

3.1 Transitional Qualification Process

3.1.1 Introduction

Per the DOT Operator Qualification Program (49 CFR Part 192 or 195), the company must perform an evaluation of an individual's ability to perform a covered task that assesses and documents the individual's qualifications to perform the covered task. This evaluation includes determining the individual's ability to recognize and react to abnormal operating conditions that he or she could reasonably encounter while performing the covered task.

The local operating departments and/or the appropriate functional staff (HR Learning Services, Gas Distribution and Technical Services, Customer Field Services, Gas System Operations, and Gas System Maintenance) will conduct the evaluation of personnel assigned covered tasks under the DOT Operator Qualification Program.

The assignment of covered tasks and/or subtasks will be the responsibility of local supervision.

3.1.2 Transitional Qualification Method

The transitional evaluation process covers a period from April 1, 2001, through October 28, 2002. During this period, Work Performance History Review (WPHR) will be used as the primary method of qualifying individuals to perform covered tasks. For individuals who were not performing a covered task on a regular basis prior to August 27, 1999, the initial qualification process shall be used to qualify individuals.

3.1.3 Evaluation Criteria – Work Performance History Review

The individual's knowledge and skill must be reviewed against the criteria enablers listed on the "Transitional Qualification Evaluation - Work Performance History Review" form for Utility Covered Tasks and/or Subtasks, Part IV of this plan.

3.1.4 Evaluation Criteria – Alternate Method of Evaluation

The Alternate Method of evaluation will be used if an individual cannot qualify using the WPHR or if it is determined that a higher level of qualification is needed. When using this method, the individual's knowledge and skill must be determined using one or more of the methods listed on the "Transitional Qualification Evaluation - Alternate Method" form for Utility Covered Tasks and/or Subtasks, Part IV of this plan.

3.1.5 Assignment of Tasks and Subtasks

Tasks and/or subtasks may be assigned as necessary to address the individual's work assignment and need not be assigned solely based on classification descriptions. For assignment of tasks and/or subtasks, see the attached list of Utility Covered Tasks and/or Subtasks.

3.1.6 Evaluators

To ensure a quality program, designated evaluators must possess the knowledge, skills, and/or experience of the appropriate task and/or subtask to evaluate and qualify individuals performing covered tasks and/or subtasks. Evaluators must also be able to recognize abnormal operating conditions and know what appropriate action to take. The evaluator need not be qualified to perform the covered tasks.

To ensure database integrity, only those designated evaluators will have authority to approve qualification documents for entry into the appropriate database.

3.1.6.1 Evaluator Titles

- frontline supervisor
- senior instructor
- instructor
- learning consultant
- senior learning consultant
- specialist
- senior specialist
- team lead

3.1.7 Work Performance History Review Process

The Work Performance History Review evaluation process may be supplemented by using the following training and/or performance related activities:

- apprenticeships training
 - non-apprenticeships
 - enhancement training
 - field performance audits
 - Gas Emergency Plan Assessments
 - Gas Emergency Plan Annual Procedural Training
 - skill block assessments
 - task specific training
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3.1.8 Alternate Method of Evaluation

When using the Alternate Method to evaluate and qualify individuals to perform covered tasks, a master copy of the test and/or check-off document must be maintained by HR Learning Services for the duration of the test/check-off plus 5 years.

3.1.8.1 Approved Alternate Methods

- written base test
- oral test
- job observation by supervisor
- on-the-job training
- simulation
- other – skill block assessment
- other – Field Performance Audit

3.1.9 Documentation Requirements

Evaluators will use the "Transitional Qualification Evaluation" forms to record individual evaluations by tasks and/or subtasks. The "DOT Gas Operation Qualification Summary" form will be used to record a summary of the individual's qualifications.

3.1.9.1 OM&C and CFS Evaluator Instructions

1. FAX completed "DOT Gas Operation Qualification Summary" sheet(s) to HR Learning Services for entry into Training Server.
2. MAIL the original "DOT Gas Operation Qualification Summary" and the "Transitional Qualification Evaluation(s)" to the HR Learning Services training coordinator in San Ramon.
3. Provide copies of all documents to the LGOQPC.

HR Learning Services will notify the LGOQPC by E-mail when the database has been updated.

