



Pump Systems Assessment Professional (PSAP) Certification Program

CANDIDATE HANDBOOK



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Certification Program**

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INTRODUCTION

About the Hydraulic Institute

The Hydraulic Institute (HI) is the global authority on pumps and pumping systems. HI is a pump association of positive displacement and rotodynamic, centrifugal pump manufacturers and suppliers whose mission is to be a value-adding resource to member companies, engineering consulting firms, and pump users worldwide. HI develops comprehensive pump standards, guidelines and guidebooks and serves as a forum for pump industry information and collaboration through volunteer participation and at pump conferences. HI standards cover pump design and applications, installation, operation and maintenance, pump testing, definitions and nomenclature and address such topics as allowable vibration, pump efficiency, nozzle loads, pump piping, viscosity correction and more.

About the Pump Systems Assessment Professional (PSAP) Certification Program

HI is the first association to develop a professional certification program for pump system assessment professionals. This program is designed to meet the needs of practitioners and other stakeholders in pump system efficiency.

Key components of the PSAP program include the following:

1. Formal credentialing requirements are established, including a standardized examination and required renewal process.
2. The program content is based on the findings of a job task analysis working group, whose members represent a broad background of pump system optimization (PSO) practitioners.
3. Agreed-upon eligibility criteria that consist of academic preparation and work experience in PSO.
4. The certification program is industry neutral.
5. Successful completion of the certification process enables pump system assessment practitioners and their employers to have confidence that they bring a core set of PSO skills to a project team.
6. The market value of the PSAP is expected to increase over time as the demand for PSO practitioners grows.

About the Job Task Analysis

The Job Task Analysis (JTA) study defines the current knowledge, skills, and abilities (KSAs) that must be demonstrated by pump systems assessment professionals to effectively and successfully provide these services. KSAs are validated according to their frequency of use and importance. The JTA also serves as a “blueprint” for the content (performance domains) of the HI PSAP examination.

HI upholds stringent guidelines for the construction and implementation of the examination development and administration process. A 13-member panel of subject matter experts was selected to develop the first JTA for the PSAP credential.

The table below includes the final domains and weights derived from the JTA.

Domain	Weight
I. Integration and Data Gathering	36%
II. Data Analysis	46%
III. Post Assessment	18%

The HI PSAP examination is based on the following test blueprint derived from the JTA. The final agreed-upon weights reflect the percentage of questions from each domain that will be included in each test form.

The JTA and the test blueprint resulting from this process will be reviewed periodically and updated as needed to reflect current practices in PSO. The following list of domains also includes the key tasks associated with each domain.

(36%) Domain I Integration and Data Gathering

- T-1 Assess the presenting situation and determine if it is amenable to a pump system assessment (i.e. jointly determine the value proposition/objectives).
- T-2 Obtain and analyze initial information about the pump system (i.e. perform pre-screening).
- T-3 Assemble a pump system assessment team and define roles and responsibilities.
- T-4 Make a visual assessment of the pump system or have the plant verify the accuracy of the information provided in order to confirm initial information, obtain additional information, and make a final determination of the project scope.
- T-5 Conduct a pump systems operations discussion with personnel in a position to answer questions, verify information previously obtained, and provide additional information.
- T-6 Obtain real-time pump system operation data.

(46%) Domain II Data Analysis

- T-7 Cross-validate the pump system data previously collected or obtained in order to ensure accuracy.
- T-8 Analyze the data based on the project scope and established boundary conditions.
- T-9 Interpret the results of the analyses to establish initial findings and possible options (e.g. equipment, controls, etc.) for pump system optimization.
- T-10 Evaluate the identified options to formulate specific recommendations for optimizing pump system efficiency and reliability.

T-11 Document findings and prepare a pump system assessment report that includes recommendations with costs and benefits.

(18%) Domain III Post Assessment

T-12 Present the report to the client/customer and assist in the transition from assessment to implementation.

T-13 Perform post-implementation measurement and verification and generate a report.

Nondiscrimination Policy

The PSAP certification program does not discriminate among candidates on the basis of race, color, creed, gender, age, religion, national origin, ancestry, disability, military discharge status, sexual orientation, or marital status. HI strives to adhere to all applicable law and regulations pertaining to nondiscrimination practices. HI will arrange for reasonable accommodation for any individual requesting it.

