

## Gas Transmission – Maintenance and Construction QUALIFICATION EVALUATION FORMS

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This document contains all the required forms and tools to properly qualify an employee in the given OQ task. The following instructions will guide you in how to complete this process.

This document contains the following documents:

**Pages 1 and 2:** Official DOT input forms. This document is to be completed by an approved OQ Evaluator for the given task. Field supervisors are not to sign and submit this document unless they are an approved evaluator.

**Page 3 :** This table contains the required training requirements for either initial or subsequent OQ Evaluation. It specifies the required formal training, OJT (via FTO's) and performance testing (JPM's) that must be completed prior to OQ Evaluation.

**Pages 4 – end:** These contain the actual Field Training Outlines necessary to complete any required OJT and Job Performance Measurements (JPM's) associated with this task.  
**These must be completed prior to OQ Evaluation.**

To complete the **OQ Process** follow these steps:

1. Go to the T drive and find the desired OQ folder for the given OQ task  
**T:\TRAINING\OPERATOR QUALIFICATION\ New Initial and Subsequent Forms\**
2. Determine if the employee requires initial or subsequent evaluation.
3. See page 3 of the document which specifies the required training.
4. Schedule the employee to complete any required formal training.
5. Working with your district MP, schedule the employee to complete any required OJT or testing (see pages 4 to the end)
6. If formal training, Field Training Outlines and JPM's are complete, contact [REDACTED] to schedule an evaluation. The primary role of the Evaluator is to assess knowledge, skills and abilities. They are not there to provide training.
7. Upon completion of OQ Evaluation, page 1 of this document is sent to [REDACTED] for processing. Do not send in this form directly to HR Learning Services.
8. The original DOT Form (page 1) is forwarded to HRLS by [REDACTED]. This notification is then input into Training Server and will appear on the DOT Operator Qualification Report for the employee's district. Maintenance Planning is also notified so that PLM (report 70) can be updated with current information.

The employee can now be properly scheduled to perform OQ associated work.



QUALIFICATION EVALUATION

Initial  
 Subsequent

EMPLOYEE FULL NAME (PRINT)		Last four of SS#

Job Title \_\_\_\_\_ Area \_\_\_\_\_ Work Location \_\_\_\_\_

Subtask Name Inspect and Maintain Transmission Line Subtask #: 08-01.00

**SUBTASK OBJECTIVE:** Using one or more of the below "Evaluation Methods", demonstrated the knowledge, skill and ability to perform this task following these qualification criteria.

	Qualified
<b>1. Safety Requirements:</b>	<input type="checkbox"/>
• Ability to identify and resolve abnormal operating condition(s)	
<b>2. Access, understand and apply the following Company Standard(s):</b>	<input type="checkbox"/>
• Gas Standard - S4111	
<b>3. Patrol Procedures:</b>	<input type="checkbox"/>
• Establish a uniform procedure for patrolling	
• Patrol all Transmission Lines	
• Patrol all Gathering lines	
• Patrol all Distribution Feeder Main	
<b>4. Methods of Patrolling:</b>	<input type="checkbox"/>
• Aerial	
• Pick up truck (including 4 wheel drive)	
• Trail Bike / ATV	
• Ground patrol (walking)	
<b>5. Points to Observe – A:</b>	<input type="checkbox"/>
• Land slides or threatened slides	
• Land erosion caused by streams and other sources of water	
• Land subsidence that could affect the pipeline or main	
• Survey work and/or construction or maintenance work being performed by others within 220 yards of either side of the pipeline or other encroachments on the right-of-way	
<b>6. Points to Observe – B:</b>	<input type="checkbox"/>
• Evidence of gas leakage, atmospheric corrosion, or other damage to Company-owned facilities	
• Any activity, which could create an unsightly condition	
• Signs of severe seismic displacement	
• Signs of damage to highway structures and other non-Company owned where public safety is a factor	
• Access roads that may not be in passable condition	
• Any other factor that affects the safe operation of the pipeline	
<b>7. Reports:</b>	<input type="checkbox"/>
• Ground patrols reports	
• Aerial patrols reports	
• Patrolling Highway and Railroad crossing reports	
• Post check job	
• <b>Note:</b> Patrol pipeline after, Heavy rainstorm and Earthquakes	

