


# System Operating Procedures

SOP-RTMKTS.0200.0015

Request OPTI Training and Changes to Training

Effective Date: July 18, 2011  
Revision No. 2

	© ISO New England Inc. 2011	<b>Procedure: Request OPTI Training and Changes to Training</b>
	Process Name: Perform Operations Training	
	Procedure Number: RTMKTS.0200.0015	Revision Number: 2
	Procedure Owner: Steve Weaver	Effective Date: July 18, 2011
	Approved By: Director, Operations	Review Due Date: July 18, 2013


# SOP-RTMKTS.0200.0015 - Request OPTI Training and Changes to Training

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## 1. Objective

### NOTE

Before implementing any modification to current Operational Performance, Training & Integration (OPTI) policies, procedures or practices recommended by auditors or outside authorities, equivalent existing procedures or practices must be compared to the recommended change and evaluated for value added, applicability to ISO and cost effectiveness by the Manager, OPTI and affected OPTI staff.


The objective of this procedure is to define the process used to document, evaluate and track requests for training and changes to OPTI courses.

This procedure applies to the following OPTI programs: Training Operations Professionals Program (TOPP), Continuing System Operator Training, and OPTI Instructor Training Programs. The Program Descriptions for each of the programs are located on the Enterprise Document Library (EDL) in Real Time Markets, Related Documents.

## 2. Background


OPTI is responsible for providing training programs for System Operations personnel, editing training programs to reflect changes in business process, procedures, software application and to the Bulk Electric System (BES). The purpose of this procedure is to formalize the process for making changes to existing training and to initiate the development of a new training course. These requests are a fundamental requirement in the creation of the Annual Training Schedule.

The Training Request sets the foundation for proper documentation of the progression of training through the assessment, design, development and implementation phases of the Systematic Approach to Training (SAT), a requirement of North American Electric Reliability Corporation (NERC) Reliability Standard PER-005 System Personnel Training and the NERC Continuing Education Program.

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### 3. Responsibilities

1. The Manager, OPTI is responsible for:
  - A. Establishing the standards and processes for factoring requested training and training changes into programs in a timely fashion.
  - B. Approving or denying requested training or training changes and notification to Requester with reason for denial.
  - C. Selecting and appointing an OPTI Training Coordinator (TC) to perform the responsibilities of OPTI Training Change Coordinator (TCC).
  - D. Ensuring the timely and effective incorporation of changes into training.
  - E. Initiating OPTI Training Change Requests in accordance with Section 5.2.
2. The Requester is responsible for submitting training requests utilizing Attachment B - OPTI Training Request Form
3. The TCC is responsible for:
  - A. Assigning a tracking number to Attachment B - Training Request Form using the next available ID number on Attachment C - OPTI Training Request Tracking Sheet.
  - B. Assigning a tracking number to an Attachment F - OPTI Training Change Request Form using the next available ID number on Attachment G - OPTI Training Change Request Tracking Log
  - C. Maintaining Attachments B and F
  - D. Evaluating training requests and training change requests for accuracy.
4. The OPTI Training Administrator (TA) is responsible for utilizing the assigned Tracking Number to initiate course records file storage in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.

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#### 4. Controls

1. All Training Requests and Training Change Requests shall be processed within the limits set forth in the directed actions of Section 5.
2. Attachments B and F shall be saved with the course records in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.
3. Training Requests shall be tracked in accordance with the guidelines in Section 5 using Attachment C.
4. Training Change Requests shall be tracked in accordance with the guidelines in Section 5 using Attachment G.

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## 5. Instructions


### 5.1 Process New Training Request

#### 5.1.1 Request New Training

1. The Requester shall:
  - A. Complete an Attachment B - OPTI Training Request for a new training course as soon as practicable prior to the inception of initial plan for a new Corporate Project that impacts Real Time or Markets business processes.
  - B. Complete an Attachment B for a new training course as soon as practicable after receiving notice of a change to the ISO New England power system that requires the addition of a new operational practice, procedure and/or operational tool or application.
  - C. Submit the completed Attachment B to the assigned TCC (e.g., wbell@iso-ne.com).


