

Gas T&D New Product Approval Checklist

Section 1: Introduction

Step	Step Description	Who	Date Complete												
1	<p>OBTAIN product/modification information from the supplier.</p> <p>PROVIDE a description, reason for submitting the product or product modification for evaluation, and product benefits and costs:</p> <p>Standard Reasons:</p> <p><input type="checkbox"/> New technology</p> <p><input type="checkbox"/> Design changes</p> <p><input type="checkbox"/> Material Problem Reports (MPRs)</p> <p><input type="checkbox"/> Replacement for discontinued product</p> <p><input type="checkbox"/> Product substitution</p> <p><input type="checkbox"/> Economics</p> <p><input type="checkbox"/> Safety</p>														
2	<p>DETERMINE whether the new product or modification is subject to this Utility Procedure TD-4001P-04 by reviewing the following criteria:</p> <table border="1" data-bbox="299 1285 1158 1727"> <thead> <tr> <th data-bbox="299 1285 943 1340">Criteria</th> <th data-bbox="943 1285 1050 1340">Yes</th> <th data-bbox="1050 1285 1158 1340">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="299 1340 943 1455">a) Does the product not affect the integrity of the gas transmission and distribution (T&D) system?</td> <td data-bbox="943 1340 1050 1455"></td> <td data-bbox="1050 1340 1158 1455"></td> </tr> <tr> <td data-bbox="299 1455 943 1543">b) Is the product part of a customized design job approved by a professional engineer?</td> <td data-bbox="943 1455 1050 1543"></td> <td data-bbox="1050 1455 1158 1543"></td> </tr> <tr> <td data-bbox="299 1543 943 1727">c) Is the product reviewed and approved by other Pacific Gas and Electric Company (Company) departments or teams (e.g., personal protective equipment [PPE] or environmental cleanup materials)?</td> <td data-bbox="943 1543 1050 1727"></td> <td data-bbox="1050 1543 1158 1727"></td> </tr> </tbody> </table> <p>If the answer to any of the above three questions is yes, Then, DISCONTINUE this procedure and OBTAIN approval to review the product from the appropriate gas technical team.</p>	Criteria	Yes	No	a) Does the product not affect the integrity of the gas transmission and distribution (T&D) system?			b) Is the product part of a customized design job approved by a professional engineer?			c) Is the product reviewed and approved by other Pacific Gas and Electric Company (Company) departments or teams (e.g., personal protective equipment [PPE] or environmental cleanup materials)?				
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	<p>If the answer to all of the above three questions is no, Then, REVIEW the following criteria for applicability:</p> <table border="1" data-bbox="299 471 1158 1015"> <thead> <tr> <th data-bbox="299 471 893 526">Criteria</th> <th data-bbox="893 471 1050 526">Yes</th> <th data-bbox="1050 471 1158 526">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="299 526 893 610">a) Is the product a standardized product that will bear gas pressure?</td> <td data-bbox="893 526 1050 610"></td> <td data-bbox="1050 526 1158 610"></td> </tr> <tr> <td data-bbox="299 610 893 694">b) Does the product affect the Company's cathodic protection systems?</td> <td data-bbox="893 610 1050 694"></td> <td data-bbox="1050 610 1158 694"></td> </tr> <tr> <td data-bbox="299 694 893 778">c) Does the product affect the coatings or wraps of the gas system?</td> <td data-bbox="893 694 1050 778"></td> <td data-bbox="1050 694 1158 778"></td> </tr> <tr> <td data-bbox="299 778 893 895">d) Does the product affect the measurement or pressure regulation of the gas system?</td> <td data-bbox="893 778 1050 895"></td> <td data-bbox="1050 778 1158 895"></td> </tr> <tr> <td data-bbox="299 895 893 1015">e) Is the product an instrument used to verify code-required construction, maintenance, or operations activities?</td> <td data-bbox="893 895 1050 1015"></td> <td data-bbox="1050 895 1158 1015"></td> </tr> </tbody> </table> <p>If the answer to all of the above five questions is no, Then, DISCONTINUE this procedure, and OBTAIN approval to review the product from the appropriate gas technical team.</p> <p>INDICATE whether the product/modification is applicable to this procedure:</p> <p>DOCUMENT the reason:</p>	Criteria	Yes	No	a) Is the product a standardized product that will bear gas pressure?			b) Does the product affect the Company's cathodic protection systems?			c) Does the product affect the coatings or wraps of the gas system?			d) Does the product affect the measurement or pressure regulation of the gas system?			e) Is the product an instrument used to verify code-required construction, maintenance, or operations activities?				
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3	SUBMIT the product/modification to the gas technical team for review.																				
4	<p>RECORD the gas technical team decision on whether to proceed with the product evaluation and explanations.</p> <p>Decision: ___ Approved ___ Not Approved</p> <p>Reasons:</p>																				

Step	Step Description	Who	Date Complete
5	RECORD the gas technical team assigned evaluator:		
6	COMMUNICATE the decision to the affected supplier and initiator.		

