# Training Matrix

Set up the course list and role requirements once, then update the employee section every time training is completed. Use the status codes below in every cell. Record completion dates, not just ticks, so expiry dates can be calculated.

## MATRIX DETAILS

**Location / site**

**Department / team**

**Matrix owner**

**Last updated**

**Next review date**

## STATUS CODES

C = Complete and current (enter completion date)
D = Due within the next [30] days
O = Overdue or expired
S = Scheduled (enter session date)
IP = In progress
NR = Not required for this role
W = Waived or equivalent qualification accepted (attach evidence)

## COURSE CATALOG (ONE LINE PER REQUIRED TRAINING)

**Course 1: name, code, owner, delivery method**

**Course 1: required for roles**

**Course 1: refresher interval**

☐ One time only ☐ Every 12 months ☐ Every 24 months ☐ Every 36 months
☐ On change of process or system

**Course 1: due within (days of hire or role change)**

**Course 2: name, code, owner, delivery method**

**Course 2: required for roles**

**Course 2: refresher interval**

☐ One time only ☐ Every 12 months ☐ Every 24 months ☐ Every 36 months
☐ On change of process or system

**Course 2: due within (days of hire or role change)**

**Course 3: name, code, owner, delivery method**

**Course 3: required for roles**

**Course 3: refresher interval**

☐ One time only ☐ Every 12 months ☐ Every 24 months ☐ Every 36 months
☐ On change of process or system

**Course 3: due within (days of hire or role change)**

**Additional courses (same details)**

## EMPLOYEE 1

**Name, employee ID and role**

**Hire or role start date**

**Course 1: status code and completion / due date**

**Course 2: status code and completion / due date**

**Course 3: status code and completion / due date**

**Additional courses: status and dates**

## EMPLOYEE 2

**Name, employee ID and role**

Hire or role start date

Course 1: status code and completion / due date

Course 2: status code and completion / due date

Course 3: status code and completion / due date

Additional courses: status and dates

## EMPLOYEE 3 (COPY THIS BLOCK FOR EACH ADDITIONAL EMPLOYEE)

Name, employee ID and role

Hire or role start date

Course 1: status code and completion / due date

Course 2: status code and completion / due date

Course 3: status code and completion / due date

Additional courses: status and dates

## COMPLIANCE SUMMARY

Total required training assignments

Number complete and current

Compliance rate (complete / required x 100)

Number overdue

**Employees working in a task without the required training (must be zero; list and action)**

**Actions and owners for overdue training**

## REVIEW SIGN-OFF

Reviewed by (manager)

Date

Reviewed by (training / HR)

Date

**Date**