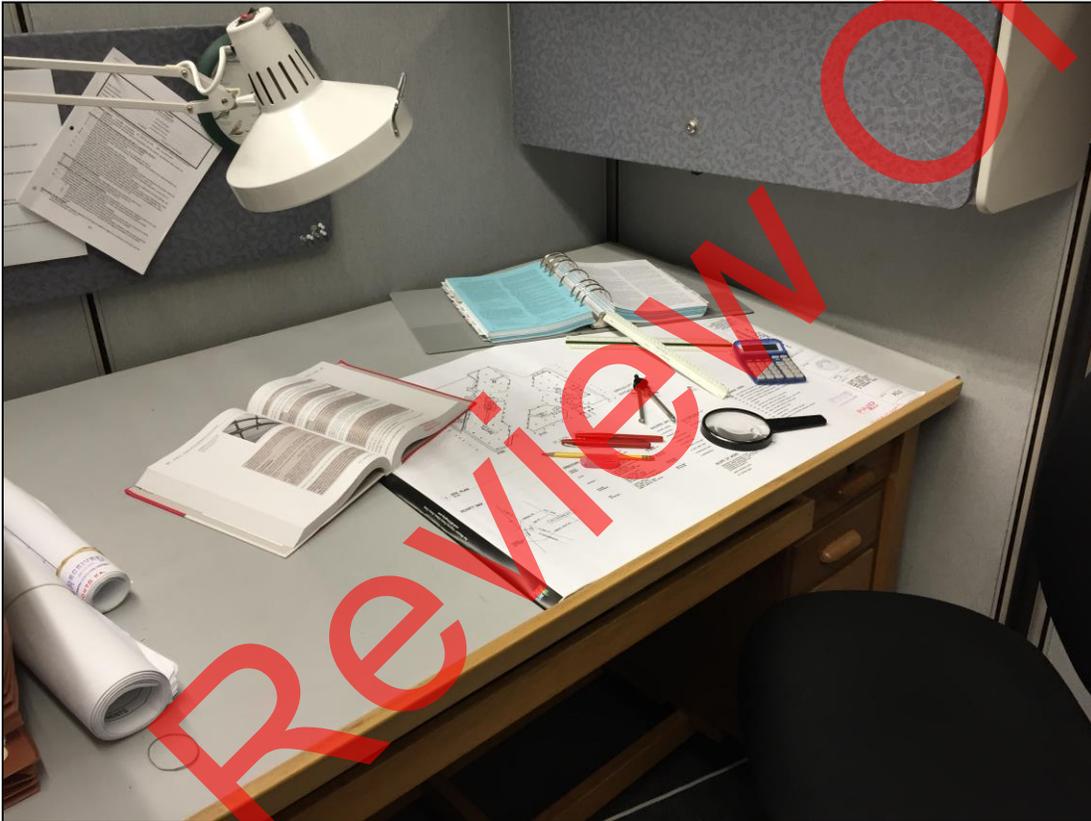


# Plan Examiner

## Certification Task Book May 2015



California Department of Forestry and Fire Protection  
Office of the State Fire Marshal  
State Fire Training

# Plan Examiner

## Certification Task Book May 2015

**Candidate:** [Click here to enter text.](#)

**SFT ID Number:** [Click here to enter text.](#)

**Fire Agency:** [Click here to enter text.](#)

**Issued By:** [Click here to enter text.](#)

**Issue Date:** [Click here to enter text.](#)

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This Certification Task Book includes the certification training standards included in Plan Examiner CTS Guide (May 2015), which is based on NFPA 1041 Standard for Professional Qualifications for Fire Inspector and Plan Examiner (2014).

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Published by:  
State Fire Training, 1131 S Street, Sacramento, CA 95811  
(916) 445-8200

Cover photo courtesy of Robert Marshall, Contra Costa County Fire Protection District

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For Review Only

## Purpose and Process

The State Fire Training certification task book is a performance-based document. It lists the Experience, Rank or Position, and Job Performance requirements for certification.

### Purpose

Each certification task book focuses on a single State Fire Training job function certification. A certification task book identifies the minimum requirements necessary to perform the duties of that certification. Completion of a certification task book verifies that the candidate has the required experience, holds the required rank or position, and has demonstrated the job performance requirements necessary to obtain that certification.

