

Training Management System Requirements for Electronic Courses (TPCP)

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Training Management System Requirements for Electronic Courses (TPCP)

Electronic Training Course Requirements

1 General

“Electronic course” as defined by this document shall include electronically delivered courses, including web-based training and computer-based training (CBT). Electronic courses shall be maintained within a documented training management system (TMS).

2 Elements of the Training Management System

2.1 The TMS for the electronic course shall include the following elements:

- a) a TMS manual, which address all of the applicable requirements of this document;
- b) course administration, policies for admission of students, course registration forms, fee schedules, course certificates, and typical advertisements;
- c) a document control system for the maintenance and updating of procedures, course materials, and examinations;
- d) records of individual students and each course offering;
- e) a student evaluation procedure, including pass/fail decisions (where applicable);
- f) administration of the examination and re-examination, including security and confidentiality of examination questions and answers;
- g) issuance of certificates;
- h) handling and resolutions of complaints and appeals;
- i) management reviews of the course.

2.2 The API TPCP shall:

- a) assure confidentiality of all materials provided and any other information or knowledge obtained during the course certification process; and
- b) safeguard against conflict of interests between training providers and evaluators.

3 Course Content

3.1 The training provider shall establish and maintain a documented course design development procedure.

3.2 Course design procedure shall address the management and implementation of any changes to the course design.

3.3 The training provider shall document the qualifications of subject matter experts and identify other resources used in program/course development.

3.4 The training provider shall ensure that the course content reflects the latest edition, version, or revision of the publication or regulation upon which course is based wholly or in part (unless there is a documented reason to do otherwise).

4 Course Prerequisites and Objectives

4.1 The training provider shall identify, document, and provide to students the training course learning objectives, which shall address:

- a) course content (what is to be learned and requirements of specific learning),
- b) method of student's evaluation (how learning is to be measured and measurement criteria).

4.2 The training provider shall identify and document any prerequisite criteria that students shall be required to have met prior to taking the electronic course.

5 Course Introduction/Manual

The course introduction or course orientation features shall:

- a) be clearly identified;
- b) state the learning objectives and the method of organization of learning material throughout the course (such as table of contents, chapters/sections, etc.);
- c) indicate a required course duration;
- d) specify any applicable regulations, standards or other reference material necessary for the learning;
- e) method of student evaluation, including, if applicable, details on the examination and pass/fail criteria;
- f) indicate the student's location within course content;
- g) include links to the major course components;
- h) be consistently positioned on screen.

6 Course Design and Electronic Exercises

6.1 The electronic course shall provide the content overview and the organization of learning material.

6.2 The electronic course shall appropriately use a variety of instructional methods (including exercises and computer simulations) designed to elicit the student's relevant experience or knowledge. Instructional methods should be sufficient and appropriate to the course content and objectives.

6.3 All learning objectives shall be addressed and adequately covered by content.

6.4 The electronic course shall utilize appropriate and effective media.

6.5 The electronic course shall utilize appropriate interactions or practice exercises.

6.6 Electronic exercises shall be aligned with the applicable course work and be relevant to the objectives.

6.7 Computer simulations of hands-on activities required on the job shall be realistic and closely representative of actual on-the-job activities.

6.8 Clear instructions shall be provided for any electronic exercises or computer simulations.

6.9 Problem-solving exercises shall provide immediate, correct, useful, and objectives-based feedback to student when incorrect responses are given.

7 Course Tracking

7.1 The course shall provide clearly identified tracking features to record the course units or other components that have been completed by the student.

7.2 Tracking features shall be appropriate for the course, including but not limited to screen counters, course completion tracking, course progress indicators and display of "time remaining" for courses that are timed.

8 Course Navigation

8.1 The electronic course shall provide clear directions and clear navigation control instructions.

8.2 The training provider shall ensure that the electronic course allows for pause/resume, forward movement, backward movement, return to main menu, saving features, and other menus when applicable. These controls shall be available at all times.

8.3 The electronic course shall provide safeguards that prevent navigation when accidental keystroke strikes are made.

9 Course Functional Support

9.1 The training provider shall provide functional support in applicable areas.

9.2 The functional support shall:

- a) be readily accessible,
- b) operate consistently,
- c) provide for technical problems, and
- d) provide for navigational problems.

10 Course Installation and Removal

10.1 The training provider shall make available to the student the system requirements for downloading the course including the following:

- a) computer configuration requirements,
- b) operating system requirements,
- c) internet connection requirements,
- d) bandwidth requirements,

- e) time estimates on installing and removing the electronic course,
- f) sound requirements,
- g) identifying any incompatible applications that may be affected by the electronic course.

10.2 The electronic course shall be provided to the student with all necessary course instructions and other documentation required for initial installation and for removal of the course software upon completion.

Links to web resources or additional needed software should be accessible to students without assistance.

