



**Instructions**  
for Participating in  
ASHRAE's

**Operations & Performance  
Management Professional (OPMP)**  
Certification  
Program



Effective date: 1/21/2012

## About ASHRAE

The American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) is an international membership society committed to the advancement of the arts and sciences of heating, ventilation, air conditioning and refrigeration to serve humanity and promote a sustainable world. In support of this mission, ASHRAE offers many products and services, including the Operations and Performance Management Professional (OPMP) certification program, which is designed to meet educational needs of the HVAC&R industry.

*ASHRAE does not discriminate on the basis of race, color, sex, religion, disability, or national or ethnic origin in its policies, procedures, or eligibility requirements for its programs.*

## About the Guide

The purpose of this guide is to provide information about ASHRAE's OPMP certification program. No information or material in this guide creates a contract between ASHRAE and an individual customer or organization. ASHRAE will do its best to apply the principles and provisions contained within this guide as written, but reserves the right to change those principles and provisions without actual notice. Nevertheless, ASHRAE will make reasonable efforts to notify customers of any changes.

## Purpose of the OPMP Certification

Candidates who earn the OPMP certification will have demonstrated a well-rounded understanding and knowledge of the management of facility operations and maintenance and their impact on HVAC&R systems' performance. The OPMP examination is designed to assess an individual's understanding of how the management of HVAC&R operations helps to achieve and maintain building performance goals.

## Disclaimer of Warranty

ASHRAE does not warrant that this program or its examination certifies a candidate's technical competence or technical ability to design any part of the HVAC&R system. Furthermore, nothing about this program or its examination is intended to replace, override, or conflict with licensing requirements for design engineers, architects, or other building professionals.

## Who Can Participate

Participation in ASHRAE's OPMP program requires that a candidate meet eligibility requirements and successfully complete the program's examination. **Membership in ASHRAE is not a prerequisite to participate in the program.**

## Eligibility Requirements

Any individual who meets **one** of the following sets of academic and work experience requirements will be eligible to take the examination for the OPMP certification.

- Government-issued or government-recognized license as a professional engineer or building contractor and a minimum of two (2) years' experience in facility operations

- Minimum of Bachelor's degree in engineering or related field from an accredited institution of higher learning and a minimum of five (5) years' experience in one of the following areas: facilities operations/management, construction, design, or consulting, including a minimum of two (2) years' experience in facility operations
- Associate's degree or Technical degree or certificate in building design, construction, construction management, facility operation, or a related field from an accredited institution of higher learning and a minimum of five (5) years' experience in one of the following areas: facilities operations/management, construction, design, or consulting, including a minimum of two (2) years' experience in facility operations
- High school diploma or equivalent or construction-related trades training or building operations training from a nationally or internationally recognized trade association with a minimum of seven (7) years' experience in one of the following areas: facilities operations/management, construction, design, or consulting, including a minimum of two (2) years' experience in facility operations

## Testing Requirements

Candidates who have completed and submitted the OPMP application and who have received approval thereof from ASHRAE can enroll for the Operations and Performance Management Professional examination. To earn the Operations and Performance Management Professional certification, the candidate must successfully pass the examination in full; no partial credit for this examination will be given.

## Completing and Submitting the Application

To participate in ASHRAE's Operations and Performance Management Professional program, a candidate must complete and submit an application. Within a reasonable time after receiving a candidate's application, ASHRAE will notify the candidate either of ASHRAE's acceptance and approval of the application or of ASHRAE's denial of approval and the reasons therefore.

(ASHRAE has a process in place if a candidate's application is denied and the candidate wants to reapply. Please contact [certification@ashrae.org](mailto:certification@ashrae.org) to request information on this process.)

If an application is declined by ASHRAE or cancelled by the applicant, the amount of the fee, less \$50 to cover administrative costs, will be refunded to the applicant.

## About the Examination

The examination for the OPMP program is a proctored, closed book/closed notes, 2.5-hour, 115-item multiple-choice test. A candidate's score is based on 100 of the items; the other 15 items, which are interspersed throughout the examination, are included for "trial" or "pre-test" purposes.

