Table of Contents

[I. PURPOSE: 2](#_Toc13043650)

[II. OVERVIEW: 2](#_Toc13043651)

[III. DEFINITIONS: 3](#_Toc13043652)

[IV. RESPONSIBILITIES: 5](#_Toc13043653)

[1) Trainee 5](#_Toc13043654)

[2) Trainer 6](#_Toc13043655)

[3) Team Members 6](#_Toc13043656)

[4) Supervisors 7](#_Toc13043657)

[V. PROCEDURE 8](#_Toc13043658)

[1) Orientation/On-Boarding 8](#_Toc13043659)

[2) Structured On-the-Job Training 8](#_Toc13043660)

[3) On-the-Job Evaluation (OJE) 10](#_Toc13043661)

[Failure of On-the-Job Evaluations 11](#_Toc13043662)

[Return to Work 12](#_Toc13043663)

[4) Oral Boards 12](#_Toc13043664)

[5) Performance Reviews 12](#_Toc13043665)

[Promotion 13](#_Toc13043666)

[Prioritization of Operational Needs 13](#_Toc13043667)

[6) Refresher and Ongoing Training 14](#_Toc13043668)

[7) Training Records 14](#_Toc13043669)

[8) Revisions 15](#_Toc13043670)

[9) Recognizing Prior Experience of New Hires 15](#_Toc13043671)

[VI: Attachments 15](#_Toc13043672)

[1) New Team member Training Statement of Understanding 16](#_Toc13043673)

[2) Training Extension Form 17](#_Toc13043674)

# I. PURPOSE:

This program guide describes the program and procedures for [Your Company] ([YOUR COMPANY]) Team member training and qualifications.

* The **Overview** is intended for the information of all who have an interest in the general structure, content, and management of the program.
* The subsequent portionsof this program guide provide detailed guidelines and procedures of the implementation and administration of the operations qualifications process.

This program guide has been reviewed and approved by [YOUR COMPANY] management and clarifies how this training program can best satisfy the needs of the company.

**NOTE: Though this guide outlines a framework and articulates the general principles governing [YOUR COMPANY] Team member training, it remains management prerogative to deviate from this guide as needs of the operation and situation dictate**.

# II. OVERVIEW:

[YOUR COMPANY] strives for operational excellence as measured in safety, environmental compliance, efficiency, and reliability. Operational excellence is the culmination of being:

* Well Run
* Well Maintained
* Well Managed
* Well Lead

Operational excellence requires well trained and engaged team members with the highest levels of professionalism and technical competence working collaboratively within a team environment at all levels.

To achieve our goals every team member must work in a state of heightened awareness and anticipation. Before taking any action, before pushing a single button, throwing a switch, or turning a valve, the team member must fully understand the task, all potential hazards and required controls involved, and must anticipate the expected system response (will flow or temperature increase or decrease, will there be an accompanying sound, etc.). The team member must look for that response and intervene in a timely manner should the system not behave as anticipated. Only team members that understand the principles and theory of operations, are completely familiar with the system, and are fully knowledgably of all controls and logic programmed or interlocked within the system are capable of consistently operating at the expected level of operations excellence.

Figure 1: Building Blocks of Operational Excellence

***This is the [YOUR COMPANY] Standard***

The heart of [YOUR COMPANY] operational philosophy is teamwork. When we talk of teamwork, we are not just speaking of working well with our fellow team members; we mean that the team is engaged in every facet of the work and every team member contributes to the overall success of the organization. The needs of the facility drive the work – not job descriptions or functional silos. This highly collaborative approach capitalizes on all the talents and experience of the team. On any given day a team member may be called upon to support other teams and other functions; operators may help with maintenance and maintenance helps with operations as the work and their capabilities allow. The success of is enmeshed with the success of the teams as is the success of each team member. Our guiding principle is Mutual Success through Mutual Respect and Mutual Support.