**EVALUATION METHODS (Check all that apply)**

Observation On-The-Job Performance       Observation by Simulation       Oral Test   
 Observation by On-The-Job Training       Written Base Test       OTHER - Field Performance Audit

**Comments / Actions:**

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\_\_\_\_\_ EVALUATOR'S NAME AND CORP ID      \_\_\_\_\_ EVALUATOR'S SIGNATURE      \_\_\_\_\_ DATE

6/23/05 version

OM&C/FSD - Mail completed **original** Qualification Evaluation form(s) to [redacted] Room B101 @ 3301 Crow Canyon Rd, San Ramon, CA.

CGT - Mail completed **original** Qualification Evaluation form(s) to [redacted] @ 375 N. Wiget Lane, Walnut Creek, CA.

OM&C/FSD/CGT - Send copy to LGOQPC (Local Gas Operator Qualification Plan Coordinator)



### Initial/Subsequent Evaluator Instructions

Subtask Name: Inspect and Maintain Transmission Line Subtask#: 08-01.00

Evaluator must provide the following reference material(s):

- Abnormal Operating Condition (AOC) Job Aid
- Gas Standard
- Patrolling Pipelines and Mains Job Aid

**Note:**

Using reference material(s) listed above, individuals must answer all questions correctly. If individual cannot provide the correct answer(s) or demonstrate performance after two additional attempts, the Evaluator should refer to the Operator Qualification Basic Plan Manual, Section 1.3.3.3 for further instructions.

**Knowledge**

Criteria #	Requirement
1.	Review Annual Operator Qualification Job Aid and Abnormal Operating Conditions (AOC) with individual(s).
2. – 7.	Provide individual with Inspect and Maintain Transmission Line Test.


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## GSMTS Operator Qualification Training Requirements

<b>PATROLLING</b>			
<b>Task 08-01</b> <b>Inspect and Maintain</b> <b>Transmission Line</b>	<b>Initial</b> <b>Qualification<sup>(1)</sup></b>	<b>Initial</b> <b>Qualification<sup>(2)</sup></b>	<b>Subsequent</b> <b>Qualification<sup>(3)</sup></b>
<b>I. Recommended Training</b> <b>Or Equivalent</b>  On-The-Job Training	Must follow the Company/Union Program  	Required	Optional
<b>II. Text and Reference Review</b>		Required: Text and References listed in Training Binder FTO that pertain to Vol. 1, TB 2.5.6	Required: Review of UO Standard S4111 and S4122. JPM Job Aid
<b>III. On-The-Job Training</b>  Job Performance Measure JPM		Required: JPM Vol. 1, TB 2.5.6	Required: JPM Vol. 1, TB 2.5.6
<b>IV. Academic Requirements</b>		No further requirement (Testing completed with training)	Subsequent OQ Test
<b>V. Documentation</b>	Original OQ form kept in WC; Original JPM's kept in District's training file.		

<sup>(1)</sup> Employee new to PG&E (also pertains to an existing GSMTS Journeyman advancing to the next classification in the training program).

<sup>(2)</sup> PG&E Journeyman with task in base classification but is not Operator Qualified to do the task.

<sup>(3)</sup> PG&E Journeyman currently Operator Qualified in the task.