A detailed content outline for the OPMP examination is provided on page 7. This outline identifies the following aspects of the examination:

- The four major content areas, as well as tasks within each area, that the examination covers
- The number of examination items devoted to each major content area
- The number of items at each cognitive level that a candidate is likely to use in responding to items in each major content area

The three cognitive levels tested on the OPMP examination are:

1. **Recall:** The ability to remember or recognize specific information
2. **Application:** The ability to comprehend, relate, or apply knowledge to new or changing situations
3. **Analysis:** The ability to synthesize information – sometimes from a variety of sources, determine solutions, and/or evaluate the usefulness of a solution

### Scheduling an Examination

After receiving notification that your application has been approved, you may schedule an examination appointment by one of the following methods. Be prepared to confirm a date, time, and location for testing and to provide your ASHRAE identification number.

**1. Schedule Online:** The candidate may schedule an examination appointment online at any time by using the Online Scheduling service at [www.goAMP.com](http://www.goAMP.com). To use this service, follow these easy steps:

- Go to [www.goAMP.com](http://www.goAMP.com) and select “Candidates.”
- Follow the simple, step-by-step instructions to choose your examination program and schedule the examination.

**2. Telephone Scheduling:** Call AMP at 888-519-9901 to schedule an examination appointment. This toll-free number is answered from 7:00 a.m. to 9:00 p.m. (Central Time) Monday through Thursday, 7:00 a.m. to 5:00 p.m. on Friday and 8:30 a.m. to 5:00 p.m. on Saturday.

If special accommodations are being requested, please submit a Request for Special Examination Accommodations form prior to contacting AMP at 888-519-9901 to schedule your examination.

The examinations are administered by appointment only Monday through Saturday at 9:00 a.m. and 1:30 p.m. Individuals are scheduled on a first-come, first-served basis. Refer to the chart below for scheduling information.

If you contact AMP by 3:00 p.m. Central Time on...	Depending on availability, your examination may be scheduled as early as...
Monday	Wednesday
Tuesday	Thursday
Wednesday	Friday/Saturday
Thursday	Monday
Friday	Tuesday

When the appointment is made, the applicant will be given a time to report to the Assessment Center. Please make a note of this time because an admission letter will not be sent. The candidate will be allowed to take only the examination for which the appointment has been made. No changes in examination type will be made at the Assessment Center. **UNSCHEDULED CANDIDATES (WALK-INS) WILL NOT BE ADMITTED** to the Assessment Center.

### Assessment Center Locations

Examinations are administered by computer at over 150 AMP Assessment Centers geographically distributed throughout the United States. Assessment Centers are typically located in H&R Block offices. Assessment Center locations, detailed maps and directions are available on AMP’s website, [www.goAMP.com](http://www.goAMP.com). Specific address information will be provided when a candidate schedules an examination appointment.

### Holidays

The examinations are not offered on the following holidays:

New Year’s Day	Columbus Day
Martin Luther King Day	Veterans’ Day
Presidents’ Day	Thanksgiving Day (and the following Friday)
Good Friday	Christmas Eve Day
Memorial Day	Christmas Day
Independence Day (July 4)	New Year’s Eve Day
Labor Day	

### Special Arrangements for Candidates with Disabilities

AMP complies with the Americans with Disabilities Act and strives to ensure that no individual with a disability is deprived of the opportunity to take the examination solely by reason of that disability. AMP will provide reasonable accommodations for candidates with disabilities. Candidates requesting special accommodations must call AMP, ASHRAE’s exam vendor, at 888-519-9901.

1. Wheelchair access is available at all established Assessment Centers. Candidates must advise AMP at the time of scheduling that wheelchair access is necessary.

2. Candidates with visual, sensory, or physical disabilities that would prevent them from taking the examination under standard conditions may request special accommodations and arrangements.

Verification of the disability and a statement of the specific type of assistance needed must be made in writing to AMP at least 45 calendar days prior to the desired examination date. Please inform AMP of the need for special accommodations when scheduling the examination.

### Telecommunication Devices for the Deaf

AMP is equipped with Telecommunication Devices for the Deaf (TDD) to assist deaf and hearing-impaired

candidates. TDD calling is available 8:30 a.m. to 5:00 p.m. (Central Time) Monday through Friday at 913-895-4637. This TDD phone option is for individuals who have compatible TDD machinery.