Section 2: Evaluation

Step	Step Description	Who	Date Complete
1	<p>OBTAIN detailed product/modification information from the supplier:</p> <ul style="list-style-type: none"> ___ Material and technical specifications ___ Lab tests or certifications ___ Maintenance and operating instructions ___ Installation instructions ___ Samples ___ Product demonstrations 		
2	<p>COMPARE the product features and costs with current and other products:</p> <ul style="list-style-type: none"> ✓ Technical features ✓ Reliability ✓ Quality ✓ Safety ✓ Performance ✓ Material Problem Reports (MPRs) ✓ Service ✓ Supplier attributes ✓ Commercial reasons ✓ Economics <p>ATTACH a report covering the above items, as appropriate.</p>		
3	<p>BENCHMARK with three other users of the product and record the results.</p> <p>ATTACH a report, as appropriate.</p>		

Step	Step Description	Who	Date Complete
4	PERFORM any needed shop tests to verify technical capabilities.		
5	RECORD the shop test results. ATTACH a report, as needed.		
6	PERFORM any needed field tests to validate the usability of the product.		
7	RECORD the field test results. ATTACH a report, as needed.		
8	MAKE a recommendation for product use at the Company: ____Product is recommended for Company use. ____Product is not recommended for Company use.		

Section 3: Approval (Gas Technical Team)

Step	Step Description	Who	Date Complete
1	REVIEW the evaluation report and recommendation.		
2	VOTE on the recommendation.		
3	RECORD the vote result on the issues log, and store all documents on the team SharePoint site.	Standards Facilitator	
4	COMMUNICATE the decision and reasons for the decision to the evaluator and initiator.	Standards Facilitator	

Section 4: Communication / Deployment

Step	Step Description	Who	Date Complete															
1	PREPARE changes to affected Company documents, and DEVELOP new documents to cover the proposed changes, following the steps in <u>Utility Work Procedure WP4000-01, "Gas Document Development and Update Process"</u>																	
2	PREPARE an announcement (e.g., bulletin) and communication plan (conference calls, road shows, etc.) to cover the initial communication of the new product deployment.																	
3	<p>ENSURE that all necessary deployment prerequisites are completed before announcing the new product, including the following activities:</p> <table border="1" data-bbox="262 880 1080 1442"> <thead> <tr> <th data-bbox="262 880 868 935">Activity</th> <th data-bbox="868 880 976 935">Yes</th> <th data-bbox="976 880 1080 935">No</th> </tr> </thead> <tbody> <tr> <td data-bbox="262 935 868 1019">a) Training and operator qualified (OQ) programs are updated.</td> <td data-bbox="868 935 976 1019"></td> <td data-bbox="976 935 1080 1019"></td> </tr> <tr> <td data-bbox="262 1019 868 1170">b) Strategic sourcing activities are completed (material codes are established, vendor's initial expected demand is met, etc.).</td> <td data-bbox="868 1019 976 1170"></td> <td data-bbox="976 1019 1080 1170"></td> </tr> <tr> <td data-bbox="262 1170 868 1289">c) Required estimating programs (e.g., Fast Flow Estimating [FFE]) reflect the change.</td> <td data-bbox="868 1170 976 1289"></td> <td data-bbox="976 1170 1080 1289"></td> </tr> <tr> <td data-bbox="262 1289 868 1442">d) Other computer programs (e.g., Integrated Gas Information System [IGIS]) potentially affected by the change are ready for the new product.</td> <td data-bbox="868 1289 976 1442"></td> <td data-bbox="976 1289 1080 1442"></td> </tr> </tbody> </table>	Activity	Yes	No	a) Training and operator qualified (OQ) programs are updated.			b) Strategic sourcing activities are completed (material codes are established, vendor's initial expected demand is met, etc.).			c) Required estimating programs (e.g., Fast Flow Estimating [FFE]) reflect the change.			d) Other computer programs (e.g., Integrated Gas Information System [IGIS]) potentially affected by the change are ready for the new product.				
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4	OBTAIN approval for the timing of the announcement from the technical team.																	
5	ANNOUNCE the changes, and DEPLOY the communication plan.																	

Section 5: Training

Step	Step Description	Who	Date Complete
1	FACILITATE the development of training programs and job aids for the new product.		
2	DETERMINE the changes to the OQ plan with the personnel charged with OQ plan duties.		
3	DETERMINE training needs outside the OQ program with the Company's training personnel.		