Task Validation Guidelines

Goal

This validation process is intended to ensure that the Jr. Tech knows how to perform basic tasks and routine maintenance on HVAC-R equipment and systems.

Introduction

The SOJT (structured-on the job training) task list contains basic HVAC-R tasks and maintenance activities common to HVAC-R. It is expected that a Jr. Tech be able to properly and safely perform these tasks in order to complete their Jr. Tech level training. The performance of these tasks should be preceded by classroom or online training. In order to be as efficient with our time as possible it is recommended that the task be practiced prior to requesting validation. The technician should have a high degree of confidence in performing the task safely and without assistance or instruction.

- Preparation
- Practice
- Performance - Validation

Definition

Task validation is to be performed in the presence of a designated observer known here as the validator. It is the job of the validator to evaluate whether the technician can perform the task without technical assistance or instruction. With safety in mind, it is best practice to get a verbal description of what the tech intends to do before they do it. Both parties are responsible for safety but the validator should take the lead and be ready to intervene if an unsafe condition arises. It is also the responsibility of the validator to take over the task if difficulties arise. At no time are we to compromise customer service during the SOJT process.

Preplanning is critical to the successful completion of any job. Because of this, the validation should begin there. Using T.I.M.S. will help us remember the major components of the process.

- Tools
  - What tool will be needed for the job?
- Information
  - What is the job to be done?
  - Model numbers
  - Voltage
  - Refrigerant
  - Is the equipment on the ground or roof? Is there difficult access?
- Materials
  - Primary Parts
  - Accompanying parts like refrigerant, driers, electrical fittings, etc.
- Safety
  - Are there any circumstances on this job that would require unique tools or special safety consideration?
  - Do I have all of my PPE supplies?