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Nuclear
Procedure

TITLE
SYSTEMATIC APPROACH TO TRAINING

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DOCUMENT RELATIONSHIP	
Applicability:	All of Nuclear
Receives Authority from:	N-PROG-TR-0005, Training

Document is Related to Pressure Boundary <input checked="" type="checkbox"/>	Document Requires CNSC Notification <input checked="" type="checkbox"/>
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PURPOSE
This procedure provides the process used to identify potential training changes, to confirm training requirements through training needs analysis, to specify training requirements through job and task analysis, and to design, develop, implement, and evaluate training. The objective of Systematic Approach to Training (SAT) is to guide the development of performance-based training to support job performance requirements and individual development at Ontario Power Generation, Nuclear (hereafter described as Nuclear). This procedure takes its authority from N-PROG-TR-0005, Training.

DATES (YYYY-MM-DD)	
PDF Creation Date:	2022-06-23

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Compliance Date: Immediate

EXCEPTIONS

- (a) When training is provided through CBT or external vendors, feedback may be provided electronically or in different formats than described herein as long as intent of procedure is met.
- (b) CBT may be conducted without direct oversight from a Training Manager. Line Manager should assign CBT invigilator in accordance with this procedure.
- (c) Training material issued in ASSET SUITE prior to Revision 22 issuance of this document is exempt from compliance with this revision of this procedure until training material is updated.
- (d) For Nuclear Security Training, N-INS-61400-10044, Nuclear Security Specialized Training, Weapons and Equipment shall be applicable.
- (e) Where training material for Security Systems and equipment are to be reviewed and approved by a Training Section Manager, either the proper security clearance will be required or assistance from the Security Line Manager or Subject Matter Expert (SME) will be required.
- (f) Documents in the Job Performance Measure (JPM) or Job Performance Evaluation (JPE) template remain valid for use, but should be converted to the current OJT and OJE format when revised.

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1.0 DIRECTION

This procedure applies to training for Nuclear Training Programs identified in N-LIST-08920-10001, Nuclear Training Programs. The extent of Systematic Approach to Training (SAT) application shall be: commensurate with the risks, determined and documented based on the importance of the task relative to safety, health, environment, security, complexity of the job performance requirements and the value to the business (cost effectiveness).

N-GUID-08920-10312, Guidelines for the Systematic Approach to Training may be consulted for more detail.

1.1 Systematic Approach to Training Process Overview

This document describes requirements to implement the SAT process. The SAT process consists of five phases: analysis, design, development, implementation, and evaluation. The output of each phase is described below:

1. The analysis phase may produce the following:
 - (a) Needs analysis
 - (b) Job analysis
 - (c) Task analysis
2. The design phase may produce the following:
 - (a) Sequenced and grouped learning objectives
 - (b) Training setting and evaluation methods
 - (c) Trainee evaluation methods
 - (d) Task-to-training matrix
 - (e) Training & Qualification Descriptions and/or Qualification Guides
3. The development phase may produce the following:
 - (a) Training materials
 - (b) Evaluation materials
4. The implementation phase may produce the following:
 - (a) Attendance records
 - (b) Trainee Evaluation results
 - (c) Training Exemptions/Equivalencies

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- (d) Trainee feedback
- 5. The evaluation phase may produce the following:
 - (a) Summaries of trainee feedback
 - (b) Post training evaluation
 - (c) Observations of training

SAT is a methodology by which training is directly linked with job performance expectations. SAT is an iterative process and activities from different phases may be conducted concurrently or repeated as further analysis dictates. For example, learning objectives may be developed concurrent with task analysis. An overview is presented in Figure 1, Systematic Approach to Training Process.

- (a) The outcomes of SAT should be based on the importance of the job to personnel and nuclear safety, equipment reliability, and complexity of the job performance requirements. Documented products of SAT shall be maintained as records as defined in N-PROC-TR-0012, Records and Documentation.
- (b) Staff responsible for executing the phases of SAT for courses shall be qualified in accordance with N-TQD-602-00001, Nuclear Trainer Training and Qualification Description.
- (c) Training shall be conducted in accordance with current approved training material.
- (d) Procedural and equipment changes, changes in job descriptions, and operating experience feedback are screened in order to identify changes to tasks and assess potential training implications leading to training modifications.

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Systematic Approach to Training

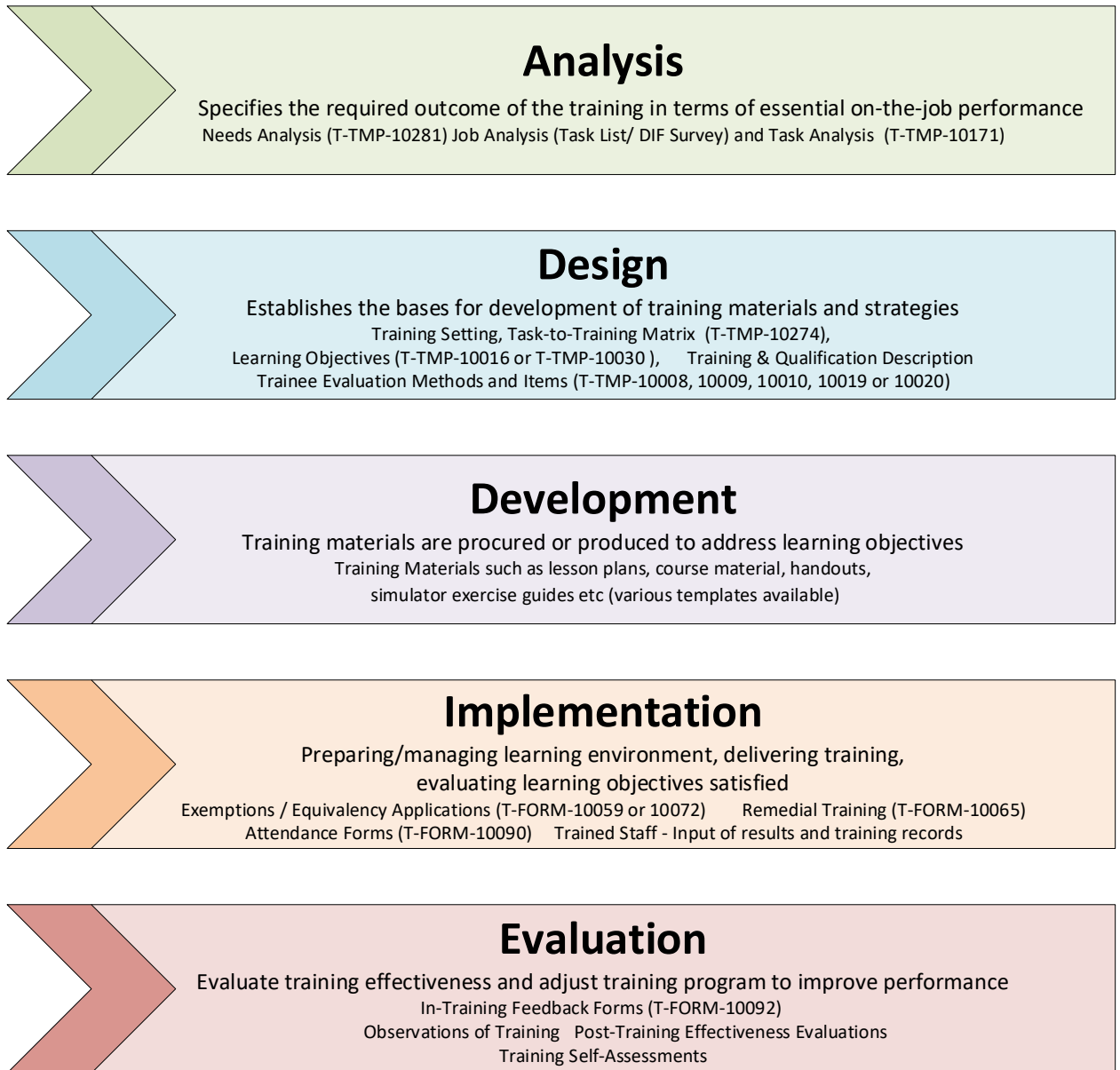


Figure 1: Systematic Approach to Training Methodology

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2.0 ANALYSIS PHASE

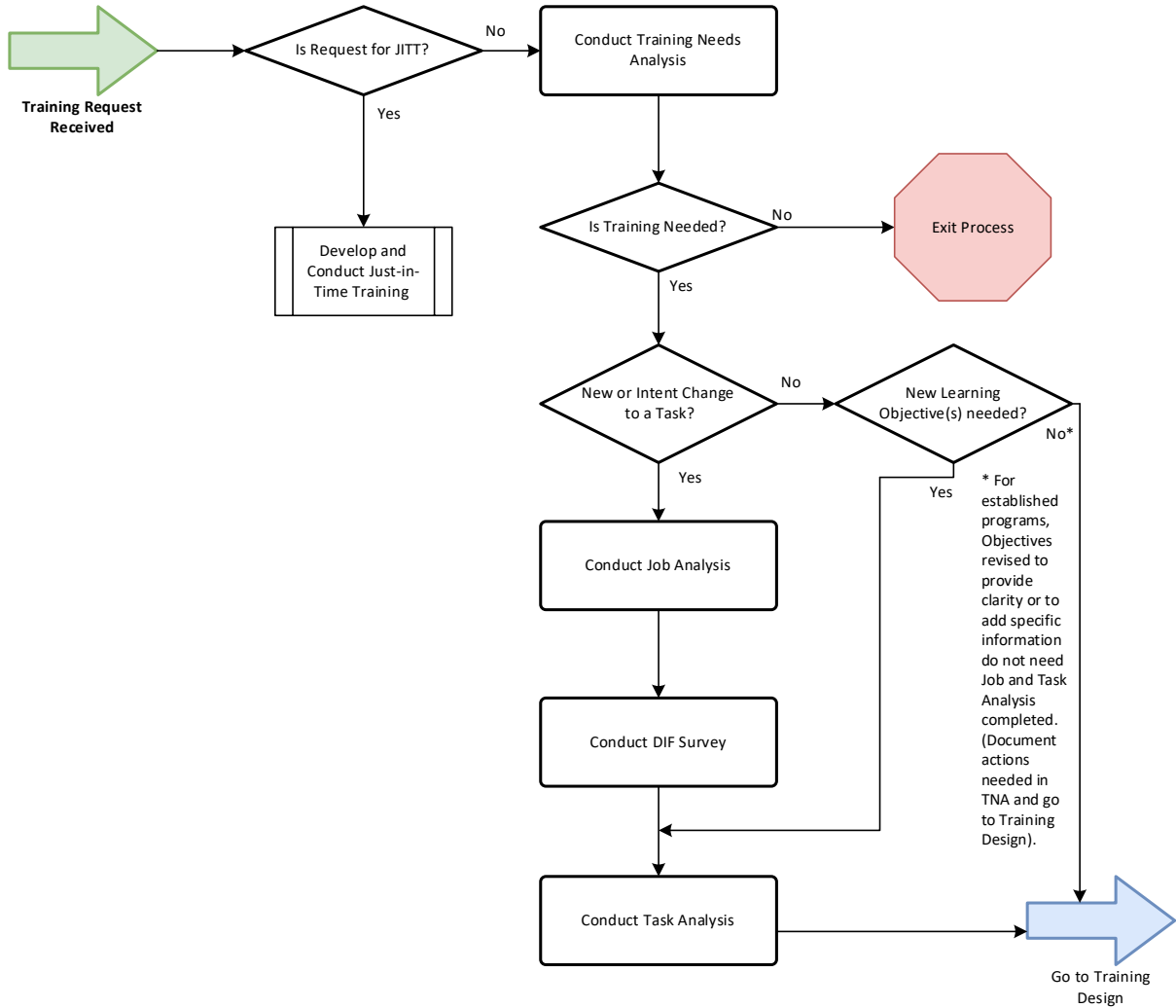


Figure 2-Summary of Analysis Phase

The training analysis phase identifies which tasks require training, specifies the required outcome of the training in terms of essential on-the-job performance as defined by role documents, procedures, or written instructions and considers the rationale for training, scope, target audience and timing.

