Operator Qualification Guidance Manual for Operators of LP Gas Systems

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Know what's **below.**
Call before you dig.

August, 2016

US Department of Transportation
Pipeline and Hazardous Materials Safety Administration
Office of Pipeline Safety

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The advisory group involved in the revision of this manual included:

Richard G. Marini, PE, APGA SIF, Project Manager
John Erickson, APGA Vice President
Bruce Benson, Connecticut Dept. of Energy & Environmental Protection
Ed Boden, AmeriGas
David Burnell, New Hampshire Public Utilities Commission
Mike Deegan, Florida Clearwater Gas System
James Hilliard, Revere Gas Virginia
Gerry Lee, APGA SIF Manager
Jim Osterhaus, Railroad Commission of Texas
Kevin Streeter, PHMSA- Central Region
Bruce Swiecicki, National Propane Gas Association
Rufus Youngblood, Ferrell Gas

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CHAPTER I: GUIDELINES FOR DEVELOPING AN OPERATOR QUALIFICATION PROGRAM

INTRODUCTION

These guidelines were prepared by a team of industry and Government pipeline safety and training experts to assist small LP operators and master meter operators to develop programs to ensure that individuals who operate and maintain these systems are qualified for the work they perform. LP operators are required to prepare and follow an Operator Qualification (OQ) program by Federal regulations at 49 CFR 192 Subpart N as well as regulations adopted by some States.

OQ programs must identify each individual, whether they are an employee of the operator or an employee of a contractor hired by the operator, who performs covered operations or maintenance activities on the piping system. The OQ program must also identify the "covered tasks" that each individual performs and ensure that each individual is evaluated to ensure they have the necessary knowledge, skills and abilities (KSA) to perform each task, as well as to recognize and react to abnormal operating conditions (AOC) that may arise while performing these tasks. The process the operator follows to accomplish these objectives must be in writing. Records of the tests, evaluations and other actions required in the plan must be made available for inspection by State and Federal pipeline safety inspectors.

The following steps should be considered when preparing an OQ program.

PREPARING A WRITTEN OPERATOR QUALIFICATION PLAN

The regulations require that you prepare and follow a written OQ plan that at a minimum includes the following eight provisions:

1. Identify covered tasks (operation and maintenance (O&M) activities affecting the integrity of the pipeline and required by the safety code);

2. Evaluate individuals performing covered tasks to demonstrate that they are qualified;

3. Allow individuals who are not qualified to perform certain covered tasks if directed and observed by an individual who is qualified;

4. Evaluate an individual if there is reason to believe that the individual's performance of a covered task contributed to an incident;

5. Evaluate an individual if there is reason to believe that the individual is no longer qualified to perform a covered task;

6. Communicate changes that affect covered tasks to individuals performing those covered tasks;

7. Establish re-evaluation intervals; and

8. Describe how appropriate training will be used in the OQ program (new hires, refresher training for existing employees who transfer to new jobs or fail re-valuations, etc.).

In addition to these minimum requirements, the written OQ plan should:

1. Name the person/position who will be responsible for ensuring that the requirements of the plan are carried out;

2. Identify records necessary to carry out the program and where those records will be kept.

IDENTIFY COVERED TASKS

A covered task is an activity, identified by the operator, that:

1. Is performed on a pipeline facility;

2. Is an operations or maintenance task[1];

3. Is performed as a requirement of this part (Part 192); and

4. Affects the operation or integrity of the pipeline.

The first step in identifying covered tasks is to identify tasks performed on pipeline facilities. "Pipeline facilities" means all underground and aboveground piping; it generally does not include piping inside customer buildings, although if gas is sold to the customer through a gas meter located inside the building, "pipeline facility" extends inside up to the outlet of the meter.

A good source to identify tasks performed on a pipeline facility is the operator's Manual for Operations, Maintenance and Emergency Response. This will describe operations and maintenance tasks performed on the system.

The following is a list of common O&M tasks. Not all of these tasks may apply to every system, and there may be additional tasks performed on other systems that meet the definition of a covered task that are not listed here:

[1] **Note: Some States (as well as current proposed revisions to Federal regulations) include new construction as operations and maintenance covered tasks.**

Investigating leak/odor complaints,

Locating and marking lines,

Controlling and monitoring pipeline pressures and product flows,

Operating an odorizer,

Monitoring propane gas odorization levels (“sniff tests”),

Repairing leaks,

Inspecting and testing pressure regulator station and overpressure protection,

Tapping pipelines under pressure,

Conducting leakage surveys,

Joining pipe for maintenance,

Inspecting critical valves,

Welding on a pipeline for maintenance,

Excavating and backfilling,

Repairing coating on existing steel pipelines,

Measuring pipe-to-soil or underground container to soil potential,

Coating aboveground piping,

Inspecting for atmospheric corrosion,

Inspecting the condition of exposed pipe or pipe coating,

Installing/replacing a rectifier,

Installing/replacing an anode or test station,

Inspecting a rectifier,

Visually inspecting for internal corrosion,

Purging,

Patrolling,

Filling/emptying an LP container,

Changing out an LP container,

Maintaining or replacing LP vaporizers,

Isolating sections of pipe or stopping off or otherwise controlling the flow of gas or product to a work site.

Certain critical tasks fall outside the scope of the OQ Rule. Relighting appliances and other work performed on gas piping or equipment inside the residences are not covered tasks since they are not performed on a pipeline facility as defined above. Conducting meter dial tests for leaks of internal piping also fall in this category. While individuals performing these tasks are not subject

to the OQ program, operators should ensure that competent people to do this work since mistakes can lead to accidents. OQ does not exempt anyone from the general good business practices to use competent individuals for all tasks that are important for the safe operation of your system.

Covered task lists may also be purchased from many industry trade associations and other vendors. If one of these lists is utilized, it must be carefully reviewed to ensure that it includes all the tasks performed on the system. Any tasks that are not performed on your system should also be deleted.

EVALUATE INDIVIDUALS WHO PERFORM COVERED TASKS

Evaluation means a process of testing a person through written tests, oral exams, or observation while performing the task on the job or in a classroom or simulated setting, or any other documented method or combination of methods that can prove the individual possesses the necessary KSA to perform the covered task and recognize and react to AOC. A checklist is required if observation on the job or a simulation is used for evaluation. To be acceptable, each evaluation must include a document that States what is pass or fail for each step in the evaluation and indicates what KSA or AOC were tested or observed.

An OQ plan must list the specific evaluations (tests, observations, etc.) that will be accepted as evidence of qualification in each covered task. The list may include more than one acceptable means of qualifying individuals for a task. For example: An operator may adopt their contractors' evaluations or evaluations by third parties (e.g., associations, vendors, State and local governments); however, the operator is responsible to show that the evaluations are appropriate for the way the task is performed on the system.

The operator should be able to demonstrate that the evaluations accepted for each covered task measure the knowledge, skills and abilities required for the task. The evaluations should address critical skills and abilities in addition to critical knowledge needed to perform each task. For example, certain tasks require physical abilities and physical skills critical to accomplishing the covered task, in addition to knowledge of how to perform the task. In that instance, it must be ensured the evaluation includes a test to address the physical ability of the individual to perform the task. The actual evaluation may involve a knowledge-based test, plus a practical application in the field or classroom simulation to demonstrate physical ability and proficiency.

Further, the testing for covered tasks included in the qualification program must also include questions or hands-on demonstrations on AOC associated with the task to both recognize and react to the AOC. Abnormal operating condition means a condition that may indicate a malfunction of a component or deviation from normal operations that may:

(a) Indicate a condition exceeding design limits; or

(b) Result in a hazard(s) to persons, property, or the environment.

For example, a leaking gas pipe is a malfunction of the pipe (it's not supposed to leak) and can result in a hazard to persons and property.

Some typical AOC as identified in ASME B31Q Pipeline Personnel Qualification include:

Unplanned escape of gas from a pipeline,

Fire or explosion,

Unplanned pressure deviation,

Unplanned flow-rate deviation,

Pipeline damage,

Activation of a safety device other than during planned testing,

Unplanned status change,

Interruption or failure of communications, control system or power,

Inadequate odorization or reports of gas odor.

