

Hazmat Role-to-Training Matrix

Start with the functions employees actually perform. This matrix is a screening tool for training-plan review, not a legal determination for a specific operation or material.

Company / location _____	Reviewer _____	Review date _____	Transport modes _____
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Role and function screening matrix

Function to review	General awareness	Function-specific	Safety	Security awareness	In-depth security*	Employer follow-up
Classifies material or confirms shipping description	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Review material, classification authority and mode-specific duties.
Selects, closes or verifies packaging	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Document packaging type, closure instructions and exceptions used.
Applies or verifies marks, labels or placards	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Map exact communication tasks to the employee's workflow.
Prepares or approves shipping papers	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Include entries, certifications, emergency response and system controls.
Offers or tenders shipments to a carrier	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Identify who has final authority before the shipment moves.
Loads, unloads, stages or segregates hazmat	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Address handling hazards, loading rules and incident prevention.
Drives and performs hazmat-related duties	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Add highway and material-specific requirements that apply.
Supervises or approves covered functions	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Train to the functions actually directed or approved.
3PL or office staff enters regulated shipment data	☐ Review	☐ Required by function	☐ Review exposure	☐ Review	☐ If plan applies	Do not exclude staff only because they do not touch freight.

* In-depth security training applies when the employer must maintain a security plan and the employee's duties are covered by that plan. A checked box means review is needed; it is not a completed applicability decision.

Timing, records and employer-specific gaps

Use this page after role screening to document the controls that a generic course certificate cannot establish by itself.

90 days	3 years	90 days after employment
Initial or changed-function training must be completed within 90 days. Direct supervision is required before completion.	Recurrent hazmat training is required at least once every three years under 49 CFR 172.704(c)(2).	Current training records must be retained during hazmat employment and for 90 days afterward, inclusive of the preceding three years.

Required current-record fields ☐ Hazmat employee name ☐ Most recent training completion date ☐ Description, copy, or location of training materials ☐ Training provider name and address ☐ Certification that the employee was trained and tested	Employer-specific content to verify ☐ Materials and hazards handled at this location ☐ Actual packages, closure instructions and equipment used ☐ Emergency contacts and damaged-package procedures ☐ Mode-specific duties: highway, air, vessel or rail ☐ Security-plan duties and actions after a breach
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Employee-level action register

Employee / role	Training gap or decision	Owner	Due date

Primary reference: 49 CFR 172.704, current as of August 3, 2026. Additional training may apply by material, mode, security plan, special permit, exemption, or employer procedure. Informational only; not legal advice.

Online companion: evergreencomply.com/buying-guides/hazmat-training-requirements-49-cfr-172-704