FIELD TRAINING/CERTIFICATION TESTING PROTOCOL

Structure

1. **Field Training/Certification Testing** is a four-day UPCS field training conducted four consecutive days (Tuesday – Friday or Monday - Thursday). The first three days are "field" training and the fourth day is the "field" exam. The training can be completed in one of two ways. The preferred way is having the Field Training/Certification Testing candidate complete four one-day inspections. The second way is to have the Field Training/Certification Testing candidate complete two one-day inspections along with one two-day inspection. However, the test day must be conducted as a single, one-day inspection from start to finish.

   PLEASE NOTE: INSPECTOR CANDIDATE MUST SCHEDULE THE FIELD TRAINING/CERTIFICATION TESTING WITHIN 90 DAYS OF PASSING THE CLASSROOM REVIEW/TESTING, WITH NO EXCEPTIONS. OTHERWISE THEY WILL BE REQUIRED TO RETAKE THE ENTIRE TRAINING FROM THE START.

2. The preferred Field Training/Certification Testing option will consist four inspections of various building counts and types. As a general rule:

   a. A recommended one-day inspection is a property with 14 – 75 units, taking into consideration the number of buildings.

   b. When properties with a large quantity of buildings are selected, there should be a smaller number of units. For example, a property with 1 building and 75 units may be acceptable, whereas a property with 10 buildings and 75 units would not be acceptable due to the length of time the inspection would likely take because of the increased number of buildings.

   c. Mock Inspections are an acceptable alternate (these inspections are not Inspection of Record, nor does an inspector get paid for these inspections). To get more information on these types of inspections, please contact the scheduling team at: Scott-Thompson.Michelle.L@hud.gov and/or Ava.M.Gordon2@hud.gov, .

   ➢ Day 1 – Day 3 Field Training. A PASS QA inspector will provide field training while the Field Training/Certification Testing candidate conducts the inspection. Every effort will be made to train the Field Training/Certification Testing candidate on all aspects of a UPCS inspection, including, but not limited to, profile verification, sample generation, inspection of all five inspectable areas, and completion of the EH&S certificate, if applicable.

   ➢ Day 4 Field Exam. A PASS QA inspector will conduct a final field exam evaluating the Field Training/Certification Testing candidate's ability to conduct a REAC inspection independently and without QA assistance. No training is provided. The Field Training/Certification Testing candidate will be evaluated on all aspects of conducting an inspection in accordance with the UPCS inspection protocol, which includes, but is not limited to, profile verification, sample

generation, inspection of all five inspectable areas, and completion of the EH&S certificate, if applicable. Field Training/Certification Testing candidates will be rated as "Within Standards" or "Outside Standards" based on the PASS QA CQA review procedures. The QA inspector will clearly communicate the result of the Field Training/Certification Testing Field Exam (Pass or Fail) to the Inspector Candidate at the conclusion of the field examination.

3. All Field Training/Certification Testing UPCS inspections must be conducted in the presence of a PASS QA inspector. A Field Training/Certification Testing inspection that is not conducted in the presence of a PASS QA inspector will be rejected and the Field Training/Certification Testing candidate will automatically fail Field Training/Certification Testing.

4. PASS QA staff must approve the properties that will be inspected for Field Training/Certification Testing, and the order in which inspections will be conducted. This is the official schedule and must be followed. Any modification to the schedule after it is sent to the Field Training/Certification Testing candidate by PASS QA must be approved by PASS QA. If a PASS QA Field Training/Certification Testing trainer notices any deviation in the schedule on site or from reviewing the REAC Scheduler, the QA Field Training/Certification Testing trainer will contact PASS QA management prior to permitting the Field Training/Certification Testing candidate to start an inspection.

5. The Field Training/Certification Testing field exam rating is not appealable. The Field Training/Certification Testing candidate, however, is given one additional opportunity to take Field Training/Certification Testing. The second Field Training/Certification Testing must be scheduled and completed within **three months**. If the second attempt is not successful, the Field Training/Certification Testing candidate will be required to retake and successfully complete the entire UPCS training (beginning with Online LMS Training & Classroom Review/Testing) within six months to become a certified inspector (this will depend on training/class availability).

