Navigating and Understanding the In’s and Out’s of STLE’s CLS, OMA, and CMFS Programs

STLE Membership Webinar

October 3, 2012
Primary Areas of Responsibilities:

• Administrator of the CLS, OMA, and CMFS Programs, including Certification and Recertification

• STLE Corporate Member Liaison (Basic and Premium)

• Assistant Secretary to STLE’s Board of Directors
Why Get Certified?

- Gain recognition from peers
- Become more valuable to your organization and customers
- Increase your salary or job security
- Gain a competitive advantage
- Shows commitment to ongoing educational opportunities and knowledge
- Adds another level of credibility to the professionals in highly technical fields in the industry
Over 1,000 individuals currently hold the CLS designation

A Lubrication Specialist is an individual who might be designated a "Lubrication Engineer" by his/her employer

Cores Responsibilities:
- Evaluate and selects lubricants to use and their purchases
- Conducts lube surveys
- Trains lubricators and assembles work list
- Develops Quality Assurance and Used Lubricant analysis programs
- Troubleshoots and problems solves lubrication issues
- Maintains records of all application as well waste collection or disposal.

Criteria Required (minimum):
3 years of active experience in the field of lubrication
CLS Exam: Resources for Preparation

- **Body of Knowledge:**
  - Bearings
  - Fluid Conditioning/Power
  - Gears
  - Lubrication Analysis/Fundamentals/Manufacturing/Programs
  - Metalworking
  - Monitoring & Consumption
  - Pneumatics
  - Problem Solving
  - Seals
  - Solvents & Cleaners
  - Storage, Handling, Transportation
CLS Resources...

- Publications

1. Basic Handbook of Lubrication
2. Handbook of Lubrication and Tribology
3. The Lubrication Engineers Manual
STLE University

* Basic Lubrication Short Course
* Fundamentals of Lubrication Certificate Course
* Lubrication Composition Short Course
* Future of Fluid Power Webinar (Webinar)
* Bearing Damage Analysis (Webinar)

In Person Educational Courses

* Basic Lubrication 101 and 102
* Advanced Lubrication 301
* Bearings
* Gears (offered in 2014)
* Basic Lubrication Overview (offered in 2015)
* Seals (offered in 2015)
Certified Metalworking Specialist: Who Is It For?

Job experience should be in areas such as fluid chemistry, machining processes, metallurgy, tooling and filtration/waste treatment.

Core Responsibilities:
- Evaluate/select proper MWF fluids
- Maintain overall responsibility of inventory, equipment management, and application/handling of fluids.
- Involved in research or training of personnel on MWF
- Troubleshoots MWF issues and facilitates management on areas of metal removal and metal forming

Criteria Required (minimum):

**Education/Training:** 2 year degree in science (with coursework in general chemistry and biology) as well as 20 hours of training in MWF application and management. (4 year degree recommended)

**Experience:** 3 years for those in manufacturing setting; 5 years for those in lab setting.
Body of Knowledge:

- MWF Operations
- Metal Removal and Forming Fluid Chemistry
- Metal Removal and Forming Fluid Condition Monitoring
- Central and Stand Alone Systems: Function & Design
- Plant Conditions/Operations Affecting Fluid Performance
- Fluid Condition Management
- Enclosures and Ventilation
- Health and Safety
- Waste Treatment
- Communications: Data Interpretation, Training, Cost/Benefit Analysis
CMFS Resources...

- Publications

2. ASTM International Standards Worldwide
3. Development of Guidelines for Using and Maintaining Metalworking Fluids
CMFS Resources...