ELIGIBILITY AND APPLICATION PROCESS

Eligibility Requirements

Eligibility requirements for the PSAP credential include the following:

Experience

Applicants must have a minimum of three (3) years of professional pump/pumping system experience, including but not limited to, the following topics and practices:

- Pump system operation
- Pump testing
- Basic vibration analysis
- Pump maintenance
- Pump system optimization
- Lifecycle costing
- Pump and motor performance curves
- System performance curves
- Data analysis

Applicants are expected to provide information on professional experience including the name of the company/employer/client, name and title of the immediate supervisor/client, contact information for the immediate supervisor/client, and dates of employment in a professional pump/pumping system position.

Education

Applicants are required to possess an undergraduate or graduate degree from a regionally accredited university or college in a STEM or business field. Examples of acceptable degrees include, but are not limited to the following:

- Physics

- Engineering
- Chemistry
- Science
- Mathematics
- Accounting
- Finance
- Management

The degree must be obtained from a regionally accredited college or university recognized by the U.S. Department of Education or similar entities in other countries. Degrees earned from non-accredited institutions will not be accepted. To demonstrate compliance with the education requirements, HI requires submission of an official, sealed transcript from the college or university and may be sent either directly by the institution or included by the applicant with the application. If the transcript is included by the applicant with the application, the transcript must remain unopened and officially sealed by the institution.

In lieu of an undergraduate or graduate degree, applicants must possess direct industrial or commercial fluid transfer and pumping systems professional experience with five (5) or more years in a field/management position and have completed a minimum of seven (7) pump systems assessments. Reports of seven of the completed pump systems assessments including the name of the company/organization and completion date must be submitted to HI.

Application and Certification Process

To apply for the PSAP certification, please follow these steps:

1. Review the eligibility requirements. Applicants must fully meet all eligibility requirements at the time of application.
2. Review the entire PSAP Candidate Handbook.
3. Complete the application form, certification agreement form, and supporting documentation.
4. Submit the examination fee and completed application packet to HI.
5. Allow two (2) to four (4) weeks for HI to review the application and notify applicants of the review results.
6. Once the eligibility notice is received, approved candidates are allowed to take the examination. Candidates may choose to take the exam on the dates offered by HI at an HI sponsored test site or make arrangements with an HI qualified proctor at a mutually agreeable date and location. Candidates have one (1) year to successfully complete the examination upon receipt of the notice of eligibility from HI.
7. Candidates will be notified of their exam results within thirty (30) calendar days of their examination date. Candidates who successfully pass the exam will earn the PSAP certification.
8. Certified individuals are required to recertify every three (3) years in order to maintain certified status.

Fees and Refunds

Applicants can submit payments in any of the following ways: credit card (MasterCard, Visa, or American Express) and checks made payable to the Hydraulic Institute in U.S. dollars drawn on a U.S. bank. Remit check payments to Hydraulic Institute, PO Box 416271, Boston, MA 02241-6271. Purchase orders will be accepted. Please contact HI for details. Fees are subject to change.

The following fees are currently approved for the PSAP program:

Examination Fee (Member) ¹ :	\$431.25
Examination Fee (Industry Partner) ¹ :	\$546.25
Examination Fee (Non-Member) ¹ :	\$575
Re-examination Fee ² :	\$275
Renewal Fee ³ :	\$285
Appeals Processing Fee:	\$150
Hand-Scoring Fee:	\$55

Note 1: Applicants must be a member or an employee of a member of HI in good standing **at the time of their application** to receive the member discount. No refunds will be granted for applicants joining HI after submission of certification application materials. The examination fee includes a \$150 non-refundable application fee.

Note 2: Re-examination fees apply to second and third attempts to pass the PSAP examination. See the section titled "Re-examination" for more details.

Note 3: The Renewal Fee applies at the time a PSAP certified individual submits a recertification application.

If applicants and candidates request to discontinue the certification process, then HI will refund the examination fee minus the application fee.