Document Name	Template/Form Number	Reviewer	Approver
Training Needs Analysis	T-TMP-10281	Training Manager	Training Program Owner
Job and Task Analysis	T-TMP-10171	Training Manager	Training Program Owner

Table 1 - Analysis Document and Approval Summary

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2.1 Training Needs Analysis

2.1.1 Initial Screening of Training Request

Instructor shall review incoming training requests including procedural and equipment changes, changes in job descriptions, and operating experience feedback in order to identify changes to tasks and assess potential training implications.

The outcome of Initial Screening is to clearly identify requests that do not require training and requests that may require training.

Screen a training request as follows:

If the request will clearly have no training impact:

- (a) Close out the training request.
- (b) Inform the initiator.

If the request duplicates another training request:

- (a) Provide reference to the duplicate request and/or reason for closure.
- (b) Close out the training request.
- (c) Inform the initiator.

If the request is for JITT, go to Section 4.2.2.

If a needs analysis is warranted, proceed to Section 2.1.2

2.1.2 Conduct of Needs Analysis

The training need is determined through needs analysis.

T-TMP-10281, Training Needs Analysis (TNA), should be used to guide and document analysis. The completed TNA shall be routed to the Training Manager for review and Training Program Owner for approval and filing in an Approved Information Management System (AIMS).

If a needs analysis is required:

- (a) Research the facts.
- (b) Determine potential solutions.
- (c) Document results using T-TMP-10281, Training Needs Analysis (TNA).
- (d) Proceed to the other phases of the SAT process if training is needed.

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2.1.3 Job and Task Analysis

Job and Task Analysis shall be conducted using T-TMP-10171 Job and Task Analysis. The completed Job and Task Analysis Form shall be routed to the Training Manager for review, Training Program Owner for approval and filing in an Approved Information Management System (AIMS).

- **NOTE:** For *established training programs*, if the changes were analyzed and addressed by actions documented in the training needs analysis, then completion of T-TMP-10171 is not required.

2.1.3.1 Conduct of Job Analysis

The outcome of a Job Analysis is a Task List.

Job analysis is conducted when:

- A new job position is identified or created, or an existing job position has changed.
- Training Needs Analysis identifies when a JTA should be conducted when a task has been changed, newly added to or deleted from an existing job position.

Start the Job Analysis by obtaining, reviewing and selecting existing job data.

- Similar job descriptions should be considered and referenced if appropriate and may be obtained from various sources such as:
 - Plants with a similar configuration
 - Government agencies that use the SAT approach for a similar job, and/or
 - Job analysis data from INPO (i.e. ACAD Documents)

Document the job analysis on T-TMP-10171

- Develop/update task list on T-TMP-10171
- Use information gained from existing job data (existing job descriptions) and revise to be plant specific.
- Gather additional information from workers, subject matter experts, and supervision.
- Identify duty or qualification areas and tasks performed by personnel in job position

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Note: Task List for major Nuclear Training Programs identified in N-LIST-08920-10001 should be revalidated at least once every six years and re-authorized by Training Manager and appropriate Training Program Owner.

2.1.3.2 Conduct of DIF Survey

The outcome of a DIF Survey (Difficulty, Importance, Frequency) is the identification of those tasks that require initial training and the identification of those tasks that also require periodic refresher training as part of continuing training or just-in-time training.

Conduct difficulty, importance, and frequency (DIF) surveys to determine the required training, if any, for each task.

- Use T-TMP-10171 to collect DIF information and document results following DIF definitions and selection guidelines (reference Appendix A).
- Importance ratings should be based on direct consequences of improper task performance on the plant or personnel.
- The Training Program Owner may choose to modify the recommendations resulting from the DIF survey based on plant performance and needs. Justification for the choice should be documented on the task list.

Determine retraining frequency for tasks selected for periodic refresher training as applicable and documented on T-TMP-10171. Retraining frequency is based on the following factors:

- Risk or consequences associated with improper performance,
- Opportunities for incumbents to maintain proficiency on task performance, and
- Plant and industry Operating Experience related to errors associated with performing task.
- Regulatory requirements for Certified Staff as identified in N-TQD-103-00001, Nuclear Certified Personnel Continuing Training and Qualification Description.

Frequency of continuing training may be established as a specific time frame (e.g., every 24 months, once every 4 years, etc.) or as just in time training (JITT). Just in time training is typically used for pre-outage work or emergent tasks.

2.1.3.3 Conduct of Task Analysis

The outcome of Task Analysis is the identification of task standards, conditions and the skills and knowledge required by employees to perform each task. Results produce the data base from which job performance measures and training program learning objectives are developed or verified.

Task analysis is required when a new task is selected for training, an existing task is modified, or if an existing task has been identified through revalidation.

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Collect data related to the task. Document task analysis information on T-TMP-10171. Relevant task information which may include but is not limited to:

- Performance expectations and task output
- Initiating and terminating cues
- Consequences of inadequate performance
- Personnel and personal safety issues
- Required tools and equipment
- Associated human interfaces
- Any non-routine or emergency condition tasks

The following references may be consulted:

- Plant design and license basis documents (e.g., technical specifications, safety analysis reports)
- Procedures
- Vendor/technical manuals
- Available analysis data pertaining to the task (e.g., job analysis, previous task analysis, and task analysis from other utilities)
- Regulatory requirements
- INPO references

Collect task analysis data from interviews, questionnaires, and/or tabletop sessions with job incumbents and subject-matter experts.

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3.0 DESIGN PHASE

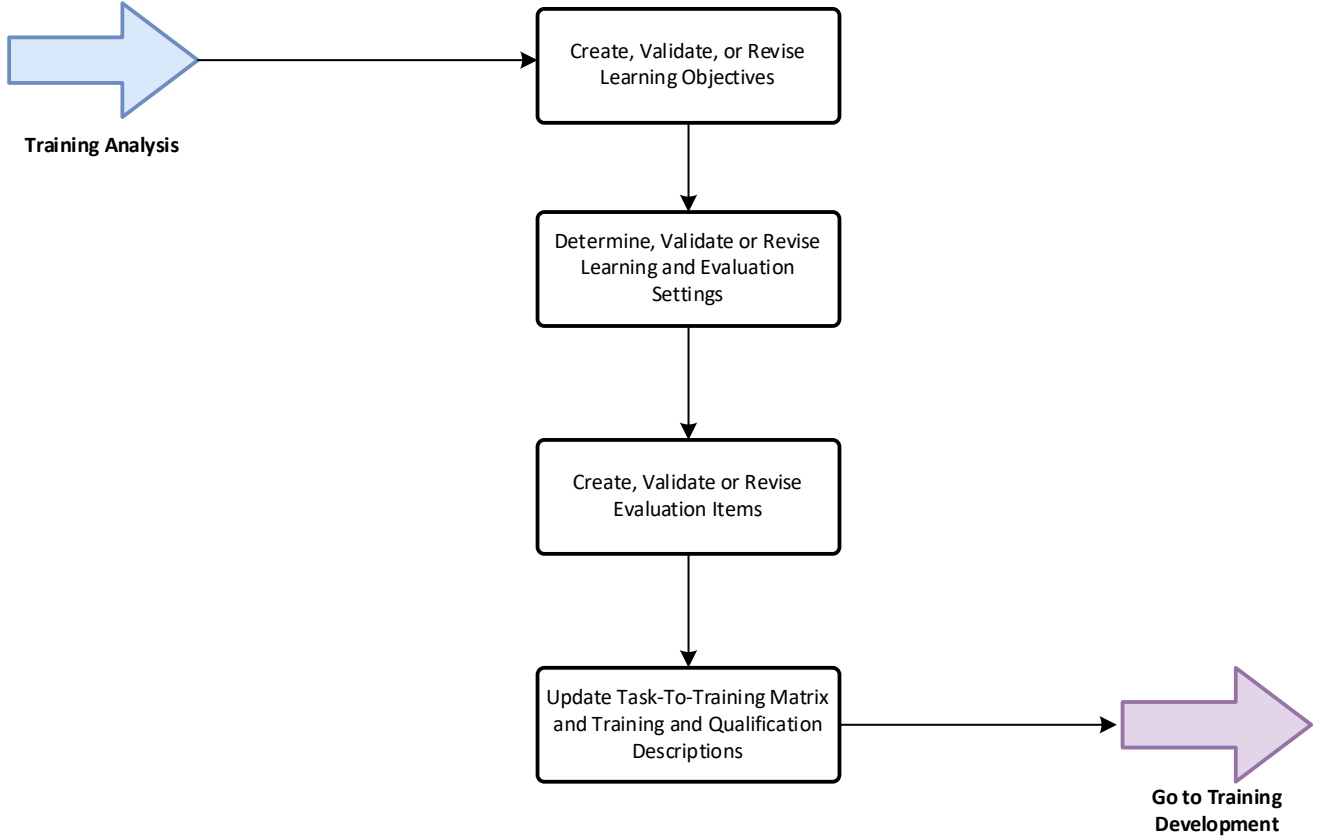


Figure 3-Summary of Design Phase

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Design phase of SAT defines scope and sets specifications for each unit of training and establishes the bases for development of training materials and strategies for confirming transfer of information from Training Analysis.

Training materials shall be designed such that:

- Objectives accommodate anticipated incoming level of knowledge, skills and experience, and task interdependence.
- Training develops diagnostic skills, and teamwork skills.
- Training reinforces conduct and performance expectations.

Document Name	Template/Form Number	Reviewer	Approver
Objectives	T-TMP-10016 or T-TMP-10030	Training Manager	Training Program Owner
Question and Answer Bank (Q&A)	T-TMP-10008	N/A	Training Manager
Skills Assignment (SA)	T-TMP-10009	N/A	Training Manager
Test Checkout (TC)	T-TMP-10010	N/A	Training Manager
On-the-Job Evaluation (OJE)	T-TMP-10019	N/A	Training Manager
Practical Evaluation (PEV)	T-TMP-10020	N/A	Training Manager
Task-to-Training Matrix	T-TMP-10274	N/A	Training Manager
Training & Qualification Description, Qualification Guides	Various	Training Manager	Training Program Owner

Table 2 - Design Document and Approval Summary

3.1 Creating and Sequencing Objectives

Creating, validating, or revising learning objectives that address the knowledge, skills, and attitude requirements is an important part of the design phase. Learning objectives may be cognitive, affective or performance based and should include the condition, action, and standard to which the activity should be learned. Learning objectives should be derived from the task analysis and sequenced to provide the foundation for effective training content created in the subsequent phase.

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Organize and sequence learning objectives to be used for the development of training items/topics that support trainee mastery of learning objectives.