Some AOC are specific to certain covered tasks (e.g., unplanned pressure deviation could be caused by the failure of a valve, regulator, relief valve, etc., depending on the task). Other AOC are general and apply to many, if not all, tasks (e.g., anyone performing operations or maintenance tasks should be able to recognize and react to gas odors, leaking product or spills). Regardless, each covered task should identify potential AOC and reactions associated with the covered task.

Operators must determine credible AOC and identify how personnel are expected to react to these. Evaluations used by the operator should address how to recognize and react to abnormal operating conditions. AOC evaluations may be broken out into a separate section of the evaluation or may be incorporated within those portions of the evaluations that address routine knowledge, skills and abilities. Operators should be able to demonstrate that all abnormal operating conditions that can reasonably be anticipated to be encountered and related to the task being performed are addressed in the evaluations for that task, particularly if off-the-shelf evaluations are being used.

Some conditions such as recognizing low pipe-to-soil potentials or corroded pipe could be considered AOC or could be considered part of the routine KSA for covered tasks such as measuring pipe-to-soil potentials or inspecting pipe condition. For OQ compliance purposes, as long as the evaluations for the covered task address how to recognize and react to these conditions, it does not matter if these are classified as AOC or normal conditions.

If an operator elects to accept evaluations developed by others, e.g., your contractors, State plumbers licenses, associations or other vendors, that operator must ensure that these evaluations address the KSA necessary to perform the task and recognize and respond to AOC according to the OQ program procedures.

The written OQ plan should address the credentials of the evaluators/qualifiers who will evaluate your employees and contractors. If the evaluations chosen require the evaluator/qualifier to make a judgment whether the task was performed correctly, then the evaluator/qualifier should possess

adequate knowledge about proper performance of the task so that a proper judgment can be made when evaluating the task. Evaluators/qualifiers should:

1. Possess the required knowledge, through training or experience, to ascertain that a worker is able to perform the covered task and recognize and react to AOC that might surface while performing the task;
2. Conduct the evaluations required to qualify or re-qualify individuals on Covered Tasks and be responsible for supplying qualification records.

ALLOW UNQUALIFIED INDIVIDUALS TO PERFORM A COVERED TASK IF DIRECTED AND OBSERVED BY AN INDIVIDUAL WHO IS QUALIFIED

Operators may allow individuals who have not met the evaluation criteria listed in the OQ plan to perform certain covered tasks under controlled conditions. A written OQ plan must spell out the conditions under which individuals who have not met the qualification criteria may perform tasks while under the observation and direction of a qualified individual. This is intended to allow on-the-job training and temporary labor work teams.

Directed and observed means that a qualified individual is at the work site and is directly watching each step of the work to ensure it is performed correctly when the covered task is being performed by an individual(s) not qualified for the task. It is not sufficient that the qualified individual be in the general vicinity, but observing each step of the task and ready to intervene immediately should it be necessary.

The written OQ plan should provide guidance on how many non-qualified workers can be directed and observed at one time by a qualified individual and a list of any tasks non-qualified persons will not be allowed to perform (e.g., hot taps).

Operators may specify in the OQ plan that only qualified individuals may perform covered tasks, in which case on-the-job training for covered tasks may not be used even with a qualified individual directing and observing the non-qualified individuals.

Example: Except with respect to welding and plastic fusion, individuals qualified in a covered task being performed will direct and observe any nonqualified individuals performing the Covered Task.

POST ACCIDENT/INCIDENT EVALUATION

The OQ plan must specify that the operator will re-evaluate anyone whose performance of a covered task may have contributed to an accident (for hazardous liquid pipelines) or incident (for gas pipelines), either caused it, failed to respond appropriately or made it worse by responding inappropriately. For example, if an accident/incident occurs because a pipeline location was inaccurately marked, the individual who marked the line may have contributed to the accident/incident. Similarly, if an individual opens a valve that should remain closed and that causes an accident/incident to be worse, that contributes to the severity of the accident/incident.

The OQ plan must specify the process used to re-evaluate these individuals. Re-evaluation need not be by the same methods used to initially evaluate the individual, but if the operator intends to use a different method, this method must:

Address the KSA and AOC for the task, and

Be listed in the written OQ Plan as an accepted evaluation for the covered task.

FOR CAUSE EVALUATION

The OQ plan must include provisions on how to re-evaluate persons for whom there are reasons to believe that they are no longer qualified. The plan should include some guidance for supervisors to recognize and react to behavior that would trigger these provisions. Reasons could include observation of the person not following procedures, injury or illness that reduces motor skills.

COMMUNICATION OF CHANGES

The OQ plan must specify how changes to policies, procedures, equipment or regulations are to be communicated to anyone who performs covered tasks affected by the change. Re-evaluation may be required if the changes affect the KSA required for the task. For example, when purchasing a new leak detection instrument, an operator should consider whether the new instrument is basically the same as the old instrument it replaces, in which case you need only communicate to the persons using the device that it has been replaced. If, however, the new instrument operates on a different principle than the one it is replacing, it may be necessary to retrain the persons using it and document this training. The OQ plan should also spell out conditions under which re-evaluation will be required such as when changes to policies, procedures, etc., require it.

ESTABLISH RE-EVALUATION INTERVALS

To continue to be qualified, individuals performing covered tasks must be periodically re-evaluated. Re-evaluation intervals should be based on factors such as:

1. How frequently is the covered task performed? More frequent performance may justify longer re-evaluation intervals;

2. How complex is the covered task? More complex tasks may require shorter re-evaluation intervals; and

3. What might the consequences be if the task is performed improperly? What is the worst that could happen if the covered task is not performed correctly, with "catastrophe" justifying shorter re-evaluation intervals and "nothing" justifying longer intervals?

Three years is the commonly accepted interval for most tasks. Intervals over 5 years will require justification. Tasks that are performed infrequently may require re-evaluation prior to performance. Federal/State regulations require re-evaluation for certain covered tasks such as pipe plastic joining and welding to be conducted at annual intervals.

Re-evaluation need not be by the same process as initial qualification but must address the KSA and AOC for the task.

TRAINING

The OQ plan should describe how training fits into an operator's OQ program. While qualification is accomplished through evaluation, not training, some individuals will require training to provide them with the KSA necessary to pass the evaluations for a covered task. Some examples of individuals requiring training are:

1. New hires
2. Individuals taking on new tasks (transferred or promoted),
3. Individuals who fail one or more evaluations,
4. Infrequent performance of a covered task,
5. Post Incident or for cause re-evaluation.

This does not mean that every individual who performs a covered task needs to go through a training program before the individual can be re-evaluated. In fact, a common misconception is that training counts as evaluation for a task. Attendance records, certificates of completion, etc., from training classes are not evaluation records and cannot be used as the basis for qualifying an individual for any task. Where a training course includes written or oral exams, observations on-the-job or in a classroom simulation, it is the records of these exams and/or observations that can be counted as evaluations for a covered task as long as they address the KSA and AOC for the task.

RECORD KEEPING

An operator must maintain records to prove that the written OQ plan is being followed. For each individual who performs a covered task on your system, an operator must be able to produce a record of the date the individual passed each evaluation required for each covered task the individual performs, the tasks for which the individual is qualified and the method used to qualify the individual. Records of re-evaluations for cause, post incident and when required by re-evaluation intervals must also be maintained. The method may include any combination of written or oral tests, observation in classroom, on-the job or simulation, or other methods specified in the OQ program as accepted for the covered task. An operator should be able to provide Federal or State inspectors with copies of the evaluation methods, e.g., tests or observation checklists used to qualify a person for the task, so that the inspector can determine if the evaluations address the appropriate KSA for the covered task. You can make an inspection easier on both you and the inspector by having a list of the KSA, AOC and identifying where each is addressed in your observation checklists, test questions and other evaluation tools.

RECORD RETENTION

Records must be maintained for 5 years after the evaluation is no longer required for current qualification for any covered task. In other words, the record retention period is 5 years PLUS the re-evaluation interval specified in an operator's OQ plan for the covered task. For example, if an operator has a 3-year re-evaluation interval for a covered task, and an individual passes an evaluation on October 28, 2012, then re-passes the evaluation on October 28, 2015, the operator must maintain the record of the October 28, 2012 evaluation until October 28, 2020, since the date October 28, 2015, is the date on which the operator ceases to rely on the October 28, 2012 evaluation for qualification.

