

Method 9 Training Planning Checklist

A practical worksheet for EHS managers, plant managers, environmental staff, and training coordinators planning initial certification or six-month recertification.

Use this checklist to identify the right students, training format, dates, equipment, and records before anyone registers. It is a planning aid, not a substitute for the applicable permit, regulation, or official method.

1. PROGRAM AND FACILITY DETAILS

Company / facility

Primary coordinator

Email and phone

Facility location

Permit / rule reference

Target completion date

2. STUDENT READINESS

- ☐ Create a roster with each student's full name, email, facility, and current certification expiration date.
- ☐ Separate first-time students from observers completing recertification.
- ☐ Confirm which students need the applicable lecture or instructional review.
- ☐ Identify students who need accessibility, language, scheduling, or technology support.
- ☐ Check for certification gaps that could leave a shift or facility without a current observer.

Students planned: _____ Initial: _____ Recertification: _____ Earliest expiration: _____

3. CHOOSE THE TRAINING PATH

- ☐ Public class - appropriate for individuals or small groups able to travel to a scheduled location.
- ☐ Private onsite class - appropriate for company groups, multiple shifts, or reduced travel needs.
- ☐ Online lecture - flexible preparation or required instruction before the visual qualification step.
- ☐ Eligible VR certification - confirm approval pathway, student eligibility, supported headset, browser, and WebXR support.
- ☐ Traditional in-person qualification - use when onsite practice, instructor-led testing, or equipment availability makes it the better fit.

METHOD 9 TRAINING COORDINATOR RESOURCE

Final Readiness and Recordkeeping

Complete these checks before the class or testing window begins.

4. ONSITE OR IN-PERSON LOGISTICS

- Confirm dates, start time, time zone, address, parking, check-in, and site-access requirements.
- Designate a safe training and observation area with appropriate access and visibility.
- Review weather contingencies and the trainer's cancellation or rescheduling process.
- Confirm classroom space, seating, power, display equipment, and internet access when needed.
- Provide the trainer with the final roster and coordinator contact information.

5. VR AND ONLINE READINESS

- Assign the correct vendor or general student portal and verify every student can sign in.
- Confirm the online lecture opens and progress is recorded for students who must complete it.
- For VR testing, use a supported headset. Meta Quest 2 is the minimum supported baseline.
- Update the headset browser, confirm WebXR support, charge the device, and test Wi-Fi before the certification session.
- Provide a safe indoor seated or standing area free of obstacles and operational hazards.
- Know the support contact and recovery process before starting a timed certification attempt.

6. CERTIFICATION RECORDS

- Confirm every successful student receives or can access a certification record.
- Record the observer name, certification method, completion date, expiration date, and facility.
- Store records where environmental and training personnel can retrieve them during an audit or inspection.
- Schedule renewal reminders 90 days and 30 to 60 days before the six-month expiration date.
- Document incomplete, interrupted, or failed attempts and the follow-up action taken.

Need help choosing a path?

Visit opaquesmokeschool.com/request-a-quote or review upcoming classes at opaquesmokeschool.com/events.

Method 9 requirements and facility obligations should be confirmed against the current official method, the applicable permit, and the responsible regulatory authority. Opaque Smoke School provides training and certification services; this worksheet is not legal or regulatory advice.