- (a) Training Manager should ensure learning objectives are developed and approved using either T-TMP-10016, Objectives (OBJ) or T-TMP-10030, Authorization Training Objectives (OBJ AT).
- (b) Training Program Owner should review and approve learning objectives. Approved objectives are filed in an Approved Information Management System.

Note:

- Terminal and enabling objectives to support Operations Training should be developed in accordance with N-JTA-100-00072-TA, Station Specific Program Objective Template and N-JTA-100-00071-TA, Continuing Training and Requalification Testing Objectives Template.
- Objectives being developed for CBT delivery should be prepared or reviewed by CBT personnel to ensure they are achievable in a CBT environment.

3.2 Training and Evaluation Environments

Identify training environments. Blended learning strategies, utilizing more than one training environment, is an effective way to accommodate various learning needs in a training program. Consideration for training environments may include the following:

Consider selecting self-study/individualized training/e-learning when:

- Training does NOT require close supervision, present hazards to personnel or equipment, or require immediate feedback.
- All conditions can be provided by training materials or made available in the plant when needed.
- Task does NOT require extended periods for trainee to achieve mastery.
- E-Learning based training should be considered when text, images, exercises, scenarios, simulations, and videos, etc. can fulfill the objectives without the need for a live instructor and physical facility.

Consider in-plant settings when:

- Assignment of trainees can be made in small groups and spread over a sufficiently long period of time.

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- There are no operating constraints in the plant and effective training conditions can be provided in the job environment.
- Qualified personnel are available to conduct and manage formal OJT/OJE.

Consider selecting the laboratory/shop facilities when:

- Tasks, elements, skills require hands-on practice.
- Conditions can be simulated to reflect actual job conditions and standards to the extent practical in the lab or shop.

Consider selecting the simulator when:

- High fidelity training that replicates job performance critical for trainee mastery is required.
- Problem diagnosis under stressful conditions is required.
- Teamwork is an important part of the task.

Consider selecting the classroom environment when:

- Large quantities of information will be presented.
- Large groups of trainees will be scheduled at a given time.
- Other settings are NOT suitable or available.

Consider selecting of virtual/distance learning when:

- Groups of trainees are geographically separate or distant
- Timing of the need for training varies
- There is a need for recall or “on-demand” for information being presented
- Other settings are not available or not suitable

3.3 Evaluation Items

The following templates are available to develop evaluation/examination:

- T-TMP-10008, Question and Answer Bank (Q&A)
- T-TMP-10009, Skills Assignment (SA)

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- T-TMP-10010, Test Checkout (TC) (template includes certification examination)
- T-TMP-10019, On-the-Job Evaluation (OJE)
- T-TMP-10020, Practical Evaluation (PEV)

In addition to this document, evaluations for certified positions are also developed in accordance with the following applicable document(s):

- N-INS-08920-10001, Requalification Testing of Certified Shift Personnel
- N-INS-08920-10002, Simulator-Based Initial Certification Examinations for Shift Personnel
- N-INS-08920-10003, Independence and Security for Initial Certification Examinations and Requalification Testing of Certified Shift Personnel
- N-INS-08920-10004, Written and Oral Initial Certification Examinations for Shift Personnel
- N-INS-08920-10005, Standards & Methodology for Formal Evaluations
- N-INS-08920-10022, Formal Evaluation of Responsible Health Physicists

Note: SM/CRSS Mentor Guides are developed using T-TMP-10011, Handouts (HO/TDP) in accordance with N-TQD-102-00001, Nuclear Shift Manager/Control Room Shift Supervisor Initial Training and Qualification Description.

Evaluation methods shall specify acceptable performance (pass/fail criteria).

Instructor should create, validate, or revise evaluation items based on learning objectives. Review the evaluation items to ensure they adequately test the objectives.

Exams should provide an evaluation of a representative cross section of the objectives. All objectives do NOT have to be evaluated in each exam.

3.4 Prepare / Update Training Description and Matrix

Training Manager should ensure T-TMP-10274, Task-to-Training Matrix (TTM) and recognized task analysis database if used (e.g., Nuclear Electronic Training Universal SAT [NEREUS]) is updated to align with information in T-TMP-10171.

Note: NEREUS is owned by Director, Fleet Operations Training. Contact Manager, Fleet Operations Training if access is required to this database.

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Prepare or revise the Training and Qualification Description (TQD) and/or Qualification Guide (QG) if required. Changes to qualification requirements may require an implementation plan (ref: N-PROC-TR-0041) that will:

- Determine the impact of the change on qualified personnel.
- Determine new qualification requirements for incumbents.
- Schedule training for incumbents as necessary.
- Prepare training exemptions as necessary.

Critical qualifications are recorded in TIMS and documented in a TQD or QG in accordance with N-PROC-TR-0041 TIMS II Administration.

The Training and Qualification Description (and associated Qualification Guides) describes the package of qualifications that make up the associated training program that address the learning objectives.

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4.0 DEVELOPMENT PHASE

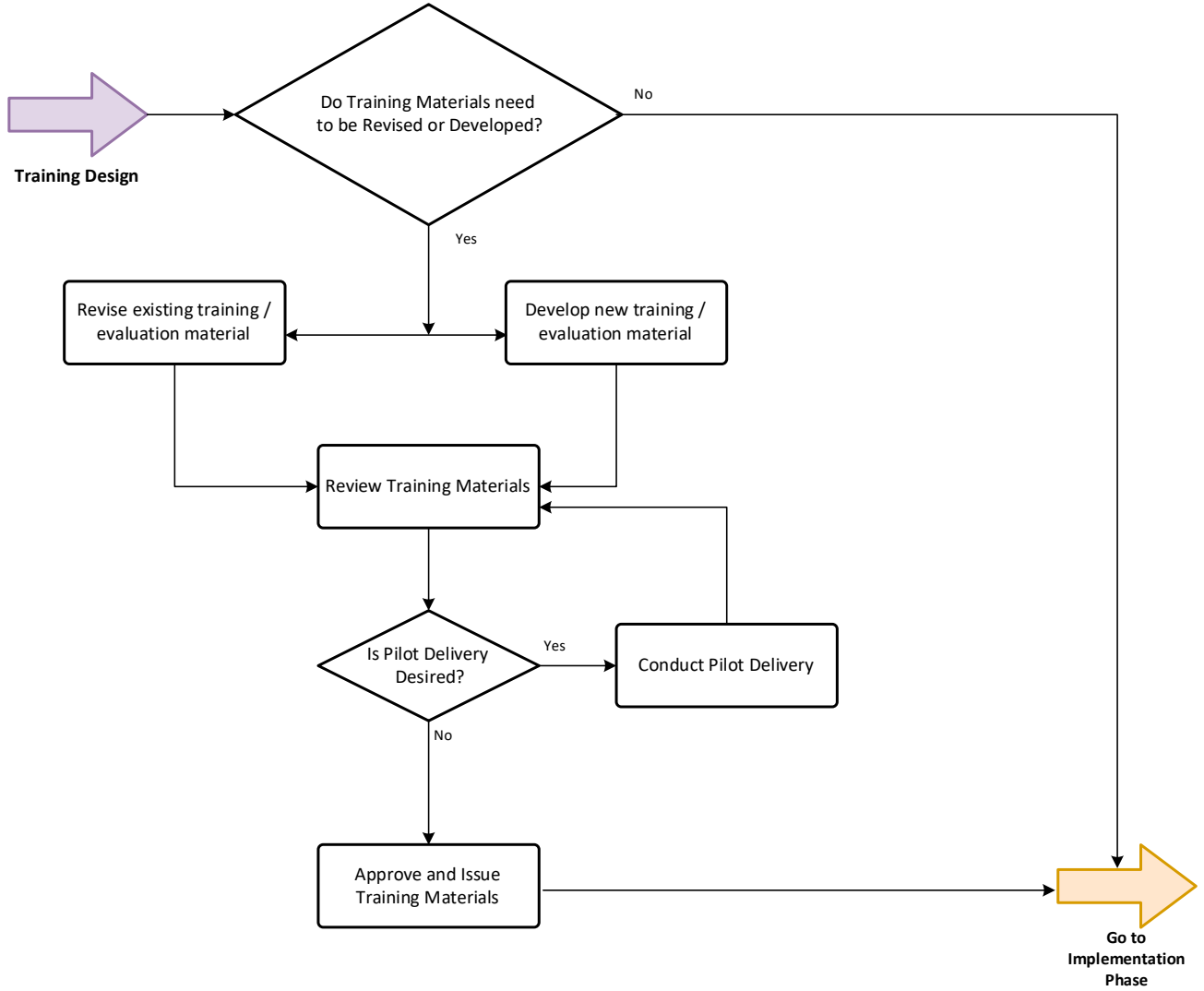


Figure 4-Summary of Development Phase

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Prior to development, objectives and evaluations were completed and clearly define scope. In the Development phase of SAT, training materials are procured or produced to address learning objectives.

Training materials shall be developed to promote effective and consistent delivery of training. Training materials include documents Instructors use to conduct training, as well as items provided to Trainees to assist them with learning.

Table 3 summarizes approved forms and templates which may be used for training materials and required approvals:

Document Name	Template/Form Number	Approver
OJT Guide	T-TMP-10003	Training Manager
Course Material (CMT)	T-TMP-10005	Training Manager
Lesson Plan	T-TMP-10006	Training Manager
Handouts (HO)	T-TMP-10011	Training Manager
Powerpoint/Overheads (OVH)	T-TMP-10012	Training Manager
Practical Evaluation (PEV)	T-TMP-10020	Training Manager
Self-Study Guide (SSG)	T-TMP-10021	Training Manager
Simulator Exercise Guide (SEG)	T-TMP-10025	Training Manager
Video (V)	T-TMP-10015	Training Manager
Just-in-Time Training	T-FORM-10093	Training Manager

Table 3 - Development Document Approval Summary

Instructor shall develop training materials such that:

- Lesson plans and other training materials are current, accurate, and support learning objectives and evaluation.
- Individualized or self-study instructions give Trainees enough guidance for mastering objectives.
- Procedures used to support training align with those in use, or those that will be used in the Station.
- Working conditions, tools and equipment in simulated tasks replicate to the extent that is practical, those of actual task. Discrepancies between simulated task and actual task should be identified and communicated to the Trainee.

Training Manager shall review and approve all training material and should ensure it is issued in Asset Suite prior to use in delivery. In exceptional circumstances, interim changes to training material may be used for delivery (refer to Section 4.3.1 Interim Changes to Training Material).

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Note:

- Personalization of training during presentations is permitted provided it does NOT change the learning objectives or lesson plan intent/scope. Personalization includes using examples, anecdotes, personal OPEX, additional training aids or pre-programmed adaption of eLearning materials based on trainee-specific data.
- CBTs and associated end-of-course checkout Question/Answer banks (if applicable) hosted on the CBT Production Server are developed and approved Training Materials using processes suitable for that environment.

4.1 Development/Revision of Training Materials

Existing training materials, including industry standard training materials, should be reviewed to determine if the material may be used with or without revision.

Note: Industry standard training and training materials must be approved for use by the Training Manager and referenced in the Lesson Plan.

If existing learning materials are considered for use, ensure the following:

- Procedures, drawings and technical references used to support training are up to date.
- Ensure management expectations are incorporated into training material, as appropriate.

