

LIMITED ENERGY ELECTRICIAN JATC MA# 1099 POLICY HANDBOOK

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WELCOME

Welcome to the Area 1 Limited Energy apprenticeship program! Apprenticeship is recognized across the United States as a pathway to a lifelong career, a competitive salary, an education, and advancement within an industry.

The Area 1 Limited Energy apprenticeship program is a registered apprenticeship program combining on-the-job training and classroom instruction to prepare apprentices to become Class A or Class B Limited Energy Technicians. Through a combination of classroom instruction at Clackamas Community College and work experience with approved employers, apprentices qualify to sit for the state license examination. A committee of journey workers and contractors – the Joint Apprenticeship Training Committee (JATC) – administers this program under the approval of the Bureau of Labor and Industries Apprenticeship & Training Division.

This policy handbook outlines the responsibilities of committee representatives, apprentices, and training agents in the Limited Energy program to ensure its successful execution and the advancement of all participants. If you desire further information on the program or apprenticeship, please visit our website at www.iecoregon.org or contact the apprenticeship department:

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APPRENTICE RESPONSIBILITIES

1. REGISTRATION

When individuals become registered apprentices, they are registered to the JATC and not to individual training agents. The effective date of registration is the day that the committee issues an initial license. Once the Apprenticeship and Training Division (ATD) receives the agreement, they mail an Apprentice Identification Card and a Direct Supervision License to the registered apprentice.

- **New Apprentice Orientation** – prior to beginning work, new apprentices must complete an orientation with the program director

2. REQUIRED IDENTIFICATION

Apprentices must possess both a current Direct Supervision License and Apprentice Identification Card issued by the Bureau of Labor and Industries (BOLI) Apprenticeship and Training Division (ATD) at all times and make the license visible to others when on the job site (*See OAR 839-282-0120(1), OAR 839-282-0270(1)(b)*). The ATD will automatically reissue these cards when they expire as long as the apprentice remains active and in good standing with the committee and has a current address on file. Please contact the ATD if the license is lost or it expires prior to receiving a new license. The ATD will not issue these cards and licenses to apprentices on suspension.

3. CPR/FIRST AID CERTIFICATION

Apprentices must obtain a current adult CPR/First Aid card within 90 days of their registration to the program and maintain a current card throughout the duration. Failure to have a current card will result in a citation to appear and a hold on re-rates. Online classes are not allowed.

4. COMMUNICATION

Apprentices must notify the program director to any changes to contact information (address, email, telephone number) or employment status within 5 days. Apprentices shall be held responsible if the JATC cannot make contact with them due to outdated contact information.

5. EMPLOYMENT

a. Approved Employment

Apprentices must work for employers registered with the committee. If an apprentice accepts work by an unapproved employer, the apprentice must notify the committee within 5 business days and the employer must apply for approved training agent status within 25 days or before the next committee meeting (whichever is shorter) and obtain approval by the committee. The apprentice may not perform any electrical work until the committee approves the employer.

b. Continuity

Apprentices must make every effort to maintain employment in the trade throughout their duration in the program. Apprentices may not “moonlight” or “work on the side” in this trade or a trade-related industry (*OAR 918-282-345 & OAR 918-282-360*). When an apprentice accepts employment with a new, committee-approved employer, they must alert the program director with the employer’s name and their date of hire within 5 days.

c. Out of Work Apprentices

Apprentices who become unemployed must notify the committee within 5 days. The committee will place all unemployed apprentices in good standing on the out of work list. These apprentices will receive a training agent list and will be given the opportunity for re-employment as soon as possible prior to the registration of new apprentices. Out of work apprentices must:

- Continue to submit monthly progress reports (MPRs) with no hours recorded
- Alert the committee to request a leave of absence if they are unavailable for reemployment
- Submit a written explanation to the program director if they refuse a job offer. If an out of work apprentice refuses a second offer the committee will cite them to appear and they will no longer be in good standing
- Appear before the committee if unemployed for over 60 days
- Appear before the committee if they receive two or more unfavorable releases from employers within a year

d. Changing Employers

Active apprentices wishing to seek employment with other registered training agents while currently employed may request a training agent list from the program director at any time. However, currently employed apprentices may not be placed on the out of work list.

6. MONTHLY PROGRESS REPORTS (MPRs)

Once registered in the program, apprentices must maintain a record of on-the-job training (OJT) received while working under the supervision of an appropriately licensed journey worker. Hours received while not under supervision may not be recorded. When recording hours, apprentices must report them in the appropriate work process category (see below). Apprentices must submit Monthly Progress Reports (MPRs) each month online by the 10th of the month or the committee will consider them late. Late MPRs may result in a hold on re-rates and/or disciplinary actions. Employers will receive an emailed notification when one of their apprentices submits an MPR, and may log in to view hours at any time. Apprentices who are referred to test and out of work must continue to submit MPRs.

Category	Class A Technician Work Process Categories Description	Min. Hours
A	General Installation – install, wire, troubleshooting & maintenance, pull, splices, conduit, flex, tray, duct control, wiring device, finish stock room & materials, overhead, and underground	3000
Categories B & C Combined Total = 3000 hours		
B	Data Communication, Specialized Controls, and Audio Visual – data telecommunications, intercom, paging, HVAC, medical, boiler, clock, and instrumentation	No minimum
C	Fire & Life Safety – fire, alarms, protective signaling, nurse call	750

Category	Class B Technician Work Process Categories Description	Min. Hours
A	General Installation – install, wire, troubleshooting & maintenance, pull, splices, conduit, flex, tray, duct control, wiring device, finish stock room & materials, overhead, and underground	2000
B	Data Communication, Specialized Controls, and Audio Visual – data telecommunications, intercom, paging, HVAC, medical, boiler, clock, and instrumentation	2000

a. Improperly Recording Hours

Falsifying hours on an MPR will result in the following:

- **First Violation:** The committee will place the apprentice on a six-month disciplinary agreement, hold them at their current period, and deduct all incorrect hours.
- **Second Violation:** Could result in termination from the apprenticeship program

7. RELATED TRAINING

a. Classes

Apprentices conduct their required related training classroom instruction at Clackamas Community College (CCC) in Wilsonville, and must comply with CCC student policies. Failure to do so could result in disciplinary action. The committee is responsible for establishing and/or approving the content and curriculum of related training classes. Apprentices must attend school in fall, winter, and spring, which equals 144 hours per year of classroom instruction. There is no summer term. Classes are one night a week for 12 weeks per term on Mondays – Thursdays from 6pm – 10pm. New apprentices begin their related training the term following their acceptance into the program.