# III. DEFINITIONS:

The [YOUR COMPANY] Training and Qualifications program is a performance-based program. In a performance-based training program, both knowledge and abilities are developed and evaluated utilizing a blended combination of content, experiences and media. Major concepts and elements of the program are defined below (shown in a conceptional order of hierarchy, not alphabetical):

1. **Work Team**: The group of team members working within a given operational area or maintenance craft. The Cutting Work Team works collaboratively to maximize quality and productivity of the cutting equipment; the Flexo Team accomplishes the work required to optimize the flexographic processes; the maintenance team optimizes the productivity and reliability of all equipment.
2. **Knowledge, Skills, and Abilities (KSAs)**: As the name implies, KSAs are the required understanding and performance capabilities associated with a given job function or area.
3. ***Training:*** Pre-requisite steps of learning by structured Lesson Plans and administered by formal instruction, self-study, or other means of obtaining core System/Task knowledge prior to Qualification.
4. ***Qualification***: the state of team member training and demonstrated proficiency which has been validated to be sufficient for the team member to perform a given task or operate independently and without restrictions in a given position.
5. ***Certification:*** a state of qualifications that meets specific formalized criteria usually specified by a governing outside agency. Certain job roles within the facility may require certification prior to being able to perform that function (for instance CPR & First Aid Certification).
6. ***Qualification Checklist (QCL)***: A list of competencies and tasks (both knowledge and skills) divided into categories for which team members must demonstrate proficiency prior to being qualified for a specific job position. QCLs outline the knowledge requirements and tasks that must be performed for each production area, process, and job functions.   
     
   The QCLs specify that the team member understand the theory of operation, equipment construction, controls and logic, and has demonstrated safe operation of the systems or equipment described. For a team member to become qualified he/she will be evaluated through appropriate means: written tests, walk downs with qualified trainers or Supervisors, oral examination, and/or evaluation of actual performance of tasks as detailed in the procedures portion below.

In addition to technical/operational requirements, the QCLs contain other knowledge and skills essential to high-performance teams. Some of the other expectations include:

* Health, Safety, and Environmental (HSE)
* Regulatory Compliance (food safety standards, etc.)
* Team skills
* Training others

Since effective teamwork requires more than technical proficiency, these other KSAs ***are essential parts integral with the technical elements of the job***. As such it is part of the expectations of all [YOUR COMPANY] team member to demonstrate as much knowledge and proficiency in these areas as their operational tasks. Failure to demonstrate proficiency in any area of the job will affect team member performance appraisals and their ability to be promoted.

1. **NOTE:** The QCL sets forth ***the minimum knowledge and ability required*** by a team member to operate safely and effectively independently and without restrictions. Other tasks and duties shall be assigned as needs arise.

Each team member operating in a specific job at a specific level of qualification within a team is expected to have mastered the knowledge, skills, and abilities specified in QCLs of all previous grades and steps within their team. For example: Lead Operators should know and be able to perform the tasks associated with both Assistant Operators and Utilities within that work team.

1. **Individual Development Plan (IDP)**: Each trainee is assigned one or more QCLs based on their job assignment. Their assigned QCLs are collectively referred to as their Individual Development Plan (IDP).   
     
   For example, a new employee hired as an operations utility will have the New Employee QCL as well as the Utility QCL assigned. Upon successfully demonstrating knowledge and proficiency on all tasks, the new employee can fulfil the role of utility without continuous supervision or restrictions.
2. ***System/Subject Matter Expert (SME)***: a person with direct knowledge of what is done in the job, what knowledge, skills, abilities and other characteristics (KSAs) are required who has been qualified on the job and has consistently demonstrated proficiency doing the job.
3. ***On the Job Training (OJT)***: OJT is training that takes place at the work site and is supervised by the trainer, a SME, or an experienced coworker when approved.
4. ***On the Job Evaluation (OJE)****:* OJE is the process of validating the trainee’s knowledge, abilities, and proficiency. OJE is conducted after all elements of OJT have been completed for a given process or procedure. OJE is administered by a person other than the individual who had previously conducted OJT with the trainee.
5. ***Resources*** – Any media (document, video, audio, job aid, procedure, simulators, hands-on demonstration, etc.) which trainees will utilize to acquire the knowledge or skills necessary to demonstrate competency for a given task. Some of the most commonly used resources for team member qualifications include:

