

Competence, Authorisation and Refreshers

The lifecycle, and the calendar that stops it lapsing quietly

Scope and limitations — read before use

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1. The rule

A training certificate is evidence of training. It is not authorisation to operate. Only the employer can authorise, and only after specific job training and familiarisation on YOUR machines and YOUR site. This is the single most common gap found at inspection.

2. Refresher intervals and triggers

Competence	Typical interval	Earlier trigger
Plant and machine operation (FLT, telehandler, MEWP, plant)	3–5 years	Incident or near miss · observed unsafe practice · change of machine or attachment · change of task or site · long break from operating · after any refusal or failure
Vehicle marshal / banksman	3 years	Any incident involving a vehicle manoeuvre
Slinger / signaller	3–5 years	Any lifting incident
Abrasive wheels	3–5 years	Wheel failure or near miss
Asbestos awareness	Annually where work may disturb asbestos	Any suspected exposure
First aid at work	3 years (annual refresher recommended)	—
Manual handling	3 years	New task or reported injury
Induction / site rules	On any significant change	New site, new hazard, new process

Toolbox talks	Rolling programme, each topic annually	After any related incident
Health surveillance	Annually, or as the provider advises	Any reported symptom

There is no fixed legal expiry for most operator training. The duty is to ensure continuing competence, which means monitoring as well as refreshing. An interval on its own is not a system.

3. Form B — Specific job training (stage 4)

Field	Entry
Name	
Machine or task	
Make, model, fleet number	
Attachments covered	
Site areas and routes covered	
Specific tasks covered	
Risk assessments and safe systems briefed	
Emergency procedures briefed	
Delivered by	
Date(s)	

Trainer signature	Employee signature	Date

4. Form C — Familiarisation (stage 5)

Date	Task performed under supervision	Duration	Supervisor comments	Initials

Supervisor	Employee signature	Date completed

5. Form D — Written authorisation to operate (stage 6)

Field	Entry
Company	
Name	
Machines or tasks authorised, including attachments	
Specific machines or fleet numbers	
Areas and tasks authorised	
EXCLUSIONS and limits	
Basic training evidence (certificate and date)	
Specific job training completed (date)	
Familiarisation completed (date)	
Valid from	

Refresher due	
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I authorise the named person to operate the machines or perform the tasks stated above. This authorisation will be reviewed after any incident, any change of machine or task, any observed unsafe practice, or at the review date, whichever comes first.

Authorising manager	Signature	Date

6. The refresher calendar — check this monthly

This is the single most useful page in the whole system. Competence expires silently. This is what catches it.

Name	Competence	Last assessed	Due	90-day warning sent	Booked	Completed	In date? Y/N

SAFETY MANAGEMENT SOPs

RED means expired. An expired authorisation means that person does not operate that machine until it is put right. Not 'until the end of the job'.