Process

1. To begin Field Training/Certification Testing, a Field Training/Certification Testing candidate must immediately identify a minimum of eight possible properties for the Field Training/Certification Testing inspections. Each of the properties proposed for Field Training/Certification Testing must meet all criteria described in Online LMS Training & Classroom Review/Testing training, including being a size that will allow you to be trained and tested on all five inspectable areas (i.e., site, building exterior, common areas, building systems and dwelling units) and complete each inspection in one inspection day.

2. After identifying the proposed properties, a Field Training/Certification Testing candidate must complete the Field Training/Certification Testing Inspection Option form by filling in all applicable fields. Hard copies are being provided, as attachments to this document.

a. Either the excel version (preferred) or the PDF version should be scanned and emailed to the scheduling team at Scott-Thompson.Michelle.L@hud.gov and Ava.M.Gordon2@hud.gov .

b. The Subject of the email must read: *Your name, Your M ID/I-ID number – Field Training/Certification Testing request*.

3. Inspections are not to be scheduled at any property until PASS QA Scheduling confirms the properties with the Field Training/Certification Testing candidate in writing. After receiving confirmation, Field Training/Certification Testing candidates must follow the PASS QA Scheduler's instructions for contacting the properties.

4. For all inspections, the time and date must be mutually agreed upon with PASS QA and the property. It is against UPCS protocol to dictate the day and time of an inspection to a property agent, owner, or representative.

5. After all inspections have been confirmed, the PASS QA scheduler will update HUD Secured Systems to reflect a Field Training/Certification Testing inspection date, time and Inspector ID. The PASS QA scheduler will then notify the Field Training/Certification Testing candidate that the inspection can downloaded at any time.

6. All Field Training/Certification Testing inspections must be downloaded **at least two weeks prior to the scheduled Field Training/Certification Testing** training to ensure sufficient time to resolve any issues that may arise. If not, the scheduled Field Training/Certification Testing training may be compromised. Call the REAC TAC at 1-888-245-4860 *immediately* if there are any problems with the download or your password.

7. Should any issue arise regarding the Field Training/Certification Testing inspections, the Field Training/Certification Testing candidate must immediately contact the PASS QA scheduler, the PASS Training staff, and the REAC TAC. It is critical that everyone is aware of any issues so that the Field Training/Certification Testing training is successfully completed.

8. Changes to any of the processes, procedures and requirements set forth above are at the sole discretion of PASS QA. Failure to comply with all of the above processes, procedures and requirements will result in failing Field Training/Certification Testing.

Successful completion of Field Training/Certification Testing

1. Those individuals who successfully complete Field Training/Certification Testing training will be fully certified UPCS inspectors and must comply with all Inspector requirements for General Liability Insurance, prior to conducting UPCS inspections. This Notice mandates UPCS certified inspectors to purchase, at their own expense, and carry General All Risk Liability insurance with the required limits not less than a Combined Single Limit of $1,000,000 per occurrence and $2,000,000 aggregate and provide evidence as follows:

a. HUD must be named as the Certificate Holder of the policy

b. The inspector's user ID number (the 5 characters "M-ID" or "I-ID number) must be on the face of the insurance certificate with the information naming the "Insured" party.

c. The inspector must submit a copy of the Certificate of Liability Insurance to HUD within five (5) days after successfully completing Field Training/Certification Testing by:

   ➤ Scanning and emailing a copy to REACInspectorInsurance@hud.gov or

   ➤ Uploading a PDF copy of the insurance certificate into HUD Secure Systems using the instructions below (see instructions below).

      o Log into Secure Systems

      o Go to the inspector profile page

      o Click on upload documents

      o Search the document directory on your computer

      o Select the pdf file of the Insurance Certificate

      o Click the open button and the file will be transferred to the website

2. UPCS certified inspectors are responsible for reading each Inspector Notice and complying with all the requirements set forth.

CERTIFICATION OF RECEIPT OF FIELD TRAINING/CERTIFICATION TESTING PROTOCOL

Please sign below. Your signature certifies that you received, read, and understand the Field Training/Certification Testing protocol.

_____

Signature   Date

_____

Printed Name