- **STLE University**
  * Metalworking Fluids Short Course
  * Emerging Issues in MWF Microbiology (Webinar)
  * VOC Emissions from Metalworking Fluids (Webinar)
  * Volatile Organic Compounds in MWFs (Webinar)
  * Fluid Management and Recycling Short Course

- **In Person Educational Courses**
  * STLE’s Metalworking Fluid Management Certificate Course (early 2013)
  * Metalworking 105- Metal Forming Fluids
  * Metalworking 250- Understanding and Controlling Metal Removal Fluid Failure
  * Metalworking Hot Topics (offered in 2014)
  * Metalworking 115- Basic Metal Removal Fluids (offered in 2015)
  * Metalworking 125- Basic Health and Safety (offered in 2015)
Predictive Maintenance Professionals who oversee the oil analysis program of a shop/plant would be suited for the OMA I, while Professionals who are at supervisory level are more suited for OMA II.

Core Responsibilities (OMA I):
- Oil sampling
- Review oil analysis reports and perform tests
- Maintain overall care of equipment and maintenance actions

Core Responsibilities (OMA II):
- Overall management of oil analysis program
- Supervise personnel
- Run all tests, interpret the data and maintain quality control.

Criteria Required (minimum):
**Education/Training:** 16 hours of training in oil analysis courses

**Experience:** One year active work experience utilizing oil analysis.
Body of Knowledge (OMA I)
Fundamentals
Sampling/Analysis Testing
Interpretation/Troubleshooting

Body of Knowledge (OMA II)
Lubrication Selection
Systems
Sampling
Data Interpretation/Validation/Testing
Maintenance/Quality/Safety
Program Management/Documentation
Publications:
**OMA Resources...**

- **STLE University**
  - Fundamentals of Lubrication Certificate Course
  - Basic Lubrication Short Course
  - CM Data Interpretation (Webinar)
  - Condition Monitoring Data Interpretation Series (Webinars)
  - Hydraulic Fluid Properties and Hydraulic Systems (Webinar)

- **In Person Educational Courses**
  - Condition Monitoring in the 21st Century
  - Hydraulics
  - Basic Lubrication 101 and 102
  - Basic Lubrication Overview (offered in 2015)
Finding Dates of Schedule Exams
### Events Calendar

#### September 2012

<table>
<thead>
<tr>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
</tr>
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<tbody>
<tr>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29 (Certification Exam)</td>
<td>30</td>
<td>31</td>
<td>01</td>
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*Current Events:*
- There are no current events.

*Looking Forward:*
- October 12, 2012: Certification Exam
## Certification Exam

**Friday, October 12, 2012**

08:30 AM - 11:30 AM
Hilton Garden Inn Salt Lake City
Downtown
250 West 600 South
Salt Lake City, UT

CLS, OMA I, OMA II, and CMFS Certification Exams

To get more information regarding STLE Certification Exams, [click here](#).

Please contact staff, Alicia Shearer, at 847-825-5536 for more information.

*Online Registration closes 2 weeks prior to exam date, on-site may be available on first come, first serve basis, but limited numbers*
Registering for Exams
CLS Exam Form

Online exam registration is available until two weeks prior to the exam date.
You must register at least two weeks in advance so that testing materials will be available for you when you arrive onsite.

New CLS Exam debuts at STLE Annual Meeting

The STLE Certified Lubrication Specialist® Committee has completed a rigorous process to convert the CLS examination from fill-in-the-blank to a multiple-choice format. Beginning May 2019, all tests will be in this new format. This change will add to the reliability and validity of the exam and will greatly speed up the grading and notification process.

Certified Lubrication Specialist (CLS) is the only independent certification for the lubrication professional that verifies our broad lubrication engineering knowledge. Certification recognizes those individuals who possess current knowledge of lubrication fundamentals and best practices in lubrication maintenance in industrial settings. Certified individuals must have at least three years of experience in the field of lubrication.

I attest that I meet the three years minimum experience in the field of lubrication.

I UNDERSTAND ALL EXAM INFORMATION IS CONFIDENTIAL AND PROPERTY OF THE STLE CERTIFICATION PROGRAM.
How Do I Get the Certification?