### Responsibilities

#### Candidate Responsibilities

The candidate is the individual pursuing certification.

All candidates shall:

- Complete a block on the Signature Verification page with an original wet-ink signature.
  - No date shall be prior to the issuance date.
- Complete the Experience, Rank, and Job Performance Requirements.
- Accurately record and maintain the certification task book.
- Sign and date the Candidate verification statement under the Authority section with an original wet-ink signature.
- Retain a copy of the completed certification task book.
- Submit the completed certification task book to State Fire Training.

#### Evaluator Responsibilities

An evaluator is any individual who verifies that the candidate can satisfactorily execute a job performance requirement. A qualified evaluator is designated by the candidate's fire chief (or authorized designee) and shall possess the equivalent or higher-level certification. If no such evaluator is present within the organization, the fire chief (or authorized designee) shall designate an individual with more experience than the candidate and a demonstrated ability to execute the job performance requirements. A certification task book may have more than one evaluator.

All evaluators shall:

- Complete a block on the Signature Verification page with an original wet-ink signature.

- Review and understand the candidate's certification task book requirements and responsibilities.
- Verify the candidate's successful completion of one or more job performance requirements through observation or review.
  - All Job Performance Requirements (JPR's) shall be reviewed, validated and dated after issuance of the certification task book.
- Sign all appropriate lines in the certification task book with an original wet-ink signature to record demonstrated performance of tasks.

### Fire Chief Responsibilities

The fire chief (or authorized designee) is the individual who reviews and confirms the completion of a candidate's certification task book.

The fire chief (or authorized designee) shall:

- Designate qualified evaluators.
- Complete a block on the Signature Verification page with an original wet-ink signature.
- Review the candidate's certification task book requirements and responsibilities.
- Verify the candidate has obtained the appropriate signatures to verify successful completion of each job performance requirement.
  - Ensure that no signature or date is prior to the certification task book issuance date.
- Verify the experience segment is completed and sign the fire chief verification statement under Authority section with an original wet-ink signature. If signing as an authorized designee, verify that your signature is on file with State Fire Training.

### Completion Process

When you receive your certification task book:

1. Thoroughly review the Experience, Rank, and Job Performance Requirements segments to make sure that you understand them.
2. Confirm who will evaluate your job performance requirements with your fire agency.
3. Complete the Experience segment, if applicable.
4. Complete the Rank or Position segment.
5. Complete each requirement in the Job Performance Requirements segment and ensure that an evaluator signs and dates each one to verify completion. Also ensure that every evaluator is listed on the Signature Verification page.
6. Ask your fire chief (or authorized designee) to verify certification task book completion by signing the appropriate paragraph under Authority section.

7. Make a copy of the completed certification task book to retain with your personal records.
8. Mail the original certification task book to State Fire Training (see address below).

After receipt and successful review of your completed certification task book, State Fire Training will approve the certification task book and mail your certificate to you. State Fire Training retains the completed, authorized original certification task book in your career file.

If State Fire Training determines that your certification task book is incomplete State Fire Training will return insufficient components, replacement pages and a checklist indicating what needs to be completed.

**Do not submit this certification task book until you have:**

- Completed the Experience segment
- Fulfilled the Rank or Position segment
- Completed Job Performance Requirements
- Obtained all required signatures

**State Fire Training Mailing Address**

Office of the State Fire Marshal  
State Fire Training  
Attn: Certification Section  
1131 S Street  
Sacramento, CA 95811

**Completion Timeframe**

State Fire Training aims to update certification task books on a five-year cycle. A certification task book in process is valid until State Fire Training issues a new certification task book for the same job function certification.

If a candidate does not complete a certification task book before the release of a new version, State Fire Training will send the candidate a task book revision supplement identifying any revisions or new requirements. The candidate must fulfill all requirements included in the revision supplement and submit the revision supplement with the original task book.

## Signature Verification

The following individuals have the authority to verify portions of this certification task book using the signature recorded below.