b. School Registration

The program director will send apprentices emailed letters about 1 month prior to the start of term providing information on dates, nights of classes, location, and cost of books. Apprentices do not need to preregister with CCC, but must register on the night of their first class with the program director.

c. Grades

Apprentices must earn a grade of “C” or better to complete a class. Apprentices receiving a lower grade will receive a citation to appear before the committee and will need to arrange to re-take the class the next term. No attendance hours will be awarded for the failed course. Advancement in the program will be on hold until the class is complete.

d. Attendance

Apprentices may miss 2 classes per term, but must make up all missed seat time hours. Activities that can make up class time include applicable industry vendor training, attending trade shows and other events, and other methods approved by the instructor. If the apprentice makes up hours after the end of the term, they must send over documentation to the program director as soon as possible. Apprentices must make up all missed class hours prior to referral to take the state exam even if the absences were excused. Apprentices with three or more absences in one class will automatically fail the course, need to appear before the committee, and repeat the course.

e. Educational Costs

Apprentices are responsible for paying for their tuition and books. The committee cannot require that training agents pay for their apprentice’s educational costs, although they may choose to do so. Apprentices must obtain all required books and pay their tuition in full to Clackamas Community College by the first night of class or make prior arrangements with the program director.

- **Tuition** – Tuition is due in full by the first night of class, and must be paid to Clackamas Community College by cash, credit card, or check. If it is not paid in full by the 3rd week of

classes, late fees will be applied and the apprentice will be cited to appear. Failure to pay tuition by the deadline will result in removal from the class. If you need an extension of the deadline to pay tuition, please send the committee an email explaining why they should not remove you from the class.

- **Book** – Apprentices must obtain all of their required books by the first night of class. Books may be purchased through Powell’s Technical Book Store.

f. Extra Related Training Classes

Generally, apprentices may only take extra related training classes during a term if they have received previous work experience and need to catch up in related training hours. The committee does not advise apprentices to “double up” on classes because program standards require that apprentices complete 144 classroom hours per year. If an apprentice completes the 2- or 3-year curriculum in less time, that apprentice may need to repeat classes later on to satisfy this State requirement.

g. Apprentice Hardship

Apprentices unable to pay for tuition and books may request a term off due to hardship by contacting the program director and appearing before the committee. Approval of a term off is at the discretion of the committee, who will consider the following reasons:

- **Financial Hardship** - Apprentices currently out of work who are unable to pay due to financial reasons. Apprentices may only request this once during their time in the program.
- **Personal/Medical Hardship** – Apprentices unable to pay due to personal/medical reasons.
- **Military Service** – Veterans may request a term off due to military service by providing governmental or other official documentation

PROGRAM ADVANCEMENT

1. WAGE PROGRESSION SCALE

Training agents must pay their apprentices at minimum the percentage of the average journey worker wage that corresponds to the apprentice’s current period. They must also pay their apprentices in accordance with BOLI rules and regulations. The committee determines the annual wage by surveying all registered training agents in the program and taking the average of all the reported hourly journey worker wages. The committee will notify apprentices and training agents of any changes to the scale via email.

(See wage scales on the next page)

Limited Energy Class A Technician

Period	Percentage	Minimum OJT	CPR Card	Minimum Related Training
1st year apprentice				
1 st	50 %	0	n/a	0
2 nd	58 %	500	Current	48 hours (Complete 1 Class)
3 rd	63 %	1500	Current	96 hours (Complete 2 Classes)
2nd year apprentice				
4 th	68 %	3000	Current	192 hours (Complete 4 Classes)
5 th	73 %	3500	Current	240 hours (Complete 5 Classes)
3rd year apprentice				
6 th	79 %	5000	Current	336 hours (Complete 7 Classes)
Referred To Test		6000	Current	432 hours (Complete 9 Classes)

Limited Energy Class B Technician

Period	Percentage	Minimum OJT	CPR Card	Minimum Related Training
1st year apprentice				
1 st	50 %	0	n/a	0
2 nd	60 %	500	Current	48 hours (Complete 1 Class)
3 rd	65 %	1500	Current	96 hours (Complete 2 Classes)
2nd year apprentice				
4 th	75 %	3000	Current	192 hours (Complete 4 Classes)
Referred To Test		4000	Current	288 hours (Complete 6 Classes)

2. SEMI-ANNUAL APPRENTICE REVIEWS

The committee reviews the progress of each apprentice every January and July to determine whether they qualify for a re-rate (advancement to the next period of the program). The committee may review apprentices who seem to be having difficulty in the program more frequently and may require those apprentices to appear at a committee meeting.

a. Evaluations

At each review, training agents will receive an emailed evaluation for each of their apprentices. The committee will carefully consider this training agent feedback when reviewing apprentice files, but may not necessarily hold an apprentice's progress in the program based only on the evaluation.

3. RE-RATE

Apprentices qualify for a re-rate to the next level of the apprenticeship program based on the following criteria (the committee will review other relevant information as necessary):

- Completion of the minimum OJT and related training requirements according to the wage scale
- No more than one late MPR during the previous 6 month period (February – July & August – January)
- Employer feedback regarding attendance, punctuality, quality of work, and safety practices
- Current Adult CPR/First Aid card (no online classes allowed)

When the committee grants a re-rate, the program director will send an email and mailed letter to both the apprentice and training agent confirming the new wage and effective date.

4. RE-RATE HELD

a. Short OJT & Related Training Hours

If an apprentice's OJT or related training hours are insufficient for advancement, the committee will hold the apprentice at their current period but the apprentice will remain in good standing with the committee. Once the apprentice meets all the requirements, they may submit a request to the program director for the committee to re-evaluate their file for advancement at the next meeting.

b. Re-Rate Held for Cause

The committee will place apprentices on hold until the next semi-annual review if they fail to keep their file updated (current CPR card, etc.) or fail to progress in the program (fail classes, missing MPRs, more than one late MPR in 6 months, etc.). These apprentices may be cited to appear.