#### 5.1.2 Process a New Training Request

1. When a completed Attachment B is received, the TCC shall:
  - A. Assign the next Tracking Number.
  - B. Determine the following:
    - (1) The need for a SME
    - (2) The department that will supply the SME support
  - C. If the SME support is to be obtained from outside of the Operations department, complete Attachment E - Subject Matter Expert (SME) Contract and forward to the Manager, OPTI to request SME Support.
  - D. Forward the following applicable forms to the Manager, OPTI for review and approval:
    - (1) Attachment B - OPTI Training Request Form
    - (2) Attachment E- Subject Matter Expert (SME) Contract

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**5.1.3 Review and Approval of New Training Request**

1. When the initial processing of a training request is complete, the Manager, OPTI shall perform the following:
  - A. Review and either approve or deny the training request.
    - (1) If the training request is approved:
      - a. Determine the Department Supervisor responsible for SME and/or material support and:
      - b. Forward the signed paper copy of Attachment E to the responsible department Supervisor (or department Manager) for approval and signature.
      - c. If approval of a SME requires the approval of a department Director (or higher), forward Attachment E to the Director, Operations for further action.
    - (2) If the training request is denied:
      - a. Contact the Requester with the reason for denial.
      - b. Notify the TCC to close out the training request in the Training Request Tracking sheet..
  - B. When the signed Attachment E is received from the responsible department Supervisor (or Manager/Director):
    - (1) Schedule delivery of the course in accordance with SOP-RTMKTS.0200.0005 - Create OPTI Training Schedule
    - (2) Record date in Attachment B - Training Request Form
2. The OPTI TA shall save the applicable completed forms in accordance with SOP-RTMKTS.0200.0025 - Maintain OPTI Records.

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**5.1.4 Closeout  
New Training  
Request**

1. The assigned Instructor shall inform the TCC when the delivery of course and all testing has been completed.
2. When notified of course completion by the assigned Instructors, TCC shall:
  - A. Update Attachment C - OPTI Training Request Tracking Sheet.
  - B. Close out Attachment C upon the successful completion of the requested training.
3. For any SOP changes that require the training of the appropriate personnel be completed prior to publication of the applicable SOP revision, the Manager, OPTI shall inform an Operations Business Process Analyst that training has been completed.

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## 5.2 Process Training Change Request

### 5.2.1 Initiate Training Change Request

1. The Manager, OPTI shall initiate a Training Change Request, utilizing Attachment F - OPTI Training Change Request Form, for all compiled required changes to training in accordance with SOP-RTMKTS.0200.0070 - Evaluate OPTI Training Program Effectiveness

### 5.2.2 Process Training Change Request


1. The TCC shall:
  - A. Enter the Training Change Request into Attachment G, the Training Change Request Log
  - B. Assign the Training Change Request the next open Training Change tracking number.
2. The assigned Instructor shall:
  - A. Contact the Manager, OPTI for clarification of the desired Training Change.
  - B. Perform the revisions to training materials in accordance with SOP-RTMKTS.0200.0045 - Design & Develop OPTI Instructional Materials.

### 5.2.3 Review and Approval of Training Change Request

1. The Manager, OPTI shall notify the TCC upon approval of revised training materials

### 5.2.4 Closeout Training Change Request

1. The TCC shall:
  - A. Close out Attachment G upon the approval of revised training materials.
  - B. Inform the Manager, OPTI that the close-out has occurred.

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## 6. Performance Measures

Successful completion of this procedure is achieved when new training or changes to training are successfully tracked and incorporated into programs.

## 7. References

NERC Reliability Standard PER 005 System Personnel Training

SOP-RTMKTS.0200.0005 - Create OPTI Training Schedule

SOP-RTMKTS.0200.0025 - Maintain OPTI Records


SOP-RTMKTS.0200.0070 - Evaluate OPTI Training Program Effectiveness

SOP-RTMKTS.0200.0035 - Analyze OPTI Training Needs


SOP-RTMKTS.0200.0045 - Design & Develop OPTI Instructional Materials

## 8. Revision History

Rev. No.	Date	Reason	Contact
0	12/11/09	Initial draft procedure	Cheryl Robinson
1	2/16/10	Added Attachment E	Cheryl Robinson

