WHS DOCUMENTS & TEMPLATES

DOC-WAS-KIT · Workplace Assessor Kit

Product Overview

For: Workplaces of every kind: supervisors, workplace assessors, experienced workers and WHS advisers who decide whether workers are competent

Version 1.0 · 20 November 2026

Decide whether workers are competent the same way every time: plan the assessment, gather valid evidence, make a fair decision, give feedback, and keep assessors consistent with moderation.

When a worker is signed off as competent, someone made a decision. This kit makes that decision fair to the worker, consistent from one assessor to the next, and defensible afterwards, when the first question asked is: how did you know they were competent?

The workplace assessment procedure sets out the principles of assessment and the rules of evidence, choosing assessors, planning and conducting the assessment, the decision (competent, not yet competent, or a safety-critical fail), feedback, reasonable adjustment, disagreement and appeals, records and moderation. The assessment plan, the evidence record and observation checklist, and the assessment decision and feedback record take one worker through it. The Guide to Assessing Competence at Work shows how to write criteria, gather valid evidence, decide fairly, give feedback and moderate, with a worked example. The Excel assessment and moderation register tracks every assessment and flags feedback, disagreements and moderation still to do. Assessment with the kit is not nationally recognised, and gives no qualification.

Written to work in any country, with Australian law as the worked example. The guide says what to check where you work. In Australia, its state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

SAMPLE

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How to Use This Kit

Setting up workplace assessment in your business, and which document to use when

1 What this kit is for

A workplace assessment decides whether a worker can do a task safely and to the standard, at work: by watching, asking and looking at records, against the task's own criteria. This kit makes that decision planned, fair, consistent and recorded, and keeps assessors consistent with moderation.

The outcomes are competent, not yet competent, or a safety-critical fail, and each criterion is marked S or NYS: the same terms a verification of competency (VOC) uses, so assessment after training and a VOC of an experienced worker read the same way. The kit does not lead to a nationally recognised qualification. Use the documents in the table below together; the register ties them up.

Document	When to use it
Workplace assessment procedure	Adopt it once, then follow it: principles, evidence, assessors, the decision, feedback, appeals
Guide to Assessing Competence at Work	Before you write criteria for a task, and before a new assessor assesses
Assessment plan template	Before each assessment: the evidence for each criterion, adjustments, risks and the briefing
Evidence record and observation checklist	Copy it for each task with the criteria, then use a fresh copy for each assessment
Assessment decision and feedback record	After each assessment: the decision, the feedback, comments and sign-off
Assessment and moderation register	To record every assessment, see what is still to do, and run moderation

2 How to use it

Step	What to do
1	Put in your logo and business name, and fill in the placeholders in the procedure and the templates.
2	List the tasks you assess, starting with the highest-risk ones, and write the criteria for each with the Guide to Assessing Competence at Work.
3	Copy the evidence record and observation checklist for each task, with its criteria, questions and safety-critical fails. Have a second assessor check it.
4	Choose and authorise your assessors for each task, and list them on the Assessors sheet of the register.
5	Consult your workers and health and safety representatives, then approve the procedure.
6	For each assessment: plan it, brief the worker, gather the evidence, decide, give feedback and sign off.
7	Enter each assessment in the register, and act on the Status: feedback due, disagreement open, moderation due.
8	Each quarter, sample assessments for moderation and record the results. Review the procedure each year.

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[Company name]

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Workplace Assessment Procedure

How [Company name] assesses whether workers are competent to do a task, fairly and consistently, and keeps the record

Procedure owner		**Assessment coordinator**	
Applies to (sites and work groups)		**Version and date approved**	

1 Purpose and scope

This procedure sets out how **[Company name]** decides whether a worker is competent to do a task: by an authorised assessor, gathering evidence by observation, questioning and records, against the task's own criteria, and recording the decision. It makes assessment fair to the worker, consistent from one assessor to the next, and defensible afterwards.

It applies to every task listed in the assessment and moderation register, after on-the-job training, for a worker who brings experience from elsewhere, and for reassessment. A verification of competency (VOC) is a workplace assessment of a worker who is already trained or experienced: where **[Company name]** runs VOCs, this procedure's principles apply to them too.

