WHS DOCUMENTS & TEMPLATES

DOC-WTR-KIT · Workplace Trainer Kit

Product Overview

For: Workplaces of every kind: supervisors, leading hands, experienced workers and WHS advisers who train others on the job

Version 1.0 · 20 November 2026

Train workers on the job the same way every time: plan training from the task, keep trainees safe while they learn, record it, and hand them over to be assessed when they are ready.

Most workers learn their jobs from the person beside them. When that training is planned and recorded, every trainee learns the task the way the procedure says, the steps that matter most are never skipped, and you can show who was trained in what, by whom. This kit gives your trainers the method and the paperwork to do it.

The on-the-job training procedure sets out who can train, planning training from the task, keeping people safe while they learn, the show, tell, do, review method, supervised practice, and handing the trainee over to an assessor or verifier for the decision: competent, not yet competent, or a safety-critical fail. The training plan template breaks the task into steps, with key points and safety-critical steps. The session plan template and the on-the-job training record, with trainee and trainer sign-off, follow every session. The Guide to Training on the Job shows how to break a task down, adapt for different learners and check understanding, with a worked example. The Excel training register shows each worker against each task, with trainees waiting for assessment flagged. Training with the kit is not nationally recognised training, 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 on-the-job training in your workplace, and which document to use when

1 What this kit is for

On-the-job training is a competent worker training another to do a task, at work, on your equipment, under your procedures. This kit makes it planned, safe and recorded, so every trainee learns the task the same way, and you can show who was trained in what.

Training ends when the trainee is ready to be assessed. An assessor or verifier then decides, on the evidence, whether they are competent: competent, not yet competent, or a safety-critical fail, the same terms a verification of competency (VOC) uses. The kit does not lead to a nationally recognised qualification. Use the documents in the table below together; the training register ties them up.

Document	When to use it
On-the-job training procedure	Adopt it once, then follow it: who trains, planning, safety, the method, practice, handover, records
Guide to Training on the Job	Before you write a training plan, and before a new trainer trains for the first time
Training plan template	Write one for each task, from its procedure and risk assessment, and train from it
Session plan template	Before each session, to plan what is covered, the risks and the questions
On-the-job training record	One for each trainee, each task: every session, the practice, and the sign-off
Training register	To see who is training in what, who is ready for assessment, and who has waited too long

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 that need on-the-job training, starting with the highest-risk ones and the ones new starters do first.
3	Choose and authorise your trainers for each task, and list them on the Trainers sheet of the register.
4	Write a training plan for each task with the Guide to Training on the Job, from the task's procedure and risk assessment. Try it, and fix what was unclear.
5	Consult your workers and health and safety representatives, then approve the procedure.
6	Put your tasks and workers in the training matrix, and start a register row when each trainee starts.
7	Train with a session plan and record every session and the supervised practice in the training record.
8	When a trainee is ready, sign the declaration, update the register and arrange the assessment. Check the register each week.

Make it work, not just exist

- Train the procedure, not the trainer's own short cuts. If the procedure is wrong, fix it first.
- Keep sessions short, and teach the reasons. People remember why.
- Give trainers time to train. Training squeezed into a busy shift is where short cuts are learned.
- Where you can, have someone other than the trainer assess.

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[Company name]

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On-the-Job Training Procedure

How [Company name] trains workers on the job, safely and consistently, and hands them over to be assessed or verified as competent

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

1 Purpose and scope

This procedure sets out how **[Company name]** plans, delivers and records on-the-job training: a competent worker training another worker to do a task, at work, on our equipment, under our procedures. It makes training consistent from one trainer to the next, keeps the trainee and others safe while they learn, and leaves a record of what was taught.

It applies to every task listed in the training register, and to employees, contractors, labour hire workers and anyone else we train. Training ends when the trainee is ready to be assessed. An assessor or verifier then decides, on the evidence, whether the trainee is competent.

Not a qualification, not a licence

On-the-job training under this procedure builds the skills and knowledge a worker needs for 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 a licence, the trainee trains under the rules for a learner, or holds the licence before they train on our equipment.

2 Definitions

Term	Meaning in this procedure
On-the-job training	Structured training at the workplace, during work or in a set-aside time, by a trainer, to a training plan
Trainer	A competent worker **[Company name]** has authorised to train others in a task (some workplaces say crew trainer)
Trainee	The worker being trained, whatever their experience elsewhere
Training plan	The task broken into steps, with the key points and safety-critical steps for each, the knowledge the trainee needs and the practice planned
Key point	What makes a step safe, right or easier: the thing an experienced worker knows and a new one does not
Safety-critical step	A step where a mistake could seriously hurt someone, or where a critical control depends on the worker. Marked ★ in the training plan
Supervised practice	The trainee doing the task, with the trainer or a competent person supervising, until they can do it safely and consistently
Ready for assessment	The trainer's view that the trainee can do the whole task, every step, without help. It is not a decision that the trainee is competent

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[Company name]

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Training Plan Template

The task broken into steps, with the key points and safety-critical steps: [Task name], at [Site name]

About this plan	
Purpose	To train every trainee in **[Task name]** the same way, the way the procedure says, with the steps that matter most marked.
Who writes it	An experienced trainer and the supervisor, from the task's procedure, risk assessment and manufacturer's instructions.
How to use it	Write one plan for each task. Train from it, give the trainee a copy of Part C, and record the training against it in the on-the-job training record.

Part A The task

Task		**Plant or equipment (make, model and ID)**	
Site and work areas		**Procedure, safe work instruction or SWMS or equivalent (name and version)**	
Risk assessment (name and date)		**Written by, and checked by**	

Part B Before training starts

Check	Yes	No	N/A	Notes
The trainee has completed the site induction	☐	☐	☐	
The licence or certification required for this work where you are (in Australia, a high risk work licence) is held, or the trainee trains as the law allows for a learner	☐	☐	☐	
The trainee has the PPE the task needs, and it fits	☐	☐	☐	
The trainee says they are fit for the task, and any needs (language, literacy, experience, health) are known	☐	☐	☐	
The equipment is safe to use, and a safe area is set aside for training	☐	☐	☐	

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Train workers on the job the same way every time: plan training from the task, keep trainees safe while they learn, record it, and hand them over to be assessed when they are ready.

What the full product contains

- **Excel training register: workers against tasks, training plan, trainer, start, target and ready for assessment dates, the assessment outcome, status with ready for assessment and waiting flags, a training matrix and a list of trainers**
  02_TEMPLATE/Training Register.xlsx
- **On-the-job training procedure: purpose and scope, roles, who can train, planning training from the task, keeping people safe during training, show, tell, do, review, supervised practice, ready for assessment and the handover to an assessor or verifier, records and review**
  02_TEMPLATE/On-the-Job Training Procedure.docx and .pdf
- **Training plan template for any task: the task broken into steps, with key points, reasons and safety-critical steps, what the trainee must know, checks before training, sessions, supervised practice and when the trainee is ready for assessment**
  02_TEMPLATE/Training Plan Template.docx and .pdf
- **Session plan template: the outcome, preparation, risks during the session, show, tell, do, review, questions to check understanding, adjustments for the trainee and follow-up**
  02_TEMPLATE/Session Plan Template.docx and .pdf
- **On-the-job training record: sessions, supervised practice, steps checked, the ready for assessment declaration with trainee and trainer sign-off, and the assessment outcome**
  02_TEMPLATE/On-the-Job Training 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 Training on the Job: breaking a task into steps and key points, show, tell, do, review, adapting for different learners and checking understanding, with a worked example**
  01_START_HERE/Guide to Training on the Job.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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