### Examination Appointment Changes/Failure to Report or to Schedule an Examination

1. A candidate may reschedule an appointment for an examination by calling AMP at 888-519-9901 at least two business days prior to the scheduled testing session. (See following table.)

If the examination is scheduled on . . .	AMP must be contacted by 3:00 p.m. Central Time to reschedule the examination by the previous . . .
Monday	Wednesday
Tuesday	Thursday
Wednesday	Friday
Thursday	Monday
Friday	Tuesday

The first reschedule or deadline extension with a two-day notice will be free; any additional reschedules or extensions will be at **full price**. Similarly, a candidate can extend the 90-day deadline for registering for and taking an exam by emailing certification@ashrae.org at least two business days prior to the 90-day deadline. ASHRAE will provide an extension of up to 45 days.

2. A candidate who wishes to reschedule his/her examination appointment, but fails to contact AMP at least two business days prior to the scheduled testing session, **will forfeit the examination fee and must reschedule the examination.**

### Inclement Weather, Power Failure or Emergency

In the event of inclement weather or unforeseen emergencies on the day of an examination, AMP will determine whether circumstances warrant the cancellation, and subsequent rescheduling, of an examination. The examination usually will not be rescheduled if the Assessment Center personnel are able to open the Assessment Center. If power to an Assessment Center is temporarily interrupted during an administration, your examination will restart where you left off and you may continue the examination.

Candidates may contact AMP's Weather Hotline at 800-380-5416 (24 hours/day) prior to the examination to determine if AMP has been advised that any Assessment Centers are closed. Every attempt is made to administer the examination as scheduled; however, should an examination be canceled at an Assessment Center, all scheduled candidates will receive notification following the examination regarding rescheduling or reapplication procedures.

### On the Day of Your Examination

On the day of your examination appointment, report to the Assessment Center no later than your scheduled testing time. After you enter the office, look for the signs indicating AMP Assessment Center check-in. A CANDIDATE WHO ARRIVES MORE THAN 15 MINUTES AFTER THE SCHEDULED TESTING TIME WILL NOT BE ADMITTED. To gain admission to the Assessment Center, a candidate needs to present two forms of identification, one with a current photograph. Both forms of identification must be current and include the candidate's current name and signature. The candidate will also be required to sign a roster for verification of identity.

Acceptable forms of identification include a current:

1. Driver's license with photograph
2. State identification card with photograph
3. Passport
4. Military identification card with photograph
5. Social security card (secondary form)

Employment ID cards, student ID cards, and any type of temporary identification are NOT acceptable as primary identification. Candidates are prohibited from misrepresenting their identities or falsifying information to obtain admission to the Assessment Center.

### Security

ASHRAE and AMP maintain examination administration and security standards that are designed to assure that all candidates are provided the same opportunity to demonstrate their abilities. The Assessment Center is continuously monitored by audio and video surveillance equipment for security purposes.

The following security procedures apply during the examination:

- Examinations are proprietary.
- No cameras, notes, tape recorders, Personal Digital Assistants (PDAs), pagers, or cellular phones are allowed in the testing room.
- You are encouraged to bring a non-programmable scientific calculator for the OPMP examination. Only silent, non-programmable calculators are permitted, but they will not be provided for you.
- No guests, visitors, or family members are allowed in the testing room or reception areas.
- No personal items, valuables, or weapons are allowed in the Assessment Center. Only keys and wallets may be taken into the testing room and AMP is not responsible for items left in the reception area.

### Examination Restrictions

- No personal belongings will be allowed in the Assessment Center. Pencils will be provided during check-in. Use of a cellular phone or other electronic device is strictly prohibited and will result in dismissal from the examination.

- You will be provided with scratch paper to use during the examination. You must sign and return the scratch paper to the supervisor at the completion of testing, or you will not receive a score report. No documents or notes of any kind may be removed from the examination room. If you need a second piece of scratch paper, you need to ask the test proctor for another piece of paper and turn in the one you used before.
- No questions concerning the content of the examination may be asked during the examination.
- Eating, drinking, or smoking will not be permitted in the Assessment Center
- You may take a break whenever you wish, but you will not be allowed additional time to make up for time lost during breaks.