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Rev. No.	Date	Reason	Contact
2	07/18/11	<p>Biennial review by procedure owner;  Header updated copyright date and procedure owner;  Footer replaced page numbers with Page X of Y format;  Global replaced Operational Performance and Training Department (OPTD) with Operational Performance, Training &amp; Integration (OPTI) group;  Section 3 modified;  Section 4 modified;  Modified Section 5.1 Title,  Modified Section 5.1.1 title and clarified steps 5.1.1.1.A, B, &amp; C, deleted step 5.1.1.1.D &amp; E;  Modified Section 5.1.2 title, modified step 5.1.2.1., added 5.1.2.1.B.(1) &amp; (2), step 5.1.2.1.D, added 5.1.2.1.D.(1) &amp; (2), deleted 5.1.2.1.E – I;  Modified Section 5.1.3 title, modified step 5.1.3.1.A, B, &amp; C, deleted 5.1.3.1.C. (1) &amp; (2) and replaced with new 5.1.3.1.(1)a., b., c. &amp; 5.1.3.1.A(2), replaced 5.1.3.1.D &amp; E with 5.1.3.1.B.(1) &amp; (2), added 5.1.3.2;  Section 5.1.4 replaced former sub-sections 5.1.4 &amp; 5.1.5 with new sub-section 5.1.4, steps 5.1.4.1, 5.4.1.2, 5,4,1,2,A. &amp; B., and 5.1.4.3;  Section 5.2 new title;  New sub-Section 5.2.1 and new step 5.2.1.1, new sub-section 5.2.1 and new step 5.2.1.1, new sub-section 5.2.2, added new step 5.2.2.1 and sub-steps 5.2.2.1.A &amp; B.;  New sub-Section 5.2.3 and new step 5.2.3.1;  New sub-Section 5.2.4, added new step 5.2.4.1 and sub=steps 5.2.4.1.A &amp; B., added new step 5.2.2 and sub-steps 5.2.2.A. &amp; B;  Section 7 added RTMKTS.0200.0045;  Replaced screen shots in Attachments B and F with new screen shots reflecting department title change, retired Attachment D</p>	Steve Weaver

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## 9. Attachments

Attachment A - Definitions

Attachment B - OPTI Training Request Form


Attachment C - OPTI Training Request Tracking Sheet

Attachment D - Retired (mm/dd/yyyy)

Attachment E - Subject Matter Expert (SME) Contract

Attachment F - OPTI Training Change Request Form

Attachment G - OPTI Training Change Request Log

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## Attachment A - Definitions

### **Major Procedure Change:**

Major changes are modifications to rules and procedures that significantly impact the way staff perform their work and will result in a change to the Job Task Analysis. These include, but are not limited to:

- Modification changed the conditions under which task is performed or cue of when the task is performed.
- Modification changed how a step or task is performed.
- Modification added or deleted a step.
- Modification changed the standard for any step or task.

A Major Procedure Change is a major revision to the training program and course materials, affecting the instructional scope or the instructional objective(s) and will require submission of a new NERC CEH Course ILA Application if one existed for the original course.

### **Minor Procedure Change:**


Minor changes are revisions to rules and procedures that do not significantly impact the way staff perform their work. Minor changes include, but are not limited to, correction of spelling, grammar, punctuation or links, the clarity, structure, and/or sequence of instructional objectives, administrative changes, format or sequence. These changes will not result in a revision to the job task analysis.

A Minor modification is an editorial “penciled in” change to the training program or course materials. A new course ID and NERC CEH ILA Application is not required.

### **Requester:**


A Requester is the person that originates the Training Request. Requesters include but are not limited to the following:

- The Director of Program Management Office, or designee, which includes but is not limited to:
  - The Project Manager
  - Product Manager, System Operations & Day Ahead Market Systems
- The Director of Operations Support Services, or designee, which includes but is not limited to:
  - Manager, System Operations Support
- The Manager of Power System Modeling
- The Manager, Control Room Operations
- LCC Head
- The Manager, Operational Performance, Training and Integration (OPTI)
- OPTI Training Coordinator

