2014 NEBB Annual Conference
Delivering Building Performance and Energy Efficiency
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Speaker: Tom Hanlon

Proctor’s Update & Orientation – 2014 TAB Practical Exam Guideline
Meet.........Your TAB Committee

Chairman:
   Nick White PE.........Abilene, Texas

Members:
   Mike Bledsoe...........Camby, Indiana
   Steve Clark.............Milton, Ontario
   Tom Hanlon...............Maumelle, Arkansas
   Rodney Hinton...........Greenville, South Carolina
   Tom Tunink...............Centennial, Colorado
   Mike Vawter PE.........Portland, Oregon
Review: THE CP Certification Path

- Pass the CP on-line examination
- Complete the on-line Report Writing course/test.
- Complete the on-line Error Finding course/test/
- Complete the “Hands On” practical test in both air and hydronics. Test to be taken at an approved practical testing site, administered by approved proctors in compliance with the 2012
New: THE CP On-line testing path

- Now delivered through Criterion. Taken at designated testing centers.

- Application through national office, not local chapters.

- Instant score……!!!

- Retake in 90 days……not 6 months

- Same test taking materials.

“TAB PRACTICAL EXAMINATION ADMINISTRATION MANUAL”
In 2010 the Board allowed for practical portions of the test to be taken at any time that they can be scheduled and may be taken at any NEBB approved testing site.

The requirements place a three-year window on completion of all phases of the TAB certification/qualification process. Once a candidate has passed a particular section of the Practical Exam, that section need not be re-taken. All testing and paperwork must be completed within a three-year window after candidate has started the testing process.
C. Instrumentation Requirements:

One of the basic elements of the Practical Exam is to have the Candidate CP demonstrate proficiency with the TAB instrumentation.

For the practical exam, it’s mandatory the candidate provide all the proper (and currently calibrated-provide proof) instruments necessary to complete the exam.

The Candidate must demonstrate to the examination proctors that he/she can properly operate, including performing zeroing adjustments, any instrument listed on his firm’s Form B.

The Candidate must describe the use and accuracy limitations of any instrument on his firm’s Form B if requested by the proctor.

Admin Manual does allow the candidate to use the testing site instruments. This however does not release the candidate from the above requirements.
Review: Practical Testing Path/Site

• Candidate can take the Practical Exam only at a local chapter site that has been approved by NEBB and the tests must be administered by proctors who have been approved by NEBB. See Section I for these requirements. Also, see Section H as certain conditions for re-tests modify these requirements.

• Test rigs must be compliant with current standards.

• Committee/ National Office supplies drawings, technical advice, support. Typically a TAB Committee member or appointed National Proctor will attend 1st practical testing session.
Review: Practical Testing Path/Site
Review: Practical Testing Path/Site
Review: Practical Testing Path/Proctors

- Typically the “Lead Proctor” is a member of the chapter hosting the tests. Not required.

- Must be two proctors with each candidate tested.
- *Three proctors is being proposed.*

- “Guest” proctors (such as consultants, etc.) can be used.

- Fees for and paid to proctors are a chapter matter.
Review: Practical Testing Path/Admin

- The Exam process requires skill, competencies and demonstration of experience with the following:

  • Knowledge of NEBB Procedural Standards
  • Familiarity with TAB instruments and their proper use during the “hands-on” sections.
  • Jobsite safety
  • Knowledge of HVAC systems and TAB procedures via the online test and ability to balance an Air and Hydronic Test Rig.
  • Management /supervisory skills, and ability to ascertain design data from plans and submittals, via the report review and pre-balance engineering report preparation that is available as an online training module though HVACR Training.
Review: Practical Testing Path/Points Grading

• Although the proctors’ responses on the grading sheets for the Hands On sections are a “yes” or “no” answer, there will certainly be times when the score is not obvious, such as partial completion of a task. Allowances for partial credit are at the discretion of the proctors. Additionally, any “no” marks must be accompanied by a remark from the proctors as to why the candidate did not successfully complete the task. Simply grading the sheet with a “no” without providing commentary is not allowed.

• Proctors must record observations and make comments on the grading sheets. It is important that at least two proctors observe and grade each candidate at all times. This is to ensure that the performance is evaluated fairly, all items on the grading sheet are checked, and that candidates are working safely around equipment. Comment!!
Review: Practical Testing Path/Points Grading

Immediately after the exam, the attending proctors meet to discuss the candidate’s performance. The proctors are not to grade the sections in the presence of the candidate, and the proctors are not to discuss the grading with candidates. The proctors may review their written notes, compare visual observations, and check the completed TAB forms to determine the final test score. Grading keys will be available to the proctors to score the written sections of the exam. Minimum passing grades for each section are found in the Proctors Binders. Candidates shall receive a “PASS” or “FAIL” grade. Numerical grades should be given for failed section scores so the candidate can properly assess the level of performance that is expected for a passing score. Neither NEBB, nor the local chapter, shall release to the candidates the proctors grading notes, or evaluations or question sheets.
Update: Eighth Edition Procedural Standards

- Final Membership Review Complete

Great input-comments.
Many implemented.

Possible consolidated instrument Lists???

Broadly expanded definitions.

Procedural Standards for Testing, Adjusting and Balancing of Environmental Systems

2013 – Eighth Edition

National Environmental Balancing Bureau
Update: Eighth Edition Procedural Standards

• Most “dramatic” change. Shall-should-may format now required.

• Greatly expanded “section 5” reporting requirements. Table format..!!!

• Deep dive into “section 3” Responsibilities. Added Cx section
Update: Eighth Edition Procedural Standards

• Energy Recovery Systems. Added reporting requirements and procedures.

• Removed much of the fume hood and labs systems of section 8. Refer to the FHT PSTs

• Final version out ???? Very Soon.....Soon..!!
Thanks !!

Questions??