## Misconduct

Individuals who engage in any of the following types of conduct, either in the testing room or during a break, may be dismissed from the examination, their scores will not be reported, and their examination fees will not be refunded. Examples of misconduct are when a candidate:

- creates a disturbance, is abusive, or is otherwise uncooperative;
- displays and/or uses electronic communications equipment such as pagers, cellular phones, or PDAs;
- gives or receives help or is suspected of doing so;
- attempts to record examination questions or make notes;
- attempts to take the examination for someone else; or
- is observed with notes, books, or other aids.

## Copyrighted Examination Questions

All examination questions are the copyrighted property of ASHRAE. It is forbidden under federal copyright law to copy, reproduce, record, distribute or display these examination questions by any means, in whole or in part. Doing so may subject you to severe civil and criminal penalties.

## Practice Examination

Upon signing in, after your identification has been confirmed, you will be directed to a testing carrel. You will be instructed on-screen to enter your identification number. You will take your photograph which will remain on screen throughout your examination session. This photograph will also print on your score report.

Prior to attempting the examination, you will be given the opportunity to practice taking an examination on the computer. The time you use for this practice examination is NOT counted as part of your examination time or score. When you are comfortable with the computer testing process, you may quit the practice session and begin the timed examination.

## Timed Examination

Following the practice examination, you will begin the timed examination. Before beginning, instructions for taking the examination are provided on-screen. The computer

monitors the time you spend on the examination. The examination will terminate if you exceed the time allowed. You may click on the "Time" box in the lower right-hand corner of the screen or select the "Time" key to monitor your time. A digital clock indicates the time remaining for you to complete the examination. The time feature may be turned off during the examination. Only one examination question is presented at a time. The question number appears in the lower right hand corner of the screen. Choices of answers to the examination question are identified as A, B, C, or D. You must indicate your choice by either typing in the letter in the response box in the lower left hand of the computer screen or clicking in the option using the mouse. To change your answer, enter a different option by pressing the A, B, C, or D key or by clicking on the option using the mouse. You may change your answer as many times as you wish during the examination time limit.

To move to the next question, click on the forward arrow (>) in the lower right portion of the screen or select the NEXT key. This action will move you forward through the examination question by question. If you wish to review any question or questions, click the backward arrow (<) or use the left arrow key to move backward through the examination.

An examination question may be left unanswered for return later in the examination session. Questions may also be bookmarked for later review by clicking in the blank square to the right of the Time button. Click on the hand icon or select the NEXT key to advance to the next unanswered or bookmarked question on the examination. To identify all unanswered and bookmarked questions, repeatedly click on the hand icon or press the NEXT key. When the examination is completed, the number of examination questions answered is reported. If all questions have not been answered and there is time remaining, return to the examination and answer those questions. Be sure to provide an answer for each examination question before ending the examination. There is no penalty for guessing.

## Candidate Comments

During the examination, online comments may be provided for any question by clicking on the button displaying an exclamation point (!) to the left of the "Time" button. This opens a dialogue box where comments may be entered. Comments will be reviewed, but individual responses will not be provided.

## Following the Examination

After completing the examination, candidates are asked to complete a short evaluation of their examination experience. Then, candidates are instructed to report to the examination proctor to receive their examination completion report. Scores are reported as either "Pass" or "Fail" and are provided in written form only by U.S. mail. Scores are not reported over the telephone, by electronic mail, or by facsimile.

## Scores Cancelled by ASHRAE or AMP

ASHRAE and AMP are responsible for the validity and integrity of the scores they report. On occasion, occurrences such as misconduct by a candidate may cause a score to be suspect. ASHRAE and AMP reserve the right to void or withhold examination results if, upon investigation, violation of its regulations is discovered.

## Confidentiality

Information about candidates for testing and their examination results are considered confidential. Studies and reports concerning candidates will contain no information identifiable with any candidate, unless authorized by the candidate.