**Supports OQ tasks: 05-01, 05-02, 08-01, 08-03**

Objective	Trainee Name: [Click here and enter name]
<p>The trainee will be able to correctly and safely:</p> <ul style="list-style-type: none"> <li>determine USA locate position using GIS.</li> <li>perform mark and locate procedures, pipeline patrolling, and standby duties.</li> <li>process USA reports as outlined in the company Standards.</li> </ul>	
OJT Instructions	OJT Hours Guideline: 46 hours
<p><b>1. Reviewer's Role</b> – A qualified reviewer (journeyperson or equivalent) will <u>guide</u> the trainee in completing the objectives for each Sub-Task in this outline. Work with the trainee by discussing, explaining, or performing as necessary the concepts associated with each Sub-Task.</p> <p><b>2. Trainee's Role</b> – Under direction of a qualified reviewer, the trainee will <u>review all text and reference material before performing the training Sub-Tasks</u> described below to prepare for completing a Job Performance Measure.</p>	
<p><b>OJT Process Steps</b></p> <ol style="list-style-type: none"> <li>GMS reviews FTO requirements with SME.</li> <li>GMS determines Sub tasks &amp; OJT hours.</li> <li>GMS schedules with WMS.</li> <li>SME and Trainee complete OJT hours.</li> <li>Completed –signed FTO is returned to GMS.</li> <li>GMS verifies completed FTO.</li> <li>GMS schedules JPM.</li> </ol>	
<p><b>Text and References:</b> <i>Trainee must review all material and attend required classes before performing listed tasks.</i></p> <ul style="list-style-type: none"> <li>Code of Safe Practices Book</li> <li>DGSAVE Manual</li> <li>GS&amp;S - L Section for Pipeline Markers</li> <li>Job Aids:             <ul style="list-style-type: none"> <li>TB2-9a Patrolling Pipelines and Mains</li> <li>TB2-9b Pipe Locating Conductive and Inductive Methods</li> <li>TB2-9c 9890XT Pipeline Locator</li> </ul> </li> <li>Operating Maps and Diagram book</li> <li>PG&amp;E approved Schools and/or Onsite Training (See recommended Centralized Schools list)</li> <li>Protection of Underground Infrastructure Manual (PUI) (contains the following Utility Operations and Gas Standards &amp; Specifications [GS&amp;S]: S4412, G14412, Bulletin 151, and GS&amp;S M-60 thru M-62)</li> <li>TPC Training System Guide #306 (Piping Systems)</li> <li>UO Standards:             <ul style="list-style-type: none"> <li>S4111 Patrolling Pipelines and Mains</li> <li>S4122 Pipeline Markers</li> </ul> </li> <li>USA ticket processing software</li> </ul>	
<p><b>Trainee Materials:</b></p> <ul style="list-style-type: none"> <li>Inductive Pipe Locator and Mechanical Probe</li> <li>Personal Protective Equipment</li> <li>Conductive Pipe Locator</li> <li>Various stakes (fiberglass or wood)</li> <li>Aerial or Pipeline Patrol Report</li> <li>Marking paint (for roads)</li> </ul>	
<p><b>Safety Requirements:</b></p> <ul style="list-style-type: none"> <li>In performance of these tasks, be able to identify and resolve any abnormal operating conditions.</li> <li>Wear the appropriate clothing and use all personal safety equipment (PPE).</li> <li>Provide work protection.</li> <li>Code of Safe Practices Section 13.</li> </ul>	

**Supports OQ tasks: 05-01, 05-02, 08-01, 08-03**

**Major Sub-Tasks:**

Vol 1 TB 2.5.1 Locating Transmission Pipelines	Vol 1 TB 2.5.4	USA Requests
Vol 1 TB 2.5.2 Locating Transmission Pipelines using a mechanical Probe	Vol 1 TB 2.5.5	Standby Pipeline
Vol 1 TB 2.5.3 Third Party Mark and Locate	Vol 1 TB 2.5.6	Patrolling Pipelines and Maintaining Line Markers

**Sub-Task Vol 1 TB 2.5.6 Patrolling Pipelines And Maintaining Line Markers**

Note: This sub-task supports both the **Operator Mechanic** and the **Transmission Mechanic** job duties.

