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Parent Policy: [Assignment of Accountability: 3.0 Training and Competency](#)

## Training and Competency Procedure

Office of Administrative Responsibility:	Health, Safety and Environment
Approver:	Director, Health, Safety and Environment
Scope:	Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy (Appendix A and Appendix B: Definitions and Categories); undergraduate, graduate, and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.

### Overview

Health, safety, and environment legislation requires that **workers** engaged in **university affairs** receive training and can demonstrate they are **competent** to perform their work safely.

Effective training enhances the quality of our research, teaching, learning and operational efforts, and aids in the prevention of **incidents** that may result in injury, illness, or damage to property or to the environment.

### Purpose

The purpose of this procedure is to ensure that workers possess the necessary knowledge, skill, and ability to work safely and to ensure compliance with health, safety, and environment legislation pertaining to training and competency.

**Senior administrators** must implement this procedure in their respective **unit(s)**. **Supervisors** have responsibilities to ensure that their workers receive required training and are competent to perform work safely. Supervisors must also track completion of required training for workers reporting to them and retain records of training.

## PROCEDURE

This procedure will assist senior administrators and supervisors in understanding and fulfilling worker training needs and legislative compliance requirements to ensure that workers participate in training and can demonstrate competency to perform tasks safely.

Training required must be identified in the **hazard** assessment process. Refer to the Hazard Identification, Assessment, and Control Procedure for more information.

### 1. Training

All current, newly hired, transferred and re-assigned workers must complete the following training:

### *A. Orientation to workplace safety practices*

An orientation must include an introduction to the following:

- The university's Health, Safety and Environment Policy and Management System
- The rights and responsibilities of a worker, as they relate to safety
- Workplace hazards and control measures
- Emergency response procedures
- Injury, illness, property damage, and environmental reporting
- Other training as identified through the Hazard Identification, Assessment, and Control (HIAC) Procedure and required by university policy

### *B. Workplace task/hazard specific training*

Before beginning a new task or undertaking a task in a new work area, workers must participate in the following:

- A hazard assessment of the task
- Hazard specific training
- An evaluation of their competency by a supervisor or another qualified worker

Supervisors must complete a training needs assessment for their work area to identify all the training required for their staff.

### *C. Ongoing and refresher training*

Workers must complete refresher training to ensure that qualifications, knowledge, and skills are current and relevant to the tasks performed.

Refresher training must be completed:

- As required by legislation or according to university policy
- When changes occur in the workplace (e.g., new hazards, new or modified methods, equipment, or technology)
- If skills have not been used recently
- After a serious incident or near miss event
- Whenever training expires or every 3 years if there is no expiry on the training.

## 2. Determining Competency

Before workers can perform a task unsupervised, supervisors must document the following competency measures:

- Completion of relevant online or in person training
- Practical demonstration of the task without assistance

Competency measures and documentation should reflect the risk associated with the task.

## 3. Training Records

Supervisors are responsible to retain all records in accordance with the U of A Records Management Policy. Supervisors should also review records regularly to ensure that training is up to date and meets legislated requirements. If refresher training has occurred, records need only reflect the most recent date of completion. Training records must include the following information:

- Name of instructor
- Date(s) training was completed and competency established
- Topics covered
- Employee signature or completion certificate

For detailed information, consult the standards under “Related Links.”

## **DEFINITIONS**

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use.	
<b>Worker</b>	Means a person engaged in an occupation (includes graduate students, post-doctoral fellows, contractors, volunteers, etc.).
<b>University Affairs</b>	Any activity that is directly related to or arising out of the operations of the university at any location
<b>Competent</b>	Means adequately qualified, suitably trained and with sufficient experience to perform work safely without supervision or with only a minimal degree of supervision.
<b>Incident</b>	An undesired, unplanned, or unexpected event that could or did result in an injury, illness, or damage to property or the environment.
<b>Senior Administrator</b>	President, Vice-Presidents, Deans and Chairs, AVP, Executive Directors, Directors
<b>Unit</b>	Entities that are part of the legal entity "The Governors of the University of Alberta" This would include faculties, departments, schools, operational units such as parking services and housing and food services, academic centres and institutes, and some affiliated centres and institutes.
<b>Supervisor</b>	A person who has charge of a worksite or authority over a worker (from Bill 30)
<b>Hazard</b>	Is a situation, behaviour, condition or thing that may be dangerous to the environment and to the safety or health of the University community

## **FORMS**

[Hazard Assessment Web Application](#)

[HSE Document & Forms Cabinet \(training and competency resources\)](#)

## **RELATED POLICY DOCUMENTS**

[Hazard Identification, Assessment, and Control Procedure](#)

## **RELATED LINKS**

Related legislation & regulations:

- [Biological materials](#)
- [Chemical hazards](#)
- [Nuclear substances/lasers/X-ray devices](#)
- [Physical hazards](#)

*For questions surrounding policy document interpretation or implementation, please contact the Office of Administrative Responsibility.*

*For the most recent version of this document, please visit <https://www.ualberta.ca/policies-procedures/index.html>*