

Employee Health & Safety Training Plan & Tracking Form

Introduction

California Code of Regulations (CCR) Title 8, Section 3203(a)(7) requires employers to provide employees with training and instructions about their job practices.

The Employee Health & Safety Training Plan & Tracking Form can be used by supervisors to identify the types of health and safety training needs for each employee, and to serve as a record of initial and refresher training. The form lists the types of training that are common to four general job categories, i.e., Office Employees, Field Employees, Laboratory Employees and Operations and Maintenance Employees.

On the form, EH&S has identified some training topics that every employee needs. It is the supervisor's responsibility to review the list of training topics and identify additional training topics that apply to each employee's duties.

This form should be reviewed **annually** (e.g., at the time of performance appraisal), or whenever job duties change.

General Instructions for Completing Employee Health & Safety - Training Plan & Tracking Worksheet

NOTE: Instructions are also found at the top of the sheet.

- Employee training information such as name, date, type of training, and dates of training are completed in the "Input Training" worksheet. The worksheet is protected; therefore, you may only type in the green and yellow areas of the "Input Training" worksheet ([see below](#)).
- After completing the "Input Training" worksheet, click on the "Print Training" worksheet ([see below](#)) to use the "AutoFilter" feature to compile the training topics that are applicable to each employee ([see below](#)).

Instructions for "Input Training" Worksheet

- Type the employee's name, position title and date ([see below](#)).
- Type "Yes" in the green area of the "Training Required" column if that subject applies to the specific employee's duties.
- Type the date of initial or refresher training in the green portions of the worksheet.

NOTE: The orange portions of the worksheet indicate the types of training that are required for all ANR employees regardless of their position.

To access Print Training worksheet

Instructions for "Print Training" Worksheet

- Access the "AutoFilter" drop-down list by clicking on the black triangle. Highlight "NonBlanks" (see below) in the drop-down list and cells marked for required and completed training in the previous worksheet will be filtered into this worksheet.
- After finishing the filtering task, click on the print command or icon to obtain a hard copy of the employee's training record.
- Always enter employee training information on the previous worksheet entitled "Input Training" (see above) and then perform the filtering function on this worksheet.

To use AutoFilter function

The screenshot shows an Excel spreadsheet with the following data:

Type of Training	Frequency	Training Required	Initial	Refresher	Refresher	Refresher	Refresher
Record Keeping and Tracking for Employee Health and Safety	Changes or Ann	(All)					
Good Health and Safety Practices Related to Position Tasks	5 Years	(Top 10...)					
Building Evacuation Plan(s)	Changes or 5 Ye	(Custom...)					
Injury Illness Prevention Plan (IIPP)	Changes or 5 Ye	Voluntary					
Emergency Response Plan	Annual	Yes					
Fire Prevention Plan	5 Years	Yes					
First Aid / CPR	3 Years	Yes					
Emergency Supplies/Equipment- Location and Use							
First Aid Kits and Equipment	5 Years	Yes					
Eyewash/Showers	5 Years	Yes					
Fire Extinguishers	Annual	Voluntary					
Good Housekeeping	5 Years	Yes					

Recordkeeping

NOTE: CCR Title 8, Section 3203 (b)(2) requires employers to document each employee's health and safety training and maintain the documentation for at least one year. The ANR EH&S office recommends retaining documentation of employee training for the duration of employment.

- Save the file with a unique file name for each employee and maintain the electronic file for future updates of training requirements and training completion dates.