<b>Name:</b> _____	<b>Name:</b> _____
Job Title: _____	Job Title: _____
Organization: _____	Organization: _____
Signature: _____	Signature: _____

<b>Name:</b> _____	<b>Name:</b> _____
Job Title: _____	Job Title: _____
Organization: _____	Organization: _____
Signature: _____	Signature: _____

<b>Name:</b> _____	<b>Name:</b> _____
Job Title: _____	Job Title: _____
Organization: _____	Organization: _____
Signature: _____	Signature: _____

<b>Name:</b> _____	<b>Name:</b> _____
Job Title: _____	Job Title: _____
Organization: _____	Organization: _____
Signature: _____	Signature: _____

## Task Book Requirements

### Job Performance Requirements

All Job Performance Requirements (JPR's) must be performed in accordance with the standards of the authority having jurisdiction (AHJ) or the National Fire Protection Association (NFPA), whichever is more restrictive.

**All job performance requirements shall be reviewed, validated and dated after issuance of the certification task book.**

### Administration

1. Prepare reports, given observations from a plan review, so that the report is clear and concise, and reflects the findings of the plan review in accordance with applicable codes and standards and the policies and procedures of the jurisdiction (7.2.1)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

2. Facilitate the resolution of deficiencies identified during the plan review, given a submittal and the established policies and procedures of the jurisdiction, so that deficiencies are identified, documented, and reported to the plan submitter with applicable references to codes and standards. (7.2.2)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

3. Process plan review documents, given a set of plans and specifications, so that required permits are issued in accordance with the policies of the jurisdiction. (7.2.3)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

4. Determine the applicable code or standard, given a fire protection issue, so that the proper document, edition, and section are referenced. (7.2.4)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

5. Create plan review checklists and forms, given applicable codes, standards, and departmental policies and procedures, so that the materials developed address key issues and clearly express code requirements of the jurisdiction. (8.2.1)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

6. Develop policies and procedures for the administration of plan review functions, given management objectives, so that the policies are defined and are in accordance with the legal obligations of the jurisdiction. (8.2.2)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

## Plan Review

7. Identify the requirements for fire protection or a life safety system, given a set of plans, so that deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (7.3.1)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

8. Verify the occupancy classification, given a set of plans, specifications, and a description of a building and its intended use, so that the classification is made in accordance with the applicable codes and standards and the policies of the jurisdiction. (7.3.2)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

9. Verify the construction type, given a set of plans, including the occupancy classification area, height, number of stories, and location, so that the building is in accordance with applicable codes and standards and deficiencies are identified, documented, and reported. (7.3.3)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

10. Verify the occupant load, given a set of plans, so that the maximum allowable occupant load is in accordance with applicable codes and standards. (7.3.4)

\_\_\_\_\_

Date Completed

\_\_\_\_\_

Evaluator Verification

11. Verify that required egress is provided, given a set of plans and an occupant load, so that all required egress elements are provided and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (7.3.5)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

12. Evaluate code compliance for required fire flow and hydrant location and spacing, given a plan, codes and standards, and fire flow test results, so that hydrants are correctly located, required fire flow is determined, and deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (7.3.6)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

13. Evaluate emergency vehicle access, given a plan, so that emergency access is provided in accordance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (7.3.7)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

14. Recommend policies and procedures for the delivery of plan review services, given management objectives, so that plan reviews are conducted in accordance with the policies of the jurisdiction and due process of the law is followed. (7.3.8)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

15. Participate in legal proceedings, given the findings of a plan review and consultation with legal counsel, so that testimony is accurate and the plan reviewer’s demeanor is appropriate to the proceeding. (7.3.9)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

16. Evaluate plans for the installation of fire protection and life safety systems, given a plan submittal, so that the fire protection systems, including pre-engineered systems, and equipment are reviewed and deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (7.3.10)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

- |  |                |                        |
|--|----------------|------------------------|
|  | Date Completed | Evaluator Verification |
|--|----------------|------------------------|
17. Evaluate landscape plans for a development, community, or a wildland urban interface, given a set of landscape plans for a development or community in a fire hazard severity zone and a set of landscape plans for a wildland urban interface area, ensuring compliance with applicable codes and standards and identifying, documenting, and reporting deficiencies according to jurisdictional policies and procedures. (OSFM)

_____	_____
Date Completed	Evaluator Verification

18. Evaluate a proposed modification or change in occupancy for a building or portion of a building, given a set of plans for an existing building or portion of a building and building records, ensuring compliance with applicable codes and standards, and identifying, documenting, and reporting deficiencies in accordance with jurisdictional policies and procedures. (OSFM)