5. PROGRAM COMPLETION

a. License Exam Referral

Apprentices must have committee approval to take the license exam. They do not need to appear at the committee meeting for approval. The committee will refer an apprentice to take the exam once they meet the following requirements:

- Completion of the minimum OJT hours in each of the work process categories;
- Completion of all related training hours in the required classes with a grade of "C" or better;
- All MPRs are submitted and complete; and
- Current CPR card is on file (online classes are not allowed)

Upon verification of all requirements, the committee will approve the apprentice for referral and note the action in its meeting minutes. The ATD will then generate and submit an exam referral letter to the Oregon Building Codes Division (BCD). Upon receipt of this letter, BCD will mail an application packet to the apprentice, who will select a test location/date and return the application to BCD.

- **Class A Apprentices Only** – Class A apprentices who have completed 2000 hours in category A (General Installation) and 2000 hours in category B (Data Communication, Specialized Controls, and Audio Visual) may submit a request to the committee to be referred to the Class B license exam.

b. Requirements of Referred Apprentices

Apprentices do not need attend class for the first 3 months of their referral, but must continue to submit MPRs, remain in good standing, and maintain a current CPR card (no online classes).

c. Exam Results & Program Completion

Apprentices must take the license exam within 90 days of referral.

- **Pass** – Apprentices who passes the exam with a score of 75% or higher must send the program director a copy of test results. The committee will then complete them from the program.
- **Fail** – If an apprentice fails the test by scoring less than 75%, they must retest within the same 90 days of referral. BCD allows retesting every 30 days. Failure to retest will result in a citation to appear before the committee. If an apprentice has not passed after 3 months, they must

attend class again.

d. Completion without Benefit of a License

Apprentices will be completed from the apprenticeship program without the benefit of a license if they fail to appear before the committee for not testing twice within 90 days of referral, or if they do not pass the state exam within one year of referral. Their apprenticeship card will no longer be valid, and they may not work in the field until they pass their state exam.

PRIOR EXPERIENCE CREDIT

1. REQUESTING PRIOR EXPERIENCE CREDIT

Apprentices can request credit for previous work or related training experience by submitting a written request and supporting documentation and a prior experience verification form to the program director before the 10th of the month of the desired committee meeting. Apprentices must make prior experience requests within their first year of registration to the program, and the committee will award credit only after they reach the second period of their apprenticeship. Apprentices requesting prior experience must attend a committee meeting. The committee will grant the number of hours of credit at their discretion.

2. PRIOR OJT EXPERIENCE

The committee will grant credit only for legally obtained work experience (i.e. work done in another state that does not require a license). Any on-the-job hours obtained in the State of Oregon are considered illegal unless earned while the apprentice was registered in a limited energy apprenticeship program, even if the company did not need a Limited Energy Class A or Class B licensed journey worker to perform the work (*See OAR 918-030-0030*). The maximum number of hours that the committee will grant for Class A is 5000 and for Class B is 3000. The committee may not grant more than the minimum number of hours required in each of the work process categories.

a. Supporting Documentation

Apprentices requesting prior work experience credit must submit supporting documentation to the committee. This may include the following:

- A letter on company letterhead with an official signature detailing the type of work done and breaking down the hours completed in each of the required work process categories (See MPR section above).
- Military records (if applicable)

b. OJT Hours Outside of the Apprenticeship Program

The committee will only grant up to 50% of the requested number of OJT hours that were not obtained in a state recognized limited energy apprenticeship program.

c. Unacceptable OJT Experience

The committee will not award OJT credit for classroom training received in employment or at any educational institution classes.

3. PRIOR RELATED TRAINING EXPERIENCE

a. Supporting Documentation

Apprentices requesting prior related training experience must submit supporting documentation to the committee. This may include the following:

- Transcripts
- Completion certificates
- Military records (if applicable)
- Seminar/workshop certificates

b. Challenging Related Training Courses

If an individual can demonstrate that their knowledge/skills are equal to or higher than a related training class in the program, then they may request to challenge that class. If the committee approves this request, then they will contact Clackamas Community College and the college will schedule and proctor a closed book exam (fees included). The college will send the results back to the JATC, who will provide credit at the next committee meeting if the apprentice passes. An apprentice has 30 days to complete a challenge once the committee approves it, and must take the challenged course if they fail to do so. Once the committee has approved a challenge, the apprentice may request a course syllabus through a written request to the program director.

c. Credit for Unapproved Classes

Apprentices wishing to receive credit for a class, course, or seminar not approved by the committee must submit a written request to the committee prior to attending. Upon completion, they must provide documentation (completion certificate, letter on company letterhead, etc.) detailing the course, topics covered, and number of hours attended. The number of hours awarded is at the discretion of the committee.

d. Apprentices on Leave of Absence

Apprentices may present any additional classroom experience obtained during their leave of absence for consideration by the committee.

OTHER PROGRAM REQUESTS

1. LEAVE OF ABSENCE

Apprentices unable to fulfill the responsibilities of their apprenticeship can request a voluntary suspension (leave of absence) by submitting a written request to the program director for committee review.

Apprentices requesting a suspension must appear before the committee. Failure to do so will result in a denial of the request and possibly disciplinary action.

a. Ending a Leave of Absence

Apprentices on leave must contact the program director before their leave of action expires, and failure to do so may result in a proposed cancellation from the program. Apprentices who wish to return before the end of their leave must notify the committee in writing, and the committee will reactivate the apprenticeship agreement once they approve the request. ATD will be notified to reactive the apprentice's card and license. Apprentices do not need to appear before the committee

to end their suspension.

b. Extension

Apprentices wishing to extend their leave of absence may submit a written request to the program director. The committee may request additional documentation.

c. Military Leave of Absence

Veterans/military apprentices must submit governmental or other official documentation supporting orders that make them unable to fulfill the responsibilities of the apprenticeship.

d. Disciplinary Probation

If an apprentice takes a leave of absence while on disciplinary probation, the probation will be on hold until the apprentice returns, at which time the apprentice must complete the duration of the probation.

2. WITHDRAWAL

Apprentices may withdraw from the program at any time by submitting a written request to the committee. Once the committee approves the request, they will cancel the apprenticeship agreement and the apprentice will receive a letter from the ATD listing their ending hours.

a. Resuming the Program

Apprentices who withdraw from the program may resume their related training level if they reapply within 2 years of their cancellation date. These apprentices may present any additional OJT or classroom experience acquired during the withdrawal period for consideration by the committee according to the prior experience policy.

APPRENTICE DISCIPLINARY POLICIES

1. PROBATIONARY PERIOD

All apprentices are subject to an initial probationary period covering the first 800 OJT hours (Class B)/1500 OJT hours (Class A) of employment or the first year of their registration to the program, whichever is shorter. Should an apprentice violate committee policies during their probationary period, they will receive a proposed cancellation. If cancelled, the apprentice's appeal rights are restricted (*See ORS 660.126 (g)*).