* Standard Safe Operating Procedures (SSOPs)
* Job Aids
* Vendor Materials
* Training Manuals (TMs)
* Piping and Instrumentation Diagrams (P&IDs)
  1. ***Standard Safe Operating Procedures (SSOPs):*** SOPs are written documents that outline the step*-by-step instructions for performing a task or procedures. In addition to the operational instructions, SSOPs include details about the hazards and controls that are contained in the OSHA required Job Safety Analysis (JSA). Combining the JSAs with the Standard Operating Procedures creates a single comprehensive document.*
  2. ***Job Aids:*** Job aids are quick reference documents that utilize graphics, diagrams, and text that work well for OJT and general reminders.
  3. ***Vendor Materials and Training Manuals:*** Vendor materials and training manuals explain the purpose, principles, construction, and controls and logic of systems and procedures. These materials may be available in either physical or electronic media. These materials are significant resources and should always be referenced during training to gain the required levels of knowledge and understanding.
  4. ***Piping and Instrumentation Diagrams (P&ID):*** P&ID’s are engineering drawings that illustrate the process flow through equipment. Included in these are the instrumentation (level, flow, pressure, temperature, etc.) essential to the controls and logic for the safe and efficient operation equipment and processes. Trainees must understand how to read and interpret P&ID diagrams as part of their qualifications and ongoing operations.

# IV. RESPONSIBILITIES:

## Trainee

Team members join one of the work team responsible for an operational area:

* Corrugating
* Pre-Print
* Flexo-Folder-Gluers
* Cutting
* Shipping
* Maintenance

Work teams work collaboratively to optimize the production, quality, and safety within a given area. Unlike traditional hierarchies, members of work teams pitch-in wherever they are needed based on their own experience and training. A less experienced operator may be entrusted to monitor machine operations while the senior operator trains a newer team member. In the same manner, maintenance team members may operate and train other team members on ways to adjust equipment or change out parts.

The trainee is responsible for completing all requirements on their assigned QCLs for the equipment their work team is accountable for. The trainee is fully accountable to study independently as well as to work closely with their team members to gain the required knowledge, skill, and abilities and then demonstrate their proficiency for each line item in the QCL.

Trainees are expected to maintain control and accountability of all materials and documentation. The trainee must keep track of their QCLs and provide them for review and evaluation periodically throughout the initial and ongoing training and qualifications process. Failure to maintain proper accountability for documentation and records is considered a direct reflection on team member performance.

Concentration and dedication to continuous development and ongoing improvement is a fundamental expectation of every [Your Company] team member. It is not anyone else’s responsibility to prod or remind a team member to complete their initial, refresher, or cross-training. **The motivation and drive a team member demonstrates is a direct reflection of their quality of work; as such, opportunities or other assignments or promotion are directly tied to individual effort, attitude, and achievement.**

## Trainer

The term trainer in this guide refers to a team member who has been specifically authorized to sign off elements of QCLs and other training requirements.

To be designated as a trainer in the formal sense of qualifications, a team member must be a SME and must be fully qualified on the job for which they are training another. Each trainer maintains a current and accurate knowledge of the systems and equipment in the area to which he/she is responsible. The trainer knows the expected level of proficiency required for each task that pertains to his/her position and is thereby capable of evaluating trainees for the appropriate depth and range of knowledge and/or skills. When satisfied with a trainee’s knowledge and certain that the trainee can consistently perform the specific task at a satisfactory level of demonstrated proficiency, the trainer initials and dates each line item of the QCL or other training resources.