CONTRACTORS

Many operators use contractors to perform covered tasks on their pipeline systems. The OQ regulation requires that <u>any individual who performs a covered task on a pipeline system be qualified for that task according to THE OPERATOR'S OQ plan</u>. If an operator uses contractors for any covered task, the operator is responsible to ensure that each contractor employee who performs one or more covered tasks on your system is qualified for that task or is being directed and supervised by a qualified individual (if the operator's OQ plan allows for this).

Below are four approaches to handling contractor qualification:

1. Operator evaluates the contractor individuals using company evaluations.
2. Operator allows the contractor to evaluate its personnel using either the operator's evaluations for the tasks or the contractor's evaluations for the tasks. In the latter case, the operator should obtain copies of the contractor's evaluations and ensure they address the same KSA and AOC as the operator's evaluations for the same tasks. Evaluations must be documented, e.g., test

questions are written and observation evaluations include checklists indicating what is observed. These evaluations must be listed in the operator's OQ plan as evaluations accepted for these tasks.

3. Require the contractor to be evaluated by a third party (e.g., NACE, NCCER, etc.). The operator should contact the third party, obtain copies of the evaluations and verify that they address the same KSA and AOC as the operator's evaluations for the same tasks. Evaluations must be documented, e.g., test questions are written and observation evaluations include checklists indicating what is observed. These evaluations must be listed in your OQ plan as evaluations you accept for these tasks.

4. The operator must ensure that non-qualified contractor personnel are watched by a person (operator or contractor personnel) qualified in the covered task being performed and the observer should be prepared to take immediate corrective action should he/she observe work being done that is not in accordance with the operator's procedures, or being done in an unsafe manner.

RECORD KEEPING FOR CONTRACTOR PERSONNEL

If contractor personnel are used to perform a covered task, the operator must be able to produce records that the contractor personnel are qualified for the covered tasks they perform. The record requirements for contractors are exactly as described above for company personnel. The records must indicate the date the individual was qualified, the task(s) for which he/she is qualified and the method of qualification. The method must be a method listed in the operator's OQ plan as accepted under the OQ plan for the covered task(s) the individual performs.

Contractor qualification records can be kept by the operator, by the contractor or by a third party. If the operator elects to have the contractor or a third party keep the records, ensure that there are provisions for the operator to obtain the records should the contractor or third party go out of business. The operator must be able to produce these records for review for up to 5 years after the last date an individual performs a covered task on your system.

EMERGENCY RESPONSE

OQ requirements for emergency response are limited to that portion of the response performed on the pipeline facility.

Fire departments and other public responders are not required to be qualified and *(if not qualified)* must not perform covered operations or maintenance tasks on the pipeline facility.

All other individuals employed by the operator must be qualified to perform their assigned covered tasks or must be under the direct observation of a qualified individual.

Covered emergency response tasks are those tasks listed in § 192.615(a) that meet the four-part test specified in § 192.801.

RESOURCES

Included in Appendix A are links to several resources that can be used with the development and implementation of an operator's OQ program and assist in preparation for OQ inspections. These resources can be used to assist in a self-assessment of an operator's OQ program to ensure that the program addresses all the important components that the regulators expect to see in an acceptable OQ program.

Appendix B references samples of existing OQ plans that can be revised by operators for their OQ plans**.**

NOTE: These sample plans must be adapted to accommodate the operator's specific policies and procedures for their system.

CHAPTER II: DEFINITIONS

A number of terms contained in the OQ Rule and its implementation found in 49 CFR Part 192, Subpart N and in Part 195, Subpart G, may be unclear and subject to different interpretations by operators and regulatory representatives. The following definitions have been obtained through consideration of gas and liquid pipeline regulations, dictionary definitions of a word or term, operator OQ plans, or other sources.

ABILITY

The capacity to do or act, physically and/or mentally.

ABNORMAL OPERATING CONDITION (AOC)

As defined in §§192.803 and 195.503, ***abnormal operating condition*** means a condition identified by the operator that may indicate a malfunction of a component or deviation from normal operations that may:

(a) Indicate a condition exceeding design limits; or

(b) Result in a hazard(s) to persons, property, or the environment.

[Note: To be qualified, an individual must be able to properly perform assigned covered task(s) and be able to recognize and react appropriately to any AOC that may (reasonably be expected to) be encountered while performing the covered task – whether the condition arises as a direct result of his/her work performance (e.g., be specific to the covered task being performed) or not (e.g., be generic in nature, but still observable because the individual is present on site).]

ACTIVITY

A specific deed, action, function, or sphere of action.

AFFECTS THE OPERATION OR INTEGRITY OF THE PIPELINE

Any activity, or omission of an activity, that could directly or indirectly result in a hazard to persons, property or the environment. As used in the safety context of the OQ Rule, the phrase indicates activities that could result in an AOC that in turn could result in an unsafe operating condition.

BENCHMARK

A standard of measurement or evaluation.

COMMUNICATE

To convey information about; make known; to reveal clearly.

COMPLIANCE

Activity (ies) in accordance with a rule.

CONTRIBUTED

Determined to be a factor.

CONTRIBUTED TO

A judgment by designated operator personnel, that the action or inaction of an individual(s) was a factor in the occurrence of an incident/accident.

COVERED TASK

As defined in §§ 192.801 and 195.501, a ***covered task*** is an activity, identified by the operator, that:

(1) Is performed on a pipeline facility;

(2) Is an operations or maintenance task;

(3) Is performed as a requirement of this part; and

(4) Affects the operation or integrity of the pipeline.

CRITERION

A standard upon which a judgment is based.

CURRENT

Belonging to the present time; now in progress.

CURRICULUM

An interrelated set of courses, structured in a manner that allows an individual to build their knowledge and skills consistent with the jobs and tasks they perform.

DEMONSTRATE

Provide tangible evidence.

DETERMINE

To conclude after consideration, investigation, or calculation.

DIRECT

To take authoritative charge of or supervise; to control, order or command.

DIRECT OBSERVATION

Observation of an unqualified individual(s) during the performance of a covered task by an individual who is qualified to perform the task being observed. The observer must be in direct visual and verbal contact with the individual(s) and must be able to take immediate and effective corrective action if incorrect procedures or AOCs are observed.

DOCUMENT

Prepare a retrievable record.

EMERGENCY RESPONSE

Actions taken by the operator, fire department, police department and others to an unexpected and usually dangerous situation that calls for immediate action.

EVALUATION

As defined in §§ 192.803 and 195.503, ***evaluation*** means a process, established and documented by the operator, to determine an individual's ability to perform a covered task by any of the following:

(a) Written examination;

(b) Oral examination;

(c) Work performance history review (WPHR);

(d) Observation during:

(1) Performance on the job,

(2) On-the-job training, or

(3) Simulations.

(e) Other forms of assessment.

[Note: Any evaluation of an individual's qualifications must follow an objective, consistent process that documents the individual's ability to perform the covered task, including the ability to recognize and react to AOCs.]

EVALUATOR

Persons performing evaluations should possess the required knowledge (1) to ascertain an individual's ability to perform the covered tasks, and (2) to substantiate an individual's ability to recognize and react to AOCs that might surface while performing those activities. This does not necessarily mean that the person performing the evaluations should be physically able to perform the covered tasks themselves.

EXCAVATION WITHIN A PIPELINE FACILITY

Qualification for this covered task does not require the operator's employee or contractor employee to be proficient in the operation of excavation equipment. Covered tasks requiring qualification shall include:

Verification of line location and depth,

One-call and underground facility owner/operator notifications,

Sloping/shoring,

Water removal,

Inspection.

Third-party excavations that take place on the operator's pipeline facility shall be handled in accordance with the operator's damage prevention program requirements.

IDENTIFY

To establish the identity of; to ascertain the origin, nature, or definitive characteristics of.

IMMEDIATE CORRECTIVE ACTION

Taking steps to correct mistakes or abnormal or hazardous conditions without delay.