**By participating in the OPMP program, each person who earns and maintains this certification agrees to be listed on ASHRAE's public website. Only those individuals who are active OPMP certificants will be listed on the site. Upon request, ASHRAE will provide a link to your company's website.**

## Duplicate Score Report

Candidates may purchase additional copies of their results at a cost of \$25 per copy. Requests must be submitted to ASHRAE, in writing. The request must include the candidate's name, identification number, mailing address, telephone number, date of examination and examination taken. Submit this information with the required fee payable to ASHRAE in the form of a check, money order or cashier's check. Duplicate score reports will be mailed within approximately two weeks after receipt of the request and fee.

## Candidate Responsibilities

Each candidate for ASHRAE's Operations and Performance Management Professional certification is responsible for:

- Submitting a completed, signed application form and the application fee.
- Enrolling for the examination.
- Paying a reschedule or cancellation fee if the candidate chooses to cancel or reschedule an enrollment.
- Complying with the rules for examination.
- Immediately notifying ASHRAE of any suspected violations of the rules for examination.

## Available Resources to Help Candidates Prepare for the OPMP Examination

Neither participating in a preparatory activity nor purchasing a publication is a requirement for participating in the OPMP program or for enrolling to take the OPMP examination. However, candidates who choose to participate in preparatory activities or to purchase publications are responsible for ensuring that the timing of the activity or purchase aligns with the timing of the examination session for which the candidate has enrolled.

Resources available to help prepare for the OPMP examination include, but are not limited to, the following:

- ANSI/ASHRAE Standard 15-2007 - Safety Standard for Refrigeration Systems
- ANSI/ASHRAE Standard 55-2004 - Thermal Environmental Conditions for Human Occupancy
- ANSI/ASHRAE Standard 62.1-2004 - Ventilation for Acceptable Indoor Air Quality
- ANSI/ASHRAE/IESNA Standard 90.1-2004 - Energy Efficient Design of New Buildings Except Low-Rise Residential Buildings
- ANSI/ASHRAE/IESNA Standard 100-2006 - Energy Conservation in Existing Buildings
- ANSI/ASHRAE/ACCA Standard 180-2008 - Standard Practice for Inspection and Maintenance of Commercial Building HVAC Systems
- CIBSE Guide M - Maintenance Engineering and Management 2008
- Guideline 0-2005 - The Commissioning Process
- Guideline 4 - 2008 - Preparation of Operating and Maintenance Documentation for Building Systems
- Guideline 12-2000R - Minimizing the Risk of Legionellosis Associated With Building Water Systems
- The Commissioning Process & Guideline 0 - ASHRAE seminar
- Fundamentals of Standard 90.1 – ASHRAE eLearning course
- Fundamentals of Standard 62.1 – ASHRAE eLearning course
- ISO 14001-2004 - Environmental Management Systems
- Building Operator Certification (BOC) training
- Environmental Management Systems: An Implementation Guide for Small and Medium Sized Organizations (December 2000, U.S. EPA, in cooperation with NSF International)

**ASHRAE does not warrant that participation in or use of any listed resources will guarantee successful completion of the examination. Nor does ASHRAE warrant that all information presented in all of the resources is non-contradictory.** However, ASHRAE will do its best to avoid testing contradictory, out-of-date, or inaccurate information.

## Renewal/Recertification Requirements

The OPMP certification is renewable every three years. To retain certification, each certificant must earn 45 PDHs during the three year period following initial certification or the last renewal.

More information about acceptable renewal activities and the continuing education hours applicable to them is provided on page 13.