## Team Members

Team members work collaboratively to achieve facility goals. As described earlier, team members are expected to proactively participate in all aspects of operations, maintenance, housekeeping, administration, and training to the greatest extent their knowledge and experience allows.

When a new member joins the team, others will contribute to the rapid acclimation and inclusion of the new team member. **At [Your Company], sharing information and training others is a job expectation.**  Though only designated trainers are authorized to sign off QCL line items, every team member is encouraged to share their knowledge, skills, and experience generously with others. Ongoing operational excellence can only be achieved and sustained when a collaborative learning/training culture pervades every facet of [YOUR COMPANY] Operations.

The collaborative team environment promotes maximum productivity and maximum engagement. It is the goal of every work team to have every member perform at the highest levels for which they are capable of achieving.

## Supervisors

Supervisors oversee the training and qualification program for their teams. The primary function of the supervisor is to act as a positive change agent - to champion excellence in operations through:

1. Fostering a collaborative environment of teamwork, accountability, and continuous improvement through leadership and mentoring
2. Utilization and revision of QCLs and other resources or tools

The supervisor will ensure that training and qualifications program conforms to [Your Company] requirements and procedures.

Supervisors are responsible to ensure that QCLs accurately reflect the requirements of each position and the correct equipment configuration. Supervisors make recommendations to ensure that appropriate revisions and modifications are incorporated into QCLs and all other resources associated with the training program.

When applicable, the supervisor is authorized to initial off tasks or other requirements that the team member is exempt from completing based on previously demonstrated knowledge or abilities and approved by their manager (for example: previously completed common requirements across multiple job functions, etc.).

The supervisor ensures that those conducting training base their evaluations of trainees on established standards of performance and knowledge required for safe and efficient operation and maintenance of the equipment, not on personal opinion or bias.

The supervisor coaches and monitors trainee progress and participation. Where knowledge or performance deficiencies have been identified, the supervisor will work with the trainee to develop appropriate remediation plans.

The supervisor is responsible for maintaining records and documentation for each trainee.

# V. PROCEDURE

Each functional area of the facility has a work team responsibility for maximizing safety, quality, productivity, and profitability. Each team member contributes to this work to the best of their abilities, experience, and qualifications. The following steps outline the process by which new employees become fully trained and qualified:

* + 1. Orientation / Onboarding
    2. Structured On-the-Job Training (OJT)
    3. On-the-Job Evaluation (OJE)

## Orientation/On-Boarding

During the first week of employment new [YOUR COMPANY] team members complete an on-boarding and orientation process during which time they accomplish the general requirements for all new team members and work with Human Resources (HR) and their designated sponsor. The sponsor is usually the Supervisor but can be a designee.

The training and qualification process will be explained to the new team member who will then sign a Statement of Understanding (Attachment 1). The trainee will be entered into the training tracking program and issued the New Employee QCL that will guide them through the orientation process.

Certain requirements are mandatory to be completed prior to being allowed to enter the operational areas of the facility outside of the main administration areas. These elements include both administrative and Health, Safety, and Environmental (HSE) requirements that are mandatory to ensure both safety and compliance. These restrictions will be explained to the new team member and completion will be verified prior to authorizing the trainee from entering the plant without a qualified escort.

## Structured On-the-Job Training

Once the mandatory requirements have been successfully completed and the team member receives authorization from their supervisor, they will join their work team. Each work area’s QCLs are structured progressively to facilitate employee development from initial orientation to process expertise. In general, the QCLs will be divided into three levels of increasing complexity and responsibility:

1. Utility/Helper
2. Assistant
3. Operator

Upon completion of the New Employee QCL the team member will be assigned the Utility/Helper QCL for their respective work area. For each line item of the QCL the trainee will study applicable text material, walk down the system, and/or work with more experienced team members to walk through operations to gain adequate knowledge/skill.