INCIDENT

As defined in § 191.3, an incident is any of the following events:

(1) An event that involves a release of gas from a pipeline, or of liquefied natural gas (LNG), liquefied petroleum gas (LPG), refrigerant gas or gas from an LNG facility, and that results in one of the following consequences;

(i) Death or injury requiring in-patient hospitalization; or
(ii) Estimated property damage of $50,000 or more, including loss to the operator and others, or both, but excluding cost of gas lost;
(iii) Unintentional estimated gas loss of three million cubic feet or more.

(2) An event that results in an emergency shutdown of an LNG facility.

(3) An event that is significant, in the judgment of the operator, even though it did not meet the criteria of paragraphs (1) or (2).

INDIVIDUAL

A person who, on behalf of the operator, performs one or more covered tasks on a pipeline facility operated by the operator. This includes contractors, subcontractors, and operator employees.

INSTRUCTOR

An individual selected to conduct training, based on possessing required subject knowledge and the ability to effectively deliver training.

INTEGRITY

The ability of a pipeline to operate safely and to withstand the stresses imposed during operations.

INTERVAL

The amount of time between two specified instants, events, or states. For OQ purposes, “interval” usually refers to the amount of time between re-evaluation of an individual’s qualifications.

KNOWLEDGE

Understanding gained through experience or study.

KNOWLEDGE, SKILLS, AND ABILITIES (KSA)

An appropriate combination of information, craftsmanship, and proficiency that allows an individual to perform covered tasks in a competent manner.

MAINTAIN

To keep in a condition of good repair or efficiency.

MAINTENANCE

The act of maintaining or the state of being maintained; the work of keeping something in proper condition; upkeep.

MASTER METER SYSTEM

As defined in § 191.3, Master Meter System means a pipeline system for distributing gas within, but not limited to, a definable area, such as a mobile home park, housing project, or apartment complex, where the operator purchases metered gas from an outside source for resale through a gas distribution pipeline system. The gas distribution pipeline system supplies the ultimate consumer who either purchases the gas directly through a meter or by other means, such as by rents.

OBSERVE

The act of watching; to watch or perceive. For purposes of conducting qualification evaluations using on-the-job (OTJ) performance, observations must include the interaction of the evaluator and qualification candidate to ensure that the candidate's knowledge of the procedures (and the reasons for the key steps therein) is adequate to ensure the continued safe performance of the task.

OPERATE

Starting, stopping and/or monitoring a device or system.

OPERATION

Actions taken to facilitate storage or movement of product through a regulated pipeline.

PERFORM

To begin and carry through to completion; to demonstrate in accordance with the requirements of; to accomplish (a covered task) in the proper, customary or established manner.

PERSON

As defined in §§ 192.3 and 195.2, ***person*** means any individual, firm, joint venture, partnership, corporation, association, State, municipality, cooperative association, or joint stock association, and includes any trustee, receiver, assignee, or personal representative thereof.

PETROLEUM GAS

As defined in § 192.3, Petroleum gas means propane, propylene, butane, (normal butane or isobutanes), and butylene (including isomers), or mixtures composed predominantly of these gases, having a vapor pressure not exceeding 208 psi (1434 kPa) at 100°F (38°C).

Note; the word "Liquefied" was removed from the code because it was causing confusion among the operators. LP Gas, LPG, Liquefied Petroleum Gas, Petroleum Gas are all synonyms with the two most common being propane and butane.

PROPANE (PETROLEUM GAS) PIPELINE OPERATOR

As defined in § 192.3, Operator means a person who engages in the transportation of gas.

PROPANE (PETROLEUM GAS) PIPELINE

As defined in § 192.3, Pipeline means all parts of those physical facilities through which gas moves in transportation, including pipe, valves, and other appurtenance attached to pipe, compressor units, metering stations, regulator stations, delivery stations, holders, and fabricated assemblies.

PROPANE (PETROLEUM GAS) PIPELINE FACILITY

As defined in § 192.3, Pipeline facility means new and existing pipeline, rights-of-way, and any equipment, facility, or building used in the transportation of gas or in the treatment of gas during the course of transportation.

PRIOR

Preceding in time or order.

PROCESS

A systematic series of actions directed to some end.

PROGRAM

A written description of processes to be followed; a clear delineation of authorities and responsibilities required and the specific results expected to be achieved for the implementing organization.

PROTOCOL

A standard methodology used to conduct inspections of regulated entities to determine conformance to specific or implied requirements prescribed by regulation.

PROVISION

The written description of the element(s) or approach employed by an operator to satisfy the requirements of the OQ Rule in §§ 192.805 and 195.505.

PURSUANT

In accordance with (or) as a follow-up.

QUALIFIED

As defined in §§ 192.803 and 195.503, *qualified* means that an individual has been evaluated and can:

(a) Perform assigned covered tasks; and

(b) Recognize and react to abnormal operating conditions.

RECORDS

Recorded information or data on a particular subject, collected and preserved to demonstrate compliance with a rule or process requirement.

RETAIN

To keep possession of, in a retrievable and useable condition.

SKILL

A demonstrable competency to perform a given task well, arising from talent, training or practice.

SPAN OF CONTROL

The number of non-qualified individuals that a qualified individual can direct and control for the conditions under which a covered task is being performed.

SUBJECT MATTER EXPERT (SME)

An individual recognized as having a special skill or specialized knowledge of a process in a particular field, or of a piece of equipment.

STANDARD

A written document which is commonly used and accepted as a basis for judging acceptability of performance in the areas addressed.

TASK

A piece of work assigned to or expected of an individual(s).

TRAINING

An educational or instructional process (e.g., classroom, computer-based, or on-the-job) by which an individual's KSA level is improved.

WORK PERFORMANCE HISTORY REVIEW

A process established by the operator to ascertain the previously demonstrated competency of an individual to perform a covered task. Evaluation parameters should include:

- A search of existing records for documentation of an individual's satisfactory performance of the covered task in the past.
- Verification that the individual's WPH contains no indications of substandard work or involvement in an incident or accident to which the individual may have contributed by committing an error in the performance of a covered task.
- Verification and documentation that the individual has satisfactorily performed the covered task on a regular basis.
- WPHR cannot be used as a sole evaluation method.

APPENDIX A: RESOURCES

CONTENTS

The following resources may be useful in developing and implementing an OQ program.

PHMSA RESOURCES

CODE OF FEDERAL REGULATIONS TITLE 49 PART 192 "TRANSPORTATION OF NATURAL AND OTHER GAS BY PIPELINE: MINIMUM FEDERAL SAFETY STANDARDS"

www.phmsa.dot.gov/regulations

This part prescribes minimum safety requirements for pipeline facilities and the transportation of gas, including pipeline facilities and the transportation of gas.

PHMSA OQ INSPECTION PROTOCOLS

http://primis.phmsa.dot.gov/oq/protocols.htm

The following protocols have been written to assist state pipeline inspectors who are evaluating operator's OQ programs. The OQ inspection form is organized around nine elements, including one for field verification. Each element has one or more associated protocol. Each protocol consists of 3 aspects: (1) a protocol number accompanied by the protocol subject or topic; (2) a protocol question(s) (sometimes followed by 'Verify' statements); and (3) guidance topics. The protocol topics have been structured into 'Protocol Question(s)' to guide inspectors through the OQ inspection process. Each protocol question is followed by 'Guidance Topics.' The guidance topics list characteristics that the regulator would typically expect to find in an effective OQ Program, and that are consistent with the intent of the regulatory language that accompanies each protocol. Some, all, or none of these characteristics may be appropriate depending on factors unique to each operator's OQ Program and pipeline assets. Operators should be prepared to demonstrate that their programs address each of these characteristics or to describe how their program will be effective in their absence.

PHMSA OQ ENFORCEMENT GUIDELINES

www.phmsa.dot.gov/foia/e-reading-room

The materials contained in this document consist of guidance, techniques, procedures and other information for pipeline safety enforcement. This guidance document describes the practices used by PHMSA pipeline safety investigators and other enforcement personnel in undertaking their compliance, inspection, and enforcement activities.

PHMSA FORM 14 "OPERATOR QUALIFICATION INSPECTION"

www.phmsa.dot.gov/pipeline/library/forms

This is the Operator Qualification Inspection Form.

PHMSA FORM 15 "OPERATOR QUALIFICATION FIELD INSPECTION"

www.phmsa.dot.gov/pipeline/library/forms

This is the Operator Qualification Field Inspection Form.

