

Homecare training matrix

Two-page usage guide • 1 / Set up and enter your records

Use one row for each worker, learning requirement and training cycle. The matrix brings learning, practical assessment and follow-up together while keeping their statuses separate.

1. Customise your branches and roles

Open **Dropdown Lists**. Replace Branch 1–3 and adapt roles before entering records. There are 30 slots for each; keep names unique. Status labels are fixed because the flags depend on them.

2. Define requirements and ownership

In **Training Matrix**, add a worker name or ID, role, main branch, required learning and requirement basis. Select **Active**. For staff covering other branches, retain one main owner and record any additional local requirement separately.

3. Enter learning dates consistently

Use real dates, displayed as day/month name/year. **Initial completion due** is the original deadline; **Completion date** is the actual date; **Next review date** is the next agreed review point. Set review arrangements from assessed needs and relevant guidance, rather than assuming annual renewal.

4. Record assessment and evidence

Select whether practical assessment is required. If Yes, enter its status and deadline; record the assessment date, assessor and evidence when available. Use secure links or record references. Keep care details and sensitive assessment notes in approved records.

5. Assign follow-up

Enter a specific action, named owner, deadline and action status. Include a brief reference to agreed supervision or task restrictions where relevant. Mark an action Closed after checking the evidence.

Annotated example: learning completed, assessment outstanding

Field	Example and meaning
Worker / requirement	HC003 • Branch 2 • Medicines learning
Learning dates	Course completed 12 days ago; next review in 180 days. This records learning only.
Practical assessment	Yes • Awaiting assessment • Due 2 days ago. Assessment flag: Assessment overdue.
Follow-up	Branch manager arranges observation. No independent relevant medicines task until competence confirmed under the agency procedure. Action deadline was yesterday: Action overdue.

Dates in Worked Examples are relative to TODAY() and move when the file recalculates. All names and evidence references are fictional; examples never enter the branch totals.

Turn flags into action

Two-page usage guide • 2 / Review, resolve and retain evidence

Weekly: investigate urgent gaps

Filter the matrix by branch and the Learning, Review, Assessment and Action flags. Check the underlying record, the worker's duties and any barriers to completion. Assign support and an owner, decide appropriate interim arrangements, and record the follow-up date. Address immediate risks when identified; do not wait for a scheduled review.

Flag	How to respond
Overdue learning / review	Confirm the requirement and date, consider the duties and risk, then arrange learning or a documented review. Due today is not overdue.
Assessment overdue / outstanding	Arrange a suitable assessor and deadline. Check whether the worker can undertake the relevant duties under your procedures.
Competence concern	"Further support needed" requires a management response and open action, even if the course is complete. Record support and reassessment arrangements.
Missing / Check flags	Complete or correct required fields, dates and action details. "Recorded – verify evidence" means common fields are present; it is not a competence or compliance judgement.

Monthly: review each branch

Check starters, leavers, transfers and temporary staff; changes in duties and care packages; induction progress; overdue learning and upcoming reviews; practical assessments; cross-branch ownership; learning needs from incidents or supervision; and evidence that previous actions were resolved.

Branch Overview counts active requirement rows, not unique staff. Counts overlap: a row can have both an overdue assessment and an overdue action. Review figures include overdue dates and the next 30 days. Correct missing/unlisted branches, missing IDs and invalid record scope in the data-quality section.

Close the gap and preserve history

For HC003, completing an observation successfully means recording Competence confirmed, the assessment date, assessor and evidence. Close the follow-up action only after checking the outcome. If support is still needed, record that outcome and keep a clear open action.

For a new learning cycle, mark the previous row **Archived** and create a new **Active** row. Keep earlier evidence. Archived records remain in the file but do not enter current flags or totals. If only a review date changes, retain the decision and previous evidence in your secure records.

Practical workbook controls

Blue cells A:T are editable; grey U:Y are protected formulas. Use the next blank prepared row: capacity is 1,000 rows. Filters work while protected. To sort, unprotect without a password, sort the whole table and re-protect with AutoFilter allowed. See Start Here before extending capacity: overview ranges must also be extended. Keep calculation Automatic; check pasted values because pasting may bypass dropdowns. Protection is not access security.

The weekly/monthly routine is suggested management practice. This template does not prescribe training intervals, certify compliance or authorise duties. Store it securely and restrict access appropriately.

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