An example of a portion of a QCL is shown below:

For knowledge and performance-based tasks detailed in the QCL, the trainee studies and prepares; this could be with the assistance of other team members.

Effective training of knowledge and tasks progresses from simple to more complex, from known concepts to new materials. The trainer or other team member begins explaining the overall concepts and objectives of each task. Included in these explanations are detailed explanations of precautions and controls that must be observed to ensure safe and effective operation. After a detailed explanation, the trainer or experienced team member will demonstrate performance of tasks talking through each step. Once the trainee understands the principles and steps to be performed, they will then perform the tasks monitored by the trainer or experienced team member. The trainee will explain each action they are taking and why. Training will continue in this manner until the trainee fully understands and demonstrates proficiency for each line item.

**WARNING: THE TRAINER OR EXPERIENCED TEAM MEMBER MUST INTERVENE AND STOP THE TRAINEE IF HE/SHE IS ABOUT TO PERFORM AN ACTION THAT WOULD RESULT IN PERSONAL INJURY, EQUIPMENT DAMAGE, OR DOWNTIME.**

Wherever possible, all performance tasks will actually be performed by the trainee. However, certain tasks are impractical or unsafe to perform for training such as emergency shutdowns of equipment. For items such as these, the trainee will demonstrate the ability to perform the task through simulation and talking through the required actions. If the action would normally be performed with a written procedure or other job aids, the trainee should use the job aid to perform the task.

**NOTE:** For emergency and critical operations the team member must know and demonstrate from memory how to conduct an emergency shutdown or take appropriate steps to place the equipment into a safe condition. Once initial steps have been taken from memory, it is expected that the team member utilize the appropriate procedures to validate actions and continue as appropriate to restore the equipment to normal operations.

Once the line item is sufficiently mastered, the **trainee initials** the block in the column marked “**Team Member**” next to each item indicating that he/she has studied the information and practiced the task to the degree that they feel ready to be evaluated verbally or through demonstrated performance. Once sufficient progress has been made the trainee asks a designated trainer to evaluate them.

To complete each line item, the designated trainer with signing authority will directly observe the trainee taking all appropriate steps independently, as if the trainer were not present. **Before each step, the trainee will state what he/she is about to do and then proceed**. This gives adequate time for the trainer to stop the trainee if the trainee is about to perform an action that would put personnel or equipment at risk.

If the trainee cannot satisfactorily perform the task without being prompted, the trainer **WILL NOT** initial the line item as complete. The trainer should thoroughly explain the deficiency to the trainee in an appropriate manner. The trainee should then continue to practice or study until he/she can complete the task at a later date unaided.

After the designated trainer evaluates through discussion and/or observation that the trainee is fully knowledgeable and/or proficient on a line item, they will **fill in the date** and **initial** the block under the heading “**Verified By**”.

**NOTE**: The trainer's evaluation will be based on objective examination of the trainee, not personal opinion or bias. **The trainer may never base his/her evaluation on second-hand information or input.**

## On-the-Job Evaluation (OJE)

OJT is training that takes place at the work site and is supervised by the designated trainer, a SME, or a more experienced team member. Sufficient Knowledge of an OJT is when the trainee can perform the task safely without assistance, prompting, or intervention.

After all line items on the QCL are properly trained and verified and the designated trainer believes the trainee has demonstrated sufficient knowledge and proficiency, the trainer will authorize the trainee to schedule an on-the-job evaluation (OJE).

**The OJE is to be completed by someone not involved with OJT.** Typically, the Supervisor will conduct the OJE.

**NOTE**: Though not exclusive, to the greatest degree possible, OJEs should be completed by the team member’s assigned supervisor there may be other times when someone other than the assigned supervisor is authorized to perform the OJE at the manager’s discretion.

A Supervisor will evaluate the trainee’s knowledge and proficiency on the system or equipment. It is not necessary to repeat all the line items of the QCL, but the evaluator must feel confident that the OJT was effective, and the trainee is thoroughly prepared. When the supervisor, or designee, is satisfied, they will complete update the training records verifying the employee has satisfactorily completed all required training.