If using supporting material, such as handouts, overheads, charts, etc. ensure the material:

- Supports learning objectives and evaluation tools
- Contains adequate detail.

If training material does NOT need to be revised or developed, go to the implementation phase.

If new training material needs to be developed, go to Step 4.2.

If a revision to existing training material is required, go to Step 4.3

4.2 Development of New Training/Examination Material

Instructor may prepare new training material for courses identified during the design phase if needed considering the following:

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- Use templates where available as identified in Table 3 above.
- Current, and accurate.
- Approved prior to use and based on approved Learning Objectives.
- A blend of learning activities is considered using a variety of material

Training Manager approves training material prior to use in delivery. Training material shall be issued in Asset Suite.

4.2.1 Lesson Plans

Lesson plans should be detailed enough to address Learning Objectives and to promote effective and consistent training delivery and are documented using T-TMP-10006, Lesson Plan (LP) including the following information:

- Introduction – including objectives.
- Evaluation method(s).
- Presentation description - including lesson objectives
- Details – in order to ensure consistent delivery by different instructors
- References (e.g., procedures, system descriptions, etc.) – in order to support technical content.
- Summary of key points.

Note: Lesson plans are not required for CBT delivery as it is pre-programmed, self-directed, and self-paced delivery. Any other use of CBT content that deviates from the pre-programmed delivery (e.g. CBT content integrated into classroom delivery) should be addressed by a separate lesson plan.

4.2.2 Just-In-Time Training (JITT)

Just-In-Time Training (JITT) is training delivered just prior to a plant activity or evolution or addresses emergent topics or information which by their nature cannot be developed in advance such as operating experience, technical updates or procedure changes.

In some cases, established continuing training with existing course material that is approved and issued will be scheduled just-in-time as appropriate to align with the plant activity or evolution. Scheduling follows normal processes described in N-PROC-TR-0044.

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In other cases, emergent topics or information will need to be presented expeditiously. These may include:

- Work expectations
- Plant modifications or equipment changes
- Procedure changes
- Infrequent plant tests and evolutions
- Plant and industry operating experience
- Technical updates
- Special requests from Training Committees

In these cases,

- Upon receipt of a request for JITT, Instructor should contact the requester for the scope of the JITT. Items to be considered may include initiating and terminating cues, work documents (e.g., procedures, work packages, etc.), work groups that should be involved, management expectations for the task, and schedule to support the training.
- Training Manager should inform Line management of the impact to training schedules and training programs to conduct the JITT.
- Instructor should review applicable references and procedures to be used during the evolution.
- Instructor should identify learning objective(s) and how they are achieved by the training.
- If the lab or simulator will be used for training, Instructor should validate the scenario that will be used for training.

In cases where training material does not exist, T-FORM-10093 Just-in-Time Training Documentation may be used to support and document the training including:

- Just-In-Time Training Title
- PEL number if it already exists
- Expiry Date of JIT training

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- Category, classification, and rationale for JIT training
- Overall goal and required skill, knowledge and attitude associated with JIT training
- Target audience
- Lesson outline including introduction, context setting and evaluation method (if applicable)
- Operating Experience (OPEX)

Training Manager should arrange to create an Administrative Requirement in TIMS per N-PROC-TR-0041 to facilitate scheduling and attendance.

If T-FORM-10093 was used to support the training, Training Manager should approve the content prior to delivery. The completed form and any supporting training materials shall be filed in AIMS in accordance with N-PROC-TR-0012.

N-INS-08920-10020, Just-in-Time Training may be consulted for additional detail on the use of Just-in-Time Training for emergent topics.

4.2.3 Vendor Supplied Training

Training Manager should ensure the following is determined:

- The training to be covered by vendor.
- If training will be held on site or off site.

Materials purchased through vendors should be received prior to implementation to allow time for the Training Manager to initiate a review to ensure:

- Vendor Objectives or outcomes meet Learning Objectives derived in design phase and meet station worker training needs.
- Evaluation instruments adequately evaluate objectives.
- Material content is technically accurate and meets station expectations.
- Initiate actions to correct any deltas.

Training Manager should ensure T-FORM-10087 Vendor Training Approval is completed for the following conditions:

- New vendor-supplied course
- Vendor has changed

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- Training material has undergone an “intent” change

4.2.4 Examinations

During the development of an exam, Instructor should consider the following:

- Avoid “direct look up” for open reference questions.
- Ensure that one question does NOT jeopardize the validity of another question.
- Multiple exam items stemming from one question do NOT jeopardize correctly answering subsequent questions.

Instructor should develop Marking Guides for Exams developed. Marking Guides should contain exam answers and point value as well as point distribution for answers with multiple parts.

Note: Question/Answer Banks may be developed to facilitate the development of multiple exams.

For *E-Learning* exams, the following should be incorporated:

- The number of test questions to be included on the exam and applicable exam bank is appropriate for the content to be tested.
- The algorithm used to create the exam (question selection criteria) ensures adequate coverage of the learning objectives of the content to be tested.

Training Manager shall review and approve the evaluation items/test questions.

Approved evaluation documents are filed in an Approved Information Management System.

4.2.4.1 Examination Security

Staff involved with examination development throughout assembly, review, approval and implementation processes should maintain confidentiality of examination content to reduce the likelihood of the exam being compromised. Draft examinations should be maintained in a secure manner. Examinations either as hard copy or open for electronic modification should not be left unattended.

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Examinations used for Certification Training Programs shall follow N-INS-08920-10003, Independence and Security for Initial Certification Examinations and Requalification Testing of Certified Shift Personnel.

In addition, *E-learning* examinations should be electronically protected within the *e-learning* framework.

Training Manager should ensure methods for securing examination material are available and access to the material is controlled.

4.3 Revision of Existing Training/Examination Material

Instructor obtains documentation for revision in accordance with OPG-PROC-0178, Controlled Document Management and revises training material or examination material. Revisions may be considered intent changes or non-intent changes (described below).

Intent Change

The following are considered “intent” changes to training material:

- Additions or deletions of objectives.
- Revision to the intent of the objective (for example changing the cognitive level).
- Significant changes to the technical content (for example changing a control system from analog to digital).

Non-Intent Change

A non-intent change includes anything NOT considered an intent change and may include the following for example:

- Grammatical or typographical errors.
- Minor changes to technical content like a setpoint change.
- Addition of more timely or relevant operating experience (and deletion of existing OPEX as appropriate).
- Addition or deletion of non-technical information provided the addition/removal is NOT pertinent to mastery of the objectives.
- Obvious incorrect sequence of steps
- Added statements for clarification.

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- Revisions to instructor notes provided the revision does NOT impact the ability to address the objectives.

Note:

- Revisions to Training Material/ Examination material may be completed within the existing version of the associated template at Training Manager discretion in accordance with OPG-PROC-0178 (i.e. transferring all the content to the most recent version of the template is not necessary).
- CBT revisions affecting course content and/or Question/Answer Banks is carried out directly on the eLearning Production servers.

4.3.1 Interim Changes to Training Materials

When formal processing (word processing, records, duplication) of changes needed to training materials is not reasonable prior to next training delivery, interim documents may be used.

Note: Interim changes should not be used to modify learning objectives or tasks.

Training Manager shall perform the following:

- (a) Review revisions and approve change on interim document being used.
- (b) Ensure associated documentation is checked out for revision in accordance OPG-PROC-0178.
- (c) Ensure interim changes are incorporated and issued as soon as possible, but no more than 90 days from initial use.
- (d) Ensure final documentation issued in AIMS as a controlled document with implementation date matching the date of original use of the interim document.

4.4 Pilot Delivery Sessions

The purpose of pilot deliveries is primarily to validate that learning objectives are effectively and efficiently achieved. Pilot Delivery Sessions are optional at the discretion of the Training Manager. The following may also be assessed during pilot delivery:

- Relevance of training content
- Appropriateness of training methodology
- Technical content accuracy

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- Effectiveness of training materials
- Ability of Instructor to effectively deliver content
- Timing and duration of delivery per lesson plan.

The pilot session may be taught in 'real-time' and in accordance with the implementation phase guidance. Training materials used during pilot may be marked with a watermark "**Pilot**" or "**Draft**".

Provide participants with T-FORM-10092 In-Training Feedback to document feedback.

Attendees may be given credit for attendance if:

- Significant changes are NOT required.
- Objectives in the pilot session are NOT different than the training session.
- Attendees have passed the evaluation.

In the event significant changes are required to the training material, then attendees can receive credit only if appropriate gap training is provided. This may be accomplished via follow-up with the attendees concerning the changes by either written notification or by attending the final approved training.

Note:

- The Instructor should implement the necessary changes. The changes are initiated as part of the development phase and therefore are NOT considered a revision. Upon completing the necessary changes, the Instructor shall obtain final review and approval.
- CBT pilot deliveries are performed online in a manner that ensures no credits are granted automatically. CBT designers manage pilot delivery in accordance with the intent of this section.

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5.0 IMPLEMENTATION PHASE

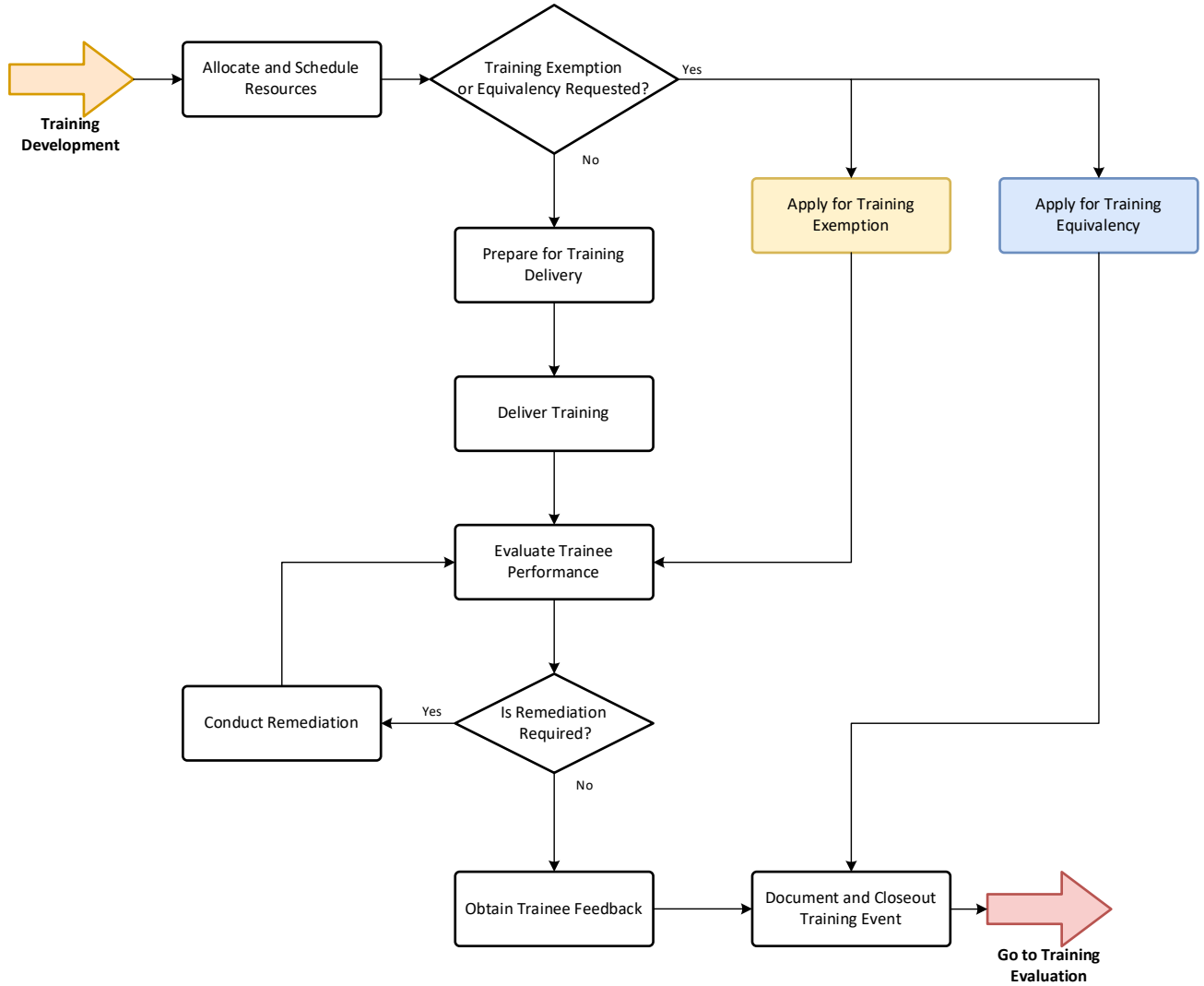


Figure 5-Summary of Implementation Phase

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Implementation addresses the following:

- Preparing for training
- Managing learning environment
- Delivering training
- Evaluating whether learning objectives have been satisfied
- Closing out training.

