! **IMPORTANT USAGE NOTE** — EMPLOYER TOOL

Use this pack to organise training evidence, certificate details, worker-role information and refresher triggers. It supports structured employer recordkeeping; it does not by itself prove legal compliance, competence or site acceptance.

WHO SHOULD USE THIS TRACKER?

- ✓ Employers and SHEQ teams managing workers exposed to height risk.
- ✓ HR and training administrators maintaining employee training evidence.
- ✓ Procurement and contractor-management teams preparing site mobilisation.
- ✓ Supervisors reviewing whether training still matches the work and equipment.

QUICK DECISION RULE BEFORE MOBILISATION

STATUS	WHAT IT MEANS	ACTION
READY	Evidence current enough for the planned work and site rules.	File evidence and proceed through normal controls.
REVIEW	A date, task, equipment or site rule creates a question.	Confirm requirement before mobilisation.
HOLD	Evidence missing, unclear or competence is in doubt.	Do not rely on assumption; close the gap first.

THE 6 TRACKER SECTIONS IN THIS PACK

1. MASTER TRACKER A
2. MASTER TRACKER B
3. INDIVIDUAL REVIEW
4. REFRESHER TRIGGERS
5. MOBILISATION CHECK
6. ACTION LOG + SIGN-OFF

EMPLOYER / PROJECT DETAILS

EMPLOYER / COMPANY _____

RESPONSIBLE PERSON _____

PROJECT / SITE _____

REVIEW DATE _____

Use the same row number on Page 3 to continue each worker's record. Record the actual work-at-height activity rather than only the job title.

EMPLOYER / COMPANY

PROJECT / SITE

#	EMPLOYEE	ID	ROLE	SITE	WORK-AT-HEIGHT ACTIVITY	PROVIDER	PROGRAMME COMPLETED	TRAINING DATE
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								

TRACK WHAT THE WORKER ACTUALLY DOES

A certificate title alone does not describe the worker's current task, equipment, work environment or site requirement. Record the real activity so later reviews have context.

Continue the same worker row numbers from Page 2. This page is designed to show what evidence exists and what should trigger a review.

#	CERTIFICATE / REF.	PROVIDER REVIEW DATE	CLIENT / SITE REQUIREMENT	PRACTICAL COMPETENCE REVIEW	EQUIPMENT CHANGE	INCIDENT / NEAR-MISS TRIGGER	NEXT REVIEW DATE	EVIDENCE LOCATION
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								

DO NOT USE A DATE AS THE ONLY DECISION

A review date is one signal. Also consider the worker's current task, equipment, site/client rules, observed competence, incidents or near misses and any change to the fall-protection system.

EMPLOYEE NAME

EMPLOYEE / ID NUMBER

CURRENT ROLE

PROJECT / SITE

1 TRAINING & CERTIFICATE RECORD

PROVIDER

PROGRAMME COMPLETED

TRAINING DATE

CERTIFICATE / REFERENCE NUMBER

CERTIFICATE OR PROVIDER REVIEW DATE (IF STATED)

EVIDENCE FILE / FOLDER LOCATION

2 CURRENT WORK & COMPETENCE CONTEXT

CURRENT WORK-AT-HEIGHT ACTIVITY

MAIN FALL-RISK EXPOSURE / ACCESS METHOD

HARNESS / LANYARD / LIFELINE OR OTHER EQUIPMENT USED

CLIENT OR PRINCIPAL-CONTRACTOR REQUIREMENT

MOST RECENT PRACTICAL COMPETENCE REVIEW DATE

SUPERVISOR / REVIEWER

3 REVIEW OUTCOME

- ☐ 🟢 **READY - evidence and competence review acceptable for current context**
- ☐ 🟡 **REVIEW - confirm one or more requirements before mobilisation**
- ☐ 🔴 **HOLD - evidence missing or competence concern unresolved**

REVIEWER NOTES / RESTRICTIONS / NEXT ACTION

Use this page to record why refresher training, reassessment, rebriefing or further investigation may be needed. A trigger does not automatically mean the same training response for every worker.