HR Learning Services will maintain a list of evaluators designated to perform evaluations and review the list with the LGOQPC and the SGOQPC annually to ensure the accuracy.

3.1.9.2 CGT Evaluator Instructions

1. FAX completed "DOT Gas Operation Qualification Summary" sheet(s) to the System Integrity Group for entry into the PLM database.
2. MAIL the original "DOT Gas Operation Qualification Summary" and the "Transitional Qualification Evaluation(s)" to the System Integrity Group.
3. Provide copies of all documents to the LGOQPC.

The System Integrity Group will maintain a list of evaluators designated to perform evaluations and review the list with the LGOQPC and the SGOQPC annually to ensure the accuracy.

3.1.10 Record Retention

All records of an individual's current qualifications must be maintained while the individual is performing covered tasks for which he or she is qualified. When an individual is evaluated for subsequent qualification, the prior qualification record must be kept for five years.

When an individual is no longer performing covered tasks, the individual's records must be kept for a minimum of five years.



TRANSITIONAL QUALIFICATION EVALUATION (Work Performance History Review)

EMPLOYEE FULL NAME (Print) SS#

Job Title Area/Work Location

Task Name Cast Iron Repair Task or Subtask #: 01-00.00

Task Objective: Demonstrated ability to repair, operate, maintain and protect cast iron gas facilities. Inspect for graphitization. Also has demonstrated the ability to identify and take action when an abnormal operating condition exists.

Table with 3 columns: Description, Yes, No. Rows include: Compare your knowledge..., Demonstrated ability to: (a) Repair bell joints and spigot seals, (b) Protect cast iron pipeline, (c) Operate and maintain pipeline.

SUPPLEMENTAL TRANSITIONAL EVALUATION METHODS:

If applicable, check the appropriate criteria used to assist in the evaluation process.

Grid of evaluation methods: Apprenticeship Training, Non-Apprenticeship Training, Enhancement Training, Field Performance Audit, Gas Emergency Plan Assessments, Gas Emergency Plan Procedure Training, Skill Block Assessments, Task Specific Training.

DATE: QUALIFIED NOT QUALIFIED

Note: If individual does not qualify under WPHR, (s)he may qualify using the Alternate Method of Qualification.

2/13/01 OM&C/CS - Mail completed form(s) to Room B101 @ 3301 Crow Canyon Rd, San Ramon, CA. CGT - Mail completed form(s) to @ 375 N. Wiget Lane, Walnut Creek, CA. OM&C/CS/CGT - Send copy to LGOQPC

TRANSITIONAL QUALIFICATION EVALUATION
(Work Performance History Review, Continued)

Comments / Actions:

EVALUATOR'S NAME
(LOCAL OPERATING DEPARTMENT)

EVALUATOR'S NAME
*FUNCTIONAL DEPARTMENT AS NEEDED

EVALUATOR'S TITLE / LAN ID

*EVALUATOR'S TITLE / LAN ID

EVALUATOR'S SIGNATURE

*EVALUATOR'S SIGNATURE

SAMPLE

2/13/01

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

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

OM&C/CS/CGT - Send copy to LGOQPC



TRANSITIONAL QUALIFICATION EVALUATION (Alternate Method)

EMPLOYEE FULL NAME (PRINT) SS#

Job Title Area/Work Location

Task Name Cast Iron Repair Task or Subtask #: 01-00.00

Task Objective: Using one or more of the below "Transitional Evaluation Methods", demonstrated ability to repair, operate, maintain and protect cast iron gas facilities. Inspect for graphitization. Also has demonstrated the ability to identify and take action when an abnormal operating condition exists.

TRANSITIONAL EVALUTION METHODS (Check all that apply)

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

Note: An original of the appropriate test and/or check-off sheet must be maintained by Learning Services for Distribution Operations and the System Integrity Group for CGT for duration of use plus a minimum of 5 years.

DATE: QUALIFIED NOT QUALIFIED

Comments / Actions:

EVALUATOR'S NAME (LOCAL OPERATING DEPARTMENT)

EVALUATOR'S NAME *FUNCTIONAL DEPARTMENT AS NEEDED

EVALUATOR'S TITLE / LAN ID

*EVALUATOR'S TITLE / LAN ID

EVALUATOR'S SIGNATURE

*EVALUATOR'S SIGNATURE

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