The goals of implementation may include but are not limited to the following:

- Training is delivered as planned and approved
- Trainee performance is evaluated
- Results of training are documented, and training records are processed

For implementation of On-the-Job Training (OJT), On-the-Job Evaluation (OJE) and Practical Evaluations (PEV), refer to N-PROC-TR-0007 On-the-Job Training On-the-Job Evaluation and Practical Evaluation.

Note: For standard CBT delivery (e.g. self-directed, self-paced), implementation phase activities are largely automatic.

Document Name	Template/Form Number	Reviewer	Approver
Application for Training Exemption	T-FORM-10059	Line Manager (Supervisor)	Training Manager
Application for Training Equivalency	T-FORM-10072	Line Manager (Supervisor)	Training Manager
Remedial Training Plan	T-FORM-10065	Line Manager (Supervisor) and RHP for RP Training	Training Manager
Attendance Sheets	TIMS or T-FORM-10090	N/A	Training Manager
Training Results	TIMS Generated	N/A	Training Manager

Table 4 - Implementation Document and Approval Summary

5.1 Allocate Resources

Training Manager allocate/evaluate instructional resources for the purpose of instruction.

- Assign qualified Instructors in accordance with N-TQD-602-00001 for training delivery and set context for pre and post-delivery expectations.

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- Assign facilitators or invigilators to scheduled courses not requiring instructor (such as CBT courses) to oversee examination process.
- Procure vendors for training delivery where needed

Line Manager (Supervisor) and Training Manager should verify training is delivered:

- Only to Trainees who need training in accordance with N-PROC-TR-0044
- In a timely fashion to support need in accordance with N-PROC-TR-0044

5.2 Schedule Resources

Create schedule for training in accordance with N-PROC-TR-0044 Training Demand, Scheduling and Cancellation.

Training Manager / Instructor should ensure training materials are updated and approved, and any special equipment or training aids are available in advance of the scheduled date of training.

5.3 Exemptions and Equivalencies

Primary justification for waiving the requirement for Nuclear training for an individual includes prior education, training, or experience, which is assessed as being equivalent to required training and demonstrated competency on-the-job. Documentation of prior training, education, experience, or examination results, which demonstrates proficiency, should be provided as part of justification.

For additional Exemption and Equivalency requirements for Authorization Training candidates, refer to Appendix B Credit Exemptions Specific to Authorization Training.

A request to waive Nuclear training may be for a specific course or multiple courses. Two types of waivers that may be considered include:

- Exemption
- Equivalency

Requirements to support each type of waiver are provided below:

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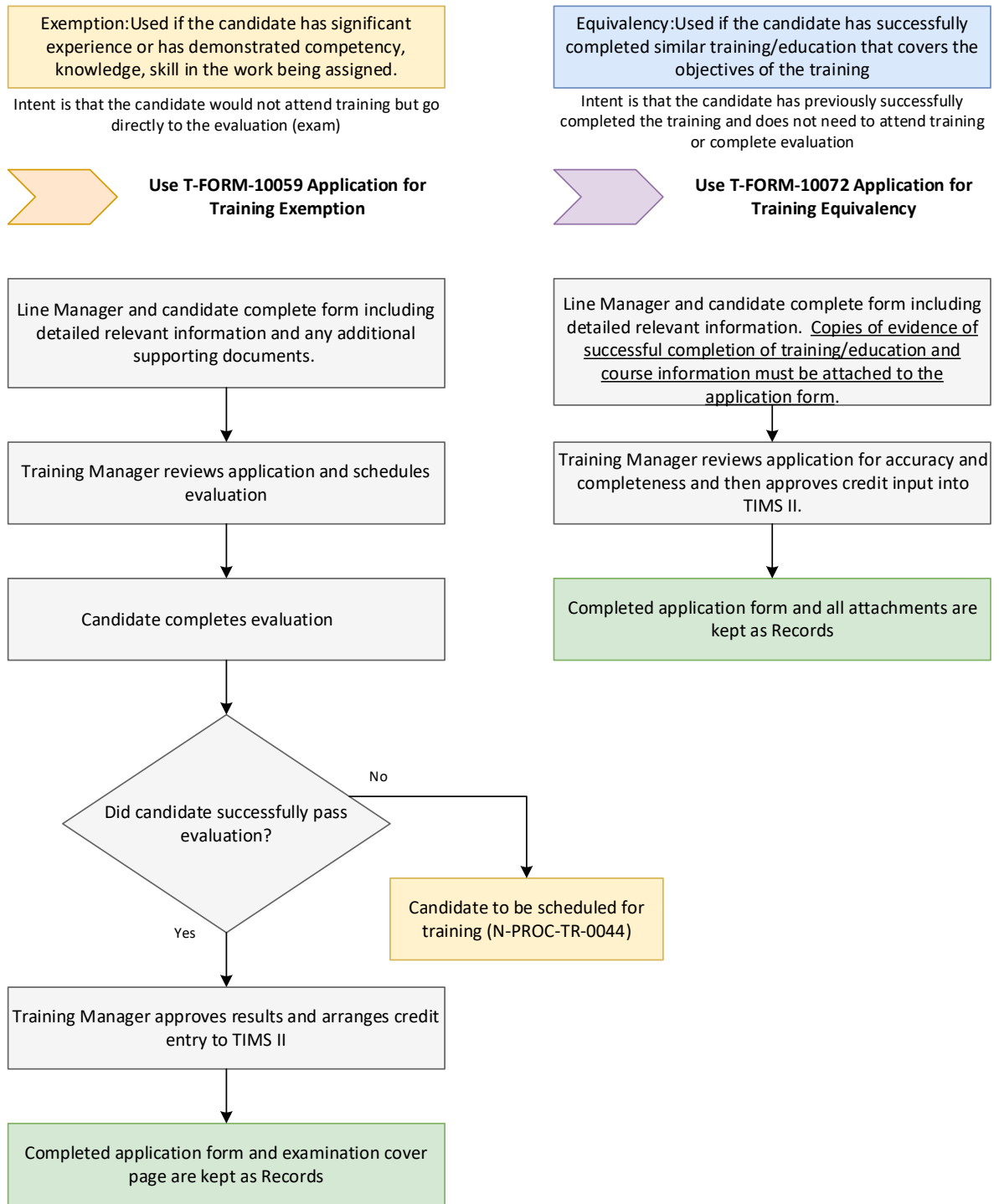


Figure 6-Exemptions and Equivalencies

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5.3.1 Training Exemption

A candidate may be exempt from attending training and proceed directly to the examination if employee has experience that is considered the same as training requirements and has shown competency in skill or knowledge on-the-job (normally appropriate for someone who has completed course with similar objectives, or who has extensive experience in area).

Individual or Line Manager may apply to be exempt from attending training and document the rationale for exemption on T-FORM-10059. Line manager then reviews it, and forwards T-FORM-10059 to Training Manager.

Training Manager should perform the following:

- Review employee's prior training, education and experience documented on T-FORM-10059 to determine if it supports request for exemption from attending specified course.
- Check TIMS II current credit status to ensure employee has **not** previously failed, received conditional status, or received previous credit for course(s). In these cases, T-FORM-10059 should not be approved.
- Arrange for scheduling of the examination.
- Ensure completed examination cover sheet is attached to T-FORM-10059. **Note:** The credit date listed on the form to be entered in TIMS should be the date the examination was conducted.
- If result is Pass, complete and approve T-FORM-10059 and forward it with Examination Cover Sheet attached to TIMS Admin for entry into TIMS II as credit type 'P'.
- If result is Fail, contact Line Manager to arrange for employee to attend training.

The completed and approved T-FORM-10059 and associated documentation shall be submitted to the employee's Individual Training Record (ITR).

5.3.2 Training Equivalency

Equivalency may be applied if employee has successfully completed training or education requirements of similar recognized qualification program. Training is equivalent when the training objectives are covered, or exceeded, by other training.

An examination is **not** required if individual has successfully completed training course which is equivalent to a Nuclear course. Employee should be given credit for course.

Individual or Line Manager may apply for equivalency by completing T-FORM-10072 and attaching proof of successful completion of the equivalent program and documentation supporting why the program should be considered equivalent training. Line Manager then reviews and forwards T-FORM-10072 to Training Manager.

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Training Manager should approve completed T-FORM-10072 and associated documentation and forward to TIMS Admin for entry into TIMS II as credit type 'P'.

The completed and approved T-FORM-10072 and associated documentation shall be submitted to the employee's ITR.

Note: The credit date on the form that is entered into TIMS should be the date equivalent training was completed.

5.4 Delivery Preparation

Instructor should prepare to document attendance. Instructor should use T-FORM-10090, Course Attendance Sheet only if electronic entry is not available from TIMS II.

Line Manager should ensure trainee participates in pre- and post-training briefings and training in accordance with N-STD-TR-0001, Conduct of Training.

Instructor should prepare for delivery in accordance with N-STD-TR-0001.

5.4.1 Oversight of Vendor-Supplied Training

Prior to training delivery by vendor at an OPG facility, the Training Manager should perform the following:

- Ensure vendor is set up and arrange facility orientation as needed.
- Review expectations and alignment with N-STD-TR-0001

5.5 Deliver Training

Instructor delivers training in accordance with N-STD-TR-0001. In addition, the instructor should perform the following:

- Distribute T-FORM-10092 In-Training Feedback or encourage electronic feedback. Encourage and promote all types of feedback by explaining the purpose and its importance in the evaluation of training.
- Introduce Trainees to operation of machinery, tools, equipment, and materials that will be used during course.
- Discuss with Trainees importance of following instructions in accordance with procedures to include stopping work and waiting for Instructor's instructions when called for in procedure
- Facilitate self-study and E-learning training, as needed.
- Ensure that appropriate actions are initiated for procedure deficiencies, drawing inaccuracies, etc., identified during the conduct of training.

