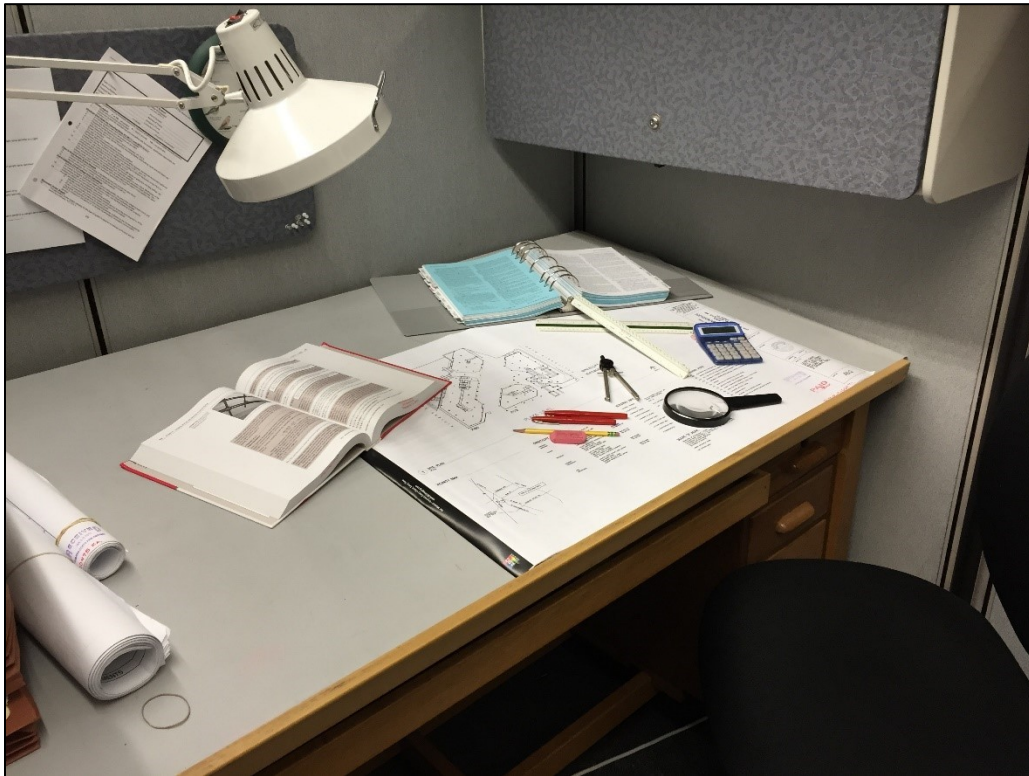


# Plan Examiner

## (NFPA Plan Examiner I/II)

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### Certification Task Book (2014)



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

## Overview

### Authority

This certification task book includes the certification training standards set forth in the Plan Examiner Certification Training Standards Guide (2015) which is based on NFPA 1031: Standard for Professional Qualifications for Fire Inspector and Plan Examiner (2014).

Revised: January 2020

Published by: State Fire Training, 2251 Harvard Street, Suite 400, Sacramento, CA 95815

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

### Purpose

The State Fire Training certification task book is a performance-based document that identifies the minimum requirements necessary to perform the duties of that certification. Completion of a certification task book verifies that the candidate has the required experience, holds the required position, and has demonstrated the job performance requirements to obtain that certification.

### Assumptions

With the exception of the Fire Fighter 1 and 2 certifications, a candidate may begin the task book initiation process upon completion of all required education components (courses).

Each job performance requirement (JPR) shall be evaluated after the candidate's fire chief initiates the task book.

An evaluator may verify satisfactory execution of a job performance requirement (JPR) through the following methods:

- First-hand observation
- Review of documentation that verifies prior satisfactory execution

State Fire Training task books do not count towards the NWCG task book limit. There is no limit to the number of State Fire Training task books a candidate may pursue at one time if the candidate meets the initiation requirements of each.

It is the candidate's responsibility to routinely check the State Fire Training website for updates to an initiated task book. Any State Fire Training issued update or addendum is required for task book completion.

A candidate must complete a task book within five years its initiation date. Otherwise, a candidate must initiate a new task books using the certification's current published version.

## Roles and Responsibilities

### Candidate

The candidate is the individual pursuing certification.

#### Initiation

The candidate shall:

1. Complete all **Initiation Requirements**.
  - Please print or type.
2. Obtain their fire chief's signature as approval to open the task book.
  - A candidate may not obtain evaluation signatures prior to the fire chief's initiation approval date.