2. DISCIPLINARY ACTION

The committee will take corrective action for any failure to satisfy program requirements. The committee will notify apprentices and training agents of any disciplinary action in writing within 22 days.

a. Citation to Appear

Apprentices who do not comply with JATC policies will receive an email and a letter citing them to appear before the committee. If the apprentice cannot appear, they must submit a written explanation to the program director.

b. Proposed Cancellation

If an apprentice continues to fail to comply with JATC polices, they will receive a proposed

cancellation letter requiring them to appear at a committee meeting. At the meeting, they will need to provide reasons why the committee should not cancel their apprenticeship agreement. Failure to appear at the meeting will result in cancellation from the program.

c. Final Cancellation

This action terminates an apprentice's agreement and apprenticeship card. The committee may only cancel an apprentice for a specified reason after they have notified the apprentice and provided the apprentice with the opportunity to come before the committee. The committee will consider all information the apprentice provides when making their final decision. The committee will send the apprentice a certified letter stating the reasons for cancellation and any appeal rights

d. Disciplinary Probation

When an apprentice's progress is not satisfactory, the committee and may impose a disciplinary probation to correct the problem. This is a formal agreement between the committee and an apprentice defining the problem, the corrective action that an apprentice must take, and a timeline. If the apprentice breaks the agreement, the committee may take further disciplinary action cancelling the apprenticeship agreement. If an apprentice takes a leave of absence while on disciplinary probation, the probation will be on hold until the apprentice returns, at which time the apprentice must complete the duration of the probation.

TRAINING AGENT APPROVAL

1. MINIMUM REQUIREMENTS FOR EMPLOYERS

The committee must approve employers wishing to train apprentices. Employers must meet the following qualifications and provide documentation with their application packet for the committee to consider their application:

a. CCB License

The employer must possess a valid CCB license demonstrating that they are a licensed Oregon Electrical Contractor for at least 6 months prior to application, no exceptions.

b. CLE/C Licenses

The employer must possess an Oregon Electrical license (CLE# or C#), allowing them to pull permits.

c. Exempt Companies

Companies that qualify for exemption from a CLE, C, or CCB license must provide written verification to the committee that the company is a governmental, educational, and/or medical facility in the State of Oregon.

d. Workers' Compensation

The employer must maintain workers' compensation insurance (non-exempt status).

- Exempt companies - Companies that qualify for exemption must provide written verification to the committee that the company's employees are family members and that the company qualifies as an exempt independent contractor in the State of Oregon (*See OAR812-003-0250*).
Licensed Journey Worker on Staff

Employers must employ at least one full-time licensed journey worker on staff for supervision of apprentices. An individual who has any of the following licenses in Oregon: Class B (LEB), Class A (LEA), or General Electrician (JLE) journey worker may supervise apprentices for the work appropriate to the license type.

e. Background Check

The employer must pass a background check by the committee in relation to business practices, licensing, and previous apprenticeship experiences. These checks may include BOLI, BCD, CCB, other related governing bodies, and previous apprenticeship programs. The committee will not consider an employer currently under BOLI, BCD or CCB investigation for training agent status until the investigation is complete and a determination has been made.

2. APPLICATION SUBMISSION & APPROVAL

Upon request, the program director will provide interested employers with an application packet. Potential training agents must submit the packet, copies of documentation verifying the minimum requirements, and an application fee to the committee 5 days prior to the next JATC meeting.

a. Orientation

A designated apprenticeship contact person must complete a new training orientation with the program director prior to approval of the new training agent by the committee.

APPLICATION PROCEDURES

1. MINIMUM QUALIFICATIONS

To qualify for acceptance into the Limited Energy apprenticeship program, applicants must meet the following minimum qualifications:

- Must be 17 years old to apply and 18 years old to be registered as an apprentice
- Must be a high school graduate, obtained a G.E.D. certificate, or an Associate Degree or higher
- Must have completed one year of high school algebra, Integrated Math 2, or equivalent post-high school course with a grade of “C”, better, or submit equivalent placement test scores.

a. Non-Qualified Applicants

Applicants who do not meet minimum qualifications will be notified by email with the reason for their application’s rejection, the requirements for acceptance, and appeal rights available.

2. OPENING PERIODS

Opening notices will be posted online at least 30 days before the earliest application opening period.

3. APPLICATION PROCESS OVERVIEW

- 1) Submit an application to the IEC Office during an opening period that includes documentation of minimum requirements and other experience.
- 2) Attend a mandatory orientation and scored interview at the IEC Office.
- 3) Applications will receive a score based on both the interview and supplied documentation.
- 4) Based on their scores, applicants will be ranked and placed on one of the applicant pools in order of

ranking. These pools are composed of existing applicants.

4. APPLICANT POOLS

There are three applicant pools: the ready for employment list, the ranked pool of eligibles, and the non-ranked pool of eligibles.

a. Ready for Employment List

The top scoring applicants are placed on the ready for employment list in order of their rank on the ranked pool of eligibles. Training agents may interview and hire these applicants. Applicants may remain on this list for up to two years.

- **Annual Registration Average** – Each January, the committee will review registration information for the previous five years and determine the average number of annual apprentice registrations. The ready for employment list will be adjusted if needed to equal 20% of the annual registration average.

b. Ranked Pool of Eligibles

Applicants who meet application requirements and complete the mandatory orientation/interview are placed in ranked order on a pool of existing applicants. Each time new applicants are added, the pool is re-ranked. Applicants may remain on this pool for up to two years.

c. Non-Ranked Pool of Eligibles

Applicants who do not attend a mandatory orientation/interview are not ranked. These applicants may move up to the ranked pool of eligibles by attending an orientation/interview, and will be given one additional opportunity to do so. Failure to attend will result in removal from the non-ranked pool.

5. APPLICANT POOL POLICIES

d. Advancing to the Ready for Employment List

When half of the applicants on the ready for employment list are hired, the top applicants from the ranked pool of eligibles will be shifted up to the ready for employment list.

e. Movement between the Class A & Class B Pools of Applicants

If both the ready for employment pool and the ranked pool of eligibles are depleted for one of the programs, the committee may give the opportunity to all ranked applicants in the other program to fill employment opportunities.

f. Survey

Every six months the committee will survey applicants on the ranked pool of eligibles and the ready for employment list to determine whether they wish to remain on the pool.

g. Removal from Pools

The committee may remove applicants from these pools prior to two years for the following reasons:

- Applicant request
- Failure to keep the committee informed of current contact information
- Failure to respond to survey
- Failure to communicate with training agents and the program director
- Turning down 2 or more job opportunities

Applicants removed from these pools can appeal the action by submitting a written request for reconsideration within 30 days of notification of removal.