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Note:

- Personalization of training presentations is permitted provided it does NOT change the learning objectives or lesson plan intent/scope. Personalization includes using examples, anecdotes, personal OPEX, additional training aids or pre-programmed adaption of eLearning materials based on trainee-specific data.
- If training is a CBT, T-FORM-10092 is not used since an electronic feedback form is used with CBTs.

5.6 Trainee Performance Evaluation

Trainee performance should be evaluated using the appropriate approved examination method identified in Design Phase (reference Section 3.3).

5.6.1 Examination Implementation

Prior to examination implementation of written or oral examination, Instructor should perform the following:

- (a) Prepare T-FORM-10066, Written Examination Control Cover Sheet or T-FORM-10067, Oral Examination Control Cover Sheet, with examination-specific information.
- (b) Prepare examination area to ensure the following:
 - Area is quiet and conducive for examination implementation, to extent practical
 - Area is free of unauthorized materials
 - Appropriate number of copies of examination are available
 - Writing paper and pencils or pens are available
 - Required reference materials are available.
- (c) Provide verbal instructions to Trainees as required.
- (d) Ensure no unapproved electronic devices (smart devices including any electronic cameras capable of capturing images or recording) are used by the Trainee during examination implementation.

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- (e) Prior to starting examination, request Trainees sign the T-FORM-10066 or T-FORM-10067 as appropriate.

Note: These forms provide examination-specific information and reinforce examination behavioural expectations with Trainee.

5.6.2 Post Examination Requirements

Upon examination completion, Instructor should perform the following:

- Collect examinations and answer sheets.
- Conduct a general examination review with Trainees.
- Document any issues identified during examination implementation.
- Instructor should place completed examinations in a *secure* location for grading.

Note: Where online examinations are used, Trainee should review incorrect answers prior to ending session.

5.6.3 Examination Security Breach

If examination security breach occurs or is suspected, Instructor should perform the following actions:

- Notify responsible Training Manager immediately.
- If examination has not started, do **not** use examination.
- If examination compromise is verified and examination is in progress, stop examination.
- If examination compromise is verified and examination grading is in progress, stop grading.

Training Manager should perform the following actions:

- Inform applicable Line Manager(s)
- Conduct thorough investigation of incident and determine if breach invalidated examination contents and/or results.
- If breach invalidated examination contents and/or results, maintain evidence of compromise.

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- Complete notifications as appropriate (Line Management, Vice President, Training or delegate, Security, and CNSC personnel, based on nature and gravity of compromise).
- Reschedule new examination.

5.7 Closing Out Training-Post-Training Activities

Upon completion of delivery, Instructor should perform the following:

- Grade examinations using approved marking guide
- Enter examination results and attendance data into TIMS II in accordance with N-PROC-TR-0041, TIMS II Administration.
- Forward any completed in-training feedback forms (T-FORM-10092) to Training Manager.
- Forward any hard-copies of graded examinations and attendance sheet (if T-FORM-10090 was used) to Training Manager
- Notify Trainee of examination score as soon as practical after marking. Notification may be accomplished by automatic notices, or through Instructor contact
- Inform Trainees and Supervisors of Trainees who did **not** successfully complete course. Training Manager and Line Manager should concur on appropriate remedial actions for Trainees who fail course examinations per Section 5.8.

Note: Grading, documentation, analysis, credit input, and report generation is currently integrated into *e-learning* framework. Requirements presented in this section are not applicable to *e-learning*.

Training Manager should review and approve graded examinations and attendance in TIMS II in accordance with N-PROC-TR-0041 TIMS II Administration. The following (if used) shall be sent to an AIMS in accordance with N-PROC-TR-0012 for filing along with examination results:

- T-FORM-10066 Examination Control Cover Sheet
- T-FORM-10067 Oral Examination Control Cover Sheet
- T-FORM-10090 Course Attendance Sheet

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- Course Attendance Sheet generated by TIMS

5.8 Failure to Meet Pass Criteria

Once it is determined that Trainee has failed to meet evaluation pass criteria, the following requirements apply.

Instructor should immediately notify the following people:

- Trainee
- Training Manager
- Line Manager.

Instructor shall ensure training results are entered as **CONDITIONAL** or **FAIL** in TIMS II in accordance with N-PROC-TR-0041, TIMS II Administration. If results cannot be immediately entered, Evaluator or Training Manager shall notify TIMS Administration to ensure Trainee does not have **QUALIFIED** status in TIMS II if applicable. (Qualification associated with the failed course only)

Line Manager shall ensure Trainee is not assigned to work independently on tasks associated with a **CONDITIONAL** or **FAIL** evaluation.

Note: Trainee should not be granted **QUALIFIED** status or progress to next training level until training deficiencies have been corrected and Trainee has satisfactorily completed re-evaluation.

5.8.1 Remedial Training Plan Development

A Remedial Training Plan is documented on T-FORM-10065 and may be used in cases where an alternative approach to the training and/or evaluation needs to be considered for a student. The form is used to record the approach that is taken and the completed and approved Remedial Training Plan T-FORM-10065 and any associated documentation shall be submitted to the employee's Individual Training Record.

Evaluation deficiencies and specific topics for Trainee remediation should be identified in the plan and addressed prior to re-evaluation.

- (a) Instructor should discuss the evaluation deficiencies with the Trainee.
- (b) Instructor should complete the evaluation deficiency description on T-FORM-10065. Description may include identification of the following:
 - Incorrect or incomplete questions
 - Deficient skills, knowledge or attitudes

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- Trainee did not meet or was deficient in demonstrating mastery of learning objectives
 - Potential cause(s) of failure
 - Any relevant historical academic information
 - Number of previous failures.
- (c) Instructor should develop Remedial Training Plan to correct evaluation deficiencies and document plan on T-FORM-10065. Remedial Training Plan may consider the following:
- Review course material by self-study.
 - Review course material with Instructor, Supervisor or co-worker.
 - Review correct answers or actions.
 - Retake complete course.
 - Practice tasks with Instructor, Supervisor or co-worker.
- (d) Instructor should route T-FORM-10065 to Training Manager for review. (For RP Training, T-FORM-10065 should be routed to Responsible Health Physicist and then to Training Manager)
- (e) Training Manager should discuss Remedial Training Plan with Line Manager.
- Note:** Discussion is essential to ensure remedial training and re-evaluation is the appropriate course of action.
- (f) Training Manager should approve Remedial Training Plan when satisfied that the plan is appropriate.

Further information on the use of Remedial Training Plans for Radiation Protection Training may be found in N-INS-08920-10026, RP Remedial Training.

5.8.2 Re-Evaluation

Re-evaluation may involve Trainee taking an OJE, PEV, or examination.

If examination failure is significant and suggests lack of comprehensive knowledge or skill required to perform a job independently, a new examination to re-evaluate Trainee shall be implemented in accordance with this procedure or N-PROC-TR-0007 in the case of OJE or PEV.

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If a Remedial Training Plan is to correct isolated or narrow knowledge or skill deficiencies, other means of evaluation may be implemented which may include an oral or written assessment dealing solely with the failed objectives. T-FORM-10065 should reference the approved evaluation document, or the questions and Trainee response should be documented on T-FORM-10065 or should be attached to T-FORM-10065.

On successful completion of re-evaluation and credit is approved, Training Manager shall forward T-FORM-10065, and other supporting documentation in accordance with N-PROC-TR-0012.

6.0 EVALUATION PHASE

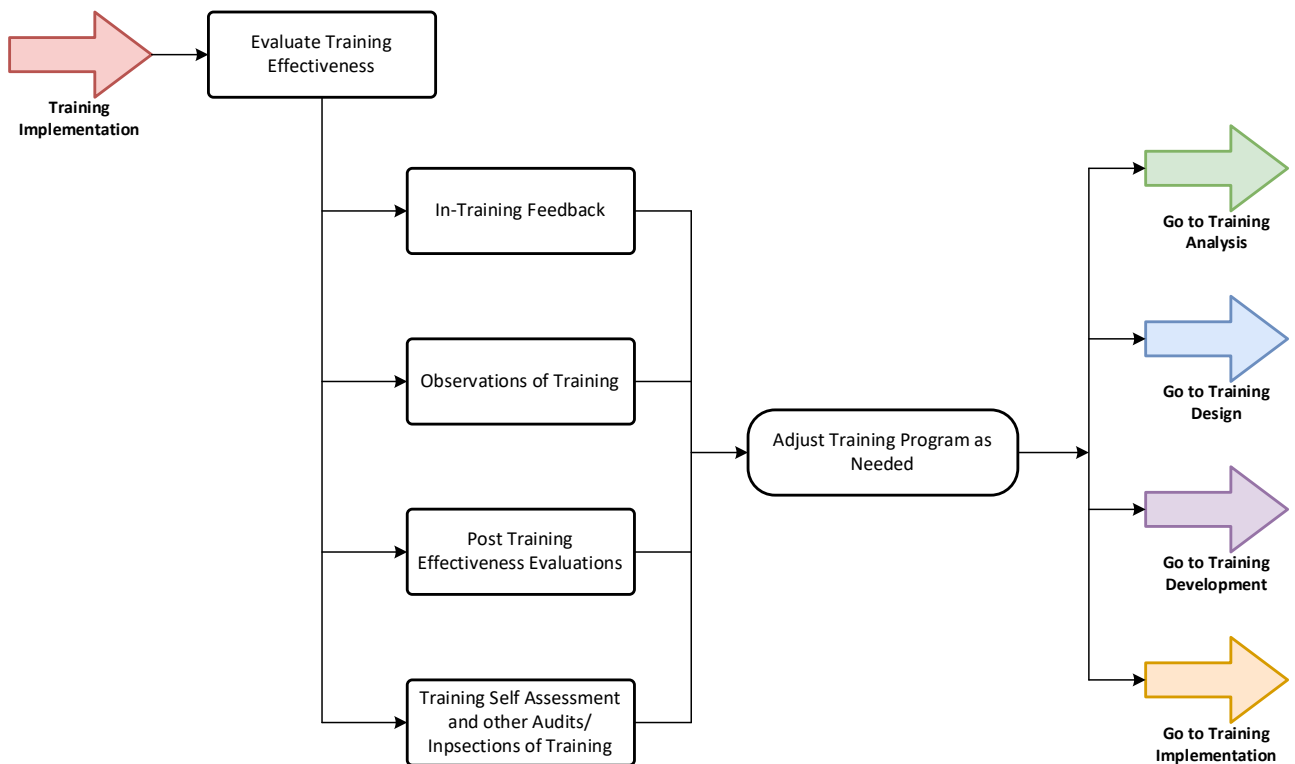


Figure 7-Summary of Evaluation Phase

Training Manager shall ensure training programs are evaluated regularly and review and assess data to identify and implement actions to enhance training or address opportunities for improvement.

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6.1 Evaluation Training Effectiveness

Instructor should review results of observations of training and student feedback. Address any improvement opportunities identified in the observation.

6.1.1 Administering In-Training Feedback

Instructor should collect completed copies of the T-FORM-10092 In-Training Feedback and any on-line feedback, review responses, and forward in accordance with routing instructions.

Note: CBT feedback is collected and managed online within the eLearning Management System. It is reviewed and used to update CBT content as required.

6.1.2 Administering Management Observations of Training

Training and Line Management should conduct observations of training.

Line Manager, including all applicable strata within organizational structure who have staff as Trainees attending training, should observe initial and continuing training delivered to staff in all training settings in accordance with N-INS-09030-10004, Observation and Coaching.