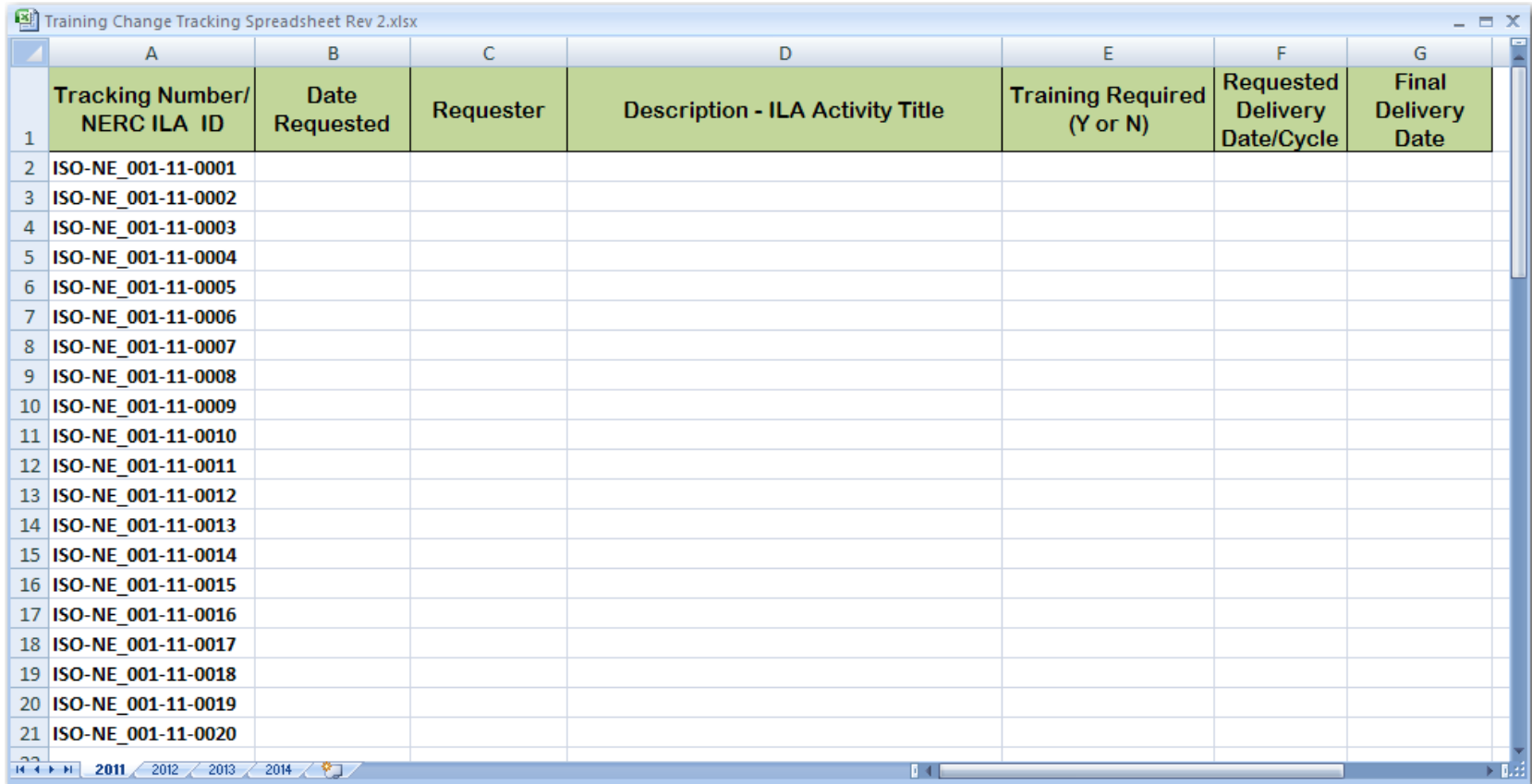
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### Attachment B - OPTI Training Request Form


<b>OPTI Use Only</b> Training Request # ISO-NE_001-11-0000	
<u>To Be Completed by Requester</u>	
<u>Reason for Request</u>	
<input type="checkbox"/> Business Process Added or Changed & Description: 0000	
<input type="checkbox"/> Procedure added or changed & Description: 0000	
→ Major Procedure Change*: <input type="checkbox"/> Yes..... <input type="checkbox"/> No	
<input type="checkbox"/> Operational Tool or Computer App. & Description: 0000	
<input type="checkbox"/> Corporate Project & Description: 0000	
<input type="checkbox"/> Other & Description: 0000	
Desired delivery date: 0000	
→ or	
Desired Training Cycle for Delivery (1, 2, 3 or 4):	Select Cycle 1, 2, 3 or 4
Requester Name: 0000	
Requester Company & Business Unit: 0000	
Requester Email: 0000	
Requester Ph #/Ext.: 0000	
Request Date: 0000	
→ <b>*Procedure change definitions contained in Attachment F</b>	
Designated Contact Person/SME: 0000	Contact Person Email and Phone Number: 0000
<u>To Be Completed by OPTI</u>	
Date Received by OPTI-TCC: 0000	
Date Approved Mgr OPTI: 0000	