Scheduling an Examination

Once the application is accepted, HI staff will contact candidates regarding the scheduling of the examination. HI is offering remote online-proctored exams via ProctorU as a safe, secure, and easy way to take the PSAP Certification Exam. ProctorU is a live online proctoring service that allows you to take your exam from the comfort of your office or home. ProctorU is available 24/7, however, you will need to schedule your proctoring session at least 72 hours in advance to avoid any on-demand scheduling fees. Cancellation and reschedule of an exam date is done through the ProctorU website.

Special Examination Arrangements

Candidates with Disabilities

HI complies with the Americans with Disabilities Act (ADA). HI strives to ensure that no individual with a documented disability is deprived of the opportunity to take the certification examination solely by reason of that disability provided that reasonable special accommodations can be made.

To request special accommodations, candidates must complete the Examination Special Accommodations Form (Appendix A). The form includes a statement of the disability and a

history of previous accommodations in education, training, assessment, or in the workplace. Candidates must provide all documentation with their application and fees at least forty-five (45) calendar days prior to a desired examination date. HI also requires that applicants notify HI of any requests for special accommodations when calling to schedule examinations.

Candidates Requesting Other Special Arrangements

Religious Obligations: If attendance at a scheduled examination date conflicts with a candidate's religious obligations, HI will try to arrange an alternate examination day. HI must receive these requests at least forty-five (45) calendar days prior to the scheduled examination date.

Limited English Proficiency: At this time, HI certification examinations are offered in English only. If English is not a candidate's first language, the candidate may request additional testing time by submitting documentation establishing birth or schooling in a non-English speaking country. HI must receive this information at least forty-five (45) calendar days prior to the scheduled exam date.

PREPARING FOR THE EXAMINATION

The PSAP examination is a written test composed of 100 multiple-choice questions with four options. There is only one correct or best answer for each question. This format has been selected because it is the most objective examination method utilized in professional certification.

Candidates will be given 3.5 hours to complete the examination. The 3.5 hour time portion of the examination is preceded by an introduction from the exam proctor and followed by a post-examination satisfaction survey which includes an opportunity to comment on the examination itself or any individual test questions. The survey is optional and can take up to ten (10) minutes to complete. The time taken for the introduction and the survey do not count towards the 3.5 hour testing time permitted.

The Pump Systems Assessment: Body of Knowledge (PSABOK) is based on the job-task analysis results and can serve as a guideline for candidates when preparing for the exam.

TAKING THE EXAMINATION

In order to use ProctorU, you will need a computer with high-speed internet connection, a webcam (internal or external), a Windows or Apple operating system, and a government issued photo ID. We do not recommend using a small laptop for the exam since it may be difficult to view the exam questions. We encourage you review the [ProctorU test-taker help center](#) to familiarize yourself with the scheduling system, learn what to expect on the day of the exam, and test your equipment. Please make sure that you are using the current version Chrome or Firefox web browser and have downloaded the ProctorU extension for Chrome or Firefox. You should expect the startup process with the proctor to take about 10-15 minutes. However, this time will not affect your exam time. Please feel free to direct any questions to the test-taker support team via the live chat within your account.

On the day of your scheduled exam, you will need to access the certification exam via your HI account. Please make sure you know your username and password for your HI account to avoid any delays on the day of your certification exam. A formula reference sheet is provided on the exam website. It's also attached to this email for your reference. You're allowed to use a scientific calculator and a whiteboard to write on. No scratch paper is allowed.

AFTER THE EXAMINATION

Examination Score Reports and the Scoring Process

HI uses a criterion-referenced methodology for determining the passing score for its examinations. There is no grading on a "curve," and candidates are not competing with each other. The specific methodology used is the modified Angoff technique, which relies on the judgments of subject-matter experts to determine an acceptable level of knowledge, skill, and ability in PSO.

Each candidate will receive an examination report in the form of a pass/fail letter including additional information on certification status. The letters for failing candidates will include some detail on specific performance levels by domain. Pass/fail letters will not include raw score data. Pass/fail letters will be sent to all candidates within thirty (30) calendar days.

HI will publish the names of all individuals who have passed the examination and who maintain current certification status.

Hand Scoring

Candidates who wish to have their examination results hand scored after the initial scoring process may request this service by contacting HI staff and paying a \$55 fee.

Re-examination

Candidates who do not pass their initial examination have an option of retaking the examination up to two (2) additional times during the first year following the approval of their application. Candidates who take the examination a second or third time will have to submit a re-examination fee.