#	TRIGGER / REVIEW QUESTION	YES	NO	N/A	ACTION / NOTES
1	Certificate or provider review date has passed?	■	■	■	
2	Client / site requires more recent training evidence?	■	■	■	
3	Worker has been away from height work for an extended period?	■	■	■	
4	New harness, lanyard, lifeline or access system introduced?	■	■	■	
5	Worker changed role, team or responsibilities?	■	■	■	
6	New height-risk task or work environment introduced?	■	■	■	
7	Unsafe behaviour or incorrect equipment use observed?	■	■	■	
8	Incident or near miss related to work at height occurred?	■	■	■	
9	Fall-protection plan or site controls changed?	■	■	■	
10	Training evidence cannot be produced or verified?	■	■	■	
11	Worker cannot demonstrate expected practical knowledge or use?	■	■	■	
12	Supervisor or competent reviewer recommends reassessment?	■	■	■	

DECISION RULE

Where a serious uncertainty remains, record the gap, restrict the worker from the affected task if necessary under your system, and close the evidence or competence issue before mobilisation.

Complete this page before sending a worker or contractor team to a site where Working at Heights evidence may be checked.

#	PRE-MOBILISATION CHECK	YES	NO	N/A	NOTES / EVIDENCE
1	Worker identity matches the training evidence?	■	■	■	
2	Current role and height-risk activity are recorded?	■	■	■	
3	Training provider and programme are clearly identified?	■	■	■	
4	Training date and certificate/reference number are available?	■	■	■	
5	Any stated provider/certificate review date has been checked?	■	■	■	
6	Client/site training currency requirement has been checked?	■	■	■	
7	Worker can explain or demonstrate expected practical controls?	■	■	■	
8	Current harness / lanyard / lifeline or access equipment is familiar?	■	■	■	
9	Equipment change since training has been considered?	■	■	■	
10	Role or task change since training has been considered?	■	■	■	
11	Incident / near-miss trigger has been considered?	■	■	■	
12	Current fall-protection plan / site rules have been briefed?	■	■	■	
13	Rescue / emergency arrangements relevant to the work are known?	■	■	■	
14	Any restrictions or unresolved gaps have been recorded?	■	■	■	
15	Next review date and evidence location are captured?	■	■	■	

HOLD

WHEN A GAP BLOCKS MOBILISATION

Examples: training evidence cannot be verified; the client requirement is not met; equipment or task changes were never addressed; or practical competence remains in doubt.

1 MISSING EVIDENCE / CORRECTIVE-ACTION LOG

DATE	WORKER / SITE	GAP / OBSERVATION	IMMEDIATE ACTION	OWNER	DUE DATE	CLOSED

2 FINAL REVIEW & SIGN-OFF

EMPLOYER / COMPANY

PROJECT / SITE

REVIEWED BY

REVIEW DATE

☐ READY FOR MOBILISATION ☐ REVIEW / CLOSE GAPS ☐ HOLD

FINAL NOTES / RESTRICTIONS / NEXT REVIEW

3 60-SECOND WORKING AT HEIGHTS TRAINING READINESS CHECK

- ☐ Training evidence found?
- ☐ Current activity known?
- ☐ Practical competence reviewed?
- ☐ Incident/near-miss triggers reviewed?
- ☐ Certificate/reference number recorded?
- ☐ Client/site requirement checked?
- ☐ Equipment changes considered?
- ☐ Next review date recorded?

REFERENCE & SUPPORT NOTES

1. Keep records that allow you to identify the worker, programme, provider, training date, certificate/reference number and evidence location.
2. Review training when the work, equipment, role, site requirements or observed competence changes.
3. Where historical SAQA Unit Standard 229998 is referenced, confirm the current programme and certificate route before booking new learners.
4. This tracker is a practical recordkeeping aid; it does not replace a competent risk assessment, fall-protection planning or professional/legal advice.

NEED WORKING AT HEIGHTS TRAINING IN CAPE TOWN?

Swift Skills Academy can assist employers, contractors and individual learners with current Working at Heights training options and group-training discussions.

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