

Gas Transmission – Maintenance and Construction QUALIFICATION EVALUATION FORMS

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.



Initial/Subsequent Evaluator Instructions

Subtask Name: Remote System Monitoring Subtask#: 13-02.00

Evaluator must provide the following reference material(s):

- Abnormal Operating Condition (AOC) Job Aid
- Gas Standard

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. | Provide individual with Remote System Monitoring Test. |

Performance

| | |
|---------|---|
| 3. – 4. | <p>Individual must perform checks as required on the Qualification Evaluation for each of these following method(s):</p> <ul style="list-style-type: none"> • Map Reading • Operation Procedures <p>Note: Skill must be demonstrated through simulation or actual field performance. Individual must verbalize each action step (bulleted items in Steps 3-4).</p> |
|---------|---|


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)

GSMTS Operator Qualification Training Requirements

| <u>Remote System Monitoring</u> <u>Task 13-02</u> <u>Clearance Procedures</u> | <u>Initial Qualification</u> ⁽¹⁾ | <u>Initial Qualification</u> ⁽²⁾ | <u>Subsequent Qualification</u> ⁽³⁾ |
|---|---|--|--|
| <u>I. Recommended Training Or Equivalent</u> On-The-Job Training | Must follow the Company/Union Program  | Required | Optional |
| <u>II. Text and Reference Review</u> | | Required: Text and References listed in Training Binder FTO that pertain to Vol. 1 (S) TB 1-6.1 (MDI & LM) and Vol.1, TB 1.9.3 | Required: Review JPM's and all applicable Job Aids listed in this FTO. |
| <u>III. On-The-Job Training</u> Job Performance Measure JPM | | Required: JPM Vol. 1 (S) TB 1-6.1 (MDI & LM) and Vol. 1 TB 1.9.3 | Required: JPM Vol. 1 (S) TB 1-6.1 (MDI & LM) and Vol. 1, TB 1.9.3 |
| <u>IV. Academic Requirements</u> | | No further requirement (Testing completed with training) | Subsequent OQ Test |
| <u>V. Documentation</u> | Original OQ form kept in WC; Original JPM's kept in District's training file. | | |

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

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

⁽³⁾ PG&E Journeyman currently Operator Qualified in the task.

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| Objective | Trainee Name: |
| The trainee will be able to explain various types of clearances used within the system, their purposes, and the implementation process. | |
| OJT Instructions | OJT Hours Guideline: 24 hours |
| <p>Reviewer’s Role – A qualified reviewer (journey person 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>Trainee’s Role – Under direction of a qualified reviewer, the trainee will <u>perform</u> the sub-tasks described below to prepare for completing a Job Performance Measure.</p> | <p>OJT Process Steps</p> <ol style="list-style-type: none"> 1. GMS reviews FTO requirements with SME. 2. GMS determines Sub tasks & OJT hours. 3. GMS schedules with WMS. 4. SME and Trainee complete OJT hours. 5. Completed –signed FTO is returned to GMS. 6. GMS verifies completed FTO. 7. GMS schedules JPM. |
| <p>Text and References:</p> <ul style="list-style-type: none"> • Clearance Procedures Manual • Operations Manual Section 3.25 • CBT Clearance Procedures | |
| <p>Trainee Materials:</p> <ul style="list-style-type: none"> • • | |

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| <p>Major Sub-tasks:</p> <ul style="list-style-type: none"> Vol 1 TB 1.6.1 Types of Clearances Vol 1 TB 1.6.2 Reporting Procedures Vol 1 TB 1.6.3 Tagging Procedures Vol 1 TB 1.6.4 Clearance Log & Master Clearance Board Vol 1 TB 1.6.5 Forms Vol 1 TB 1.6.6 Grounding |
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Sub-task Vol 1 TB 1.6.1 Types of Clearances (Operations Manual Section 3.25)

Objective: The trainee will be able to explain the types of clearances used within the department.

Identify and/or explain:

- System Clearance.
 - New Clearance.
 - Standard.
- Station Clearance.
- Vol. 2 TB 2.8.1 Exemption Clearance.
- Authorization Clearance.
- Approval process (flow chart).

| Hours Recommended | OJT Hours Received* | Trainee | Reviewer | Date |
|-------------------|---|---------|----------|------|
| 4 Hours | <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | | | |

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

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 1.6.1 Types of Clearances

| Task Element | Evaluation Method P = Perform S = Simulate D = Describe | Results S = Satisfactory U = Unsatisfactory NA = Not Applicable | Evaluator Initials Date |
|---|--|--|--------------------------------|
| Explain the types of clearances used within the department. | 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 explain:

- the various types of clearances.
- when and where the clearances are applied to equipment associated with transmission and distribution of natural gas.

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| Objective | Trainee Name: [Click here and enter name] |
| The trainee will be able to explain the theory of operation of the Los Medanos Underground storage facility including the use of the old wells, compressor and well platforms, and the injection and withdrawal processes. | |
| OJT Instructions | OJT Hours Guideline: 24 hours |
| <p>Reviewer’s Role – A qualified reviewer (journey person 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>Trainee’s Role – Under direction of a qualified reviewer, the trainee will <u>perform</u> the sub-tasks described below to prepare for completing a Job Performance Measure.</p> | <p>OJT Process Steps</p> <ol style="list-style-type: none"> 1. TA reviews FTO requirements with SME. 2. TA determines Sub-tasks & OJT hours. 3. TA schedules with WMS. 4. SME and Trainee complete OJT hours. 5. Completed –signed FTO is returned to TA. 6. TA verifies completed FTO. 7. TA records FTO in WMS with MA. 8. TA schedules JPM. |
| <p>Text and References:</p> <ul style="list-style-type: none"> • Operations Manual • Clearance Manual • Station Maps & Diagrams | |
| <p>Trainee Materials:</p> <ul style="list-style-type: none"> • Station Maps & Diagrams | |

Major Sub-tasks:

- Vol 2 TB 2-8.1 Withdrawal Gas Routing
- Vol 2 TB 2-8.2 Injection Gas Routing
- Vol 2 TB 2-8.3 Gas Routing Through System

Sub-task Vol 1 No. TB 1.9.3 Gas Routing Through System

Objective: the trainee will be able to explain the various piping configurations used for transmission and distribution of natural gas throughout the department’s service territory.

Explain basic overviews of the gas transmission system in the:

- Northern Area.
- Central Area.
- Southern Area.

| Hours Recommended | OJT Hours Received* | Trainee | Reviewer | Date |
|-------------------|---------------------|---------|----------|------|
| 8 Hours | □□□□ □□□□ | | | |

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

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 No. TB 1.9.3 Gas Routing Through Entire System (Operating Instructions and Diagrams)

| Task Element | Evaluation Method P = Perform S = Simulate D = Describe | Results S = Satisfactory U = Unsatisfactory NA = Not Applicable | Evaluator Initials Date |
|--|--|--|--------------------------------|
| Explain the various piping configurations used to facilitate the compression, transmission, and distribution of natural gas throughout the department’s service territory. | 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:

- identify the main transmission lines and tap lines located throughout the service territory.
- explain the routing flow of natural gas in the three geographic locations:
 - Northern: Redwood Path.
 - Central: Bay Area Loop.
 - Southern: Baja Path.
- explain how the various compressor stations affect the flow rates in the various pipelines.
- explain how compression can be used to “pack” a line to increase system capacity.