

EHS Training Matrix Template

Eccesis EHS Software | www.eccesis.net

What this is	A role-based training matrix that maps required training topics to job roles, records completion dates for each employee, and automatically flags training that is overdue or coming due.
How to use it	1. Open the Training Requirements tab and adjust the refresher intervals to match your own program. 2. Open the Role Requirements tab and mark which topics each role must complete (X = required). 3. Replace the example rows on the Training Matrix tab with your own employees and completion dates. 4. The Compliance Status tab updates automatically. Nothing on it should be typed into.
Colour legend	Yellow cells are for you to fill in or adjust. White cells on the Compliance Status tab are calculated - do not overwrite them. Status values are CURRENT, DUE SOON (within 60 days), OVERDUE, NOT RECORDED, and N/A (not required for that role).
Adding a training topic	Insert a row on Training Requirements, then insert a matching column on Role Requirements, Training Matrix and Compliance Status in the same position. Keep the four tabs in the same column order or the lookups will misalign.
Before you rely on this	The regulatory citations and refresher intervals below are provided as a starting point and reflect common practice, not legal advice. Several OSHA standards set no fixed refresher interval; the values here are defaults you should confirm against the current regulation text and your own written programs. Have a qualified EHS professional review this matrix before use.
Outgrowing the spreadsheet	Spreadsheets break down at scale: version conflicts, no automatic reminders, no audit trail, and no way for a supervisor to see their own team. Eccesis Training Management Software keeps the same role-based logic but updates itself as training is completed. See www.eccesis.net/Training-Management-Software.aspx

Training Requirements Reference

Yellow cells are yours to adjust. 0 = one-time training, no recurring refresher.

Training Topic	Regulatory Citation	What the Standard Requires	Refresher Interval (Months)	Notes
New Hire Safety Orientation	Company policy	Before initial job assignment	0	Not a single OSHA standard; driven by the training-before-exposure requirements below.
Hazard Communication	29 CFR 1910.1200(h)	At initial assignment and when a new hazard is introduced	12	OSHA sets no refresher interval. 12 months is a common employer practice, not a rule.
Lockout/Tagout	29 CFR 1910.147(c)(7)	Initial; retrain on change in job, machinery or procedure	12	Periodic inspection of energy control procedures is required at least annually.
Confined Space Entry	29 CFR 1910.146(g)	Before first assignment; retrain on change in duties or hazards	12	Retraining also required when a deviation in procedure is observed.
Fall Protection	29 CFR 1926.503	Before exposure; retrain on change in workplace or equipment	12	Construction standard. General industry walking-working surfaces: 1910.30.
Powered Industrial Truck	29 CFR 1910.178(l)(4)(iii)	Evaluation of operator performance at least every 3 years	36	Refresher also required after an accident, near-miss or unsafe operation.
Respiratory Protection	29 CFR 1910.134(k)(5)	Annually, and when workplace conditions change	12	Fit testing is a separate annual requirement under 1910.134(f)(2).
Bloodborne Pathogens	29 CFR 1910.1030(g)(2)(ii)	At initial assignment and at least annually thereafter	12	Annual interval is explicit in the standard.
Personal Protective Equipment	29 CFR 1910.132(f)	Before assignment; retrain when PPE or hazards change	12	Written certification of training is required by 1910.132(f)(4).
Emergency Action Plan	29 CFR 1910.38(e)-(f)	On initial assignment and when the plan changes	12	Also required when an employee's responsibilities under the plan change.
Electrical Safety	29 CFR 1910.332	Training for qualified and unqualified persons before exposure	36	NFPA 70E recommends retraining at least every 3 years.
Hearing Conservation	29 CFR 1910.95(k)(2)	Annually for employees in the hearing conservation program	12	Applies where 8-hour TWA noise exposure equals or exceeds 85 dBA.
Fire Extinguisher Use	29 CFR 1910.157(g)(2)	Upon initial assignment and at least annually thereafter	12	Required where portable extinguishers are provided for employee use.
First Aid / CPR	29 CFR 1910.151(b)	Adequate trained personnel where no infirmary is nearby	24	Interval is set by the certifying body (commonly 2 years), not by OSHA.
RCRA Hazardous Waste	40 CFR 262.17(a)(7)	Within 6 months of assignment and annually thereafter	12	Large quantity generators. Small quantity generators: 40 CFR 262.16(b)(9)(iii).

Role Requirements Matrix

Mark X where a role must complete a topic. Blank means not required.

Job Role	New Hire Safety Orientation	Hazard Communication	Lockout/Tagout	Confined Space Entry	Fall Protection	Powered Industrial Truck	Respiratory Protection	Bloodborne Pathogens	Personal Protective Equipment	Emergency Action Plan	Electrical Safety	Hearing Conservation	Fire Extinguisher Use	First Aid / CPR	RCRA Hazardous Waste
Production Operator	X	X	X		X		X	X	X	X		X	X	X	
Maintenance Technician	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Electrician	X	X	X	X	X		X	X	X	X	X	X	X	X	
Warehouse / Forklift Operator	X	X			X	X		X	X	X		X	X	X	X
EHS Manager	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Supervisor	X	X	X	X	X	X	X	X	X	X		X	X	X	X
Office / Administrative	X	X								X			X		
Contractor	X	X			X				X	X			X		

Training Matrix - Completion Dates

Enter the date each employee last completed each topic. Leave blank if never completed.

[illegible]

Dates are shown as YYYY-MM-DD. Example rows 5-9 are illustrative only - replace them with your own records. They are written as =TODAY()-n so the sample always opens with realistic statuses; overwrite them with real dates.

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CURRENT
57

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