

Staff Training Record and Training Matrix

Checklist · UK · Published 2026-10-26 · Square brackets are placeholders to replace with your own details.

A staff training record is the written evidence of the training one person has completed: each skill, procedure or course, the date it was done, how competence was checked, who signed it off, and when it is next due. A training matrix puts those records side by side, so one grid shows every person and role against the training each role needs, with completed, refresher and sign-off dates in each cell.

Most small businesses train people well enough and record it badly: a certificate in a drawer, a tick in a supervisor's notebook, a spreadsheet that stopped being updated when the person who built it left. HSE guidance on providing training puts the case for records plainly: "Keeping training records will help you decide if refresher training is needed." A record with a date, a sign-off and a due date is also what an inspector, an insurer or a new manager will usually ask to see when they want to know who is trained to do what.

This template gives you three printable grids: the individual training record, a role requirements grid that sets which training each role needs and how often it is refreshed, and the team training matrix that shows completion, refresher or expiry dates and sign-off for everyone. It also covers how to sign training off, how to handle refresher and expiry dates, and what people look for when they read a training record.

How to use this record

This template holds three grids for [Your company]. The individual training record is one sheet per person, and it moves with them if they change role or site. The role requirements grid is one sheet per site or team: it says which training each role needs and how often it is refreshed. The team training matrix is one sheet per team: it shows at a glance who is trained in what, who signed it off and when it is next due.

Fill in the role requirements grid first, because it decides what goes on everyone else's record. Then build each person's record from it, and copy the dates into the team matrix. Where the two disagree, the individual record wins and the matrix is corrected: the matrix is the summary, the record is the evidence.

Write each entry when the training is signed off, not later from memory. A record rebuilt at the end of the year is the one an inspector, insurer or tribunal trusts least.

Employee details

- Name: [full name]
- Job title: [job title] | Role in the role requirements grid: [role]
- Site or team: [site/team] | Start date: [date] | Line manager: [name]
- Previous training or certificates checked at induction: [what was seen, by whom, on what date — or none]
- Particular training needs to plan for: [new recruit / changing jobs / extra responsibilities / young worker / health and safety representative — or none]
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How training needs to be delivered for this person: [language, literacy or access arrangements — or none]. Keep any health information in a separate, restricted file, not on this sheet.

- Record held at: [system/location] | Record owner: [name/role]

Individual training record

One row for each training item this person has completed. When a refresher is done, add a new row rather than overwriting the old one: the history is what shows the training kept up with the work.

The "How competence was checked" column is what turns attendance into evidence. Write what actually happened (an observed task, a knowledge check and its score, test pieces, a supervised shift), not just "course attended".

Individual training record — the first row is a worked example; the blank rows are for you to complete.

Training item (skill, SOP or course)	Version or content date	Date completed	How competence was checked	Refresher or expiry due	Signed off (trainer and employee)
[Example] Safe use of the glass washer — [SOP reference]	[version or date]	[date]	Observed a full cycle and a chemical change; answered 5 of 5 questions correctly	[date set from the role requirements grid]	[trainer initials] / [employee initials]

Role requirements: which training each role needs

Build the list from your risk assessments and procedures, not from a catalogue of courses. HSE's leaflet on training says: "Your risk assessment should identify any further training needs associated with specific risks."

Role requirements — R: before unsupervised work; P: within the period you set; dash: not needed for the role

[illegible]

Team training matrix

One row per person, one column per training item from the role requirements grid. Each cell holds three facts: the date the item was completed, the date it is next due (the refresher date, or the expiry date on a certificate if that comes first), and the initials of the person who signed it off. Write them in that order so anyone can read the grid.

Five training items fit across one printed sheet. For more, continue on a second sheet with the same names in the same order, or keep the full matrix electronically and print it by team.

- Done [date] · Due [date] · [initials]: completed, next due, and signed off by.
- Booked [date]: in the training plan, not done yet.
- Overdue since [date]: the due date has passed. The person does not do that task unsupervised until the item is refreshed and signed off.
- Not needed: the role does not need this item (a dash in the role requirements grid).

