Gas Document Development and Update Process

Summary

This utility procedure provides the steps that individuals must follow when developing or updating gas documents.

Pacific Gas and Electric Company (the Company) develops and updates gas documents to help employees and supervisors conduct work in accordance with all applicable government codes, Company standards, manufacturer's instructions, and industry best practices.

Attachment 1, "Gas Document Development and Update Process Flowchart," outlines the steps Company personnel follow when developing or updating a gas document. The Procedural Steps starting on Page 2 of this document are the detailed instructions to follow in conjunction with the flowchart steps in Attachment 1.

Target Audience

Individuals who develop or update gas documents.

Safety

Conduct this procedure in accordance with Utility Standard Practice (USP) 22, "Safety and Health Program."

Before Starting this Procedure

Personal protective equipment (PPE): None required.

Training: Employees using this procedure must be trained on the steps in this procedure. Untrained employees must work with the assistance of a trained person.

Tools: Standard Company word processing, spreadsheet, and flowcharting software.

Procedural Steps

1. Needs Assessment

1.1 Assess the need for developing or updating a gas document, and understand the purpose the documentation must fulfill. Gas documentation needs can originate from a variety of sources, some of which are listed below:

- Business imperatives, goals, or metrics.
- Introduction of new products, tools, or technology.
- Changes in applicable government codes or regulations.
- Changes in Company standards or requirements.
- Changes in Integrity Management Program procedures.
- Changes in suppliers or existing products (e.g., obsolescence).
- Changes in manufacturers' maintenance and operations (M&O) instructions.
- Changes in cost drivers (e.g., repair versus replacement, life extensions, asset utilization).
- Audits results.
- Information gained from incidents.
- Required changes resulting from Material Problem Reports (MPRs).
- Requests from third parties.
- Identification of best practices.
- Employee suggestions.
- Need to clarify or correct text or illustrations.
- Need to improve readability.

1.2 Submit gas document recommendations to the appropriate gas technical team.

Note: Gas technical team operations are described in Utility Procedure TD-4001P-03, Gas Technical Team Procedures.

1.3 Obtain approval from the appropriate gas technical team to validate that the needs are a high priority before initiating work on a gas document.

IF the changes involve implementing a new tool or technology,

THEN, follow the steps in Utility Procedure TD-4001P-04, "New Gas Product Approval."

IF the changes involve significant impacts on the Company's training curriculum development resources,

THEN, ensure that the gas technical team is made aware of this situation and forward the request for training curriculum assistance to the Gas Standards Steering Committee to prioritize this need.

2. Document Development and Updates

2.1 General Information

2.1.1 Choose the proper gas document to update or document type to develop a new document, based on direction from gas standards personnel.

2.1.2 Complete the document template by following the Company's guidance documents applicable to that document type (See Utility Standard TD-4001S, "Gas Standards Documentation Requirements," and its associated procedures).

2.1.3 Review and incorporate the applicable requirements into the document, as required by Utility Standard Practice (USP) 4, "Record Retention and Disposal."

2.1.4 Develop the document from the user's perspective, using concise, direct action steps.

2.1.5 Identify the impact the document has on Company personnel other than the document's target audience (usually design, construction, maintenance, and operations personnel).

2.1.6 Address any issues with affected personnel before releasing the document.

The following are examples of Company activities that could be affected by a new process:

- Training programs and materials.
- Operator qualification (OQ) programs.
- Integrity management programs.
- Auditing processes.
- Strategic sourcing processes (material codes).
- Estimating processes (e.g., Fast Flow Estimating [FFE]).
- Computer programs (e.g., the Integrated Gas Information System [IGIS]).
- Development of an effective communication plan.

2.1.7 **Commitments**: Identify any special commitments that the Company has made with a government regulator by superscripting the appropriate section, paragraph, or sentence with the gas transmission and distribution (T&D) commitment number. The commitment number is in the format of *GTD-yyyy-xxx*, where *yyyy* indicates the year and *xxx* represents the number of the commitment assigned by the section that maintains the department's commitment numbers. Do not change procedure sections that have commitment numbers without senior director-level approval.