Once all requirements are completed, the supervisor will notify the area manager and the manager (or designee) will provide final authorization for a team member to operate independently and without restrictions. Upon final authorization, the supervisor will ensure the appropriate records reflect completion. The Supervisor will notify Human Resources and the employee is fully qualified to work independently and without restrictions as part of the work team. Human resources will take appropriate actions to document records and authorize any changes in pay or benefits as appropriate.

### Failure of On-the-Job Evaluations

For OJT, trainees must demonstrate competency, as determined by the trainer (or designee) on each line item of the QCL as specified above. When all line items are satisfactorily completed, the trainee schedules an OJE with a supervisor

If an OJE is failed during the first administration, the trainee has up to five (5) working days to pass a second OJE.

If an employee fails to complete the required qualification program or fails to gain satisfactory minimum knowledge in a timely manner, a determination will be made on continuing training. Should additional time be allocated, the Supervisor will complete and submit a **TRAINING EXTENSION** form to the Human Resources Department. The following situations will be considered for training extension:

* Illness
* Injury
* Military Service
* Special Duty Assignment
* Administrative leave involving the determination of team member’s status
* Other (a detailed explanation must be made for this request to be considered for approval)

The trainee will continue to train in that position for the period specified in the **TRAINING EXTENSION** form (Attachment 2).

**Should an employee fail to gain** satisfactory **knowledge and proficiency to safely work independently and without restrictions at a specific level, these restrictions will be documented and the employee will continue to work in those areas for which they have demonstrated sufficient knowledge and proficiency to work independently and without restrictions. These restrictions will be documented in the employee’s performance reviews and maintained in the employee record.**

**NOTE:** The opportunity to attempt to qualify at the higher level in the future will be assessed at a later date and will be based upon performance on a case-by-case basis at the sole discretion of management.

### Return to Work

Should a team member have an approved extended period of time away from the job, upon return they may need refresher or retraining to ensure safe and efficient ability to operate. Upon return to work the team member will work with human resources and management to determine an appropriate refresher training plan to ensure the individual is adequately trained and prepared for safe operations within the facility.

## Oral Boards

In addition to completing the prerequisite QCLs and a final OJE, qualification for the senior most positions of a work team requires successful demonstration of knowledge before an oral board. Each oral board will be made up of three (3) persons:

* a qualified team member from a different shift’s work team
* a supervisor
* a member of management

The oral board will evaluate the team members knowledge of theory, normal and emergency operations, and teamwork skills. The oral board helps ensure the team members highest level of technical and professional readiness and serves as an ongoing validation of the effectiveness of the training program. In addition, satisfactory performance before an oral board serves as a rite of passage celebrating a team member’s hard work and dedication to the highest quality standards.

**NOTE**: Failure to demonstrate sufficient knowledge during an oral board will be managed in a similar manner to failure of an OJE.

## Performance Reviews

Performance reviews will be completed for all team members in accordance [Your Company]’s performance management policies. Individual performance appraisals are based on qualifications, performance, behavior, teamwork, and assignment flexibility. Increasing the range and scope of capabilities and demonstrating willingness to support the operational demands of the facility increases the value the team member provides and thereby increases the likelihood for career advancement and other opportunities.

Performance reviews are conducted for team members by supervisors and managers on a periodic basis to discuss performance and development. Frequent discussions between leaders and team members about performance help create an environment that encourages development of skills and abilities and builds stronger teams. It also leads to better alignment on short-term goals and activities.

In addition to regular performance reviews, more frequent reviews are conducted while a team member is in training to review the trainee’s progress and performance in the developmental areas. Items that shall be discussed include:

1. Timely progress towards completion of assigned QCLs
2. Gaining and retaining the required knowledge and skills
3. Individual motivation and attitude
4. Ability to work well with others and integrate with the team

The performance review process records the progress and is used to formally document any concerns or areas for performance improvement. Performance issues can result in discipline up to and including termination.

