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Standard Guide for Contents and Use of a Position Task Book (PTB)¹

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1. Scope

1.1 This guide defines the use and content of Position Task Books in a “competency-based qualification system.”

1.2 Each Position Task Book lists the competencies, behaviors, and tasks required for successful performance in a position or operational level.

1.3 Position Task Books provide a standard form for documenting the knowledge, skills, and abilities of an individual by observation of that individual’s performance of tasks in a position or at a particular operational level. When all tasks in the PTB are successfully completed, the evaluated individual is considered qualified and eligible for assignment in that position or at that operational level.

1.4 This guide only defines the use of Position Tasks Books and the content required for successful application. It does not define the requirements for any position or operational level.

1.5 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety, health, and environmental practices and determine the applicability of regulatory limitations prior to use.*

1.6 *This international standard was developed in accordance with internationally recognized principles on standardization established in the Decision on Principles for the Development of International Standards, Guides and Recommendations issued by the World Trade Organization Technical Barriers to Trade (TBT) Committee.*

2. Terminology

2.1 Definitions:

2.1.1 *behavior, n*—the observable activity or manner of behaving of an individual in a specific situation.

2.1.2 *competency, n*—a combination of knowledge, skills, and abilities that, when acquired, allows a person to perform a task or function at a specifically defined level of proficiency.

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2.1.3 *competency-based qualification system, n*—a system in which qualified evaluators document, in writing, in a standard form (usually a Position Task Book), when an individual has competently performed one or more tasks required for a position or operational level.

2.1.4 *competent, adj*—possessing suitable or sufficient skill, knowledge, experience, etc., for some purpose; properly qualified.

2.1.5 *position task book (PTB), n*—a standard form adopted by an authority having jurisdiction and assigned to an individual to record training and competency on an ongoing basis over a set period of time for a specific position or operational level.

2.1.6 *qualified evaluator, n*—an individual who has demonstrated, to the satisfaction of the authority having jurisdiction, his or her competency in a task or tasks, one or more knowledge bases, or a position or operational level, and thereby has the authority to document competent completion of a task or tasks in an individual’s Position Task Book.

2.1.7 *task, n*—a specific activity which, when performed, demonstrates all, or part, of a particular behavior.

3. Significance and Use

3.1 This guide defines the use and content of Position Task Books.

3.2 A Position Task Book lists all of the observable activities which must be performed to demonstrate the ability to successfully fill a position or operational level.

3.2.1 Each activity, or Task, partly or fully demonstrates the existence in an individual of a specific Behavior.

3.2.2 One or more of these Behaviors signifies that the individual is capable of a particular Competency.

3.2.3 One or more defined Competencies are required for each position or operational level.

3.3 Each Position Task Book used to document the suitability of an individual to perform in a particular position or operational level shall meet the requirements of this guide.

3.4 Nothing in this guide precludes an authority having jurisdiction (AHJ) from adding additional content to a Position Task Book.

3.5 This document may be used by an AHJ to develop Position Task Books.

4. Position Task Book Use

4.1 PTBs may be used by an AHJ to:

4.1.1 Identify when trainees are considered competent to perform in a specific position or operational level.

4.1.2 Demonstrate currency of knowledge, skills, and abilities of personnel performing in a specific position or operational level.

4.2 Tasks in a Position Task Book may be evaluated during one or more assignments, and may be observed by more than one evaluator.

4.3 A PTB shall include and define all of the tasks required for an individual to perform in a specific position or operational level.

4.3.1 Tasks pertaining to tactical decision-making and safety require performance in that position during an incident.

4.3.2 Other tasks may be evaluated by other means, such as through simulation or other emergency and non-emergency work.

4.3.3 A person must be observed demonstrating the knowledge and competent performance defined for each task in a PTB.

4.3.4 Performance of each task in a PTB shall be documented by an evaluator with his or her initials and the date of completion.

4.4 Successful completion of all required tasks for the position, as determined by evaluators, will be the basis for recommending qualification of an assignee for a position or operational level.

4.5 If prerequisite training is normally documented with its own PTB, completion of that PTB shall be used to demonstrate competency.

5. PTB Content Requirements

Position or Operational Level Identification

5.1 A PTB shall clearly identify the position or operational level that the PTB is intended to assess.

5.1.1 A PTB may assess more than one position or operational level. If so, the position or level for which the PTB is used shall be clearly identified within prior to its assignment.

5.2 A PTB shall identify the position for which it was created, and shall define the operational scope of the position.

5.3 A PTB should clearly identify the organization utilizing it.

PTB Assignment

5.4 A PTB shall be assigned to an individual.

5.4.1 At a minimum, assignment shall be documented by the individual's name and signature.

5.4.2 Documentation of assignment may also include:

5.4.2.1 The individual's unit or agency.

5.4.2.2 The individual's unit phone number.

Verification of Completed PTB

5.5 A PTB shall include a section for verification by a final evaluator of its completion. This section shall include, at minimum, the following:

5.5.1 A statement that the PTB's assignee has successfully completed all tasks for the position, that all tasks have been documented appropriately, and that the assignee should be considered for certification in that position. This statement shall include the name of the PTB's assignee.

5.5.2 A line for the final evaluator's signature.

5.5.3 A line for the final evaluator's printed name.

5.5.4 A line for identifying the final evaluator's home unit or agency.

5.5.5 A line for the date of verification.

Agency Certification of Completed PTB

5.6 A PTB shall include a section in which an agency representative shall certify the PTB's assignee. This section shall include, at minimum, the following:

5.6.1 A statement of certification stating that the PTB's assignee has met all requirements for qualification and that the qualification has been issued. This statement shall include the PTB assignee's name.

5.6.2 A line for the certifying official's signature.

5.6.3 A line for the certifying official's printed name.

5.6.4 A line for the certifying official's title.

5.6.5 A line for identifying the certifying official's home unit or agency.

5.6.6 A line for the date of certification.

Duration of Validity of PTB

5.7 A PTB shall have a predetermined length of time during which it shall be completed.

5.7.1 The time period shall be clearly stated in the PTB.

5.7.2 The time period shall begin:

5.7.2.1 Upon assignment of the PTB to an individual, or

5.7.2.2 When the first task is completed.

5.7.3 This time period shall be determined by the organization responsible for the creation of the PTB.

Intent, Function, and Use of PTB

5.8 A PTB shall include a general overview of its intent and function.

5.9 A PTB shall include instructions that clearly explain its use.

5.10 Each PTB shall include protocols for exceptions and/or extensions that may be applied to the individual to which the PTB is assigned. These protocols shall also state which representative(s) of an AHJ shall have the authority to provide said exceptions and/or extensions.

Incident or Event Code

5.11 Each task in a PTB shall have an incident or event code associated with it to identify the type of assignment in which the task may be completed. The following incident or event codes and related descriptions are recommended:

5.11.1 *O (Other)*—Task can be completed in any situation, including classroom, simulation, incident, planned event, etc. Successful completion of a training course which tests whether the trainee has the knowledge, skills, and/or abilities associated with the task is also proof of completion, as is evaluation of