PHMSA FORM 2 "STANDARD INSPECTION REPORT OF GAS DISTRIBUTION OPERATOR"

www.phmsa.dot.gov/pipeline/library/forms

PHMSA Form 2 is the Standard Inspection Form used by Federal or State inspectors to inspect gas distribution operators to ensure they are in compliance with all applicable section of 49 CFR Part 192 *Transportation of Natural/Other Gas by Pipeline*. This includes a review to ensure that all O&M procedures, abnormal and emergency operating procedures, damage prevention and public education procedures, and pipeline installation, connection, repair and operations are in compliance.

OTHER RESOURCES

GAS PIPING TECHNOLOGY COMMITTEE

ANSI Z380.1 "GUIDE FOR GAS TRANSMISSION AND DISTRIBUTION PIPING SYSTEMS"

www.aga.org/membercenter/gotocommitteepages/GPTC/Pages/default.aspx

The guide material presented in the Gas Piping Technology Committee's (GPTC) Guide for Gas Transmission and Distribution Piping Systems (Guide) contains information and some "how to" methods to assist the operator in complying with the Code of Federal Regulations (CFR), Title 49 Parts 191 and 192.

The recommendations contained in the Guide are based on sound engineering principles developed by a committee balanced in accordance with accepted committee procedures and must be applied by the use of sound and competent judgment. The guide material is advisory in nature and contains guidance and information for consideration in complying with the regulations.

AMERICAN SOCIETY OF MECHANICAL ENGINEERS

ASME B31Q "PIPELINE PERSONNEL QUALIFICATION"

www.asme.org/products/codes-standards/b31q-2010-pipeline-personnel-qualification

This consensus standard establishes the requirements for developing and implementing an effective pipeline personnel qualification program utilizing a combination of technically based data, accepted industry practices and consensus based decisions. The standard also offers guidance and examples of a variety of methods that may be used to meet selected requirements.

NATIONAL FIRE PROTECTION ASSOCIATION

NFPA 58 "LIQUEFIED PETROLEUM GAS CODE"

www.nfpa.org/codes-and-standards/document-information-pages

This code applies to the storage, handling, transportation, and use of LP-Gas.

NFPA 59 "UTILITY LP-GAS PLANT CODE"

www.nfpa.org/codes-and-standards/document-information-pages

This code shall apply to the design, construction, location, installation, operation, and maintenance of refrigerated and non-refrigerated utility gas plants.

NFPA 54 "NATIONAL FUEL GAS CODE"

www.nfpa.org/codes-and-standards/document-information-pages

Provides minimum safety requirements for the design and installation of fuel gas piping systems in homes and other buildings. Requirements cover the installation and operation of fuel gas piping systems, appliances, equipment, and related accessories, with rules for piping systems materials and components, piping system testing and purging, combustion and ventilation air supply, and venting of gas-fired appliances and equipment.

NFPA 501A "STANDARD FOR FIRE SAFETY CRITERIA FOR MANUFACTURED HOME INSTALLATIONS, SITES, AND COMMUNITIES"

www.nfpa.org/codes-and-standards/document-information-pages

This standard covers fire safety requirements for the installation of manufactured homes and manufactured home sites, including accessory buildings, structures, and communities.

NATIONAL ASSOCIATION OF PIPELINE SAFETY REPRESENTATIVES

COMPENDIUM OF STATE PIPELINE SAFETY REQUIREMENTS AND INITIATIVES PROVIDING INCREASED PUBLIC SAFETY LEVELS COMPARED TO CODE OF FEDERAL REGULATIONS

www.napsr.org

The purpose of this report is to highlight the areas where additional State actions have been taken to improve pipeline safety improvements and to identify the different areas of focus.

APGA SECURITY AND INTEGRITY FOUNDATION

www.apgasif.org

The APGA SIF is a non-profit 501(c)(3) corporation created in 2004. The SIF is dedicated to promoting the security and operational integrity of natural gas and LP distribution and utilization facilities. SIF resources enhance the ability of small gas system operators to prevent, mitigate and repair damage to gas distribution infrastructure.

SIF efforts focus on providing education, procedures & training, materials, services and products specifically designed to increase the KSA of distribution, master meter and propane system operators. It also focuses on increasing operator compliance with Federal and State regulation.

STATE PIPELINE SAFETY PROGRAMS

The following is a listing of the websites for the State pipeline safety programs.

Alabama Public Service Commission
www.psc.State.al.us

Arizona Corporation Commission
www.azcc.gov

Arkansas Public Service Commission
www.arkansas.gov/psc

California Public Utilities Commission
www.cpuc.ca.gov/puc/

Colorado Public Utilities Commission
www.dora.State.co.us/puc

Connecticut Department of Energy and Environmental Protection
www.ct.gov/deep/

Delaware Public Service Commission
www.depsc.delaware.gov/

District of Columbia Public Service Commission
www.dcpsc.org/

Florida Public Service Commission
www.psc.State.fl.us/

Georgia Public Service Commission
www.psc.State.ga.us/

Idaho Public Utilities Commission
www.puc.idaho.gov/

Illinois Commerce Commission
www.icc.illinois.gov/

Indiana Utility Regulatory Commission
www.in.gov/iurc/

Iowa Utilities Board
www.State.ia.us/iub/

Kansas Corporation Commission
www.kcc.State.ks.us/

Kentucky Public Service Commission
www.psc.ky.gov/

Louisiana Department of Natural Resources
www.dnr.louisiana.gov/

Maine Public Utilities Commission
www.maine.gov/mpuc/

Public Service Commission of Maryland
www.psc.State.md.us/

Massachusetts Department of Public Utilities
www.mass.gov/dpu/

Michigan Public Service Commission
www.michigan.gov/mpsc/

Minnesota Department of Public Safety
www.dps.mn.gov/

Missouri Public Service Commission
www.psc.mo.gov/

Montana Public Service Commission
www.psc.mt.gov/

Nebraska State Fire Marshall
www.sfm.ne.us/

Nevada Public Utilities Commission
www.nv.gov/

New Hampshire Public Utilities Commission
www.puc.nh.gov/

New Jersey Board of Public Utilities
www.bpu.State.nj.us/

New Mexico Public Regulation Commission
www.nmprc.State.nm.us/

New York State Department of Public Service
www.dps.ny.gov/

North Carolina Utilities Commission
www.ncuc.commerce.State.nc.us/

North Dakota Public Service Commission
www.psc.nd.gov/

Ohio Public Utilities Commission
www.puco.ohio.gov/

Oklahoma Corporation Commission
www.occeweb.com/

Oregon Public Utility Commission
www.puc.State.or.us/

Pennsylvania Public Utility Commission
www.puc.State.pa.us/

Rhode Island Division of Public Utilities and Carriers
www.ripuc.org/

Office of Regulatory Staff of South Carolina

www.regulatorystaff.sc.gov/

South Dakota Public Utilities Commission
www.puc.sd.gov/

Tennessee Regulatory Authority
www.State.tn.us/tra/

Railroad Commission of Texas
www.rrc.State.tx.us/

Utah Public Service Commission
www.psc.utah.gov/

Vermont Department of Public Service
www.publicservice.vermont.gov/

Virginia State Corporation Commission
www.scc.virginia.gov/

Washington Utilities and Transportation Commission
www.utc.wa.gov/

West Virginia Public Service Commission
www.psc.State.wv.us/

Wisconsin Public Service Commission
www.psc.wi.gov/

Wyoming Public Service Commission
www.psc.State.wy.us/

Insert Organization's Name

Propane Pipeline System
Operator Qualification Plan

This Operator Qualification Plan sets forth [Insert Organization's Name] (hereafter “company” or “operator”) program for complying with the pipeline safety regulations found in 49 CFR 192, Subpart N.

Date: MM/DD/YYYY (Replaces and supersedes previously dated Plan page)

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PURPOSE AND SCOPE OF THIS PLAN

This Operator Qualification Plan (OQ Plan) sets forth the Company's policy and procedures for compliance with the minimum pipeline safety regulations defined in 49 CFR Part 192, Subpart N. Specifically, this OQ Plan outlines the requirements for evaluating the qualifications of individuals performing certain operating and maintenance tasks on the company's propane gas distribution pipeline system and facilities.