### Promotion

At [Your Company], promotions are performance based. To progress from one level to the next, a team member must:

1. Consistently perform satisfactorily in their team assignments for a sufficient period of time to demonstrate proficiency
2. Complete all qualifications requirements for the next higher level
3. Be recommend for promotion by their Supervisor

Demonstrated motivation will be strongly considered for all assignments, opportunities, and promotions within [Your Company]. To maximize advancement opportunities, team member should consistently work on increasing their personal and professional knowledge and skills as time and opportunity allows. Once qualified in one area, team members should proceed to train and qualify other areas.

### Prioritization of Operational Needs

At management’s discretion, team members may be authorized to utilize overtime to gain additional qualifications. To minimize impact and ensure priority is placed on meeting the operational requirements of their primary area of responsibility **team members can only be scheduled to train on overtime with prior approval from their Supervisor.** Holidays and other days that mandate premium pay will not normally be approved for training except in extraordinary circumstances.

**NOTE:** Even when scheduled for training, urgent operational needs may require the team member to work their primary job assignment. Altering an approved training schedule will be minimized to the greatest extent possible but the decision remains at management’s discretion.

## Refresher and Ongoing Training

Once initially qualified, team members must maintain sufficient knowledge and proficiency in the areas for which they are qualified. This will involve refresher training and operational rotations. Refresher Training may cover a wide variety of topics and learning modalities, some of which include:

* Classroom
* Crew meetings
* Computer based training
* Simulators
* Procedure and policy reviews
* Review of QCLs and OJT requirements
* Safety, health, and environmental
* Lessons learned from past operations and incidents
* Process modifications & improvements

In addition to refresher training, any new systems or significant changes to existing equipment or procedures will be governed by [YOUR COMPANY] Management of Change Process (MOC). Refer to MOC policy for additional information.

**NOTE: It is the team member’s responsibility to actively participate in all required refresher training, completing it within** the **required timeframe. Resistance to attendance, noncooperation, or failure to successfully complete any required training is a performance problem and may result disciplinary action.**

## Training Records

The team member has primary responsibility and accountability to maintain custody and control of their QCL any other qualification documentation during the course of their training. These will be reviewed periodically by the supervisor throughout the qualifications timeframes to ensure accuracy and adequate progress. Recording the periodic progress will help ensure accurate records are maintained as well as ensuring adequate effort is being demonstrated by the team member.

**NOTE:** If, during the course of qualification, the partially completed QCL is lost, or becomes illegible, the previously completed line items may be lined out and initialed by the Supervisor. The Supervisor will annotate on the front cover of the QCL that the original was lost and that they attest that those line items had been completed according to the standards and policies outlined in this guide. The Supervisor gives the annotated record to the trainee to allow completion of the remainder of the QCL.

The team member’s Supervisor is responsible for recording and filing training documentation in the team member’s training record. Upon completion of the applicable qualifications process for each team member, regardless of whether the team member successfully qualifies or fails to qualify, completed QCL, tests, Sections 2 and 5 of the OJEs, and any other required team member action forms will be filed in the trainee’s permanent record.

## Revisions

Revisions to the QCLs may be issued as agreed upon by management. Revisions will be incorporated into the QCLs and will become part of the position’s qualification requirements.

The supervisor will ensure that all affected team members have been notified and adequately trained on any changes to the equipment or processes. If warranted, this process may utilize the refresher training process described above or the MOC process and documented accordingly. A record of the understanding of the changes must be placed in the all affected team members’ training files.

All team members are encouraged to suggest revisions and additions as appropriate and deemed necessary. These suggestions will be forwarded to their supervisor who will review the suggestions with input from the teams. These recommendations are then routed to management for final approval.

Any revisions to the qualifications program must be communicated throughout the department.

