: _____ **Time:** _____

Misc. Equipment Tasks



- The Team Member knows how to care for the flow meter and how to change the batteries.
- The Team Member knows how to avoid flow meter breakage or damage from freezing.
- The Team Member (Injector System) Team Member has been taught and can calibrate an injector system.
- The Team Member (Injector System) Team Member knows the policy for weekly injector calibration.
- The Team Member (Injector System) Team Member understands the scale on the injector stem.
- The Team Member (Injector System) Team Member understands how to set the injector for the termiticide being used.
- The Team Member (Injector System) Team Member has been taught and can flush the injector system after using it.
- The Team Member (Injector System) Team Member knows how to clean the in-line filter.
- The Team Member (Injector System) Team Member knows how to recognize signs of possible clogs in the lines and backflow preventer.
- The Team Member (Tank System) Team Member can properly mix Termiticide at the proper concentration.
- The Team Member (Tank System) Team Member knows how to regulate the pump to deliver 2 gallons per minute.
- The Team Member (Tank System) Team Member knows how to do a bucket check.
- The Team Member (Tank System) Team Member has been taught and knows how to check the tank bottom for residue.
- The Team Member (Tank System) Team Member has been taught and knows how to remove residue from tank bottom.
- The Team Member (Tank System) has been taught and knows how to check the pump oil level.
- The Team Member (Tank System) has been taught and knows how to check the pump for leaks.
- The Team Member (Foam Machine) has been taught to clean the foam machine.

- The Team Member (Foam Machine) understands the use of the different treating tips including the gallery tip, the high-volume wall foaming tip and the bath trap treating rod.
- The Team Member (Mini Mister) Team Member knows how to flush and clean the treating equipment.

Date: _____ **Time:** _____

Products

- The Team Member understands the importance of applying the product only to a labeled site.
- The Team Member has a basic understanding of the product label.
- The Team Member knows spill control procedures when a small spill, such as a leaking gun, occurs.
- The Team Member knows spill control procedures when a large spill, such as when a hose bursts, occurs.
- The Team Member knows to report leaking equipment IMMEDIATELY.
- The Team Member understands the importance of using a product at the proper concentration.
- The Team Member understands the importance of using a product in accordance with the label.
- The Team Member reviews Product labels for Termidor Dry.
- The Team Member reviews Product labels for Bora-Care.
- The Team Member reviews Product labels for Termidor.
- The Team Member reviews Product labels for Premise 2.

Date: _____ **Time:** _____

Total Coverage Upgrade Treatment

- The Team Member knows to **NEVER** allow pesticide spray to contact personal belongings or items in the attic.
- The Team Member has been taught how to use the Mini Mister inside.
- The Team Member has been taught how to safely use a ladder inside.

The Team Member has been taught how to mix Premise 2 in the Mini Mister using a Dosing Syringe.

The Team Member has participated in all aspects of performing a Total Coverage Upgrade Treatment to attics and crawl spaces.

Date: _____ **Time:** _____

Wall Void/Brick Veneer Termite Treatment

The Team Member has been taught to treat termite galleries (sub and drywood) by either drilling pilot holes and injecting or foaming into kick holes.

The Team Member has participated in foam treatments for wall voids.

The Team Member has participated in foam treatments for brick veneer voids.

The Team Member has participated in foam gallery treatments.

The Team Member has been taught to patch holes with caulk, spackling, and wood putty.

Date: _____ **Time:** _____

Bath Trap Access Panel and Treatment

The Team Member has been taught to mix dry foam using a Dosing Syringe to measure exact quantities of foaming agent, water, and termiticide.

The Team Member knows how to treat bath traps by accessing the soil through tar (if found) and using the liquid fitting on the foam system and 3/16" rod to treat the soil.

The Team Member has been shown how to calculate the proper volume to apply in bath trap.

The Team Member understands and can install an access panel using the template.

Date: _____ **Time:** _____

Manager Notes

Use this section to record specific examples of performance observed. Include positive behaviors, areas where additional training may be required, and any coaching or feedback provided during the observation.

Strengths observed ●

Areas for Improvement ●

Coaching & Next Steps ●

Acknowledgement

By signing below, both the manager and the team member confirm that the manager directly observed the completion of the above tasks and that this checklist was completed accurately and honestly.

_____ Date: _____
Manager Signature

_____ Date: _____
Team Member Signature