6. EXCEPTIONS

If they qualify, applicants may enter the program under any of the exceptions listed below:

a. Exception #1 Current Apprentice (Transfer)

An apprentice currently registered in a registered limited energy apprenticeship program may enter this program as far as practical according to wage progression scale as long as they meet the following criteria:

- 1) They meet the current minimum qualifications of this program (proof of diploma & algebra)
- 2) They have completed at least 500 OJT hours in the current program; and
- 3) They are in good standing with the current program

These transferring apprentices must provide copies of ending on-the-job training hours and related training transcripts to the committee. Once approved at the monthly JATC meeting, these apprentices will be placed on the out of work list, issued a temporary direct supervision license, and may start reporting OJT hours.

- Former apprentices who have transferred to another apprenticeship program must wait 90 days from their date of transfer to reapply and transfer back into this program.

b. Exception #2 Experienced Apprentice (Re-Entry)

Apprentices who gained their experience in a registered limited energy apprenticeship program may enter this program as far as practical according to wage progression scale as long as they meet the following criteria:

- 1) They meet the current minimum qualifications of this program (proof of diploma & algebra)
- 2) They gained their experience during the 2 years prior to applying to this program; and
- 3) They were not terminated from an apprenticeship program for cause

These returning apprentices must provide copies of ending on-the-job training hours and related training transcripts to the committee. Once approved at the monthly JATC meeting, these apprentices will be placed on the out of work list, issued a temporary direct supervision license, and may start reporting OJT hours.

c. Exception #3 New Training Agent

An employer who has not participated in the training of limited energy apprentices under *ORS 660* for at least 2 years prior to seeking entry or reentry into this program may provide the committee with a list of their current employees. Once registered as a training agent in this program, the employer may register the listed employees as apprentices at any time without going to the ready for employment pool if the employees meet the following criteria:

- 1) They meet the current minimum qualifications of this program (proof of diploma & algebra)
- 2) They have been on the employer's payroll for at least 3 months; and

- 3) They have documented at least 360 work hours

After registering their listed employees as apprentices, the employer must select from the ready for employment pool or out of work list.

d. Exception #4 Previous Experience Applicant (Not Registered)

Applicants who gained their experience not in a registered limited energy apprenticeship program with a minimum of 2000 legal hours of work experience and 48 hours of academic training applicable to this apprenticeship program may enter this program as far as practical according to wage progression scale as long as they meet the following criteria:

- 1) They meet the current minimum qualifications of this program (proof of diploma & algebra)
- 2) They gained their experience within 2 years of applying to this program; and
- 3) They have documentation of legal work experience and academic training equivalent to at least the first two periods of this program

Once approved at the monthly JATC meeting, these apprentices will be placed on the out of work list, issued a temporary direct supervision license, and may start reporting OJT hours.

e. Exception #12 Veteran's Entry

Veterans may apply to the program at any time if they meet the minimum qualifications of the program and are:

- 1) Members of the Regular Services who have been discharged from active duty service with a DD214 issued within 24 months indicating Honorable Discharge;
- 2) Members of the Selected Reserve or Individual Ready Reserve with a DD214 issued within 24 months; or
- 3) Members of the Oregon National Guard who are active or with a DD214 issued within 24 months.

The committee will score qualifying individuals and place them at the top of the ranked pool of eligibles.

TRAINING AGENT RESPONSIBILITIES
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1. ACCEPTANCE OF RULES & POLICIES

Training agents must accept and abide by all rules set by the Oregon State Bureau of Labor & Industries (BOLI) and the Limited Energy JATC. Failure to comply with these policies will result in a review by the committee of the training agent's status in the program and may result in removal.

2. LICENSING LAWS

Training agents must comply with all electrical licensing laws in the state of Oregon.

3. COMMUNICATION

Training agents must report any changes affecting their apprentices or training agent status to the committee within 5 days. Training agents must also keep the committee updated on any changes to name, address, or contact information for the company.

4. EMPLOYMENT

Training agents must cooperate with the committee to keep apprentices employed, progressing, and safe. This includes the following:

- Striving to offer each apprentice a full spectrum of training and adequate hours in the field to progress in the program
- Validating that the hours that apprentices report are true and accurate by viewing Monthly Progress Reports in the M3-FlashPoint database
- Scheduling work so that apprentices can attend required relate training classes
- Ensuring that working conditions conform to all state and local laws and regulations regarding health, welfare, and safety.

a. Non-Competition Agreement

Training agents may not have their registered apprentices sign a non-competition agreement.

5. HIRING APPRENTICES

Registered apprentices who are out of work and in good standing with the committee will be given the opportunity for re-employment as soon as possible prior to the registration of new apprentices. If there are no out of work apprentices, a training agent may hire from the ready for employment list. If the training agent hires their choice of individual from the ready for employment list, then their next hire must be either the top individual on the ready for employment list or an out of work apprentice (if there are any).

a. Requesting the Ready for Employment/Out of Work List

Training agents wishing to hire new/out of work apprentice must contact the apprenticeship department to request the out of work list or ready for employment list. The program director will provide the training agent with the names, phone numbers, and emails of the applicants/out of work apprentices. Training agents must attempt to contact these individuals by both email and phone.

- Training agents may request to see only the applicants willing to work in a specific geographic zone(s)¹. If all of the applicants on the ready for employment list turn down a job assignment because it is outside of their selected zones, training agents may interview the top applicant on the ranked pool of eligibles.

b. Intent to Hire Form

Training agents must submit the Intent to Hire form to the program director when they interview and hire apprentices. If a training agent hires an apprentice, they must provide the start date on the form. If a training agent chooses not to hire an individual, they must provide the committee with a written, job-related reason that is consistent with both their documented employment policies and State and Federal EEOA requirements. If the rejection reasons are excessive or appear inappropriate, the committee will cite the training agent to appear at the next committee meeting for review, and may take disciplinary action.

c. Temporary Direct Supervision License

Once the apprenticeship department receives the Intent to Hire form from a training agent, they can issue a temporary direct supervision license to the apprentice within 1-2 days. New apprentices must complete a new apprentice orientation and receive this license prior to working in the field.

