SOP WAREHOUSESOP

FREE PRINTABLE CHECKLIST

Training Program and Skills Matrix Checklist

Best practice: no regulation governs this procedure, so none is cited.

FACILITY	AREA OR EQUIPMENT ID	DATE	SHIFT
INSPECTED BY (PRINT)		SIGNATURE	

1. Procedure checks

Tick each step as it is done, in this order.

DONE	CHECK	NOTES
☐	Check the matrix before assigning or accepting a task: the cell, not memory, says who is qualified	
☐	Trainee status means you work only in sight of a qualified person or trainer	
☐	Trained on an old revision after a material change? You are not current until retrained	
☐	A new or revised SOP means retraining before its effective date, not after	
☐	Watch your due dates: an expired refresher pulls you off the task automatically	
☐	No assessment, no qualification: attendance alone never signs anyone off	
☐	Asked to do a task you are not qualified for? Stop, say so, and tell your supervisor	

2. Compliance checks

Tick each item that is in place.

DONE	CHECK	NOTES
☐	A current skills matrix exists mapping every role to its required SOPs and certifications, carries a last-updated date, and is accessible to supervisors at the point of assignment	
☐	Every training record identifies the trainee, the requirement, the SOP revision trained against, the dates, the assessment result, and the trainer	
☐	Every SOP revision is classified as material or editorial, the classification is recorded, and a material revision moves everyone qualified on the requirement to a retraining list	
☐	Everyone affected by a material SOP revision is trained and assessed on the new revision before its effective date, or does not perform the affected task until they are	
☐	Refresher and recertification due dates, including the cadences fixed by regulated programs such as forklift and DOT hazmat training, are tracked in the matrix and scheduled before expiry	
☐	No one is marked Qualified without a recorded assessment, and trainees work only under the observation of a qualified person	

☐	Trainers are authorized per requirement on a maintained roster, and every training record traces to a trainer who was on the roster for that requirement on that date	
☐	A coverage report showing percent current, gaps by area, upcoming expirations, and single points of failure is produced on the set cadence and every gap carries an owner and a date	
☐	Any person found working outside their qualification is stopped immediately, the event is investigated as a system failure, and return to the task goes through training and assessment	
☐	Training records, including superseded-revision records marked as superseded, are retained for the required period and retrievable for audits and investigations	

WARNINGS

Never perform or assign a task the matrix does not show as currently qualified, even for a minute, even under time pressure

Never sign off training you did not deliver or an assessment you did not observe

A wallet card or certificate is not the record: the matrix and the training file are

SUPERVISOR REVIEW

REVIEWED BY (SUPERVISOR)	SIGNATURE	DATE