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### Attachment C - OPTI Training Request Tracking Sheet



	A	B	C	D	E	F	G
	Tracking Number/ NERC ILA ID	Date Requested	Requester	Description - ILA Activity Title	Training Required (Y or N)	Requested Delivery Date/Cycle	Final Delivery Date
1							
2	ISO-NE_001-11-0001						
3	ISO-NE_001-11-0002						
4	ISO-NE_001-11-0003						
5	ISO-NE_001-11-0004						
6	ISO-NE_001-11-0005						
7	ISO-NE_001-11-0006						
8	ISO-NE_001-11-0007						
9	ISO-NE_001-11-0008						
10	ISO-NE_001-11-0009						
11	ISO-NE_001-11-0010						
12	ISO-NE_001-11-0011						
13	ISO-NE_001-11-0012						
14	ISO-NE_001-11-0013						
15	ISO-NE_001-11-0014						
16	ISO-NE_001-11-0015						
17	ISO-NE_001-11-0016						
18	ISO-NE_001-11-0017						
19	ISO-NE_001-11-0018						
20	ISO-NE_001-11-0019						
21	ISO-NE_001-11-0020						

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**Attachment D - Process Flow Request Training/Changes to OPTI Training  
(Retired mm/dd/yyyy)**

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**Attachment E - Subject Matter Expert (SME) Contract**

Date: \_\_\_/\_\_\_/\_\_\_\_\_

Requestor Department: \_\_\_\_\_

SME Department (if different from above): \_\_\_\_\_

Subject Matter Expert Supervisor/Manager: \_\_\_\_\_

Due to the scope and content of the requested training that has been requested by \_\_\_\_\_, of the \_\_\_\_\_ department located at \_\_\_\_\_, the Operational Performance, Training and Integration group is requesting a Subject Matter Expert (SME) or Designated Department Contact to be made available for the development and delivery of this training. Development is expected to begin on \_\_\_/\_\_\_/\_\_\_\_\_. The delivery of the training is scheduled to begin on \_\_\_/\_\_\_/\_\_\_\_\_ and conclude on \_\_\_/\_\_\_/\_\_\_\_\_.

I understand that the SME will be required to develop / assist in development of the training content, to develop / assist in the development of exam questions and will be required to deliver / be present for delivery of the training for all occurrences of this course. If the SME is unavailable for development or delivery at any time, an alternate contact shall be made available. By signing I certify that I understand and agree to the SME requirements and will make the SME or alternate available for the duration of the training.

\_\_\_\_\_  
Requestor (Print)

\_\_\_\_\_  
Requestor Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date

\_\_\_\_\_  
SME Dept. Sup / Mgr (Print)

SME Assigned - (Print Name)

\_\_\_\_\_  
SME Dept. Sup / Mgr. Signature

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date


Received by OPTI Training Change Coordinator on (date) \_\_\_/\_\_\_/\_\_\_\_\_

\_\_\_\_\_  
Training Change Coordinator (print)

\_\_\_\_\_  
Manager, OPTI (Print)