¹ 1) Multnomah 2) Yamhill 3) Washington 4) Clackamas & Wasco 5) Tillamook 6) Clark 7) Columbia 8) Clatsop 9) Hood River

6. RELEASING APPRENTICES

Training agents must notify the committee in writing within 5 business days when an apprentice is terminated for cause, leaves their employ, or is laid off. Training agents will receive an emailed release performance evaluation for the former apprentice. The training agent must return this form within 48 hours. The program director will review the release performance evaluation and determine with the JATC whether the apprentice should be cited to appear before the JATC to discuss any issues.

7. PROPER SUPERVISION

Training agents must ensure that a licensed journey worker or supervisor directly supervises each apprentice at all times while they are working on any systems that fall under the scope of work performed in the limited energy industry. Limited energy technicians and apprentices install, troubleshoot, maintain, repair, and replace electrical systems under 100 volts or less. These systems include the following:

	Class B	Class A
Basic telephone cable installation & termination	✓	✓
Audio/visual systems/CCTV (monitor only)	✓	✓
Communication systems	✓	✓
Sound & public address systems	✓	✓
Programmable & controlling instrumentation	✓	✓
Structured wiring systems	✓	✓
Specialized control systems including HVAC, medical, boiler, clock, instrumentation	✓	✓
Fire Alarm Systems	N/A	✓
Burglar Alarm Systems	N/A	✓
Closed-Circuit Television Security System	N/A	✓
Nurse Call & Emergency Call Systems	N/A	✓

Please note that although some of the above activities do not require licensing nor permits/minor labels, apprentices must still be supervised when performing such work. For more information on the types of tasks limited energy technicians might perform on these systems, please see Appendix 1.

a. Direct Supervision License

Apprentices possessing this license must be on the same job-site as their supervisor. Supervision by means of a telephone is prohibited.

b. Indirect Supervision License

The Indirect Supervision License allows qualifying apprentices to work under indirect supervision at the discretion of their supervisor on projects not exceeding 8 hours duration that are within the scope of the apprentice’s license (*See OAR918-282-0270*). This license does not allow an apprentice to supervise another apprentice, and the apprentice ratio must still be maintained at all times.

Apprentices qualify who meet the following criteria:

- They are Class A apprentice entering into the 6th (final) period of their apprenticeship
- They have at least 5,000 hours of on-the-job training, have completed 7 classes (336 hours), and have a current CPR card

Qualifying apprentices may send a request for this license to the program director by the 10th of the

month of the desired committee meeting. They do not need to appear at the committee meeting.

c. Washington State Trainee Card

Apprentices working in the state of Washington must obtain a trainee card, as Oregon's apprenticeship card is not valid in Washington State and working without one could result in fines. Apprentices can obtain a card by contacting the Washington State Trade and Licensing Department: <https://www.lni.wa.gov/>

8. RATIO

Training agents must adhere to a one journey worker to every one apprentice ratio. When requesting a new apprentice, training agents must submit a form verifying their current ratio.

9. APPRENTICE WAGES

Oregon law requires that training agents pay their apprentices according to the pay scale determined each year by the committee's annual wage survey and approved by the Director of Apprenticeship of BOLI. Training agents may not pay registered apprentices at a lower pay rate at any point even if they do work outside of the program's work process categories. Training agents must also abide by BOLI Wage & Hour law.

a. Annual Wage Survey

Oregon law requires that training agents provide the committee with journey worker wage information each year. Any information provided will be confidential. The committee will terminate training agents who fail to return annual wage survey. *See ORS 660.137(6)*

10. MANDATORY MEETINGS

Training agents must attend mandatory meetings as scheduled, and failure to do so may result in cancellation of training agent status.

11. BILLING REQUIREMENTS

Training agents must pay all training agent fees.

a. Monthly Administrative Fee

Training agents must pay a monthly fee of \$85 per month per employed apprentice. Training agents who fail to notify the program director of apprentice layoffs within 5 business days will be charged the full monthly administration fee for those apprentices.

b. Education Enhancement Fee

All registered training agents must pay an annual fee of \$60, even if they do not have any apprentices. Training agents will receive invoices in July. Failure to pay this fee will result in cancellation from the program. The committee will only apply proceeds from this fee toward improvements to the related training program.

c. Late Fees

Training agents must pay their bills within 15 days of the date of invoice. Past due invoices for the monthly fee will incur a \$15 per apprentice late fee. Training agents who fail to pay their monthly bill within 60 days will receive a citation to appear before the committee, and failure to attend will result

in cancellation.

d. Joinder Agreement

No registered training agent shall charge or cause charges to be levied against an apprentice for purposes of financially supporting the administrative, clerical or organizational cost of operating the apprenticeship program. This policy does not affect any requirement that a registered apprentice pay the normal cost of tuition of educational services.

TRAINING AGENT DISCIPLINARY POLICIES

1. PROBATIONARY PERIOD

The first year of initial registration as a training agent will be considered a probationary period. Failure to comply with all the rules and regulations of the committee, BCD, CCB, or BOLI may result in immediate cancellation of training agent status.

2. DISCIPLINARY ACTION

The committee may request and review information indicating that a training agent may be in violation of the apprenticeship standards, policies, or procedures. If the committee determines that a violation did occur, they will cite the training agent to appear at the next committee meeting to discuss the issue(s). Failure to appear will result in proposed cancellation, and the committee may consider cancellation depending on the circumstances. Apprentices working for a cancelled training agent will be notified, placed on the out of work list, provided a training agent list, and given a timeframe to find new employment.

a. Training Agent Disciplinary Probation

The committee may impose a disciplinary probation to correct a problem with a training agent. This is a formal agreement between the committee and the company defining the problem, the corrective action that the company must take, and a timeline. If the training agent breaks the agreement, then the committee may take further disciplinary action.

3. REGISTERED TRAINING AGENT UNDER INVESTIGATION

If a registered training agent with the Limited Energy JATC comes under committee, BCD, CCB, or BOLI investigation, the following will occur:

1) Cite to Appear

The training agent will be cited to appear at the next committee meeting as a part of their investigation. A representative from the company must attend that meeting. Failure to attend will result in cancellation of training agent status. The cancellation letter will be emailed and mailed by certified mail.

2) Disciplinary Probation

The training agent will be placed on disciplinary probation until the JATC has completed the investigation and has come to decision.