Candidates who fail the examination three (3) times will be required to wait one year from the date of their last attempt to reapply for certification. Reapplying under these circumstances involves a complete new submission of all application materials. Candidates who fail the examination three (3) times are also encouraged to pursue a program of education/training prior to reapplying for certification.

Security and Confidentiality

All test related materials including the examination form, test questions, worksheets and graphics included in test items are the exclusive intellectual property of HI. Accordingly, none of these confidential materials are available for review by any persons other than HI staff and the Certification Board.

All candidates will have to accept a certification agreement stating that candidates will not discuss or share the specific content of any HI certification examinations with anyone. Any violation of this provision could result in potential sanctions including revocation of certification status.

CERTIFICATION COMPLAINT PROCESS

All certification complaints must be submitted in writing to HI. Complaints may either be sent to the attention of the Hydraulic Institute, 300 Interpace Parkway, Bldg. A, 3rd Floor, Parsippany, NJ 07054 or submitted via email at psap@pumps.org.

HI will conduct a review of all complaints in an impartial and timely manner. All information regarding complaints is kept confidential.

APPEALS OF CERTIFICATION DECISIONS

Appeals Eligibility

Appealable decisions include the following:

- Denial of eligibility for certification
- Denial of certification
- Denial of renewal
- Revocation of certification

Appeals Process

Applicants, candidates, or certified individuals wishing to appeal a decision must submit written documentation within thirty (30) days of the receipt of the written decision by HI. The written documentation should specify the grounds on which the appeal is based. A fee of \$150 drawn on a U.S. bank in U.S. dollars must be submitted with the letter of appeal.

Appeals Panel

HI will appoint an appeals panel consisting of three (3) Certification Board members. None of these individuals shall have had any affiliation (business, professional, or personal) with the individual filing the appeal. The appeals panel members will conduct their work and render a written decision within ninety (90) calendar days of their appointment.

Appeals Decisions

The appeals panel shall render a decision on any allegations of procedural error or in the making of a decision with insufficient evidence to support it. Appeals regarding required compliance with existing and published testing standards or program requirements are not accepted. The appeals panel may render a decision to uphold the HI decision, grant the appeal requested by the appellant, or refer the matter back to the Certification Board for reconsideration. A written copy of the appeals panel decision shall be sent to the Certification Board and to the appellant.

DISCIPLINE PROCESS

Certified individuals are required to comply with all existing and future rules, regulations, and administrative ethical standards for certification established by HI. Certified individuals are responsible for demonstrating compliance, and failure to do so may lead to disciplinary actions, including but not limited to the denial of eligibility, nonrenewal of a certification, revocation of certification, probation or suspension, issuance of a letter of censure, or issuance of a written reprimand.

Individuals may report alleged violations of HI rules or regulations in writing to HI. Written documentation should include the identity of the individual involved in the alleged misconduct and the nature of the misconduct described in as much detail as possible.

HI also has the authority to initiate a disciplinary action without receiving a complaint or notification of inappropriate conduct. HI also reserves the right to pursue any and all civil and legal remedies available under the law.

Grounds for disciplinary action include, but are not limited to, the following list:

- a. Conviction of any felony involving moral turpitude.
- b. Conviction of any other criminal offense which reasonably calls into question the certificate holder's ability to provide PSO services.
- c. Engaging in, authorizing, or aiding or abetting fraud, deceit, misrepresentation of materials/facts, provision of false or forged evidence, or bribery in connection with any application for a certificate or registration.
- d. False statements made in any initial or renewal application materials.
- e. Obtaining or attempting to obtain certification or renewal by any fraudulent means.
- f. Failure to meet renewal requirements.
- g. Use of expired credentials or false or unauthorized use of any HI credentials.
- h. Unauthorized possession or distribution of HI examination or testing materials.
- i. Unauthorized use of any registered trademark of HI.
- j. Inability to fulfill the requirements for certification
- k. Delay in informing the certification program staff of any of the above
- l. Violation of the PSAP Code of Ethics

HI shall have the authority to establish procedures for hearings and potential reinstatement upon satisfactory assurance of proper conduct.