<p style="text-align: center;"><b>The American Society of Heating, Refrigerating and Air-Conditioning Engineers</b></p> <p style="text-align: center;"><b>Operations and Performance Management Professional Examination Detailed Content Outline</b></p> <p>Open cells show an examination could include items from indicated cognitive levels. Shaded cells prevent appearance of items on examinations.</p>	Cognitive Level			Totals
	Recall	Application	Analysis	
<b>I. FACILITY LIFE CYCLE</b>	<b>4</b>	<b>8</b>	<b>4</b>	<b>16</b>
<b>A. Process</b>	<b>2</b>	<b>5</b>	<b>2</b>	<b>9</b>
1. Commissioning				
a. advise an owner whether functional performance testing results of new building systems (e.g., mechanical, electrical, plumbing, life safety) conform to specification and performance criteria				
b. facilitate testing of existing building systems (e.g., mechanical, electrical, plumbing, life safety) for conformance to specification and performance criteria				
c. interpret functional performance testing of existing building systems (e.g., mechanical, electrical, plumbing, life safety) for conformance to specification and performance criteria				
d. determine when expert advice should be sought for potential corrective actions that will address deficiencies identified by functional performance testing				
e. implement corrective actions based on functional performance testing results				
f. recommend enforced system design requirements before occupancy				
2. Post-occupancy evaluation				
a. facilitate building operations data collection (e.g., building automation system, work order system, personal observation, occupant survey)				
b. monitor data (e.g., energy usage, complaints, temperature, pressure, repair logs) to verify performance of building systems on an ongoing basis				
c. recommend alterations to any building system based on functional changes				
d. order testing of building systems (e.g., mechanical, life safety, plumbing) for conformance to specification and performance criteria				
3. Continual improvement				
a. identify ongoing training needs for occupants, and operations and maintenance staff				
b. identify benchmarks that are appropriate for a building and staff productivity and its uses				
c. use management benchmarks to report on performance levels				
d. evaluate processes (e.g., preventive maintenance, inventory control, staffing levels) for potential energy savings and maximize life-cycle				
4. Manage end-of-service life issues for occupant spaces and building system components				

The American Society of Heating, Refrigerating and Air-Conditioning Engineers  Operations and Performance Management Professional Examination Detailed Content Outline	Cognitive Level			Totals
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<b>B. Costing for Building Components</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>7</b>
1. Capital budget				
a. estimate costs associated with potential projects				
b. calculate life-cycle costs				
c. interpret life-cycle cost and related economic analyses				
d. recommend projects for the capital budgeting process				
2. Operations budget				
a. identify elements of the operations budget				
b. prepare an operations budget for a building				
c. manage the operations budget				
d. compare life-cycle costs for component options				
e. compare lease-, performance-, and purchase-contract options				
f. identify anomalies in resource and other budget items				
g. recommend operational changes in reaction to anomalies				
<b>II. MANAGEMENT ASPECTS</b>	<b>18</b>	<b>26</b>	<b>17</b>	<b>61</b>
<b>A. Creation and Implementation of an Operations and Maintenance Program</b>	<b>3</b>	<b>3</b>	<b>3</b>	<b>9</b>
1. Prepare a systems and equipment inventory				
2. Select a maintenance strategy for the functional use of individual building systems				
a. time-based				
b. reliability-centered				
c. predictive				
d. preventive				
e. run-to-failure or reactive				
3. Creation of a building operations plan				
a. develop measures of performance				
b. select inspection and maintenance tasks				
c. determine inspection frequency				
d. identify resources (e.g., inventory, staff)				
e. describe failed conditions				
f. adjust inspection frequency				
4. Write business continuation plans for emergencies (e.g., life-safety, building operations)				

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<b>B. Supervision of Operations and Maintenance</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>8</b>
1. Resource allocation				
a. manage work orders including the use of computerized maintenance management systems (CMMS)				
b. prioritize tasks				
c. schedule tasks				
d. monitor task completion				
e. manage inventory (e.g., parts, tools)				
f. manage the budget				
2. Repair				
a. initiate repairs or corrective actions				
b. determine the most efficient skill or ability resource utilization				
c. identify associated work that should be recommended				
d. identify items on the predictive failure curve that deserve attention				
e. verify satisfactory completion of each repair				
3. Implement the business continuation plan (e.g., restart, relocation, data preservation)				
<b>C. Manage Building Performance</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>15</b>
1. Trend and performance data				
a. create trend data from building systems				
b. interpret trend data (e.g., results of water and eddy current analyses, fan and pump curves, utility bills, data loggers)				
c. interpret building management system data				
d. analyze maintenance reports				
2. Compare building performance data to design expectations from calculated or computer modeling results				
3. Access data from a building information management system				
4. Use a building information management system for problem resolution				
5. Instruct staff and contractors on design intentions behind building systems				
<b>D. Building Automation Systems</b>	<b>3</b>	<b>3</b>	<b>2</b>	<b>8</b>
1. Verify that systems are operating according to the designed sequence of operations				
2. Verify that building performance indicators match outputs from automated systems				
3. Correct systems that are operating out of specification				
4. Maintain sensors and controllers				
5. Document program, schedule, and setpoint changes				