**Objective:** The trainee will be able to properly patrol a pipeline and maintain pipeline markers.

**Demonstrate and/or explain:**

- the District's frequency of aerial and/or ground patrols.
- how to interpret gas maps to find underground facilities.
- the differences between Class 1, 2, and 3 areas.
- how to recognize conditions that may impact pipeline integrity (UO Standard S 4111).
- when it might be necessary to stay at a site if the integrity of the facility is in question.
- conduct a patrol of a pipeline and then properly document patrol and pipe conditions.
- how to document patrol conditions on an Aerial or Ground Patrol Report.
- how to perform a post check of a job.
- how to identify various types of line markers and where it is recommended to install them (Carsonite marker [L-10] is installed in landscaped areas, Paddle type [L-11.1] is installed in open fields, etc.).
- proper methods for installation of line markers (approved stickers for the marker, correct placement over buried pipe and above-ground pipe, etc. – UO Standard S 4122).
- how pipeline markers should be maintained.

Hours Recommended	OJT Hours Received*	Trainee	Reviewer	Date
8 Hours	□□□□ □□□□	[Initials]	[Initials]	[Date]

Operator Qualification – Job Performance Measure				
Trainee Name		Corp ID	SSN	Location
Last	First	4 digits	Last 4 digits	Headquarters or District Name

**Objective:** The trainee can correctly and safely:

- determine USA locate position using GIS.
- perform mark and locate procedures, pipeline patrolling, and standby duties.

process USA reports as outlined in the company Standards.

**Directions:** This form documents the Job Performance Measures of the named trainee. Upon completion, the results will be put into the Operator Qualification database. The Evaluator will:

- observe the tasks as they are performed or described and rate the results.
- stop a task if the participant’s actions will endanger life or equipment.

**Safety Requirements:**

- In performance of these tasks, be able to identify and resolve any abnormal operating conditions.
- Wear the appropriate clothing and use all personal safety equipment (PPE).
- Provide work protection.
- Code of Safe Practices Section 13.

**Sub-Task Vol 1 TB 2.5.6 Patrolling Pipelines And Maintaining Line Markers**

Note: This sub-task supports both the **Operator Mechanic** and the **Transmission Mechanic** job duties.

Task Element	Evaluation Method P = Perform S = Simulate D = Describe	Results S = Satisfactory U = Unsatisfactory NA = Not Applicable	Evaluator Initials  Date
Patrol transmission lines, maintain line markers, and recognize pipeline class locations.	Method <input type="checkbox"/> P <input type="checkbox"/> S <input type="checkbox"/> D	Results <input type="checkbox"/> S <input type="checkbox"/> U <input type="checkbox"/> NA	Initials  Date

**Standard:** The trainee can correctly demonstrate and/or explain how to:

- find underground facilities by correctly interpreting gas maps.
- recognize conditions that may impact pipeline integrity as identified in the “points to observe” section of Standard S4111.
- properly document patrol conditions on the Air and/or Ground Patrol Reports.
- identify various types of line markers and where to use them (GS&S L Section and S4122).
- properly maintain pipeline markers.

Link to UO Standard S4111 Patrolling Pipelines and Mains:

[http://www.techlib/default.asp?body=manuals/uo\\_standards/s4111.htm](http://www.techlib/default.asp?body=manuals/uo_standards/s4111.htm)

Link to UO Standard S4122 Gas Pipeline Markers:

<http://www.wedm3/cgi-bin/doccontent.dll?LibraryName=dmspge01^dmsedm01&SystemType=2&LogonId=f1bfd2719e4f9922d4c6d3a182f76d5a&DocId=972740006&Page=1>

Job Aids:

Patrolling Pipelines and Mains

Pipe Locating: Conductive and Inductive Methods

Pipeline Locator 9890 XT Operation

Link to Job Aids: [http://www.wint02/gsm/training/job\\_aids.htm](http://www.wint02/gsm/training/job_aids.htm)