\_\_\_\_\_  
Training Change Coordinator Signature

\_\_\_\_\_  
Manager, OPTI Signature

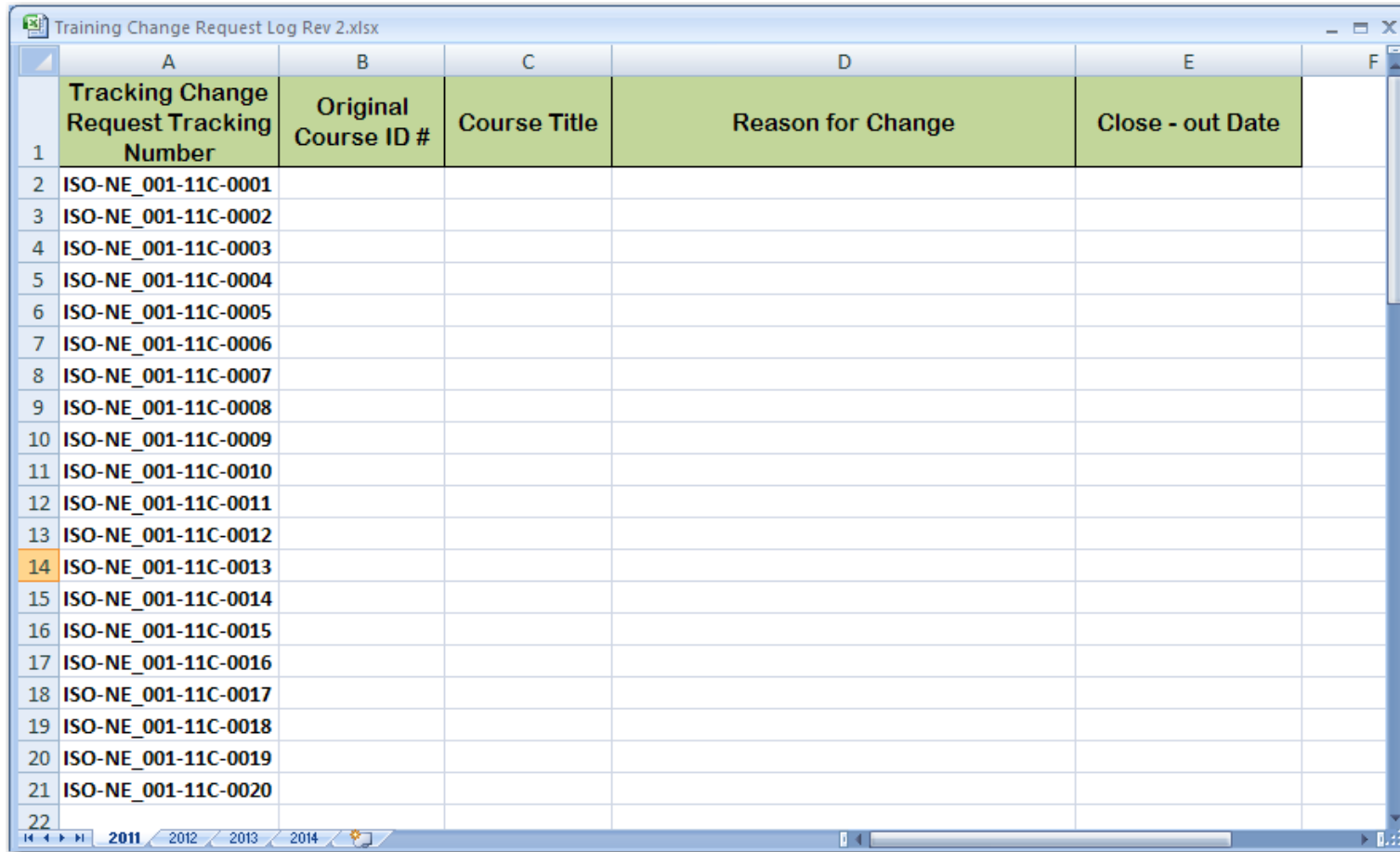
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**Attachment F - OPTI Training Change Request Form**

<b>Training Change Request # ISO-NE_001-11-C-0000</b>
<u>To Be Completed by Manager, OPTI</u>
OPTI Course ID & Title:
<u>Reason for Change</u>
<input type="checkbox"/> Job Task Changed -- Job Task # Description of change:
<input type="checkbox"/> OPTI Training Program Effectiveness Evaluation Deficiency.
Request Date:
<b>Documentation</b>
Date Received by OPTI-TCC:
Date Closed Out by OPTI-TCC:

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### Attachment G - OPTI Training Change Request Log



	A	B	C	D	E	F
	Tracking Change Request Tracking Number	Original Course ID #	Course Title	Reason for Change	Close - out Date	
1						
2	ISO-NE_001-11C-0001					
3	ISO-NE_001-11C-0002					
4	ISO-NE_001-11C-0003					
5	ISO-NE_001-11C-0004					
6	ISO-NE_001-11C-0005					
7	ISO-NE_001-11C-0006					
8	ISO-NE_001-11C-0007					
9	ISO-NE_001-11C-0008					
10	ISO-NE_001-11C-0009					
11	ISO-NE_001-11C-0010					
12	ISO-NE_001-11C-0011					
13	ISO-NE_001-11C-0012					
14	ISO-NE_001-11C-0013					
15	ISO-NE_001-11C-0014					
16	ISO-NE_001-11C-0015					
17	ISO-NE_001-11C-0016					
18	ISO-NE_001-11C-0017					
19	ISO-NE_001-11C-0018					
20	ISO-NE_001-11C-0019					
21	ISO-NE_001-11C-0020					
22						