10.3 Technical support shall be made available either online, with documentation, or by dedicated telephone line.

11 Course Login Information

11.1 The training provider shall provide the student with a login procedure that includes a unique student user-identification system.

11.2 Upon login, system configuration information shall be provided to the student.

12 Course Interruption

12.1 The electronic course shall allow for course interruption or discontinuation and for successful return to the original place in the course.

12.2 Safeguards shall be put in place that allow for saving of completed material when the student exits a course.

12.3 The electronic course shall have necessary technical support available for troubleshooting and other assistance to enable the student to discontinue or uninstall the course.

13 Text and Format

13.1 Text

13.1.1 The electronic course shall provide text that is legible, in contrast with backgrounds, grammatically correct, spelled correctly, and can be viewed on commonly used computer screens.

13.1.2 The electronic course text and graphics shall be adjustable in a manner that optimizes viewing for the student.

13.1.3 Graphics shall be clear, contrasting with other screen images, and contain text labels.

13.2 Format

13.2.1 Formatting (headings, subheadings, screen set-up) shall be shown with proper spacing, size appropriate and consistently presented to avoid distraction.

13.2.2 Margins shall be adequate for all material on the screen.

13.2.3 Screen presentations shall be consistent and similar.

14 Evaluation of Students

14.1 General

14.1.1 The training provider shall establish and maintain an examination/evaluation procedure describing the methods of student evaluation and the pass/fail criteria. This procedure shall address the length of examinations if placing a time limit is necessary. If the time limit is established for an examination, the suitable features shall be in place to enforce strict adherence to the examination time limit.

14.1.2 Passing Point Criteria—For those training providers offering courses that must comply with specific standards, industry or regulatory requirements (i.e. API T2) passing points used for these courses may be detailed in the related standards and regulations and shall be followed.

14.1.3 The training provider shall establish procedures to resolve any disputes in grading.

14.1.4 The examination procedure shall include a system to generate multiple and unique examinations.

14.2 Re-examination

The training provider shall establish and maintain a policy for re-examination, including provisions for the maximum time interval and number of allowable chances for re-examinations (where applicable).

If a student fails the examination or computer simulation test, re-examinations may be given. The re-examination shall not be identical to the original examination; neither may it be the same simulation test problem. It shall, however, test the same skills/knowledge as the original examination.

14.3 Student Evaluations/Examinations

Student evaluations/examination shall:

- a) be provided upon a course/section of a course completion and contain clear instructions on testing,
- b) be linked to the defined and documented course objectives,
- c) use a variety of methods to elicit student responses,
- d) offer review or additional practice, and
- e) be designed to allow students to resume assessment after an interruption.

14.4 Additional Information

14.4.1 The students shall be notified in advance if evaluations are time controlled.

14.4.2 Evaluation results shall be documented by the training provider and made available to students at the conclusion of each section or entire course.

14.4.3 If proficiency in hands-on activities is critical to safety and environmental protection, the evaluation shall include a hands-on portion or a realistic and closely representative simulation of actual on-the-job activities.

15 Changes to the Course

15.1 All course design changes and modifications shall be in compliance with the course design procedure. Course design changes and changes to course design documents shall require the same controls as the original course design and course design documentation.

15.2 All course changes and updates shall be identified, documented, communicated to affected parties (i.e. instructors, etc.), and approved by authorized personnel prior to their implementation.

15.3 All course changes and updates shall require the same controls as the original course.

15.4 Documented policies or procedures shall require that course design changes (in content or length) must be submitted to API prior to implementation. The policy or procedure shall specify the function responsible and process for notifying API.

16 Training Course Administration

16.1 Course Policy

The training provider shall provide to the student the policies governing the course and shall include the following:

- a) time schedule and constraints,
- b) evaluation/examination requirements,
- c) passing points for any examination,
- d) testing out of course components,
- e) confidentiality requirements,
- f) instructions for handling any technical difficulties encountered by the student during the course.

16.2 Course Materials

16.2.1 Each student shall be provided with a complete set of course materials at the beginning of the course.

16.2.2 Course materials shall clearly state the course learning objectives. Course material shall identify the training provider's name and course identification.

16.2.3 The documents included in the training manual or course materials shall comply to the established document management practices, including document version, table of contents, and appropriate page numbering.

16.2.4 Course materials may include typical examination questions, provided they are not used in any of the examinations, either during the course or following the course.

16.2.5 If the required reference materials (i.e. industry standards, etc.) are not supplied as part of the course materials, the training provider shall advise the student, prior to commencement of the course, to enable the student to obtain the proper reference materials and provide proper links to the required reference materials for downloading.

16.3 Feedback

The training provider shall establish a student feedback mechanism, such as course evaluation forms.

16.4 Certificates of Completion

16.4.1 A certificate of course completion shall be provided in a downloadable format to each student who has successfully met the requirements of the course.