The American Society of Heating, Refrigerating and Air-Conditioning Engineers  Operations and Performance Management Professional Examination Detailed Content Outline	Cognitive Level			Totals
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6. Identify failures of building automation system components				
7. Instruct staff and contractors on design intentions and functionalities behind the building automation system				
8. Create trend logs				
<b>E. Documentation Preparation</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>3</b>
1. Prepare inspection reports				
2. Maintain statutory records				
3. Prepare monthly reports (e.g., variances, complaints, preventive maintenance tasks scheduled and completed, log of subcontractor work)				
4. Update record drawings				
5. Document building management system programming changes				
<b>F. Procurement Management</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>3</b>
1. Evaluate the cost/benefit of using outside contractors for projects				
2. Develop the scope of work for an outside contract				
3. Request or write purchase orders				
4. Manage purchase orders				
5. Manage contracted work				
6. Assess the environmental and energy impacts of purchased products and services				
<b>G. Training</b>	<b>1</b>	<b>3</b>	<b>1</b>	<b>5</b>
1. Identify ongoing training needs for occupants, and operations and maintenance staff				
2. Select entities who can provide training				
3. Schedule training for staff and occupants				
4. Mentor staff to expand their problem solving abilities				
5. Document training that has been completed				
6. Develop a budget and support for training activities				
7. Assess the effectiveness of training				
<b>H. Quality Management</b>	<b>1</b>	<b>3</b>	<b>1</b>	<b>5</b>
1. Identify benchmarks associated with building performance goals				
2. Identify benchmarks associated with operations and maintenance objectives including internal staff and external contractors				
3. Prepare a quality assurance plan				
4. Compare quality assurance data with benchmarks				
5. Implement actions to improve quality				

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<b>I. Resource Management</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>5</b>
1. Develop a resource conservation plan including benchmarks				
2. Implement the resource conservation plan				
3. Monitor resource utilization				
4. Compare resource utilization results against benchmarks				
5. Implement actions to further improve resource utilization				
<b>III. COMMUNICATIONS</b>	<b>2</b>	<b>5</b>	<b>3</b>	<b>10</b>
<b>A. Management</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>2</b>
1. Assess building performance needs of the owner				
2. Align operations and management priorities with those of the owner				
3. Educate the property management about building performance, and operations and maintenance				
4. Advocate projects that enhance building performance and efficiency to senior management				
<b>B. Occupants</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>3</b>
1. Interface with customer relations (e.g., help-desk, tenant relations) staff to meet needs of occupants				
2. Prioritize needs of occupants				
3. Respond to data collected from occupants regarding building performance and corrective actions				
4. Use data from the request tracking system to respond to occupants				
5. Track responses including response times and customer satisfaction				
6. Ensure occupants are informed about and prepare for impacts from operations and maintenance activities				
<b>C. Staff</b>	<b>1</b>	<b>3</b>	<b>1</b>	<b>5</b>
1. Prioritize work orders for repairs, preventive maintenance, capital improvements, and occupant requests				
2. Distribute work orders for repairs, preventive maintenance, capital improvements, and occupant requests				
3. Coach staff in problem solving strategies				
4. Verify documentation of completed work				
5. Interact with staff and suppliers about scheduled work				
6. Provide information to staff regarding special events				
7. Communicate operational goals and objectives				
8. Implement rewards and discipline				