Text of 49 CFR 192 Subpart N

Subpart N—Qualification of Pipeline Personnel

§ 192.801 Scope.

(a) This subpart prescribes the minimum requirements of operator qualification of individuals performing covered tasks on a pipeline facility.
(b) For the purpose of this subpart, a covered task is an activity, identified by the operator, that:
  (1) Is performed on a pipeline facility;
  (2) Is an operations or maintenance task;
  (3) Is performed as a requirement of this part; and
  (4) Affects the operation or integrity of the pipeline.

§ 192.803 Definitions.

Abnormal operating condition means a condition identified by the operator that may indicate a malfunction of a component or deviation from normal operations that may
(a) Indicate a condition exceeding design limits; or
(b) Result in a hazard(s) to persons, property, or the environment.

Evaluation means a process established and documented by the operator, to determine an individual's ability to perform a covered task by any of the following:
(a) Written examination;
(b) Oral examination;
(c) Work performance history review;
(d) Observation during:
  (1) Performance on the job,
  (2) On the job training,
  (3) Simulations; or
(e) other forms of assessment.

Qualified means that an individual has been evaluated and can:
(a) Perform assigned covered tasks; and
(b) Recognize and react to abnormal operating conditions.

§ 192.805 Qualification Program.

Each operator shall have and follow a written qualification program. The program shall include provisions to:

(a) Identify covered tasks;
(b) Ensure through evaluation that individuals performing covered tasks are qualified;
(c) Allow individuals that are not qualified pursuant to this subpart to perform a covered task if directed and observed by an individual that is qualified;
(d) Evaluate an individual if the operator has reason to believe that the individual's performance of a covered task contributed to an incident as defined in part 191 of this chapter;
(e) Evaluate an individual if the operator has reason to believe that the individual is no longer qualified to perform a covered task;
(f) Communicate changes that affect covered tasks to individuals performing those tasks;
(g) Identify those covered tasks and the intervals at which evaluation of the individual's qualifications are needed;
(h) After December 16, 2004, provide training, as appropriate, to ensure that individuals performing covered tasks have the necessary knowledge and skills to perform the tasks in a manner that ensures the safe operation of pipeline facilities; and,
    (i) After December 16, 2004, notify the Administrator or a State agency participating under 49 U.S.C. Chapter 601 if the operator significantly modifies the program after the Administrator or State agency has verified that it complies with this section.

§ 192.807 Recordkeeping.

Each operator shall maintain records that demonstrate compliance with this subpart.
(a) Qualification records shall include:
    (1) Identification of qualified individual(s);
    (2) Identification of the covered tasks the individual is qualified to perform;
    (3) Date(s) of current qualification;
    (4) Qualification method(s).
(b) Records supporting an individual's current qualification shall be maintained while the individual is performing the covered task. Records of prior qualification and records of individuals no longer performing covered tasks shall be retained for a period of five years.

§ 192.809 General.

(a) Operators must have a written qualification program by April 27, 2001.. The program must be available for review by the Administrator or by a State agency participating under 49 U.S.C. Chapter 601 if the program is under the authority of that State agency.
(b) Operators must complete the qualification of individuals performing covered tasks by October 28, 2002.
(c) Work performance history review may be used as a sole evaluation method for evaluating for individuals who were performing a covered task prior to October 26, 1999.
(d) After October 28, 2002, work performance history may not be used as a sole evaluation method.
(e) After December 16, 2004, observation of on-the-job performance may not be used as the sole method of evaluation.

1.0 Definitions and Qualification Criteria

All interpretations and definitions regarding the Operator Qualification Program and the OQ Plan will be based on 49 CFR Part 192, Subpart N and any subsequent changes to Subpart N that may be made by the U.S. Department of Transportation pursuant to its jurisdictional authority.

In determining which tasks performed by Company employees and the employees of contractors hired by the Company requiring proof of qualification, the following definitions taken from §192.801 and §192.803 have been applied.

A *Covered Task* is an activity identified by the [pipeline] operator that:
(1) Is performed on a pipeline facility;
(2) Is an operations or maintenance task;
(3) Is performed as a requirement of this part [49 CFR 192]; and
(4) Affects the operation or integrity of the pipeline.

Abnormal operating condition means a condition identified by the operator that may indicate a malfunction of a component or deviation from normal operations that may indicate a condition exceeding design limits or result in a hazard(s) to persons, property, or the environment.

Evaluation means a process, established and documented by the operator, to determine an individual's ability to perform a cover task by any of the following:
(a) Written examination;
(b) Oral examination;
(c) Work performance history review[1];
(d) Observation during:
    (1) Performance on the job;
    (2) On-the-job training,
    (3) Simulations, or
(e) Other forms of assessment.

Qualified means that an individual has been evaluated and can:
(1) Perform assigned covered tasks; and
(2) Recognize and react to abnormal operating conditions.

Covered Tasks means an activity identified by the company that:
(1) Is performed on a pipeline facility;
(2) Is an operations or maintenance task;
(3) Is performed as a requirement of Part 192;
(4) Affects the operation or integrity of the pipeline.

[1] Work performance history review may not be used as a sole evaluation method.

2.0 Plan Implementation and Assignment of Plan Management Responsibilities

In order to effectively implement and maintain the Operator Qualification Program, the company has established the following procedures and identified the person(s) listed to ensure proper administration:

2.1 Plan Administration

Name or Title is designated Plan Administrator and is responsible for the administration of this plan.

The duties of the Plan Administrator includes:

a. Developing the OQ Plan, including identifying the covered tasks that apply to the Company pipeline facilities and AOC that apply to each covered task;
b. Maintenance of the complete OQ Plan, including material incorporated by reference;
c. Distribution of up-to-date copies of the Plan to appropriate personnel;
d. Making the Plan available for inspection by authorized agents of regulatory agencies;
e. Ensuring that all milestones, periodic evaluation intervals, etc. are conducted as specified in this Plan;
f. Notifying all company employees in advance of the date that an employee's current qualification will expire;
g. Scheduling evaluations;
h. Recording the results of evaluations;
i. Verifying that any contractors or contractor employees who perform covered tasks on pipeline facilities are qualified under this plan;
j. Maintaining a current list of qualified employees;
k. Monitoring Federal and State regulations that affect this Plan;
l. If significant modifications are made to this OQ plan after the OPS Administrator or State agency has verified that it complies with 49 CFR Part 192, Subpart N— notifying the jurisdictional authority; that is, the Administrator of the Office of Pipeline Safety, or State agency which ever applies;
m. Verifying that, after December 16, 2004, training is provided as appropriate to ensure that individuals performing covered tasks have the necessary knowledge and skills to perform the tasks in a manner that ensures the safe operation of the pipeline facilities;
n. In the event of a pending merger or acquisition, establishing and implementing procedures for managing qualifications of individuals performing identified covered tasks during OQ program integration following a merger or acquisition;

o. Document and communicate any substantial change to the methods and procedures for a covered task to persons qualified to perform the task under this plan when new equipment, techniques or technology is adopted, and revise qualification evaluation methods accordingly;
p. Determine if qualification evaluation is required for any previously qualified person based on task performance or the occurrence of an incident that could indicate that an individual's qualification re-evaluation is appropriate;
q. And, such other activities as are necessary to carry out the scope and purpose of this Plan.

2.1.1 Program Review

The Plan Administrator will periodically review (at least annually) the effectiveness of the OQ Program to identify areas where improvements should be made.

- The Plan Administrator will collect and maintain records of supervisor's field observations, pass/fail rates for re-evaluations, incident investigation reports and other measures of program effectiveness and periodically review these to identify any covered tasks showing up in a disproportionately high number of occurrences.
- The Plan Administrator will review the identified tasks to recommend improvements to the procedures, training and/or evaluations for these task(s).

2.2 General Employee Responsibilities

All employees are expected to be aware that covered tasks (listed in Attachment A to this Plan) may only be performed by persons qualified under this Plan. Any employee observing any of these covered tasks being performed on the pipeline facilities by a non-qualified person must immediately report this condition to the Plan Administrator.

