

Staff Training SOP

SOP · US · Updated 2026-08-10 · Square brackets are placeholders to replace with your own details.

A staff training SOP sets out how a business trains its people: how training needs are identified, how onboarding and job-specific training are delivered, how understanding is checked, and how completion is recorded — so training happens the same way for every new hire, on every shift.

Most businesses train people; far fewer can show it. Without a written procedure, onboarding depends on who happens to be on shift, refreshers slip, and the records an OSHA inspector, insurer, or plaintiff's attorney asks for do not exist. This template turns training from a habit into a system.

Use it alongside the onboarding checklists in this library: this document is the SOP for how training runs; the checklists are what a given new hire actually works through.

Purpose and scope

This procedure sets out how [Your company] identifies training needs, delivers training, checks understanding, and keeps records. It applies to all employees, including those in their introductory period, and to [temporary staff/contractors — state who else is covered].

The aim is that every person is trained for the work they actually do, before they do it unsupervised, with evidence to show it.

Identifying training needs

1. Maintain a training matrix listing each role and the training it requires: OSHA-mandated topics for the role's hazards, state-mandated topics, job-specific procedures, and equipment or systems training.
2. Review the matrix whenever a role changes, new equipment or procedures are introduced, or an incident or near-miss suggests a gap.
3. For each new hire, generate their individual training plan from the matrix before their first day.
4. Record who is responsible for delivering each item and the deadline for completing it.

Onboarding training

Every new hire completes onboarding training before working unsupervised.

- Safety basics: emergency action plan and evacuation routes, first aid arrangements, injury reporting, and the site-specific hazards of their role.
- The policies every employee must acknowledge: [list — e.g. safety policy, code of conduct, IT acceptable use, anti-harassment].
- Job-specific procedures for their role, taken from the training matrix.
- A named person responsible for their onboarding, and a completion deadline of [one week/two weeks].

Job-specific and refresher training

Training does not end at onboarding. Each role's matrix entry states the refresher cycle for every topic.

- Refresh safety-critical and compliance topics at least every [twelve months], or sooner where a standard, state law, insurer, or your own hazard assessment requires it — some OSHA standards set their own retraining triggers and intervals, so the matrix records the rule per topic.
- Trigger out-of-cycle refreshers when procedures change materially, after an incident, or when someone returns from extended leave.
- Record the version of the procedure or content each refresher was delivered against.

Delivering training and checking understanding

1. Assign the training with a due date and tell the person what completing it involves.
2. Deliver it in the form that fits the content: written procedure, walkthrough, demonstration, or supervised practice — in a language and vocabulary the employee understands, which OSHA expects for safety training.
3. Check understanding with a knowledge check or observed task — completion alone is not evidence of competence. Set a pass standard of [e.g. 80%].
4. If someone does not pass, retrain and reassess. Do not sign off training that was not understood.
5. The trainee and the trainer confirm completion, and the record is made at the time — not reconstructed later.

Training records

For each person, [Your company] keeps a record showing:

- What training was completed, with the date and the name of whoever delivered or verified it.
- The version of the content or procedure the training covered.
- How understanding was checked, and the result.
- When the next refresher is due.
- Records are retained for [duration of employment plus X years, or longer where a specific standard requires it] and produced on request for inspections, audits, and claims.

Review and ownership

[Job title] owns this procedure and the training matrix. Both are reviewed at least every [twelve months], and sooner when roles, equipment, procedures, or legal requirements change.

How to use this template

1. Replace every highlighted placeholder with your own roles, timescales, and policy list.
2. Build the training matrix first — the rest of the procedure hangs off it. Start with the OSHA topics for your hazards, add any state mandates, then job-specific ones.
3. Set pass standards and refresher cycles you will actually honor; an unmet twelve-month promise looks worse in an audit than an honest eighteen-month one.

4. Decide where records live and who owns them before rollout, so evidence exists from day one.
5. Have the finished procedure reviewed by a qualified safety professional if your operations carry specific OSHA training standards.

Official guidance

- › [OSHA — Training resources and requirements](#)

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-sop-us> is kept current; this file is a snapshot.