



Procedure Writing

Potential PDH: 16

Description:

The Technical Procedures Writing course provides participants with the knowledge and skills needed to develop clear, accurate, and consistent technical procedures used in refineries and petrochemical facilities. Technical procedures are essential tools for ensuring that critical tasks are performed correctly and safely by qualified users. This course teaches participants how to structure and write procedures that are easy to follow, minimize human error, and promote efficiency during field and control room operations.

Through a combination of theory, practical exercises, and guided examples, learners will develop the ability to apply correct grammar, structure, and formatting techniques to produce procedures that meet standards. By the end of the course, participants will be able to:

- Write procedures using clear, imperative language and consistent verb forms.
- Apply standardized formats, including document information, preparation, and execution sections.
- Determine the proper level of detail using C-Factors (Cognitive Level, Criticality, Complexity, Consequences, and Constancy).
- Use conditional, concurrent, and reversed step structures to improve safety and clarity.
- Incorporate proper use of Cautions, Warnings, and Notes for hazard communication.
- Ensure consistency in terminology, style, and formatting across all procedures.

Outline:

Module 1 – Introduction to Technical Procedures

- Purpose of the Course
- Definition and Function of Technical Procedures
- Standard Procedure Format

Module 2 – Basic Procedure Steps

- Imperative Voice
- Summary Steps
- Sequencing

Module 3 – Action Verbs and Verb Selection

- Definition and Importance of Action Verbs
- Instructional Frameworks
- Verb Levels and Recommended Verbs



- Verb Consistency
- Examples and Knowledge Checks

Module 4 – Number and Form of Action Verbs

- Multiple Verbs in One Step
- Bloom's Levels and Verb Grouping
- Verb Form
- Knowledge Checks and Practical Exercises

Module 5 – Adverbs

- Role of Adverbs
- Acceptable Adverbs
- Proper Placement
- Exercises on Correct Usage

Module 6 – Level of Detail

- Determining Appropriate Detail
- Cognitive level, Criticality, Complexity, Consequences, Constancy
- Additional Detail Formats

Module 7 – Reversed Step Structure

Module 8 – Conditional and Concurrent Steps

- Conditional Steps
- Concurrent Steps
- Knowledge Checks

Module 9 – Numbered and Bulleted Lists

- Purpose and Use
- Verb Placement
- Formatting Rules
- Exercises on Proper List Construction

Module 10 – Referencing and Branching

- Referencing
- Branching
- Practice Activities

Module 11 – Informational Statements

- Non-instructional supporting information.
- Cautions: Minor hazards or equipment risks.



- Warnings: Severe injury, death, or environmental impact.
- Notes: Helpful context without safety implications.
- Formatting Rules

Module 12 – Course Review and Reflection

Who Should Attend:

This course is ideal for procedure developers, reviewers, technical writers, and trainers responsible for ensuring that operational documentation meets the highest standards of clarity, safety, and usability.

Subject Matter Expert (SME):

Ida Soto has over 15 years of experience in process improvement and technical training with Big 5 Consulting companies as well as mid-sized and small firms. Ida has Project Management experience with multi-million dollar projects focused on maintaining product quality and integrity, budgetary, and scheduling constraints while incorporating continuous improvement measures. She is a skilled translator of English and Spanish. Ida holds a BS in Chemical Engineering from University of Puerto Rico and an MS in Chemical Engineering from University of Houston.