Individuals who wish to report a possible certification violation may send a written letter of complaint to the attention of the Hydraulic Institute, 300 Interpace Parkway, Bldg. A, 3rd Floor, Parsippany, NJ 07054 or via email at psap@pumps.org.

PSAP CODE OF ETHICS

The Hydraulic Institute requires ethical practice by each of its PSAP members and has adopted the following Code of Ethics of Pump Systems Assessors as referenced in the HI Certification.

Code of Ethics of Pump Systems Assessment Professionals

Pump System Assessment Professionals uphold and advance the integrity, honor and dignity of the pump systems assessment profession by:

- Using their knowledge and skill for the enhancement of human welfare;
- Being honest and impartial, and serving with fidelity their clients (including their employers) and the public; and
- Striving to increase the competence and prestige of the pump systems assessor

The Fundamental Core Principals

1. Pump Systems Assessment Professionals shall hold paramount the safety, health and welfare of the public in the performance of their professional duties.
2. Pump Systems Assessment Professionals shall perform services only in the areas of their competence; they shall build their professional reputation on the merit of their services and shall not compete unfairly with others.
3. Pump Systems Assessment Professionals shall continue their professional development throughout their careers and shall provide opportunities for the professional and ethical development of those engineers under their supervision.
4. Pump Systems Assessment Professionals shall act in professional matters for each employer or client as faithful agents or trustees, and shall avoid conflicts of interest or the appearance of conflicts of interest.
5. Pump Systems Assessment Professionals shall respect the proprietary information and intellectual property rights of others, including charitable organizations and professional societies in the engineering field.
6. Pump Systems Assessment Professionals shall associate only with reputable persons or organizations.
7. Pump Systems Assessment Professionals shall issue public statements only in an objective and truthful manner and shall avoid any conduct which brings discredit upon the profession.
8. Pump Systems Assessment Professionals shall consider environmental impact and sustainable development in the performance of their professional duties.
9. Pump Systems Assessment Professionals shall not seek ethical sanction against another engineer unless there is a good reason to do so under the relevant codes, policies and procedures governing that engineer's ethical conduct.
10. Pump Systems Assessment Professionals who are members of the Hydraulic Institute shall endeavor to abide by the Constitution, By-Laws and Policies of the Hydraulic Institute, and they shall disclose knowledge of any matter involving another member's alleged violation of this Code of Ethics or the Hydraulic Institute's Conflicts of Interest Policy in a prompt, complete and truthful manner to the Chairperson of the PSAP Board of Directors.

CERTIFICATION RENEWAL PROCESS

Certificates are only valid for three (3) years. In order to maintain certification, certificate holders must participate in the renewal process. Certificate holders must demonstrate compliance with certification renewal requirements during their three-year certification cycles.

One of the hallmarks of a strong professional certification program is the implementation of a process to help ensure the continuing competence of certificate holders in the discipline. HI will use a Professional Development Unit (PDU) system similar to those used in other professional certifications.

Professional Developmental Unit Requirements

All PSAP certified individuals will be required to achieve a total of 30 PDUs within the three (3) year certification period. The table below describes various options for achieving the required PDUs along with any required minimum or maximum PDUs specified in each category.

PDU category	Description of policy	PDU points allowed
Participation in formal education/training programs provided on PSO topics	This option includes courses, seminars, and workshops on PSO-related issues.	One (1) PDU per each hour of instruction. Certified individuals must achieve at least 8 PDUs in this category during the three-year renewal period.
Self-directed learning	This category includes reading articles and books or watching instructional videos on PSO issues.	One (1) PDU per each hour of self-directed learning. Note: Certified individuals may earn a maximum of 10 hours in this category in a three-year period.
Creating new PSO knowledge or content	Examples in this category include authoring articles, books, newsletters, etc. PDUs are also awarded for serving as faculty at various learning events.	One (1) PDU is awarded for each hour of activity spent in these activities.
Volunteer service	Examples in this category include serving as a volunteer for HI or its regional chapters, working on PSO related meetings, or assisting the certification process.	One (1) PDU is awarded for each hour of volunteer service. Certified individuals may earn a maximum of 10 hours in this category in a three-year period.
PSO professional work experience	Full-time employment as a PSO professional for a minimum of one (1) year.	Five (5) PDUs are awarded for each full year of employment as a PSO professional.

