

Training matrix

A training matrix shows, for each person or role, which training and competence the work needs and where each stands: required, done, due or expired, with the dates. It is for the people who plan work and training to see gaps and expiry dates in one place. **Completing a course is not competence:** competence is whether the person can do the task, which someone who has seen them do it judges, and the matrix only holds the result. **A matrix cell is not a permit to work or an authorisation:** whoever assigns a task decides whether a person may do it now, on the task, the equipment and the supervision. This form is for printing on **landscape A4**; copy page 2 when you have more people. It is a voluntary record: no law or standard is quoted, none is said to require this layout, and the code letters, headings and example rows are examples to change. Keep personal data to what you need and decide how long you keep it.

1 Matrix details

Site or team	Matrix owner	Version and date	Next full review due
People or roles this matrix covers, and who is tracked elsewhere (for example contractors)		Where the evidence behind each entry is kept (certificates, assessments, sign-in sheets)	

2 Status codes: you write your own

Example code	Meaning (example)	What to write in the cell
R	Required for this person's role and not yet done.	Leave the date blank. Put it in section 5 if it is overdue by your own rule.
C	Completed, and the evidence is on file.	Write the completion date here and the expiry date in the Expires column.
E	Expired, or a refresher is overdue.	Keep the old dates visible and add a line in section 5 with the action and an owner.
N/A	Not required for this person's role.	Write the reason and who decided in section 3, not in each cell.
D (optional)	Due soon: expiring inside your own window (for example 60 days).	Choose the window yourself and write it in the box below, so everyone reads D the same way.

Status codes in use (write your own, and use the same ones on every page)

3 Role requirements

Role or job title	Required training or competence	Refresher interval (your own, with the reason)	Who confirms competence (name or role)	Not required for this role (N/A): why, and who decided
Example: truck driver	Example: site induction; manual handling; truck operation, trained and then evaluated doing the work	Example: evaluation every 3 years, set by the firm, and after an incident or a change	Example: trainer, then the shift lead	Example: first aid at work is not needed; the shift lead holds it

Write the requirement once per role here and copy it to the matrix columns, so two people in the same role are not held to different lists. Refresher intervals come from your own procedure, the maker's instructions and the rules that apply to you, not from this form.

4 Training matrix

Person (name or role)	Role	Training or competence item 1		Training or competence item 2		Training or competence item 3		Training or competence item 4		Training or competence item 5		Training or competence item 6	
		Completed (date or code)	Expires	Completed (date or code)	Expires	Completed (date or code)	Expires	Completed (date or code)	Expires	Completed (date or code)	Expires	Completed (date or code)	Expires
Example: person A	Example: driver	C 14/05/23	14/05/26	R		N/A							

Name each item in its heading (for example a course, a licence, a workplace evaluation). For every item write what is in the Completed (date or code) column and the date it Expires. Use the same code letters as section 2. A cell shows a record: it does not show that the person is competent today and it is not a permit to work.

5 Expiry and refresher actions

Person	Item	Expiry date	Action to take (book, assess, restrict the task, other)	Owner and due date	Done on	Cell updated, checked by

Set the action before the date, not after. If a refresher is overdue, the person who assigns work decides what the person may do meanwhile.

6 Leavers and role-change check

Date	Person	Leaver or change of role (last day, or the new role)	Requirements added or removed	Row updated or closed (initials)	Task owner told (who)	Access and authorisations reviewed (by whom)

A new role, a transfer or a change in equipment or ways of working can add requirements; a leaver's row is closed with its date so it does not look current.

7 Review and sign-off

Cells checked against evidence (how many, by whom)	Gaps and expiries found at review	Changes to codes, intervals or requirements

Review date	Next review due	Where this matrix is kept, and who can see it

Role	Name	Signature	Date
Matrix owner			
Reviewed by (manager)			
Task owner or supervisor (if different)			