Individuals who are not qualified to perform a covered task may do so as long as a qualified individual directly observes the performance and is able to take immediate corrective action when necessary. The qualified person monitoring the activities of non-qualified persons is ultimately responsible for the performance of the task.

The Company will not allow a non-qualified individual to perform any of the following tasks on its pipeline facilities:

- Plastic pipe joining,
- Welding on steel pipe or components
- Hot tapping a pressurized pipe

even under the observation of a qualified person. All other covered tasks may be performed by non-qualified persons under the observation and direction of a qualified person within the span of control limits for the task.

3.0 Identification of Covered Tasks

3.1 Responsibility

The Plan Administrator is responsible for maintaining an up-to-date listing of covered tasks and must approve modifications or additions to the covered task list. The rationale for any changes to the covered task list will be recorded**.**

3.2 Identifying Covered Tasks

Covered tasks are those tasks that:

- Are performed on a pipeline facility;
- Are an operations or maintenance task;
- Are performed as a requirement of 49 CFR Part 192; and
- Could affect the operation or integrity of the pipeline.

Tasks that have been evaluated against the four-part tests are listed in Attachment A to this Plan. The Plan Administrator will apply the four-part test to determine whether any new activities not addressed in Attachment A are or are not covered tasks when performed on pipeline facilities.

Whenever OPS amends its regulations or the Company amends its procedures, the Plan Administrator will review the covered task list to determine 1) whether the change creates a new activity not addressed in the original covered task analysis, or 2) whether the rationale for classifying an activity as a covered or non-covered task has changed. The covered task list and evaluations will be modified as appropriate.

The Company may include in its list of covered tasks additional optional tasks that may not meet the 4-part test for identifying covered tasks shown above.

3.3 Records

The current list of covered tasks is shown as Attachment A to this Plan, along with worksheets used to analyze the tasks and to determine qualification evaluation methods, requalification intervals and other pertinent information.

The Plan Administrator will maintain documentation of the rationale for the determination of whether any task is covered or not covered for this OQ Plan.

4.0 Methods for Assuring Qualification of Persons Performing Covered Tasks

4.1 Responsibility

Selection of evaluation methods and the re-evaluation interval for each covered task listed in Attachment A is the responsibility of the Plan Administrator.

4.2 Specified Evaluation Methods

The required evaluation(s) for each covered task are recorded and maintained by the Plan Administrator.

The evaluation method(s) will verify that the employee, contractor or contractor employee performing a covered task has the skills to perform the task and knowledge to recognize and respond to AOC identified for the task. The evaluation methods may include but are not limited to the following:

1. Written examination
2. Oral examination
3. Observation by a skills evaluator during:
    - Task performance on the job,
    - On-the-job training, or
    - Simulations
4. Other forms of assessment.

Each evaluation method used will incorporate means to verify that persons who perform identified covered tasks on the pipeline facilities can recognize and properly react to AOC specific to the tasks they perform.

4.3 Re-evaluation intervals

Re-evaluation intervals for each person's qualifications to perform a covered task are specified for each task in the Task Worksheets in Attachment A.

In determining the appropriate re-evaluation interval, the Plan Administrator will consider:

1. Coordination of OQ task training and evaluation with other company DOT training requirements such as hazmat employee training;
2. The nature of the covered task
    - The complexity of the knowledge and/or skills being evaluated for the task;

- The frequency with which the task will be performed by the person being qualified during the course of his/her work;
- The safety-sensitivity of the task, i.e., what is the "worst case scenario" if this task is improperly performed.

The Plan Administrator will give consideration to the following factors when applying treatment of task complexity, frequency of task performance, and task safety sensitivity as a basis for determining task requalification intervals:

- Greater task complexity may require more frequent re-evaluation;
- Greater task performance frequency may require less frequent re-evaluation;
- Greater safety sensitivity may require more frequent re-evaluation.

4.4 Work Performance History Review

WPHR will not be used to qualify individuals for covered tasks.

4.5 Identification of pipeline operator employees performing covered tasks

The Plan Administrator is responsible for identifying those employees who perform covered tasks during the course of their work on the pipeline system and will schedule each employee for evaluation of his/her qualifications to perform each covered task. Evaluation will be done using one of the evaluation methods identified in **4.2** of this Plan. The Plan Administrator will maintain a list of persons and the covered tasks they are qualified to perform.

4.6 Assuring Qualification of Persons not Employed by the Pipeline Operator

4.6.1 Assuring Qualification of Contractors and Contractor Employees

The Plan Administrator is responsible for assuring that contractor employees and employees of their subcontractors are qualified if they are to perform covered tasks on the pipeline system, and consequently, is responsible to transmit with the request for bids or proposals and other contract specifications company's OQ plan qualification requirements.

Contractors and other non-pipeline operator employees who perform covered tasks on pipeline facilities must be qualified if they perform any of

the covered tasks listed in Attachment A. Qualification may be accomplished by any one of the following:

- The operator may evaluate the contractor employees using the evaluations required of company employees performing the same task(s), or

- Contractors and other non-pipeline operator employees who perform covered tasks on pipeline facilities may provide evidence that all personnel have completed the evaluations specified in Attachment A or Attachment B for the covered tasks they will perform after the Plan Administrator has reviewed and adopted the evaluation methods used by contractors listed in Attachment B as approved methods for qualifying contractors or as an accepted equivalent alternative method to that found in Attachment A, or

- The Plan Administrator has reviewed and adopted certain 3rd-party certification/qualification programs as accepted evaluation methods for certain covered tasks. These qualification criteria are listed in Attachment B. Contractor personnel possessing current qualifications from these 3rd parties will be accepted by the Company as evidence of qualification.

4.6.2 Incorporation by Reference: Operator Qualification Plans of Companies with which the Pipeline Operator has Mutual (aid) Assistance Plans

In the event of major natural disasters or other emergencies, the company may utilize employees of other gas companies to restore natural gas service to the pipeline system's customers. These individuals may be required to perform certain covered tasks on the pipeline facilities. In order to allow this mutual assistance to occur without violating 49 CFR 192, Subpart N, this OQ Plan has incorporated by reference in Attachment C the qualification requirements of those mutual aide companies whose employees might be utilized for certain covered tasks.

The Plan Administrator is responsible to identify covered tasks in Attachment A of this Plan that might utilize borrowed employees to perform under mutual assistance arrangements. The Plan Administrator will also identify companies that the Company would be likely to rely upon for emergency assistance and request a copy of the qualification requirements these companies have established for these covered tasks. These qualification requirements, found in Attachment C of this Plan have been evaluated and are incorporated by reference into this Plan as acceptable alternative methods of qualification for the covered tasks listed.

In the event the Company is offered and accepts assistance from a company not listed in Attachment C, the Plan Administrator will obtain and incorporate the qualification requirements of that company into Attachment C as soon as possible.

5.0 Maintenance of Personnel Qualification Records

5.1 Maintenance of Qualification Evaluation Records

The Plan Administrator is responsible for establishing a system to maintain records that demonstrate compliance with the OQ Rule for evaluating the qualifications of persons who perform covered tasks identified in Attachment A to this OQ plan. Accordingly, all records maintained will satisfy the following minimal requirements:

- Records will include identifying information (name, employee number, etc.)
- Records will include the name of the covered task(s) the individual is qualified to perform, the qualification dates, and method of qualification/ evaluation.
- All records will be maintained as active while the individual is qualified to perform the covered tasks.
- All previous records will be retained for a period of five years.
- Record keeping will be kept in the Company's headquarter offices and available at all times to Company managers, supervisors and credentialed representatives of the Office of Pipeline Safety of the U.S. Department of Transportation and/or any other authority having jurisdiction.

5.2 Maintenance of OQ Plan records

The Plan Administrator will also maintain records of all actions performed as requirements of this OQ Plan:

- Processes for identification of covered tasks,
- Evaluation records,
- Investigations of incidents,
- Re-evaluation on reasonable suspicion,
- Communication of changes to persons who perform covered tasks and changes in the OQ plan to jurisdictional authorities required to be notified according to Subpart N to Part 192.

6.0 Re-Evaluation of a Person's Qualifications

The Plan Administrator is responsible for tracking the expiration dates of the qualifications for each company employee and notifying the employee before any required evaluation will expire. The Plan Administrator is responsible for scheduling re-evaluation activities prior to the expiration date of qualifications for each employee.