All claimed PDUs must be submitted to and verified by HI prior to the expiration date of a certified individual's certificate. Certified individuals are reminded that they will not be able to claim more than the maximum PDUs allowed in any specific category.

Recording PDUs and the Audit Process

Certified individuals are required to keep accurate records of all professional development activities including all certificates/letters confirming attendance and/or participation in approved education/training programs. Certificate holders must maintain thorough and accurate records of all PDU activity as part of their certification renewal responsibilities.

Random Auditing of Certification Renewal Information

HI will periodically audit certified individuals to verify the PDUs claimed in their renewal application. Certified individuals are only required to submit a renewal application form verifying required renewal activity, but all certified individuals must retain all documented proof of obtained PDU credits during the certification period. Examples of such documented proof could include certificate copies, letters of attendance at acceptable continuing education offerings, transcripts, copies of first page of article or manuscript showing author, title, publication name, etc.

HI will audit a percentage of randomly selected PSAP renewal application forms. If audited, certified individuals will be required to provide documented proof of all PDUs to HI staff within thirty (30) calendar days. If unable to provide documented proof within thirty (30) calendar days, certification will be considered inactive. Certified individuals in the inactive status will have one (1) year to complete the renewal process by providing the required documentation or by obtaining new PDUs.

If all of the documentation is complete and the appropriate number of PDUs are earned, a notification will be sent that the certification is valid until the next renewal date. If after submission of PDUs it is determined that some of these are not acceptable, an appropriate amount of time will be allowed for you to earn additional replacement PDUs.

Transfer of Excess PDUs to the Next Renewal Cycle

Certified individuals earning more than the required 30 PDUs in their three-year certification period may transfer a maximum of 5 PDUs to their next certification cycle. The transferred PDUs may be from any category.

Renewal Reminders

HI will contact all certified individuals via email early in the year they are required to renew certification. However, it is the responsibility of the certified individual to submit their renewal application form prior to the expiration date of their certificate whether or not they receive the renewal reminder notification. Certified individuals are reminded of the importance of keeping contact information up-to-date in order to ensure that renewal information is received in a timely manner.

CHANGES IN THE NAME AND ADDRESS OF CERTIFIED INDIVIDUALS

All candidates and certified individuals must notify HI immediately of any change in their name or address used for purposes of commutation regarding certification matters.

You may notify HI by email at psap@pumps.org or call HI staff at 973-267-9700. Individuals who are changing their names must contact HI staff to review the necessary legal documentation required to verify such changes.

USE OF THE PSAP CREDENTIAL

Once certified individuals receive written confirmation from HI of their approved certification status, they may use the PSAP mark after your name. Always list your designation in block (PSAP) letters. The PSAP designation may only be used in conjunction with a certified individual's name. The PSAP designation should not be used in reference to a company or organization.

HI will send new certified individuals a packet of materials including the following:

- Letter conferring certification status
- Information on the dates of your certification cycle for renewal purposes
- Your unique certification number
- Your certification certificate

HI will publish an official list of all current PSAPs on its website.

CONTACT INFORMATION

All inquiries regarding the Pump Systems Assessment Professional Certification Program can be directed to the attention of:

Hydraulic Institute
300 Interpace Parkway
Bldg. A, 3rd Floor
Parsippany, NJ 07054
917-267-9700
psap@pumps.org

APPENDIX A: EXAMINATION SPECIAL ACCOMODATIONS FORM

Prefix (Mr., Mrs., Ms., Dr., etc.)

First Name: _____

Middle Name: _____

Last Name: _____

Email Address: _____

Telephone Number: _____

Please describe the disability that significantly impairs your ability to complete the PSAP examination.

Please list the specific testing accommodation requested. Feel free to use additional separate sheets if needed.

You must also provide HI with written supporting documentation from a licensed/certified healthcare provider with education, training, expertise, and experience that relates specifically to the need for the accommodation requested. This documentation should include a statement describing your disability, diagnosis of your health condition, and a specific recommendation for the type of accommodation requested and history of previous similar accommodations.

HI will not be able to process any request for an accommodation related to compliance with the Americans with Disabilities Act of 1990 until both this Accommodation Request Form and the required healthcare provider documentation have been submitted to HI.

Signature _____

Date _____