#### Completion

The candidate shall:

1. Complete all **Job Performance Requirements**.
  - Ensure that an evaluator initials, signs, and dates each task to verify completion.
2. Complete all **Completion Requirements**.
3. Sign and date the candidate verification statement under **Review and Approval** with a handwritten signature.
4. Obtain their fire chief's handwritten (not stamped) signature on the fire chief verification section.
5. Create and retain a physical or high-resolution digital copy of the completed task book

#### Submission

The candidate shall:

1. Submit a copy (physical or digital) of the completed task book and any supporting documentation to State Fire Training.
  - See Submission and Review below.

A candidate should not submit a task book until he or she has completed all requirements and obtained all signatures. State Fire Training will reject and return an incomplete task book.

### Evaluator

An evaluator is any individual who verifies that the candidate can satisfactorily execute a job performance requirement (JPR).

An evaluator may verify satisfactory execution through the following methods:

- First-hand observation
- Review of documentation that verifies prior satisfactory execution

A qualified evaluator is designated by the candidate's fire chief and holds an equivalent or higher-level certification. If no such evaluator is present, the fire chief shall designate an individual with more experience than the candidate and a demonstrated ability to execute the job performance requirements.

A task book evaluator may be, but is not required to be, a registered skills evaluator who oversees a State Fire Training certification exam.

A certification task book may have more than one evaluator.

All evaluators shall:

1. Complete a block on the **Signature Verification** page with a handwritten signature.
2. Review and understand the candidate's certification task book requirements and responsibilities.
3. Verify the candidate's successful completion of one or more job performance requirements through observation or review.
  - Do not evaluate any job performance requirement (JPR) until after the candidate's fire chief initiates the task book.
  - Sign all appropriate lines in the certification task book with a handwritten signature or approved digital signature (e.g. Docusign or Adobe Sign) to record demonstrated performance of tasks.

## Fire Chief

The fire chief is the individual who initiates and then reviews and confirms the completion of a candidate's certification task book.

A fire chief may identify an authorized designee already on file with State Fire Training to fulfill any task book responsibilities assigned to the fire chief. (See *State Fire Training Procedures Manual*, 4.2.2: Authorized Signatories.)

## Initiation

The fire chief shall:

1. Review and understand the candidate's certification task book requirements and responsibilities.
2. Verify that the candidate has met all **Initiation Requirements** prior to initiating the candidate's task book.

3. Open the candidate's task book by signing the **Fire Chief Approval** verification statement with a handwritten (not stamped) signature.
4. Designate qualified evaluators.

## Completion

The fire chief shall:

1. Confirm that the candidate has obtained the appropriate signatures to verify successful completion of each job performance requirement.
  - Ensure that all **Job Performance Requirements** were evaluated after the initiation date.
2. Confirm that the candidate meets the **Completion Requirements**.
3. Sign and date the Fire Chief verification statement under **Review and Approval** with a handwritten signature.
  - If signing as an authorized designee, verify that your signature is on file with State Fire Training.

## Submission and Review

A candidate should not submit a task book until he or she has completed all requirements and obtained all signatures. State Fire Training will reject and return an incomplete task book.

To submit a completed task book, please send the following to the address below:

- A copy of the completed task book (candidate may retain the original)
- All supporting documentation
- A completed SFT Fee Schedule
- Payment

State Fire Training

Attn: Cashier

PO Box 997446

Sacramento, CA 95899-7446

State Fire Training reviews all submitted task books.

- If the task book is complete, State Fire Training will authorize the task book and retain a digital copy of the authorized task book in the candidate's State Fire Training file.
- If the task book is incomplete, State Fire Training will return the task book with a notification indicating what needs to be completed prior to resubmission.

Completion of this certification task book is one step in the certification process. Please refer to the *State Fire Training Procedures Manual* for the complete list of qualifications required for certification.

## Initiation Requirements

The following requirements must be completed prior to initiating this task book.

### Candidate Information

Name: \_\_\_\_\_

SFT ID Number: \_\_\_\_\_

Fire Agency: \_\_\_\_\_

### Prerequisites

State Fire Training confirms that there are no prerequisites for initiating this certification task book.

### Education

The candidate has completed the following course(s).

- Plan Examiner 1A: Building Plan Review
- Plan Examiner 1B: Fire Protection and Life Safety Systems Plan Review
- Plan Examiner 1C: Hazards and Special Operations Plan Review
- California Statutes and Regulations (SFT FSTEP Course)

### Fire Chief Approval

Candidate's Fire Chief (please print): \_\_\_\_\_

I, the undersigned, am the person authorized to verify the candidate's task book initiation requirements and to initiate State Fire Training task books. I hereby certify under penalty of perjury under the laws of the State of California, that the completion of all requirements to open the task book documented herein are true in every respect. I understand that misstatements, omissions of material facts, or falsification of information or documents may be cause for rejection.

Signature and Date: \_\_\_\_\_

## Signature Verification

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

Please print except for the Signature line where a handwritten signature is required. Please add additional signature pages as needed.