## Recognizing Prior Experience of New Hires

[YOUR COMPANY] recognizes and values that many new team members bring previous experience and knowledge to the job. It is not uncommon to hire a team member for a more senior position than utility or helper. As such, the team member will not have had the detailed review of all the previous training and qualifications outlined in the QCLs. Since we have one standard for [YOUR COMPANY] requiring all team members to be fully qualified on lower level positions, all new team members will review and validate their knowledge regardless of the seniority level at which they are hired.

Working with the supervisor, new team members with prior experience will review the QCLs and demonstrate knowledge and proficiency on all tasks for the position for which they were hired and all lower positions in that line of progression. There is no minimum time for a team member to wait prior to demonstrating their knowledge or abilities. They can complete them as quickly as their prior knowledge and experience allows.

Should it be shown that a new team member does not have adequate knowledge or experience to justify the higher level at which they were offered employment they will work with their Supervisor and the supervisor to adjust their QCL accordingly.

**NOTE:** Failure to gain adequate knowledge and skills may result in administrative actions that could involve personnel actions when deemed appropriate.

# VI: Attachments

1. New Team member Training Statement of Understanding
2. Training Extension Form

## New Team member Training Statement of Understanding

|  |  |  |
| --- | --- | --- |
| **Name: (Last, First, Middle Initial)** | | **Employee Number:** |
| **Primary Job Assignment:** | | **Work Team:** |
| I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge and declare that:  Print Name  (i) I acknowledge my commencement of my training program and affirm that I fully understand my responsibilities to study the appropriate materials to prepare for and complete all requirements outlined in my Individual Development Plan (IDP).   1. In addition, I confirm that I have received, read, and understood the [Your Company] team member Qualifications Program policies. Should I have any questions or concerns I will address them to my supervisor and/or human resources. 2. I will notify my supervisor if, at any time, there are conflicts, constraints, or other extenuating circumstances that may affect my ability to adequately participate or otherwise comply with the requirements of my IDP. Together we will work towards resolving the issue or altering the IDP as deemed appropriate and in full compliance with [Your Company]’s policies and procedures. 3. I agree to conduct my activities in accordance with [Your Company]’s policies and understand that breaching these standards may result in adverse performance evaluations as well as potential disciplinary actions up to and including termination or other legal remedy available to the organization. | | |
| **Team member: (Printed Name)** | **Team member Signature:** | |
| **Human Resources: (Printed Name)** | **Human Resources Signature:** | |
| **Supervisor: (Printed Name)** | **Supervisor Signature:** | |
| **Manager: (Printed Name)** | **Manager Signature:** | |

## Training Extension Form

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| If the trainee fails to complete the required qualification program or fails to gain satisfactory minimum knowledge in a timely manner, the Supervisor will complete and submit a TRAINING EXTENSION form to the Human Resources Department. The trainee will continue to train in that position for the period specified in the TRAINING EXTENSION form. ***Please submit this form to your Supervisor*** | | | | | |
| **Name: (Last, First, Middle Initial)** | | | | **Employee Number:** | |
| **Area:** | | | | **Work Team:** | |
| **The following are the only circumstances provided in the rules for which extensions can be granted. Please check one:** | | | | | |
| ❑ Illness  ❑ Injury  ❑ Military Service  ❑ Special Duty Assignment | | ❑ Administrative leave involving the determination of team member’s status  ❑ Other (please attach a ***detailed*** explanation for this request.) | | | |
| **Identify the position(s) for which extension is being granted:** | | | | | |
| **Date Extended To: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | ❑ Approved | | ❑ Approved w/conditions: | | ❑ Disapproved |
| **Comments:** | | | | | |
| **Human Resources: (Printed Name)** | | **Human Resources Signature:** | | | |
| **Supervisor: (Printed Name)** | | **Supervisor Signature:** | | | |
| **Manager (Printed Name)** | | **Manager Signature:** | | | |