

Provenance Consulting

CERTS™ – Certification and Employee Refresher Training System

For operations and maintenance personnel, each job role (or certification) can be thought of as a group of procedures for which he/she is responsible. These procedures may address equipment startup, shutdown, emergency, or normal operating conditions.

CERTS provides a mechanism to track and document the OSHA Process Safety Management (PSM) standard training requirements, by allowing the employee to “take credit” for normal, everyday activities which, in essence is comprised of a review of one or more procedures. These activities include:

- Participation in Process Hazard Analyses (PHA's)
- Updating/rewriting procedures
- Training exercise (scenario drill) participation
- Self-study/procedure review
- Attend training
- Provide training to others
- Review/signoff on MOC (Management of Change) related to a procedure

This tracking and documentation concept can be extended to other plant personnel – any set of requirements can be tracked and managed in the same manner as procedures.



Section 1910.119(g) of the OSHA PSM Standard defines training requirements for personnel, including the following:

Initial Training

Each employee presently involved in operating a process, and each employee before being involved in operating a newly assigned process, shall be trained in an overview of the process and in the operating procedures as specified in paragraph (f) of this section. The training shall include emphasis on the specific safety and health hazards, emergency operations including shutdown, and safe work practices applicable to the employee's job tasks.

Refresher Training

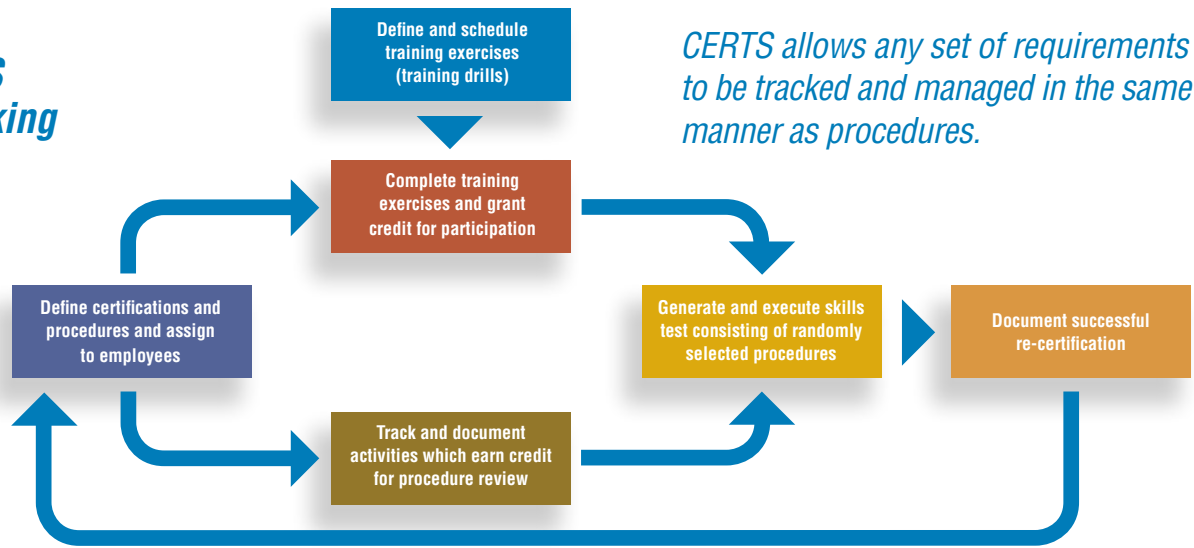
Refresher training shall be provided at least every three years, and more often if necessary, to each employee involved in operating a process to assure that the employee understands and adheres to the current operating procedures of the process. The employer, in consultation with the employees involved in operating the process, shall determine the appropriate frequency of refresher training.

Training Documentation

The employer shall ascertain that each employee involved in operating a process has received and understood the training required by this paragraph. The employer shall prepare a record which contains the identity of the employee, the date of training, and the means used to verify that the employee understood the training.

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The CERTS Training/Tracking Process



Training Exercises/Scenario Drills

In many facilities, operations personnel participate in scheduled training exercises, sometimes referred to as “scenario drills”. The training or operations department defines a set of scenario drills, each of which is designed to mimic a potential real-world occurrence. Some examples include:

- Loss of a utility (steam, cooling water, etc.)
- Power failure (partial or total)
- Loss of feed

When such occurrences take place, there is a sequence of procedures that must be followed to adjust the affected equipment’s operating conditions, including possible safe shut down (which requires a specific order of steps).

During a training exercise, the procedures that are utilized are reviewed, and the CERTS software can document these reviews in a very automated and efficient manner:

- Training Exercises are defined in CERTS (related procedures are associated with each exercise)
- Training Exercises are scheduled in CERTS
- Training Exercises are documented in CERTS:
 - Participants and included procedures are documented
 - Participants answer customized questions relating to the training exercise, facilitating ongoing improvement
- As Training Exercises are approved in CERTS, participants receive credit for their involvement

CERTS stores historical information for each completed training exercise relating to participants, procedures, and participant feedback for future reference.

Certification Process

Training credits are granted throughout the certification period for participation in scenario drills and other training opportunities. As the end of the certification period approaches, CERTS permits reporting of certification activities and requirements:

- Employee states his knowledge of the procedures included in his/her certification
- A walkthrough test is generated, consisting of a user-defined quantity of random procedures
- Employee is “tested” on these procedures by a trainer
- Upon successful completion, CERTS is updated to reflect successful certification and a re-certification date is assigned. A new certification period begins from a clean start. CERTS retains historical information regarding previous certifications for audit purposes.



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Provenance Consulting, LLC
BORGER, TX • AUSTIN, TX • BALTIMORE, MD

TEL 806 • 273 • 5100
FAX 806 • 273 • 5103

www.provenanceconsulting.com