**Name:** \_\_\_\_\_  
Job Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Signature: \_\_\_\_\_

**Name:** \_\_\_\_\_  
Job Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Signature: \_\_\_\_\_

**Name:** \_\_\_\_\_  
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Signature: \_\_\_\_\_

**Name:** \_\_\_\_\_  
Job Title: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Signature: \_\_\_\_\_



## Job Performance Requirements

The candidate must complete each job performance requirement (JPR) in accordance with the standards of the authority having jurisdiction (AHJ) or the National Fire Protection Association (NFPA), whichever is more restrictive.

All JPRs must be completed within a California fire agency or Accredited Regional Training Program (ARTP).

For JPRs that are not part of a candidate's regular work assignment or are a rare event, the evaluator may develop a scenario or interview that supports the required task and evaluate the candidate to the stated standard.

Each JPR shall be evaluated after the candidate's fire chief initiates the task book.

### Administration

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

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

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

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

3. Process plan review documents, given a set of plans and specifications, so that required permits are issued in accordance with the policies of the jurisdiction. (NFPA 7.2.3 / OSFM) (CTS 2-3)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

4. Determine the applicable code or standard, given a fire protection issue, so that the proper document, edition, and section are referenced. (NFPA 7.2.4 / OSFM) (CTS 2-4)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

5. Create plan review checklists and forms, given applicable codes, standards, and departmental policies and procedures, so that the materials developed address key issues and clearly express code requirements of the jurisdiction. (NFPA 8.2.1) (CTS 5-1)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

6. Develop policies and procedures for the administration of plan review functions, given management objectives, so that the policies are defined and are in accordance with the legal obligations of the jurisdiction. (NFPA 8.2.2 / OSFM) (CTS 5-2)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

## Plan Review

7. Identify the requirements for fire protection or a life safety system, given a set of plans, so that deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (NFPA 7.3.1) (CTS 3-1)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

8. Verify the occupancy classification, given a set of plans, specifications, and a description of a building and its intended use, so that the classification is made in accordance with the applicable codes and standards and the policies of the jurisdiction. (NFPA 7.3.2 / OSFM) (CTS 3-2)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

9. Verify the construction type, given a set of plans, including the occupancy classification area, height, number of stories, and location, so that the building is in accordance with applicable codes and standards and deficiencies are identified, documented, and reported. (NFPA 7.3.3) (CTS 3-3)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

10. Verify the occupant load, given a set of plans, so that the maximum allowable occupant load is in accordance with applicable codes and standards. (NFPA 7.3.4 / OSFM) (CTS 3-2)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

11. Verify that required egress is provided, given a set of plans and an occupant load, so that all required egress elements are provided and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (NFPA 7.3.5 / OSFM) (CTS 3-4)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

12. Evaluate code compliance for required fire flow and hydrant location and spacing, given a plan, codes and standards, and fire flow test results, so that hydrants are correctly located, required fire flow is determined, and deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (NFPA 7.3.6) (CTS 3-5)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

13. Evaluate emergency vehicle access, given a plan, so that emergency access is provided in accordance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (NFPA 7.3.7) (CTS 3-6)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

14. Recommend policies and procedures for the delivery of plan review services, given management objectives, so that plan reviews are conducted in accordance with the policies of the jurisdiction and due process of the law is followed. (NFPA 7.3.8) (CTS 3-7)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

15. Participate in legal proceedings, given the findings of a plan review and consultation with legal counsel, so that testimony is accurate and the plan reviewer's demeanor is appropriate to the proceeding. (NFPA 7.3.9) (CTS 3-8)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

16. Evaluate plans for the installation of fire protection and life safety systems, given a plan submittal, so that the fire protection systems, including pre-engineered systems, and equipment are reviewed and deficiencies are identified, documented, and reported in accordance with the policies and procedures of the jurisdiction. (NFPA 7.3.10 / OSFM) (CTS 3-9)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

17. Evaluate landscape plans for a development, community, or a wildland urban interface, given a set of landscape plans for a development or community in a fire hazard severity zone and a set of landscape plans for a wildland urban interface area, ensuring compliance with applicable codes and standards and identifying, documenting, and reporting deficiencies according to jurisdictional policies and procedures. (OSFM) (CTS 3-10)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

18. Evaluate a proposed modification or change in occupancy for a building or portion of a building, given a set of plans for an existing building or portion of a building and building records, ensuring compliance with applicable codes and standards, and identifying, documenting, and reporting deficiencies in accordance with jurisdictional policies and procedures. (OSFM) (CTS 3-11)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

19. Evaluate a design concept, given a preliminary design presentation, so that the proposed concept meets the intent of applicable codes and standards in accordance with the policies and procedures of the jurisdiction. (NFPA 8.3.12) (CTS 6-11)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