The American Society of Heating, Refrigerating and Air-Conditioning Engineers  Operations and Performance Management Professional Examination Detailed Content Outline  Open cells show an examination could include items from indicated cognitive levels. Shaded cells prevent appearance of items on examinations.	Cognitive Level			Totals
	Recall	Application	Analysis	
<b>IV. ENVIRONMENTAL, HEALTH, AND SAFETY</b>	<b>6</b>	<b>4</b>	<b>3</b>	<b>13</b>
<b>A. Legal Requirements</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>5</b>
1. Comply with laws (e.g., environmental, occupational safety, MSDS, HAZMAT, fire and life-safety systems, labor)				
2. Comply with codes				
3. Identify tasks that require Authorized Persons				
<b>B. Voluntary Steps</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>4</b>
1. Manage indoor environmental quality (e.g., temperature, humidity, lighting, noise, air quality)				
2. Create safety programs for staff and occupants				
3. Manage the carbon footprint of a building				
4. Evaluate ethical and environmental impacts of building operations and maintenance				
5. Recommend potential solutions for ethical and environmental impacts of building operations and maintenance				
<b>C. Security</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>4</b>
1. Control access to restricted areas				
2. Manage the security of building systems against extraordinary events				
3. Test security systems against intrusion				
4. Ensure required signage is posted				
5. Integrate security and building management systems				
<b>Totals</b>	<b>30</b>	<b>43</b>	<b>27</b>	<b>100</b>

## Renewal Requirements for ASHRAE Certification Programs

Each Certificant is required to renew his/her certification every three years. The renewal process includes submittal of a renewal fee (\$125 for members, \$195 for non-members) and evidence of earning 45 ASHRAE Continuing Education (ACE) units during each three-year renewal period.\*

The three-year renewal period starts on December 31 of the year in which the Certificant earns the certification. For example, a Certificant who earns the certification anytime in 2012 will have a renewal deadline of December 31, 2015.

Individuals who fail to submit renewal fees and evidence of the required ACEs by the December 31 deadline will be considered as “non-renewing,” notified accordingly, and advised to cease using the specific certification designation after their names. The names of non-renewing Certificants will be removed from the list of Certificants on ASHRAE’s website.

To be reinstated, non-renewing Certificants must submit the renewal fee, a reinstatement fee (\$60), and evidence of the required ACEs by December 31 of the year following their active status. After that date, non-renewing Certificants must follow the same process as that for the initial application. Extenuating circumstances will be reviewed on a case-by-case basis by the Committee.

## Acceptable Methods of Obtaining ACE credits

Type	Credits
Successful completion of a course in a related field from an accredited institution of higher learning Note: To qualify for this credit, a course must be offered regularly and must conclude with a test that sets a passing grade.	15 ACEs per credit hour (semester system) OR 10 ACEs (quarter system)
Patent Note: Credit can be claimed after a patent is issued and the inventor submits details to the board. The invention must be related to engineering.	10 ACEs
Publication of article/paper/book in recognized peer reviewed journal in relevant field (max. 3 per year). Note: A “news” article in a technical or professional bulletin is not considered a published paper.	10 ACEs per published item
Active participation in a professional or technical society relevant to the field Note: The certificant must serve as an officer and/or must actively participate in a committee of the organization. PDH credits are earned at the end of each year of service.	2 ACEs per year per organization
Writing ASHRAE certification exam items in relevant field	5 ACEs per exam
Accreditation Visit Evaluator (or ASHRAE approved equivalent)	3 ACEs per year
Professional awards	2 ACEs per award
Teaching of approved courses and workshops in relevant field Note: Teaching credit is valid for teaching a course or seminar for the first time only. It does not apply to faculty performing regular duties.	ACEs are determined by multiplying by two (2) the total number of course hours (for preparation time).
Attendance at meetings and conferences (e.g. National, Annual, Regional) or special conferences relevant to the field	Qualifying seminars and workshops will be based on one ACE unit for each hour of attendance.
Attendance and completion of approved short courses and other continued education activities in relevant field	Qualifying seminars and workshops will be based on one ACE unit for each hour of attendance.

\*Certificants are not required to submit a report of Professional Development activities as part of certification renewal. A percentage of Certificants are randomly chosen for audit each year. If audited, a report of continuing professional development with documentation must be submitted to the Certification Coordinator for review.

Activities that qualify for ASHRAE's Continuing Education units **might** also qualify for continuing education credits (e.g., PDHs, CEUs, or LUs) from other credentialing bodies or organizations. The individual is responsible for contacting the relevant governing body to determine whether an activity qualifies for that body's continuing education credit.

For questions about any of the information about ASHRAE's certification renewal requirements, including clarification of acceptable and reportable qualifying activities, please contact ASHRAE's Communications Coordinator-Certification at [certification@ASHRAE.org](mailto:certification@ASHRAE.org).