Not a qualification, not a licence

A workplace assessment under this procedure decides whether a worker is competent to do a task at **[Company name]**. It does not lead to a nationally recognised qualification or statement of attainment, and it does not replace the licence or certification required for this work where you are (in Australia, a high risk work licence). Where the work needs one, the worker must hold the licence of the right class before they do the work.

2 Definitions

Term	Meaning in this procedure
Workplace assessment	Gathering and judging evidence that a worker can do a task safely and to the standard, at work
Assessor	A person **[Company name]** has authorised to assess a task (some workplaces say crew assessor, or verifier for a VOC)
Worker	The person being assessed, whatever their experience, licence or qualification
Criteria	What the worker must do and know for the task, written as things an assessor can see or hear. ★ marks a critical criterion
Evidence	What the decision rests on: observation, the worker's answers, work products, records and reports from others
S and NYS	Each criterion is marked S (satisfactory) or NYS (not yet satisfactory), or N/A where it does not apply
Competent	Every applicable criterion S, on evidence that meets the rules of evidence, with no safety-critical fail
Not yet competent	One or more criteria NYS, or not enough evidence, with no safety-critical fail

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[Company name]

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Evidence Record and Observation Checklist

The evidence gathered for one worker's assessment: [Task name], at [Site name]

About this record	
Purpose	To record what the assessor saw, asked and collected, so that someone else could see how the decision was reached.
How to fill in the blanks	Copy the criteria from the task's assessment tool into Part C, as steps the assessor can see, in the order of the task. Write the questions and the safety-critical fails for the task. Then save it as the task's own record.

Part A Details

Worker		**Assessor**	
Task and assessment tool (version)		**Date, place and conditions**	

Part B Pre-assessment checks

Complete every line before the assessment starts. If one fails, do not start.

Check	Yes	No	N/A	Notes
The worker's identity is confirmed	☐	☐	☐	
The licence or certification required for this work where you are (in Australia, a high risk work licence) is sighted, current and of the right class, where the task needs one	☐	☐	☐	
The worker has completed the site induction for **[Site name]**	☐	☐	☐	
The worker says they are fit for work today	☐	☐	☐	
The equipment and the work area are safe, and the worker has been briefed	☐	☐	☐	

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Decide whether workers are competent the same way every time: plan the assessment, gather valid evidence, make a fair decision, give feedback, and keep assessors consistent with moderation.

What the full product contains

- **Excel assessment and moderation register: every assessment with its tool, assessor, methods, adjustment, outcome, feedback, disagreement and moderation, a status that flags what is still to do, a moderation summary for each assessor and a list of assessors**
  02_TEMPLATE/Assessment and Moderation Register.xlsx
- **Workplace assessment procedure: purpose and scope, principles of assessment, rules of evidence, roles, assessor selection, planning, conducting, the decision, feedback, reasonable adjustment, disagreement and appeals, records, moderation and review**
  02_TEMPLATE/Workplace Assessment Procedure.docx and .pdf
- **Assessment plan template: the evidence plan for each criterion, the rules of evidence, reasonable adjustment, risks during the assessment, briefing the worker and agreement**
  02_TEMPLATE/Assessment Plan Template.docx and .pdf
- **Evidence record and observation checklist template: pre-assessment checks, an observation checklist marked S, NYS or N/A, safety-critical fails and the stop rule, questions, and other evidence checked against the rules of evidence**
  02_TEMPLATE/Evidence Record and Observation Checklist.docx and .pdf
- **Assessment decision and feedback record: the evidence summary, the decision, feedback, the worker's comments, sign-off and moderation**
  02_TEMPLATE/Assessment Decision and Feedback Record.docx and .pdf
- **How to Use This Kit: how to complete and adapt it, the law in brief with Australia as the worked example, records and every placeholder**
  01_START_HERE/How to Use This Kit.pdf
- **Guide to Assessing Competence at Work: writing criteria, gathering valid evidence, making fair and consistent decisions, giving feedback and moderation, with a worked example**
  01_START_HERE/Guide to Assessing Competence at Work.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas (no macros)
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

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