3) Suspension of Hiring of Apprentices

The training agent will be suspended from hiring any new or replacement apprentices until the conclusion of the investigation. Existing apprentices may continue employment throughout the investigation unless the committee or BOLI determines that there are extenuating circumstances that warrant immediate removal. The program director may audit apprentice payroll records at any time.

4) Submit Documentation

The training agent may be required to submit the following documentation to the Limited Energy JATC

for the specified period under investigation within 2 weeks of the request from the committee:

- Pay stubs for all apprentices for every pay period
- Time sheets for all apprentices for every pay period including:
 - Date of job
 - Job site number or name
 - Address of the job
 - Start and end time for each day
 - Electrical permit (full or minor) number and authority with jurisdiction for each job
 - Scope of work for the job
- Time sheets for all journey workers who were supervising apprentices on jobs for each pay period. This is to ensure the daily proper supervision of apprentices. With these time sheets please include:
 - Date of job
 - Job site number or name
 - Address of the job
 - Start and end time for each day
 - Electrical permit (full or minor) number and authority with jurisdiction for each job
 - Scope of work for the job
- Copies of certified payroll for any prevailing wage jobs that apprentices were working on

Failure to submit the above documentation by the deadline specified by the committee will result in cancellation of training agent status. The cancellation letter will be emailed and mailed by certified mail.

4. READMISSION

The committee will not consider the readmission of an employer whose training agent status was terminated/removed/cancelled for cause from this program for one year after the cancellation date. The committee may place these reapplying training agents on a disciplinary probation at their discretion for a specified period of time. If the training agent violates any rules, policies, or standards set by BOLI, BCD, CCB, or the Limited Energy JATC while on the probation, then the committee may cancel the training agent and they may not reapply for 3 years from the date of cancellation.

EQUALITY AND HARASSMENT POLICIES

1. EQUAL EMPLOYMENT OPPORTUNITY

Any committee member, training agent, sponsor or representatives who act on behalf of the committee, training agents or sponsors shall:

- Provide equal opportunity in the recruitment, selection, employment and training of apprentices without regard to race, color, religion, sex (including pregnancy and gender identity), sexual orientation, genetic information, national origin, marital status, age (where the individual is 18 years or older), expunged juvenile record, family relationship, opposition to safety and health hazards, mental or physical disability or association with anyone of a particular race, color, sex, sexual orientation, national origin, marital status, age or religion and;
- Uniformly apply rules and regulations concerning, but not limited to, equality of wages, periodic

advancement, promotion, job performance, rotation among all work processes of the trade/occupation, assignment of work, imposition of penalties or other disciplinary matters and all other aspects of the administration of an apprenticeship program to all apprentices during their apprenticeship according to the United States Code, Code of Federal Regulations and Oregon State Law.

2. VETERANS

The Area 1 Limited Energy JATC has been approved by the Department of Veteran Affairs to offer VA educational benefits.

a. Eligibility

A veteran wishing to use VA benefits for apprenticeship should contact the VA at (888) 442-4551 or www.gibill.va.gov to confirm entitlement to benefits. After confirmation of eligibility, the veteran should then contact the program director.

b. Monthly Certifications

Once enrolled for educational benefits, veterans must submit the following each month to the program director, who will report the hours to the VA:

- Monthly OJT Certification Form (VA form 22-6553d-1)
- Copies of paystubs for the month

3. HARASSMENT

Any committee member, training agent, sponsor or representatives who act on behalf of the committee, training agent or sponsors shall provide a workplace training site free from harassment of any kind, including but not limited to: sex (including pregnancy and gender identity), sexual orientation, genetic information, race, color, religion, national origin, political affiliation, marital status, age, mental or physical disability or association with anyone of a particular sex, sexual orientation, race, color, age, national origin, political affiliation, marital status or religion and uniformly apply rules and regulations concerning harassment to all employees.

a. Harassment Definition

Unwelcome verbal and physical advances, requests for favors and other verbal and physical conduct constitutes harassment when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment/training;
- Submission or rejection of such conduct by an individual is used as a basis for employment/training decisions affecting the individual
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating hostile or offensive working or training environment.

4. COMPLAINT RESOLUTION PROCEDURE

The committee will address any complaints brought to its attention promptly and fairly. A training agent, training agent applicant, apprentice, or apprentice applicant who has a dispute with the program must proceed as follows:

- State the grievance in writing and submit to the program director no less than 5 days before the

- next committee meeting date for placement on the agenda;
- Attend the meeting and attempt resolution of the dispute; and
- The committee will communicate the resolution to the grievant in writing and note it in the committee minutes.

COMMITTEE STRUCTURE

5. COMMITTEE COMPOSITION

The Limited Energy JATC consists of an equal number of principal employer and employee representatives. Principal Representatives must be able to attend monthly JATC meetings, have a general knowledge and understanding of the Limited Energy industry, and be currently active or retired as a Limited Energy training agent or journey worker.

a. Employer Representatives

Employer representatives have the ability to hire and fire apprentices.

b. Employee Representatives

Employee representatives must be journey workers or employees in the Limited Energy trade who are unable to hire or fire apprentices.

6. ALTERNATE REPRESENTATIVES

When principal committee representatives are absent, alternate representatives may serve in their place. Alternate representatives may attend all committee meetings and participate in discussions and committee activities, but may only vote when acting as substitute for principal committee representatives.

7. ELECTED OFFICERS

The committee elects a Chairperson and a Secretary from the pool of current committee members. One officer must be an employer representative and the other an employee representative. These officers shall serve for no less than 1 year and no more than 2 years without an election. In addition to the general requirements of committee members, officers must have the ability to donate time beyond the monthly JATC meetings and have served on the JATC for a minimum of 2 years prior to election.

8. REMOVAL OF COMMITTEE REPRESENTATIVES

Committee representatives may be removed due to inactivity, failure to abide by committee policies and procedures, or by formal request. The committee may appoint a replacement representative at the same meeting at which it removes a representative.

COMMITTEE OPERATION

1. COMMITTEE REPRESENTATIVE RESPONSIBILITIES

- Operate under Oregon State Law and administrative rule, the approved program standards, and these policies to facilitate the apprenticeship program's long-term success
- Work to accomplish the program's outlined Affirmative Action Goals & Objectives (*See OAR 839-*

011-0145)

- Regularly attend and actively participate in monthly JATC meetings and bring any relevant information to share with the committee, and inform the program director about meeting attendance.