16.4.2 The certificate shall include:

- a) the name of the training provider, as it is certified in the API TPCP;
- b) the course title, date of completion, and any other course identification (i.e. number); and
- c) the name of the student.

17 Management Review

17.1 The management of the training provider shall review its administrative procedures at least annually. Records of these reviews shall be retained for at least 5 years.

17.2 The management of the training provider shall review the course design and its delivery at least annually to gain assurance of the continued suitability and effectiveness of the course content and presentation. Records of these reviews shall be retained for at least 5 years.

17.3 Subjects for management reviews shall include, at a minimum:

- requirements of the API TPCP;
- changes in the course;
- students' pass/fail rate;
- student feedback, evaluations and comments;
- students complaints and appeals;
- results of audits on the TMS;
- changes to the industry/government publications for the potential effect on the TMS or a specific course requirements.

The management review shall also include evidence of any actions taken to improve the TMS.

18 Course Records

18.1 Records may be kept in any media form, such as hard copy or electronic media.

18.2 The records for each course presentation shall include (as applicable):

- a) course dates, related advertisement, and promotional literature,
- b) Identification of the specific version of the course materials used;
- c) the examination results and the final grade for each student (where applicable);
- d) all certificates of course completion issued with the individual's name, date of issue and course attended;

- e) the percentage of students that successfully completed the course;
- f) list of students that took a re-examination, together with the re-examination records for each (where applicable);
- g) evidence of students' having met the prerequisite criteria for the course (if applicable).

18.3 If electronic courses are taught in a group environment, a class roster shall be completed for each training course taught by the training provider (if applicable). The class roster shall include: name of course, course dates, mediator/instructors name, and all student names.

19 Records Control

19.1 Documented procedures or policies shall identify the personnel functions responsible for the maintenance of the records

19.2 Student records shall be maintained for each student. The records shall be kept on file by the training provider for a period of at least 5years or the requirement imposed by applicable related standards, laws or regulations, whichever retention period is longer.

19.3 The training provider shall maintain a record listing the name of each student issued a certificate of completion, along with the date of completion, date of expiration, course description, and API certificate number.

20 Document Control

20.1 Documents required by the TPCP shall be controlled with a documented policy or procedure that establishes and defines the necessary controls for the following:

- a) approving documents for adequacy prior to issue;
- b) reviewing, updating and re-approving documents as needed;
- c) ensuring that changes and the current revision status of documents are identified;
- d) ensuring that relevant versions of applicable documents are available at points of use;
- e) ensuring that documents remain legible and readily identifiable;
- f) ensuring that documents of external origin are identified and their distribution controlled;
- g) preventing the unintended use of obsolete documents, including suitable identification of such.

20.2 Training provider shall establish and maintain a master list or equivalent control feature to identify all the documents required by the TMS and their current revision status.

20.3 Changes to documents shall be reviewed and approved by the same personnel functions that performed the original review and approval.

21 Customer Complaints and Appeals

21.1 The training provider shall have documented procedures for handling customer complaints and for handling appeals against its decisions, including provision for corrective and/or preventive action resulting from root cause analysis to be taken if required because of any complaint or appeal.

21.2 The training provider shall inform all students of the right to make a complaint or an appeal and shall provide details of the process for doing so.

22 Confidentiality

22.1 The training provider shall have adequate arrangements, consistent with applicable laws, to safeguard confidentiality of all information provided by students, including results of examinations. These arrangements shall be extended to include organizations or individuals acting on the training provider's behalf.

22.2 Except as required in this document, information about a student shall not be disclosed to a third party (i.e. student's employer) without the written consent of the student.

23 Use of the TPCP Mark

23.1 The training provider shall not use the API TPCP logo in advertising or in a manner that suggests that any other courses or products that are offered by the training provider have been certified by API.

23.2 The training provider shall not use the mark "API" or "AMERICAN PETROLEUM INSTITUTE," except in the following circumstances:

- 1) as part of the API TPCP marks;
- 2) advertising texts may state that training course meets, exceeds or otherwise satisfies API standards.

23.3 The training provider shall not use the marks "API" or "AMERICAN PETROLEUM INSTITUTE" apart from the API TPCP marks, in such a manner as to suggest or indicate API's sponsorship, approval or endorsement of the courses.

23.4 The training provider agrees to notify API in a timely manner if it has evidence or information which indicates that its certified training courses do not conform to API's requirements or of any assertion by a third party that the curriculum and training was invalid or misleading. The training provider agrees that API shall have the right to terminate the certification agreement, in response to said assertion or information.

23.5 When the API TPCP logo is used on student course completion certificates, it shall always be in conjunction with the applicable TPCP license number(s).

23.6 The training provider agrees that API may notify vendors, governmental authorities, potential users, and others of an improper or unauthorized use of the mark or the failure of courses to satisfy API requirements when in judgment of API such notifications are necessary to protect consumers the public, or for API's own protection.



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