2.2 Procedures

2.2.1 Ensure that all gas M&O forms provide spaces to record the following entries for the person performing the maintenance and the reviewing supervisor, when required:

- The employee's printed name, printed initials, or printed LAN ID.
- The employee's scripted initials or signature.
- The maintenance or review date.

2.2.2. Specify the frequency for performing repetitive processes with the following language:

> "…<period of time>, not to exceed <maximum period of time>, to the date."
>
> For example, "Perform inspections annually, not to exceed 15 months, to the date."

2.3 Job Aids[1]

Ensure that all gas job aids reference the appropriate gas standard, numbered document, or procedure.

3. Approval

Route gas documents for approval in compliance with applicable Company standards and procedures or department direction.

For documents approved by gas business unit employees, route the final documents for approvals as follows:

[1] Job aids address Company commitments to the CPUC detailed in the October 13, 2009 letter transmitting the Company's response to the CPUC on the April 7–10, 2009 Topock Audit (NOV-2).

Bulletins

1) Standards facilitator
2) Author/subject matter expert (SME)
3) Approver
4) Director in charge of integrity management and technical support

Procedures

1) Standards facilitator
2) Author/SME
3) Others, as appropriate
4) Approver
5) Director in charge of integrity management and technical support

Standards

1) Standards facilitator
2) Author/SME
3) Others, as appropriate
4) Director in charge of integrity management and technical support
5) Senior director in charge of gas engineering

4. Publication

Collaborate with Company personnel responsible for posting documents to the Technical Information Library (TIL) and producing other media (CD or paper documentation) to publish the approved document at the direction of assigned gas standards personnel.

5. Communication

5.1 Use an effective communication method, as directed by the gas technical team, based on the importance level of the new information (examples provided in Table 1, Page 6).

Table 1. Methods of Communicating Availability of New Gas Standards Documentation

Change Level	Communication Methods	Documentation Examples
Minor	Email.	• Update of material codes. • Minor procedural changes.
Mid-level	• Email. • Conference call with affected supervisors. • Online web-based training classes (as appropriate).	Introduction of procedural changes to existing processes.
Major	• Email. • Conference calls or meetings (road shows) with supervisors. • Supervisor rollout of changes to target audiences with verification. • Online web-based training classes with verification of understanding by users.	• Introduction of new manual. • Rollout of major new procedure. • Issuance of major new tools or a major piece of new technology.

5.2 Verify that target audiences and their direct supervisors receive notification of new or changed documentation.

5.3 Notify gas standards personnel to ensure that the next publication of the gas manual includes the updated documentation.

Implementation Responsibilities

Individuals using this utility procedure are expected to carry out the steps herein. Gas technical teams are responsible for directing and approving or disapproving of documents.

Governing Authority

This document is governed by Utility Standard TD-4001S, "Gas Standards Documentation Requirements."

Reference Documents

Utility Procedures:

- TD-4001P-03, "Gas Technical Team Procedures"
- TD-4001P-04, "New Gas Product Approval"

Utility Standard TD-4001S, "Gas Standards Documentation Requirements"

Utility Standard Practice (USP) 4, "Record Retention and Disposal"

USP 22, "Safety and Health Program"

Attachments

Attachment 1, "Gas Document Development and Update Process Flowchart"

Document Recision

This utility procedure supersedes Utility Procedure TD-4001P-01, "Gas Document Development and Update Process," dated January 2010.

Definitions

CPUC: California Public Utilities Commission.

Gas document: A formal document that provides instructions to Company personnel for designing, building, maintaining, and/or operating gas facilities or tools. Examples of such documents include the following:

- Gas numbered documents (design and construction standards).
- Gas utility standards (for M&O activities).
- Gas procedures.
- Engineering material specifications.
- Training materials.
- Manuals.
- Job aids.

Gas document developer: A subject matter expert, gas standards employee, or other employee who is developing or updating a gas document.

Gas standards personnel: Employees assigned to ensure that Company gas documents are reviewed and updated in a timely fashion.

Gas technical team: A cross-functional team representing stakeholders for a specific subject matter. At a minimum, teams must be composed of subject matter experts and field stakeholders.

LMS: Learning Management System.

M&P: Methods and procedures.

SME: Subject matter expert.

Approved By

[redacted]
Principal Supervising Engineer

Document Owner

[redacted]