

Train: awareness, training and **verified competence**

Say who needs to know what. Keep a record that they were told. Keep a separate, signed record that someone checked they can do the work.

Train Basic and Train Advanced now come together

Every plan that includes Train (Growth, Scale and Enterprise) now includes both sides of it: awareness and training records, and the competence records that used to sit in Train Advanced. That means the competency matrix, signed competence verification and recertification tracking.

What Train does

Train keeps two kinds of record and keeps them apart on purpose. A worker confirming they read a document is not the same as someone else confirming the worker can do the job.

Were people told?

AWARENESS AND TRAINING

- Four kinds of training item: read-and-sign for a controlled document, session, certification and e-learning. Train records these; it does not deliver them.
- Requirements aimed at a position, a job classification, a part of the organization or an individual, each able to carry the regulation or obligation behind it.
- Assignments created from your requirements in one step, or assigned directly to one person or many.
- A My Training page for every worker: what is due, the document to open, and an acknowledgment to sign.
- A new acknowledgment requested automatically when the document is revised.
- Awareness campaigns, with acknowledgment rates by part of the organization.
- Notifications and daily reminders by email, and an overdue notice to the person's supervisor where your org chart names one.

Can they do it, and who checked?

COMPETENCE

- Competencies you define, with a safety-critical flag and a recertification interval.
- A signed verification by someone other than the worker, stating the basis, the method and the criteria. Nobody verifies themselves.
- A verification can also be signed on the basis of experience, recorded as such, with no training item linked.
- The competency matrix: each required person and competency shown as Missing, Awaiting verification, Disposition owed, Current, Expiring or Expired, with gap views.
- A daily recertification check that opens a new assignment when a record lapses.
- A stamped audit-pack PDF of the matrix: records as of a date you pick, against today's requirements.
- Signed records stay as signed. A later verification supersedes an earlier one; it never changes what the earlier one says.

From requirement to signed record

1**Define**

Add the item or competency to the catalog.

2**Require**

Say which roles, teams or people must hold it.

3**Assign**

Create the assignments, with due dates.

4**Acknowledge**

The worker opens the material and signs.

5**Verify**

For a competency, someone else signs.

6**Stay current**

A lapsing record opens a new assignment.

New this month

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Effectiveness checks: did the training work?

Schedule a check on a completed training record and record what it found: effective, not effective or inconclusive, with a note and an evidence link. A training item can define how it is judged: a quiz with a pass mark, an observation or an attestation, carried out outside ClearVue.

A per-person check asks whether the training took effect for that person, and the person trained never records their own result. A not-effective result ends that record's validity and opens a retraining assignment.

Training as a corrective action

Link a training assignment to a CAPA action item. An action-level check then asks whether the training, as a corrective action, stopped the problem recurring. The CAPA shows whether that check is scheduled and what it found.

Once an action-level check is scheduled on it, the CAPA cannot be recorded as effective until the latest such check is recorded as effective. With none scheduled, the link holds nothing back.

Safety-critical authorization status

One page lists each person against each safety-critical competency they are required to hold and says whether their most recent signed-off record is still current. It flags records that are about to lapse and filters by outcome.

It is a status display. It shows what the records say; it does not block or allow any work.

The matrix by facility, and competence in Insights

Narrow the competency matrix, the gap views and the audit pack to a facility.

Insights now computes two competence measures: Requirement Coverage, and Verification Compliance, which uses the matrix's rule.

Smaller changes

- Set the recertification warning period for each competency.
- People pickers list only the people within your own scope.
- Train pages offer only the actions your role allows.
- Competencies has its own entry in the Train menu.
- Each row of the assignment roster opens the training record behind it.

Works with the rest of ClearVue

Document Control

Read-and-sign items point at controlled documents. A revision requests a new acknowledgment.

Inspect

An equipment type can require a competency. Starting an inspection then warns, or is refused if you choose to block, when the inspector's record is missing or lapsed.

CAPA

A training assignment can be the corrective action. Once an action-level check is scheduled on it, the CAPA cannot be recorded as effective until the latest such check is recorded as effective.

Insights

Awareness and competence measures on the Training & Awareness board.

What Train supports in ISO 9001:2015

CLAUSE	WHAT IT ASKS	WHAT TRAIN RECORDS
§7.3	People know the quality policy, the objectives that concern them, how their work contributes, and what not conforming means.	Who was assigned what, each person's signed acknowledgment, and the acknowledgment rate for each awareness campaign.
§7.2 a)	Determine the competence people need.	Each competency you define, whether it is safety-critical, who must hold it, and the regulation or obligation behind the requirement.
§7.2 b)	Make sure those people are competent.	A signed verification by someone else, with its basis, method and criteria, and a list of who is not yet verified. Train records who signed; it does not check the signer's own competence.
§7.2 c)	Act to acquire competence where needed, and evaluate whether the action worked.	Assignments, the list of gaps, and a new assignment when a record lapses. NEW Where you schedule one, an effectiveness check on a training record, with its recorded result.
§7.2 d)	Keep documented information as evidence.	Each verification as it was signed, and a stamped audit-pack PDF of the matrix.

ISO 45001:2018 §7.2 has a similar four-part shape for health and safety; its §7.3 covers more topics than the row above. Train holds records only for people with a ClearVue user account. Whether those records satisfy your certification body is for you and your auditor to judge.