20. Evaluate proposed passive fire protection elements of a building or portion of a building, given a set of plans and specifications for a building or facility, so that the protection provided for the facility is in accordance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (NFPA 8.3.2) (CTS 6-2)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

21. Evaluate plans for a process or operation, given plans and specifications, so that the process or operation is reviewed for compliance with applicable codes and standards and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (NFPA 8.3.3) (CTS 6-3)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

22. Evaluate plans for storage, handling, and use of flammable and combustible liquids and gases, given plans and specifications, so that the plans are reviewed and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (NFPA 8.3.4 & 8.3.8 / OSFM) (CTS 6-4)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

23. Evaluate plans for the installation of fire protection and life safety systems, given a plan submittal, so that the systems and equipment are reviewed and deficiencies are identified, documented, and reported in accordance with the applicable codes and standards and with the policies and procedures of the jurisdiction. (NFPA 8.3.5) (CTS 6-5)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

24. Evaluate a proposed alternative method for compliance with applicable codes and standards, given supporting documentation of a design that does not meet prescriptive code requirements, so that the design meets the intent of applicable codes and standards. (NFPA 8.3.6 / OSFM) (CTS 6-6)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

25. Evaluate the integration of life safety, fire protection, security, and building service systems, given a plan submittal, a life safety report, a sequence of operations report, and testing criteria, so that the integration of proposed systems meets the requirements or intent of the applicable codes and standards and meets the fire and life safety objectives of the jurisdiction and any deficiencies are identified, documented, and reported in accordance with the policies of the jurisdiction. (NFPA 8.3.7) (CTS 6-7)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

26. Evaluate plans for storage, handling, and use of hazardous materials, given plans and specifications, so that the plans are reviewed for compliance and deficiencies are identified, documented, and reported in accordance with the applicable codes, standards, policies, and procedures of the jurisdiction. (NFPA 8.3.4 & 8.3.8 / OSFM) (CTS 6-4)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

27. Verify that egress elements are provided, given a plan of a building or portion of a building, so that all egress elements are identified and deficiencies are identified, documented, and reported in accordance with applicable codes and standards and the policies of the jurisdiction. (NFPA 8.3.9 / OSFM) (CTS 6-8)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

28. Evaluate a plan with special storage arrangements, given a plan, so that deficiencies are identified, documented, and reported in accordance with adopted codes and standards and the policies of the jurisdiction. (NFPA 8.3.10) (CTS 6-9)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

29. Evaluate heating, ventilation, air conditioning, and other building service equipment and operations, given plans and specifications, so that the systems and other equipment are designed in accordance with applicable codes and standards and deficiencies are identified, documented, and re-ported in accordance with the policies of the jurisdiction. (NFPA 8.3.11) (CTS 6-10)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

30. Evaluate a performance-based design concept, given a preliminary design presentation, so that the proposed concept meets the intent of applicable codes and standards in accordance with the policies and procedures of the jurisdiction. (NFPA 8.3.12) (CTS 6-11)

Evaluator Signature: \_\_\_\_\_ Date Verified: \_\_\_\_\_

## Completion Requirements

The following requirements must be completed prior to submitting this task book.

### Experience

The candidate meets the following experience requirements.

- Have a minimum of one year full-time or two years' volunteer or part-time paid experience in a recognized fire agency in California as a Plan Examiner

**OR**

- Have a minimum of one year full-time or two years' volunteer or part-time paid experience in a recognized fire agency in California as a Fire Inspector or Fire Prevention Officer with the primary responsibility for doing plan review

| Agency | Experience | Start Date | End Date |
|--------|------------|------------|----------|
|        |            |            |          |
|        |            |            |          |
|        |            |            |          |

### Position

The candidate meets the qualifications for this level of certification. The position requirement is met when applicant fulfills the role of the specific duties as defined by the Fire Chief.

### Supporting Documentation

State Fire Training confirms that there are no supporting documentation requirements for this job function certification.

### Updates

The candidate has completed and enclosed all updates to this certification task book released by State Fire Training since its initial publication.

Number of enclosed updates: \_\_\_\_\_

## Completion Timeframe

The candidate has completed all requirements documented in this certification task book within five years of its initiation date.

Initiation Date (see Fire Chief signature under **Initiation Requirements**): \_\_\_\_\_



## Review and Approval

### Candidate

Candidate (please print): \_\_\_\_\_

I, the undersigned, am the person applying for Plan Examiner certification. I hereby certify under penalty of perjury under the laws of the State of California, that the completion of all requirements documented herein is true in every respect. I understand that misstatements, omissions of material facts, or falsification of information or documents may be cause for rejection or revocation.

Signature and Date: \_\_\_\_\_

### Fire Chief

Candidate's Fire Chief (please print): \_\_\_\_\_

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

Signature and Date: \_\_\_\_\_