2. MEETINGS

The committee generally meets the 3rd Monday of each month.

a. Agenda

Those wishing to add an item to the committee agenda must submit a request by the 10th of the month prior to the scheduled meeting. Apprentices and training agents have the right to appear before the committee to discuss any questions or concerns.

b. Quorum

The transaction of business and/or committee action requires the presence of at least two employer and two employee representatives.

c. Electronic Meetings

The committee may conduct business using email or other electronic media according to the following guidelines:

- The committee may not conduct electronic polling for issues requiring the personal appearance of applicants, apprentices, or employers (cite to appear, proposed cancellation, final cancellation, etc.)
- Staff may poll all committee representatives electronically, providing them with the option to approve, defer, or table the item for discussion at the next in-person meeting
- Voting committee representatives will have 24 hours to respond to the questions presented
- If at least two principal employer and two principal employee representatives respond and all responding members express approval, staff shall prepare a “Minutes of Electronic Actions.”

3. POLITICAL ACTIVITY

No committee representative or delegate acting on behalf of the committee may direct apprentices to perform political activities of any sort or make advancement/retention in the program dependent on the performance of such activities. Political activities include, but are not limited to: posting flyers, placing yard signs, working on phone banks, sending mailings, collecting funds, etc.

LIMITED ENERGY TRAINING TRUST (LETT)

1. TRUST MEMBER REQUIREMENTS

Trust members must be currently employed by or own a registered training agent in good standing with the program and have the ability to attend the quarterly LETT meetings.

2. TRUST MEMBER APPROVAL

The Limited Energy JATC will appoint a committee member to serve on the LETT. This representative will attend LETT meetings and report to the JATC on a quarterly basis.

APPRENTICESHIP TERMS & DEFINITIONS

Apprentice – An individual approved by an apprenticeship committee and registered with the state of Oregon to learn a skilled trade.

Apprenticeship and Training Division (ATD) – The division of the Bureau of Labor and Industries registers programs and apprenticeship agreements, conducts audits to ensure compliance with state and federal regulations, provides technical assistance to programs, and assists in the development of new programs.

Building Codes Division (BCD) – Administers Oregon’s Statewide Building Code, regulates building laws and rules, and licenses qualified businesses and individuals who work in the trades.

Bureau of Labor & Industries (BOLI) – The division of the U.S. Department of Labor that regulates apprenticeship on a federal level. Divisions of BOLI include the Apprenticeship and Training Division, Wage and Hour, and Civil Rights.

Civil Rights Division (CRD) – The division of BOLI that protects all Oregonians from unlawful discrimination and investigates allegations of civil rights violations in workplaces, career schools, housing and public accommodations.

Construction Contractors Board (CCB) – Ensures compliance with Oregon Contractors Law and provides for licensing of residential and commercial construction contractors, subcontractors, and home inspectors.

Joint Apprenticeship & Training Committee (JATC) – A registered committee approved by the OSATC to operate apprenticeship programs.

Journey Worker – An individual who has any of the following licenses in Oregon: Class B (LEB), Class A (LEA), or General Electrician (JLE) journey worker. Journey workers receive a license and certificate that is nationally recognized and respected by industry employers.

On-the-Job Training (OJT) – Paid occupational training provided by a registered training agent and supervised by a journey worker. Apprentices must submit their OJT hours every month.

Oregon State Apprenticeship & Training Council (OSATC) – The organization that oversees the state’s apprenticeship committees, approves programs, and enforces state and federal apprenticeship laws. The council currently consists of 8 members.

Out-of-Work List – A list of all registered apprentices in the Area 1 Limited Energy program who are currently unemployed. The program director provides the list to training agents who are requesting an apprentice.

Program Director – The person who conducts the day-to-day operations of the committee and provides information to registered apprentices, employers, the public, committee members, and regulatory agencies.

Related Training – Classroom training related to an occupation that is required as part of an apprenticeship. Apprentices conduct their required related training hours for the Area 1 Limited Energy program at Clackamas Community College in Wilsonville, OR.

Standards – A written agreement submitted by a local committee and approved by the OSATC that contains all of the terms and conditions for the qualification, employment, and training of apprentices.

Training Agent – An employer approved by a local committee to provide on-the-job training to apprentices.

Wage and Hour – The division of BOLI that enforces laws related to minimum wage, overtime, terms and conditions of employment and prevailing wage rates on public works projects.

APPENDIX 1

Examples of types of tasks that may be performed by limited energy technicians on electrical systems:

1. Prepare for System Installation

- a. Review and understand electronic system requirements & documentation (blueprints, etc.)
- b. Perform site survey
- c. Develop overall job plan
- d. Organize technical work plan
- e. Complete pre-assemblies & fabrication of sub systems
- f. Gather inventory/parts
- g. Pre-test components
- h. Inventory tools

2. Wire Buildings

- a. Use documentation to lay out components
- b. Secure area (drop cloths, safety cones, etc.)
- c. Rough in device component locations
- d. Install cable support structure or drill wire paths
- e. Pull & secure wire
- f. Label tag wire/cable per documentation

3. Trim

- a. Pre-termination functions
 - i. Prepare cable ends
 - ii. Route cable
- b. Connect passive devices
 - i. Connectors
 - ii. Outlets
 - iii. Patch panels
- c. Splicing
- d. Intermediate termination

4. Install Components

- a. Remote location components
- b. Central/main location

5. Configure – Program

- a. Calibrate & align electronically and physically
- b. Install or enter control programs, if applicable (complex)
- c. Setup system instructions, labels, etc.

6. Test, Troubleshooting, Debug

- a. Power up
- b. Operate and test functions
- c. Evaluate performance
- d. Identify problems, errors, discrepancies
- e. Diagnose causes of problems
- f. Take remedial action
- g. Document actions

7. Train Users

- a. Review user documentation manuals & instructions
- b. Identify training objectives
- c. Confirm actual users and their requirements
- d. Procure/develop training & user aids manuals tip sheets
- e. Demonstrate system function/guide user through system
- f. Observe user using the system/ have customer demonstrate knowledge of system
- g. Communicate results of training back to all relevant parties

8. Documentation

- a. Review final blueprints, wiring diagrams, and hookup instructions
- b. Complete work reports and time sheets
- c. Provide/prepare/deliver system documentation
 - i. User manual and training materials
 - ii. As built drawings
 - iii. Zone diagrams
 - iv. Equipment lists
 - v. Warranty paperwork

9. Maintenance & Repair

- a. Perform scheduled preventive maintenance
- b. Diagnose problems
- c. Read documentation