- The Actual Exam?
  --150-160 questions per exam in multiple choice format
  --Offered at in person testing events
  --3 hour time frame-All materials provided

- How am I Certified?
  -Each certification is obtained by scoring 70% of higher on their designated exam.
  --Valid for 3 years
  --Receive wall certificate, carrying card, and lapel pin for achievement.
All STLE certified individuals are valid for 3 years and then must be renewed by the holder.

STLE policy for recertification requires the individual to:
  * Meet 4 of the 12 Required Proofs
  * Pay the Recertification Fee

2 Month “grace period” from the expiration date to allow flexibility in process- after this period, only option to renew is to retake examination.

Once renewed, the certification is updated and a new carrying card is sent to holder.
Employer supplies a letter vouching for continued employment related to their field of certification.

Two other individuals with same current certification supply a letter vouching for continued employment in their field of certification.

Provide proof of receiving 4.5 Continuing Education Units (CEUs) from courses relevant to their field of certification (these would require certificates that state CEU’s from Accredited institutions are not the same as STLE EC’s earned on webinars, etc.)

Provide proof of attending or virtually participating in six (6) STLE section meetings.

Provide proof of attending one (1) STLE Section education seminar.

Provide proof of attending one (1) educational seminar relevant to their field of certification such as at the annual meeting of one of the following: STLE, SME, SAE, NLGI, AISE, or SMRP; or proof of attending an educational seminar, which is part of a third party training seminar, such as a corporate training program or education provider seminar; or proof of reading six (6) relevant technical articles published in national or international technical publications.
What can be used for Proofs?

- Provide proof of attending one (1) annual meeting conference with programs relevant to their field of certification such as from one of the following: STLE, SME, SAE, NLGI, AISE, or SMRP.

- Give one (1) presentation/course at a conference or seminar relevant to their field of certification.

- Publish one (1) article or paper in publications relevant to their field of certification.

- Author or co-author one (1) book or a significant chapter of a book relevant to their field of certification.

- Provide proof of active participation in technical committees or councils with programs relevant to their field of certification.

- Provide proof of attendance of eight (8) hours (EC) of educational content, such as webinars, presented by STLE or an STLE Training Partner identified on the STLE Education website.

- OTHER OPTION IN LIEU OF PROOFS- OPT TO RETAKE THE EXAMINATION
STLE Resources for Recertification

- **STLE Store** - Purchase STLE University online courses, webinar recordings, local section education courses, and conference proceedings.

- **STLE Sections** - Search for section meetings near your location or start your own section.

- **Tribology & Lubrication Technology** - Access technical articles at the touch of a button or find out how to publish your own article.

- **STLE Committees** - Use your expertise by getting involved with one of the many industry, technical or administrative councils/committees.

- **Certification Directories** - Verify that the individuals who will vouch for you are also currently certified in the same designation.
Questions?
Contact Information

Society of Tribologists and Lubrication Engineers (STLE)
840 Busse Highway
Park Ridge, Illinois 60068 (USA)
P: (847) 825-5536 ext. 203
F: (847) 825-1456
ashearer@stle.org

Also, feel free to utilize our STLE Staff Directory to find the right person for any information you seek.
"I pursued certification to differentiate myself from the pack. It has given me credence as a resource for my customers and internally within my company. Increased responsibility has followed along with increased pay."

"I believe the CLS certification through STLE is an internationally recognized level of competency in the lubrication field. When you are corresponding with people you do not know, those three letters after your title let them recognize that you should know what you are talking about."

"Customers are looking for standards in expertise; CMFS provides that to a large extent. Having credentials leads to increased job security."

"As an Oil Monitoring Analyst (OMA) and member of STLE, it gives me the endorsement and assurance that my certification and membership meet the recognized industry standard set by the world's leading tribologist and lubrication engineers' society."

"It is my goal to achieve worldwide recognition in the tribology world. I truly believe that STLE is the way to get certified."