Team training matrix — the completed date, the refresher or expiry date, and the sign-off initials in each cell

Name and role	[Training item 1]	[Training item 2]	[Training item 3]	[Training item 4]	[Training item 5]
[Example] [name] — [role]	Done [date] · Due [date] · [initials]	Done [date] · Due [date] · [initials]	Booked [date]	Not needed	Overdue since [date]

Signing off training

1. Name in advance who may sign off each item: usually the trainer, or a manager or supervisor who is signed off on it themselves. Keep the list at [system/location].
2. Check competence before signing. HSE describes competence as "the combination of training, skills, experience and knowledge that a person has and their ability to apply them to perform a task safely". A signature should mean the person can do the task, not that they sat through the session.

3. If the check is not passed, retrain and check again. Do not sign off an item that was not understood, and do not let the person work unsupervised on it in the meantime.
4. The trainer and the employee both initial the record on the day. The employee's initials confirm the training took place; they do not mark their own work.
5. Copy the dates into the team matrix the same day, and close the item on the training plan.

Refresher and expiry dates

- Every item in the role requirements grid has a refresher interval, or a note that it is refreshed only when its content changes.
- Where a certificate carries an expiry date, the due date is whichever comes first: the certificate's expiry or the date the grid's refresher interval gives.
- Bring a refresher forward when the work changes. HSE says: "Staff will need extra training if you get new equipment or your working practices change." Bring it forward too after an incident or near miss that shows a gap, and when someone returns from a long absence.
- Check the matrix every [month] for items due in the next [30] days, and add them to the training plan with a trainer and a target date.
- Treat an overdue item like an item never done: the person does not do that task unsupervised until it is refreshed and signed off.
- Add a new row to the individual record for each refresher. Never change the old date to the new one.

What people look for in a training record

Inspectors, insurers, auditors and new managers tend to ask the same questions, and a certificate in a drawer answers none of them.

- A record for each person that matches the team matrix, so the summary and the evidence agree.
- Dates and sign-offs by a named person, written at the time.
- The version or date of the procedure each item was trained against, so a changed SOP shows who still needs retraining.
- A competence check recorded for each item, not attendance alone.
- Refresher and expiry dates that have not passed, or, where one has, a booked date and a restriction in place until then.
- The people HSE singles out for particular training needs: "new recruits, people changing jobs or taking on extra responsibilities, young employees and health and safety representatives".
- Part-time, agency, seasonal and contract staff on the matrix wherever they do the work, not only permanent employees.

Records, data protection and review

Keep the individual records, the role requirements grid and the team matrix together at [system/location], with copies of any certificates. Keep one master copy: a second spreadsheet on someone's laptop is how two versions of the truth begin.

Training records name individuals, so they are personal data. GOV.UK's summary of the data protection principles says information must be "accurate and, where necessary, kept up to date" and "kept for no longer than is necessary". Set the retention period for training records in your data retention policy ([retention period]) and limit access to the people who need it.

Owner of this record and matrix: [name/role]. The role requirements grid is reviewed every [twelve months], and whenever a role, a procedure or a piece of equipment changes. Next review due: [date].

How to use this template

1. Fill in the role requirements grid first: list your roles and the training each one needs, working from your risk assessments and procedures.
2. Set a refresher interval for each item that you can defend, and note where a certificate, a regulation or an insurer sets a date of its own: the item is due on whichever date comes first.
3. Start an individual record for every person, including part-time, agency and seasonal staff. Fill it from the evidence you hold, and leave anything you cannot evidence unsigned until it is checked.
4. Copy each person's dates into the team training matrix and mark anything overdue.
5. Name who may sign off each item, and write the record when the training is checked, not afterwards.
6. Check the matrix every month, move anything coming due into your training plan, and keep the records where their owner can produce them on request.

Official guidance

- › [HSE — Provide information, training and supervision](#)
- › [HSE — Decide what training and information you need](#)
- › [HSE — Health and safety training: A brief guide \(INDG345, PDF\)](#)
- › [HSE — What is competence?](#)
- › [GOV.UK — Data protection](#)

Need your team to follow this? [Use it in TrainedTeam, free for up to 5 people](#). It becomes assigned training with an optional knowledge check and an audit-ready record.

This template is provided in good faith and for general information — it is not legal advice. Adapt it to your organisation and, where your sector carries specific legal requirements, have the finished document reviewed by a qualified adviser. The live version at <https://trainedteam.com/templates/staff-training-record-template> is kept current; this file is a snapshot.