6.2 Post-Training Effectiveness Evaluations

Major Nuclear Training Programs should conduct at least one Post-Training Effectiveness Evaluation (PTEE) annually to identify and evaluate performance changes in the workplace as a result of training provided. PTEEs can be conducted on both initial and continuing training and can focus on a stand-alone course, or on a series of courses. Additional information can be found in N-GUID-08920-10024, Post-Training Effectiveness Evaluations.

Training Manager should identify the scope of the evaluation and which course or courses may be the subject of the PTEE. The following may be considered when planning PTEEs:

- Performance gap identified in Training Needs Analysis
- Training identified as a causal factor for an adverse condition and the training has since been revised to address the gap.
- Adverse trend identified and despite training delivery, the adverse condition still exists.

Training Manager may consider a variety of approaches to conduct the PTEE including:

- Observations of worker performance
- Interviews
- Surveys
- Document review

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- Focus groups

Training Manager should document PTEE in the Observation, Coaching and Self Assessment (OCRSA) database in the Benchmarking Tab.

6.3 Training Self-Assessments

Training Managers should ensure self-assessments of their training programs are conducted. Training self-assessments should be conducted in accordance with N-PROC-RA-0097, Self-Assessment and Benchmarking.

7.0 ROLES AND ACCOUNTABILITIES

7.1 Director, Training Programs

- Oversees the execution and compliance of this procedure
- Provides training conscience for all SAT-based activities

7.2 Training Manager

- Recommends TQDs/QGs for Line Management approval
- Ensures that the provisions of this procedure are fully implemented.
- Ensures that records are maintained in accordance with defined record retention requirements.
- Observes, evaluates, and provides feedback on training activities and instructors' performance.
- Ensures trainee attendance or participation issues are addressed with the appropriate training program owner.
- Ensures Line support for training activities is obtained as required.
- Ensures instructors assigned to conduct training activities meet qualification requirements.
- Ensures the exemption and equivalency processes are implemented appropriately.
- Provides program oversight with tactical and strategic planning.
- Manages training resources to support the needs of the station and workforce including instructional aids, equipment, and training material.
- Reviews Analysis and Objectives
- Approves Training Material for use in classroom and issuance in Asset Suite

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- Approves Training Exemptions and Equivalency applications

7.3 Training Program Owner

- Identifies perceived needs to appropriate training department.
- Assists Training Manager with SAT process by providing SMEs when required.
- Approves Training Analysis, Objectives, Training Qualification Descriptions and Qualification Guides.
- Provides feedback on in-plant job performance to the training department.
- Ensures training materials are current by notifying Training when changes to procedures, drawings, or technical references used to support training occur, and by providing updates as required to maintain credible training.
- Specifies work standards and management expectations and identifies performance that does not meet expectations.
- Requests just-in-time training as necessary to support plant activities.

7.4 Line Manager

- Conducts observations of training.
- Ensures trainees complete make-up training and are remediated following failure to meet performance standards.
- Resolves trainee attendance/participation issues.
- Reviews exemptions and equivalencies in accordance with the exemption and equivalency process.
- Participates in pilot deliveries and provides appropriate feedback.
- Implements OJT, OJE, and PEV in accordance with N-PROC-TR-0007.
- Participates in training effectiveness, quality, and efficiency evaluations and assessments.

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8.0 DEFINITIONS AND ACRONYMS

8.1 Definitions

Established Training Program – A training program listed on N-LIST-08920-10001, Nuclear Training Programs that documents the use of a Systematic Approach to Training and is routinely delivered.

Refer to N-LIST-08920-10000, Training Definitions for complete list of definitions used in this document.

8.2 Abbreviations and Acronyms

ACAD	Academy Document (National Academy for Nuclear training)
AIMS	Approved Information Management System
AR	Action Request
CBT	Computer-Based Training
CNSC	Canadian Nuclear Safety Commission
CRSS	Control Room Shift Supervisor
DIF	Difficulty, Importance, Frequency
INPO	Institute of Nuclear Power Operations
ITR	Individual Training Record
JITT	Just-In-Time Training
JTA	Job and Task Analysis
NEREUS	Nuclear Electronic Training Universal SAT
OJE	On-the-Job Evaluation
OJT	On-the-Job Training
OPEX	Operating Experience
PEL	Program Element
PEV	Practical Evaluation
PTEE	Post-Training Effectiveness Evaluation
QG	Qualification Guide
RRC	Records Retention Code
SAT	Systematic Approach to Training
SM	Shift Manager
SME	Subject Matter Expert
TIMS II	Training Information Management System II
TNA	Training Needs Analysis
TQD	Training and Qualification Description

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9.0 BASES, RECORDS AND REFERENCES

9.1 Bases

None

9.2 Records

The following records may be generated by use of this document and shall be registered in appropriate document management system in accordance with the following table. Training Records are retained in accordance with applicable Record Retention Code (RRC) as identified in OPG-PROC-0019, Records and Document Management and OPG-PROC-0179, Nuclear Quality Assurance Records as applicable.

Record Created	Associated Form or Template Number	QA Record? Y/N	Filing Information/Retention (AIMS Type/Sub-Type)
Application for Training Exemption	T-FORM-10059	Y	Filed in Employee Individual Training Record (ITR)
Authorization Training Objectives	T-TMP-10030	N	Indexed in ASSET SUITE as a Controlled Document
Course Attendance Sheet	T-FORM-10090	Y	Filed in Employee Individual Training Record (ITR)
Course Material	T-TMP-10005	N	Indexed in ASSET SUITE as a Controlled Document
Handouts	T-TMP-10011	N	Indexed in ASSET SUITE as a Controlled Document
In-Training Feedback	T-FORM-10092	N	Send to PLC Records for Scanning
Job and Task Analysis	T-TMP-10171	N	Indexed in ASSET SUITE as a Controlled Document
Lesson Plan	T-TMP-10006	N	Indexed in ASSET SUITE as a Controlled Document
Mentor Guide	Various using T-TMP-10011	N	Indexed in Asset Suite as a Controlled Document Document Number: N-HO- (TIMS II Module number)
Objectives	T-TMP-10016	N	Indexed in ASSET SUITE as a Controlled Document

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On-The-Job Evaluation	T-TMP-10019	N	Indexed in Asset Suite as a Controlled Document Document Number: N-JPM-PEL-YYYYY-OJE
On-The Job Training	T-TMP-10003	N	Indexed in Asset Suite as a Controlled Document Document Number: N-JPM-PEL-YYYYY-OJT
Oral Examination Control Cover Sheet	T-FORM-10067	Y	Indexed in Approved Information Management System through Smart Form; as part of the STE package N-STE-yyyyyy (yyyyy = STE number), Or as part of the ITR N-ITR-xxxxxx (xxxxxx = Employee number) RRC# TRN-0002
Overheads	T-TMP-10012	N	Indexed in ASSET SUITE as a Controlled Document
Practical Evaluation	T-TMP-10020	N	Indexed in Asset Suite as a Controlled Document Document Number: N-PEV-PEL-YYYYY
Question and Answer Bank	T-TMP-10008	N	Indexed in ASSET SUITE as a Controlled Document
Remedial Training Plan	T-FORM-10065	Y	Filed in ITR file
Self Study Guide	T-TMP-10021	N	Indexed in ASSET SUITE as a Controlled Document
Simulator Exercise Guide	T-TMP-10025	N	Indexed in ASSET SUITE as a Controlled Document
Skills Assignment	T-TMP-10009	N	Indexed in ASSET SUITE as a Controlled Document
Task to Training Matrix	T-TMP-10274	N	Indexed in ASSET SUITE as a Controlled Document
Test Checkout	T-TMP-10010	N	Indexed in ASSET SUITE as a Controlled Document
Training Equivalency	T-FORM-10072	Y	Filed in ITR file

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Training Needs Analysis	T-TMP-10281	N	Indexed in ASSET SUITE as a Controlled Document
Vendor Training Approval	T-FORM-10087	N	Indexed in Asset Suite as a Record N-REF-08920.005-
Video	T-TMP-10015	N	Indexed in ASSET SUITE as a Controlled Document
Written Examination Control Cover Sheet	T-FORM-10066	Y	Indexed in Approved Information Management System through Smart Form; as part of the STE package N-STE-yyyyyy (yyyyy = STE number), Or as part of the ITR N-ITR-xxxxxx (xxxxxx = Employee number)

9.3 References

9.3.1 Performance References

N-INS-08920-10001, Requalification Testing of Certified Shift Personnel

N-INS-08920-10002, Simulator-Based Initial Certification Examinations for Shift Personnel

N-INS-08920-10003, Independence and Security for Initial Certification Examinations and Requalification Testing of Certified Shift Personnel

N-INS-08920-10004, Written and Oral Initial Certification Examinations for Shift Personnel

N-INS-08920-10005, Standards & Methodology for Formal Evaluations

N-INS-08920-10022, Formal Evaluation of Responsible Health Physicists

N-INS-09030-10004, Observation and Coaching

N-INS-61400-10044, Nuclear Security Specialized Training, Weapons and Equipment

N-JTA-100-00071-TA, Continuing Training and Requalification Testing Objectives Template

N-JTA-100-00072-TA, Station Specific Program Objective Template

N-LIST-08920-10000, Training Definitions

N-LIST-08920-10001, Nuclear Training Programs

N-PROC-RA-0097, Self-Assessment and Benchmarking

N-PROC-TR-0007, On-the-Job Training, On-the-Job Evaluation, and Practical Evaluation

N-PROC-TR-0012, Records and Documentation

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- N-PROC-TR-0041, TIMS II Administration
- N-STD-TR-0001, Conduct of Training
- N-TQD-102-00001, Nuclear Shift Manager/Control Room Shift Supervisor Initial Training and Qualification Description
- N-TQD-103-00001, Nuclear Certified Shift Personnel Continuing Training and Qualification Description
- N-TQD-602-00001, Nuclear Trainer Training and Qualification Description
- OPG-PROC-0019, Records and Document Management
- OPG-PROC-0178, Controlled Document Management
- OPG-PROC-0179, Nuclear Quality Assurance Records
- T-FORM-10059, Application for Training Exemption
- T-FORM-10065, Remedial Training Plan
- T-FORM-10066, Written Examination Control Cover Sheet
- T-FORM-10067, Oral Examination Control Cover Sheet
- T-FORM-10072, Training Equivalency
- T-FORM-10087, Vendor Training Approval
- T-FORM-10090, Course Attendance Sheet
- T-FORM-10092, In-Training Feedback
- T-TMP-10003, On-the-Job Training Guide (OJT)
- T-TMP-10005, Course Material (CMT)
- T-TMP-10006, Lesson Plan (LP)
- T-TMP-10008, Question and Answer Bank (Q&A)
- T-TMP-10009, Skills Assignment (SA)
- T-TMP-10010, Test Checkout (TC)
- T-TMP-10011, Handouts (HO/TDP)
- T-TMP-10012, Overhead (OVH)

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- T-TMP-10015, Video (V)
- T-TMP-10016, Objectives (OBJ)
- T-TMP-10019, On-the-Job Evaluation (OJE)
- T-TMP-10020, Practical Evaluation (PEV)
- T-TMP-10021, Self-Study Guide (SSG)
- T-TMP-10025, Simulator Exercise Guide (SEG/DEG)
- T-TMP-10030, Authorization Training Objectives (OBJ AT)
- T-TMP-10171, Job and Task Analysis (JTA)
- T-TMP-10274, Task to Training Matrix (TTM)
- T-TMP-10281, Training Needs Analysis (TNA)