_____	_____
Date Completed	Evaluator Verification

19. Evaluate a design concept, given a preliminary design presentation, so that the proposed concept meets the intent of applicable codes and standards in accordance with the policies and procedures of the jurisdiction. (8.3.1)

_____	_____
Date Completed	Evaluator Verification

20. Evaluate proposed passive fire protection elements of a building or portion of a building, given a set of plans and specifications for a building or facility, so that the protection provided for the facility is in accordance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (8.3.2)

_____	_____
Date Completed	Evaluator Verification

21. Evaluate plans for a process or operation, given plans and specifications, so that the process or operation is reviewed for compliance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (8.3.3)

_____	_____
Date Completed	Evaluator Verification

22. Evaluate plans for storage, handling, and use of flammable and combustible liquids and gases, given plans and specifications, so that the plans are reviewed and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (8.3.4)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

23. Evaluate plans for the installation of fire protection and life safety systems, given a plan submittal, so that the systems and equipment are reviewed and deficiencies are identified, documented, and reported in accordance with the applicable codes and standards and with the policies and procedures of the jurisdiction. (8.3.5)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

24. Evaluate a proposed alternative method for compliance with applicable codes and standards, given supporting documentation of a design that does not meet prescriptive code requirements, so that the design meets the intent of applicable codes and standards. (8.3.6)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

25. Evaluate the integration of life safety, fire protection, security, and building service systems, given a plan submittal, a life safety report, a sequence of operations report, and testing criteria, so that the integration of proposed systems meets the requirements or intent of the applicable codes and standards and meets the fire and life safety objectives of the jurisdiction and any deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (8.3.7)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

26. Evaluate plans for storage, handling, and use of hazardous materials, given plans and specifications, so that the plans are reviewed for compliance and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (8.3.8)

\_\_\_\_\_  
Date Completed

\_\_\_\_\_  
Evaluator Verification

27. Verify that egress elements are provided, given a plan of a building or portion of a building, so that all egress elements are identified and deficiencies are identified, documented, and reported in accordance with applicable codes and standards and the policies of the jurisdiction. (8.3.9)

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Date Completed

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Evaluator Verification

28. Evaluate a plan with special storage arrangements, given a plan, so that deficiencies are identified, documented, and reported in accordance with adopted codes and standards and the policies of the jurisdiction. (8.3.10)

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Date Completed

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Evaluator Verification

29. Evaluate heating, ventilation, air conditioning, and other building service equipment and operations, given plans and specifications, so that the systems and other equipment are designed in accordance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (8.3.11)

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Date Completed

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Evaluator Verification

30. Evaluate a performance-based design concept, given a preliminary design presentation, so that the proposed concept meets the intent of applicable codes and standards in accordance with the policies and procedures of the jurisdiction. (8.3.12)

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Date Completed

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Evaluator Verification

**Experience**

The candidate meets the following requirements for experience.

Have a minimum of one year full-time or two year’s volunteer or part-time paid experience in a Recognized Fire Agency in California as a plan examiner

**OR**

Have a minimum of one year full-time or two year’s volunteer or part-time paid experience in a Recognized Fire Agency in California as a fire inspector or fire prevention officer with the primary responsibility for doing plan review

Assignment	Agency	Start Date	End Date

Please attach additional pages if more space is needed to document experience.

**Rank or Position**

The candidate meets the following qualifications for rank or position. Performing in an acting capacity does not qualify.

Rank or Position	Agency	Appointment Date
Plan Examiner or Fire Inspector / Prevention Officer		

**Authority**

**Candidate's Fire Chief**

Candidate's Fire Chief: \_\_\_\_\_  
Fire Chief's (or Authorized Designee's) Printed Name

I, the undersigned, am the person authorized to verify the candidate's experience, rank, and job performance requirements. I hereby certify under penalty of perjury under the laws of the State of California, that completion of all experience, rank, and job performance requirements made herein are true in every respect. I understand that misstatements, omissions of material facts, or falsification of information or documents may be cause for rejection.

\_\_\_\_\_  
Fire Chief's (or Authorized Representative's) Signature

\_\_\_\_\_  
Date

