Training Records

Sample orientation information

Legal Requirements for Training Records

Employers should ensure employees have **knowledge** of the methods, processes, equipment and hazards of their tasks and workplaces. Where the risk is high and the hazard cannot be controlled by elimination or isolation, it is critical that verifiable training records are kept, to demonstrate understanding and competency

Procedure for Training Records

Employees new to a workplace, (including transfers) must be provided with **orientation training**, including health and safety matters

Orientation training should include:

Emergency procedures
Incident and injury reporting
Identification of the main hazards
Responsibilities of the employer, employee and any peer representatives
Information about the consultation process
The health and safety roles of their particular workplace
The process to follow for lodging a work incapacity claim
The process expected and followed for rehabilitation
The availability and use of safety equipment

Employees should be trained in how to complete their tasks safely and have knowledgeable supervision available

Training must be recorded and confirmed by the employee. **Critical safety training** records must be able to confirm **competencies** have been achieved

How to complete Training Records using SafetyBase

Sample orientation information, including a confirmation questionnaire can be found under Help/Health and Safety Procedures Manual/Training/Training Record. It's at Help/Health and Safety Procedures Manual/ Training/Training Record (top of page). Paste the information into your own document. Then, you will need to format it and edit in your specific information

Open a **Training Record** file under the **Training** heading. SafetyBase prompts you to nominate a suitable trainer and record appropriate confirmation of completed training

If you have advanced versions of SafetyBase, they prompt you to record critical competencies and supervisory/training status

Using Tasks while completing Training Records

Tasks can be notifications, instructions, alerts or corrective actions associated with a particular file. You can add Tasks as you go during data entry, using the inline **New Task** button in your screen. You can also use the Toolbar at the bottom of your screen during data input, or the **Tasks** tab after you submit the file

As you create a file, SafetyBase may automatically set suggested Tasks, depending on some of your droplist selections. Watch for inline informational messages, which are there to alert you if a droplist might create an automatic Task

Please note that although these automatic Tasks may be created as helpful prompts, they do have generic wording, so you have the choice of creating Tasks yourself. This is advisable if you prefer the wording to be specific or personal. If appropriate, you can select the **"Recurring"** button, which lets you create a repeating schedule, (say, an inspection, review or check-up interval)

When any Task is set in the system, it will display in the form you created, a summary tab in the file and in the Task List of the person it is allocated to (Recurring Tasks don't show until they are due). Tasks are also e-mailed to the allocated person on the required number of days prior to the Due Date

A small number of tasks have been set as mandatory (example, reporting serious injuries to the statutory authority). *These cannot be deleted.*

SafetyBase Tips and Tricks for managing Training Records

If the file status is left as **"Planned"**, the file will show on the Dashboard list, to alert key users it needs following up to closure. This is important, as a means of ensuring visibility to all affected parties

Consider associating an electronic document (example, an existing image, pdf, spreadsheet, document, video etc), using the**"Attach Documents"** tab, or inline toolbar at the bottom of your screen while entering data. Record the document's details by completing the appropriate data fields, then click Attach Document. The document will upload and be available for viewing. Many file types will display as a thumbnail

You can associate a SafetyBase file using the **"Link Files"** inline button on the toolbar at the bottom of the screen while entering data, or afterwards, using the Tasks tab (example, Hazard, Accident Investigation or similar file that has direct relevance). Record the file's details by completing the appropriate data fields, then click ADD. Use the progressive filtering of the drop lists and ADD the file you want. The file will be linked. If you follow the link, the linked file will automatically have a link back to the file you came from

Remember to link People with this file type, using the **"Associate People"** inline button on the toolbar at the bottom of the screen while entering data, or afterwards, using the Associate People tab. Doing this will build an automatic safety history for each person, which you can view by clicking on the person's name anywhere in the account

Check file history in the **"Status Log"** tab. This automatically records status changes to the file. If you would like to monitor the file, click the**"Watch"** button at the top of the file summary. This will place the file on your Watchlist and e-mail you whenever the file status changes