9.3.2 Developmental References

- CNSC REGDOC-2.2.2, Personnel Training
- DOE-HDBK-1074-95, DOE Handbook: Alternative Systematic Approaches to Training
- DOE-HDBK-1078-94, DOE Training Program Handbook: A Systematic Approach to Training
- DOE HDBK-1080-97, Guide to Good Practices for Oral Examinations
- INPO 94-005, The Principles and Objectives for the Standard Operation and Support of Nuclear Plants
- INPO ACAD 02-001, The Objectives and Criteria for Accreditation of Training in the Nuclear Power Industry
- INPO ACAD 84-032, Training System Development Model Overview
- INPO ACAD 85-006 (Supplement), A Supplement to Principles of Training System Development
- INPO ACAD 85-006, Principles of Training System Development
- INPO ACAD 88-002 (Addendum I), The Principles of Training System Development Manual, Addendum I: Test Item Development
- INPO ACAD 88-002 (Addendum II), The Principles of Training System Development Manual, Addendum II: Examinations: Design, Development, and Implementation

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INPO ACAD 88-002 (Addendum III), The Principles of Training System Development Manual, Addendum III: Evaluation Instrument Examples

INPO ACAD 88-002 (Addendum IV), The Principles of Training System Development Manual, Addendum IV: Learning Objectives

INPO ACAD 92-004, Guidelines for the Conduct of Training and Qualification Activities

INPO ACAD 98-004, Guidelines for Training and Qualification of Engineering Personnel

INPO Event Report Level 4 16-2, Training Effectiveness Hindered by Deficient Analysis

INPO NISP-TR-01, Systematic Approach to Training Process

N-FORM-10173, Trainer Evaluation

N-GUID-08920-10024, Process for Conducting Post-Training Effectiveness Evaluations

N-GUID-08920-10312, Guidelines for the Systematic Approach to Training

N-INS-08920-10020, Just-in-Time Training

N-INS-08920-10026, Radiation Protection Remedial Training

N-PROC-RA-0047, Communications with the Canadian Nuclear Safety Commission

N-PROG-TR-0005, Training

OPG-PROC-0179, Nuclear Quality Assurance Records

Nuclear Information Records Management Association TG17-1993, Guidelines for Management of Nuclear-Related Training Records

P-CORR-00531-03197, CNSC letter, T. Schaubel to M. Elliott and P. Tremblay, "Evaluation of The Nuclear Operator (NO) Training Programs at Pickering A and Pickering B", November 20, 2007

10.0 REVISION SUMMARY

This is an **intent** revision. Revision bars were used.

- Clarified Training Analysis Flowchart and Job and Task Analysis on established training programs.
- Clarified use of e-Learning in various sections
- DCR# 0000155996 – Incorporated to update title of N-INS-08920-10020 to Just-in-Time Training

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- DCR# 0000156438 – Incorporated to correct procedure number OPG-PROC-0178 in Section 4.3.
- DCR# 0000157261 – Incorporated throughout document to ensure consistent use of term Training Program Owner rather than Line Program Owner.
- DCR#0000157262 – Incorporated to reference N-GUID-08920-10312
- DCR# 0000157263 – Incorporated to revise TABLE 4 to reflect reviewers not applicable for Attendance Sheets
- DCR# 0000157498 – Incorporated to clarify use of Remedial Training Plans.
- DCR# 0000157709 – Incorporated to correct typo in Figure 1 – Implementation Phase of SAT T-FORM-10072
- DCR# 0000158029 – Incorporated to revise TABLE 2 and 3 to remove instructor review for training documents.
- DCR# 0000158368 – Incorporated to reflect use of TABLE A-3 and A-4 for Operations Use.
- DCR# 0000158513- Incorporated to clarify Remedial Training Plans and included specific Radiation Protection Training requirements.
- DCR# 0000158810 – Incorporated (Similar to DCR# 000158368 above)
- DCR# 0000159048 – Incorporated to reflect the fact that CBTs do not require a Lesson Plan.
- DCR# 0000159263 – Incorporated to clarify Remedial Training Plans (Similar to DCR# 000158513 above).
- DCR# 0000159502 – Incorporated to reflect change of position title Vice President Nuclear Regulatory Affairs and Stakeholder Relations to Director Nuclear Regulatory Affairs
- DCR#0000159766 – Incorporated to clarify examination security requirements.
- DCR#160798 – Correct error on SAT Overview Chart - T-TMP-10092 should read T-Form-10092

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**Appendix A:
DIF RATING DEFINITIONS AND TRAINING SELECTION GUIDELINES**

Table A-1 - Job Analysis DIF Survey Rating Definitions for Personnel Other Than Operations Staff	
<ul style="list-style-type: none"> Use this table in conjunction with Table A-2 	
Difficulty	
1	This task is very easy to perform. Mental activity required is low and degree of task complexity is low.
2	This task is somewhat easy to perform. Mental activity required is low and degree of task complexity is medium.
3	This task is moderately difficult to perform. Mental activity required is medium and degree of task complexity is medium.
4	This task is very difficult to perform. Mental activity required is medium to high and degree of task complexity is high.
5	This task is extremely difficult to perform. Mental activity required is high and degree of task complexity is very high.
Importance	
1	Negligible: Improper task performance may result in inconvenience, but does not result in health risk (radiological, physical, or chemical exposure) or make any difference in plant operations (no equipment damage or lost production) or any environmental consequences.
2	Undesirable: Improper task performance may result in radiation doses or exposure to industrial health and safety hazards such as chemicals at levels higher than normal but within plant procedure requirements and regulatory levels. It may also result in some undesirable consequences to plant operations such as loss of support or auxiliary equipment availability, but not to production or safety equipment.
3	Serious: Improper performance may result in exceeding plant or equipment operational limits that require corrective actions to return the plant or equipment to normal operations or cause an on-site environmental impact.
4	Severe: Improper performance of this task may exceed regulatory limits, result in on-site personnel injury or equipment damage, result in an automatic or manual plant shutdown or requiring extensive corrective action.
5	Extremely High: Improper performance of this task may jeopardize public health and safety, produce an off-site environmental impact, or compromise reactor safety.
Frequency	
1	Never: (emergency operations only).
2	Rarely: This task is performed once or twice a year or less.
3	Seldom: This task is performed three or four times a year (once every 3 to 4 months).
4	Occasionally: This task is performed about once a month (once every 3 to 5 weeks).
5	Often: This task is performed about once a week (once every 4 to 10 days).
6	Very Often: This task is performed daily or more often.

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Appendix A (Continued)

Table A-2 Training Selection Guidelines for Personnel Other Than Operations Staff			
*Use this table in conjunction with table A-1			
If average Difficulty Rating is:	If Average Importance Rating is:	If Average Frequency Rating is:	Decision to Train or Not to Train is:
3.5 ≤ D ≤ 5.0 (Very Difficult)	I ≥ 2.5 (More Important)	F ≥ 3.0 (Often)	Initial
		F < 3.0 (Infrequent)	Initial and Continuing
	I < 2.5 (Less Important)	F ≥ 5.0 (Often)	No Train
		F < 5.0	Initial
2.5 ≤ D < 3.5 (Moderately Difficult)	I ≥ 2.5 (More Important)	F ≥ 3.0 (Often)	Initial
		F < 3.0	Initial and Continuing
	I < 2.5 (Less Important)	F > 2.0	No Train
		F ≤ 2.0 (Infrequent)	Initial
D < 2.5 (Not Difficult)	I ≥ 2.5 (More Important)	F > 2.0	No Train
		F ≤ 2.0 (Infrequent)	Initial
	I < 2.5 (Less Important)	F ≥ 5.0 (Often)	No Train
		2.0 < F < 5.0	No Train
		F ≤ 2.0 (Infrequent)	No Train

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Appendix A (Continued)

Table A-3 Job Analysis DIF Survey Rating Definitions for Operations Staff	
<ul style="list-style-type: none"> Use this table in conjunction with Table A-4 	
Difficulty	
1 (Low)	Individual can learn proper task performance with little or no help
2 (Medium)	Individual can learn proper task performance, but significant amount of time is required. It is better to provide training on task.
3 (High)	Individual cannot learn proper task performance without training.
Importance	
1 (Low)	Not important to plant power production or personnel or equipment safety. Limited or not personnel risk due to radiological conditions. Improper task performance has insignificant administrative consequences. No OP&P action required.
2 (Medium)	Important to plant power generation but not important to personnel or equipment safety, although minor personnel injury or minor damage to equipment may occur. Potential exists for risk of procedural non-compliance or exceeding administrative exposure limits. OP&P action required, not immediate.
3 (High)	Important to safety of personnel, equipment, and/or public. Serious personnel injury or equipment damage to very expensive or safety-related equipment may result. Important to safety of personnel due to exposure rates or contamination levels. Exposures greater than regulatory limits may occur. Consequences of improper task performance may include regulatory compliance problems or high cost of corrective actions. OP&P required action, immediate action required. Basis or reason for each element/step of associated task would be expected knowledge of job incumbent.
Frequency	
1 (Low)	Performed less than once every 90 days (semi-annual).
2 (Medium)	Performed less than once per shift cycle (35 days) but greater than once per 90 days (quarterly).
3 (High)	Performed at least once per shift cycle (35 days).

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Appendix A (Continued)

Table A-4 Training Selection Guidelines for Operations Staff			
*Use this table in conjunction with table A-3			
Importance	Difficulty		
	1	2	3
1	No Training Required	Procedure Adequate or Train	Train
2	Procedure Adequate or Train	Train	Train
3	Train	Train	Train
Train - Selected for Training (such as Initial, Continuing, Limited Personnel, or Just-in-Time). No Training Required - No formal training needed. Procedure Adequate or Train - Formal training is optional.			
Note: Continuing Training requirements for Certified Shift Personnel are specified in N-TQD-103-00001, Nuclear Certified Shift Personnel Continuing Training and Qualification Description.			

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Appendix B: Credit Exemptions Specific to Authorization Training

- (a) Canadian Nuclear Safety Commission (CNSC) Concurrence on Exemptions: Training Manager or Vice President, Training or delegate shall obtain CNSC (Performance Qualification Assessment Division) written concurrence for training exemptions as appropriate from portions of Initial and Continuing Authorization Training. Requests shall be supported with written rationale and with specific modified program outline.
- (b) Examination Failure: Bypass Examination retakes shall not be permitted for initial authorization training programs.
- (c) Full Reciprocity: The only qualification within authorization training program that may be fully accepted between stations is Science Fundamentals and Equipment Principles portion of program and corresponding CNSC examination credit. Some review and re-examination in this area may be required.
- (d) Partial Credit for Station Specific Training: Individuals who are re-authorizing at different station may receive partial credit for some station specific training and generic task skills. Subject to approval of Training Manager or Vice President, Training or delegate and acceptance of CNSC, this portion of these individuals' reauthorization training program may be shortened.
- (e) Records Retention: Bypass Examination, Marking Guides, and copies of candidates' papers used to provide exemption from portions of authorization training shall be kept with individual's candidate authorization training file for at least 5 years after authorization, in anticipation of CNSC request to review them.