6.1 Examination of Qualification for Cause

Each employee is responsible for notifying the Plan Administrator whenever he/she has reason to believe that any person working on the pipeline system is no longer qualified to perform a covered task. Reasons may include, but are not limited to:

- Observation that an employee or employee of a contractor is improperly performing a task,
- Observable loss of motor skills,
- Extended period without performing the task or other reasons that indicate a person may no longer be able to perform a task.

The Plan Administrator will investigate and may require re-evaluation in the covered task as determined by the investigation. The results of the investigation and any subsequent task requalification(s) will be recorded.

6.2 Evaluation of Qualifications Following an Accident or Incident

Investigation of reportable incidents as defined in Part 191 will include assessment of whether any person's performance of a covered task may have caused or contributed to the severity of the incident. If the Plan Administrator determines that an employee's or contractor employee's performance of a covered task contributed to a reportable incident, qualifications related to the incident will be re-evaluated. Qualifications in other covered tasks unrelated to the incident need not be re-evaluated. The results of the investigation will be recorded.

If the incident investigation identifies an AOC for a task that was not included in existing evaluations for that task, the Plan Administrator will:

- Define the AOC,
- Determine how the AOC can be recognized, and
- Determine the appropriate reaction to it

An evaluation for the new AOC will be added to the training and evaluation requirements for the task.

6.3 Review of Qualifications after a Change in Regulations, Operating or Maintenance Procedures

The Plan Administrator will monitor changes in regulations, procedures, technology, new equipment, etc. that may affect the performance of a covered task and will determine if a specific change is so substantial as to require re-evaluation of the qualifications of persons qualified to perform the covered task(s) affected by the change.

The Plan Administrator will determine whether existing evaluation method(s) must be changed as a result of such changes. Evaluation methods should be modified if the new equipment, technology or procedure requires different KSA than those measured by the current evaluation method(s) and individuals should be re-evaluated in the new procedures or equipment before the new procedures or equipment are implemented. The results of this process and subsequent employee qualification re-evaluations will be recorded.

The Plan Administrator will also verify that the changes to task qualification evaluation are promptly coordinated with affected contractors and mutual aid partner-companies as required, and that the re-evaluation of their employees is documented and confirmed in a timely manner and prior to the performance of the affected covered task by non-pipeline operator personnel.

Attachment A: Identified Covered Tasks

A.1 Pipeline Operator's Covered Task List (Mark all that apply ☑.)

Task Family Group 1.0 Corrosion Protection

DOT Reference § § (49 CFR 192. 445, .457, .459, .465, .467, .471, .475, .477, .479, .481,.485, .489)

Polyethylene Pipeline Systems With No Buried Metal Pipe or Components

Task	☐ Inspect for Atmospheric Corrosion

Buried Steel Pipeline Systems / Underground ASME Tanks

Task	☐ Inspect for Atmospheric Corrosion
Task	☐ Measure Structure-to-Soil (Electrolyte) Potential
Task	☐ Inspect Rectifier and Obtain Readings
Task	☐ Inspect Buried Pipe and Components When Exposed, Including Inspecting Removed Metal Pipe or Component for Internal Corrosion
Task	☐ Inspect Installed Pipe and Components for Mechanical Damage

Task Family Group 2.0 Damage Prevention

Task/ Reference	☐ Locate Underground Pipelines (49 CFR § 192.614)
Task/ Reference	☐ Install and Maintain Pipeline Markers (49 CFR § 192.707)
Task/ Reference	☐ Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator (49 CFR § 192.616)
Task/ Reference	☐ Preventing Damage: Inspection During Third Party Excavation or Encroachment Activities as Determined Necessary by Operator (49 CFR § 192.616)

Task Family Group 3.0 Installing Meters and Regulator Sets (49 CFR § 192.357)

Task Family Group 4.0 Joining Piping Materials

Task/ Reference	☐ Weld on Steel Pipelines (49 CFR §§ 192.235, 192.241, 192.245)
Task/ Reference	☐ Joining Steel Pipelines By Methods Other Than Welding
Task/ Reference	☐ Join Plastic Pipe With Heat Fusion (49 CFR §§ 192.281, 192.287)
Task/ Reference	☐ Join Plastic Pipe With Mechanical Fittings (49 CFR §§ 192.281, 192.287)
Task/ Reference	☐ Join Copper Pipe (49 CFR 192.279)
Task/ Reference	☐ Install Service Lines (49 CFR §§ 192.361, 192.365, 192.367, 192.369, 192.379)

Task/ Reference	☐ Test Service Lines (49 CFR §192.725)

Task Family Group 5.0 Detecting Leaks / Repairing Distribution or Service Lines

Task/ Reference	☐ Investigate Leaks Inside Buildings or Structures
Task/ Reference	☐ Investigate Outside Leaks (49 CFR §§192.705, 192.706, 192.721, 192.723)
Task/ Reference	☐ Make Permanent Field Repairs on Distribution Lines (49 CFR §§192.711, 192.713, 192.715, 192.717)

Task Family Group 6.0 Odorization Monitoring

Task/ Reference	☐ Periodic Sampling: Performing “Sniff Tests” at Bulk Plants and At the Extremities of the Pipeline System (49 CFR §192.625 & NFPA 58)

Task Family Group 7.0 Controlling Pipeline Pressure

Task/ Reference	☐ Inspecting and Testing Pressure Limit Stations, Relief Devices and Pressure Regulators and Regulating Stations (49 CFR §§193.731, 192.739, 192.741, 192.743, 192.749)

Task Family Group 8.0 Purging Pipeline Facilities

Task/ Reference	☐ Purging With Gas (49 CFR § 192.629)
Task/ Reference	☐ Purging With Air or Inert Gas (49 CFR §192.629)
Task/ Reference	☐ Isolating, Abandoning and Deactivating Pipeline Facilities (49 CFR §192.727)

Task Family Group 9.0 Tapping and Stopping Pipelines (49 CFR §192.627)

Polyethylene Pipeline Systems

Task	☐ Tapping a Pipeline With a Built-In Cutter
Task	☐ Squeeze Off Plastic Pipe

Steel Pipeline Systems

Task	☐ Tapping a Pipeline (tap diameter 2 inch and less)
Task	☐ Tapping a Pipeline (tapping diameter greater than 2 inch)
Task	☐ Stopper (Stopple) Pipe

Task Family Group 10.0 Valve Inspection and Maintenance (49 CFR §§ 192.745, 192.747)

Task	☐ Manually Opening and Closing Valves
Task	☐ Visually Inspecting and Partially Operating Valves
Task	☐ Performing Valve Maintenance

Task Family Group 11.0 Prevent Accidental Ignition (49 CFR §192.751)

Optional Covered Tasks as Required by Pipeline System Design and Operation, or by Operator Prerogative:

Task Family Group 12.0 Operating and Maintaining Propane Vaporizers

Task Family Group 13.0 Operating and Maintaining Propane/Air Mixers

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Inspect for Atmospheric Corrosion

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source) _____
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify) _____

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task Name
_____	Inspect for Atmospheric Corrosion

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Inspect for Atmospheric Corrosion

Task Abnormal Operating Condition(s)

1. Blowing/escaping gas/grade one leak
2. Fire on a pipeline
3. Odor complaint
4. Metal loss due to atmospheric corrosion
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Inspect for Atmospheric Corrosion

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Measure Structure-to-Soil (Electrolyte) Potential

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Measure Structure-to-Soil (Electrolyte) Potential

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Measure Structure-to-Soil (Electrolyte) Potential

Task Abnormal Operating Condition(s)

1. Blowing/escaping gas/grade one leak
2. Fire on a pipeline
3. Inoperable/Failure of a test station
4. Stray current on pipeline
5. Odor complaint
6. Low pipe-to-soil potential
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Measure Structure-to-Soil (Electrolyte) Potential

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Inspect Rectifier and Obtain Readings

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Inspect Rectifier and Obtain Readings

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Inspect Rectifier and Obtain Readings

Task Abnormal Operating Condition(s)

1. Blowing/escaping gas/grade one leak
2. Fire on a pipeline
3. Inoperable/Failure of a rectifier (including physical damage, broken wires, etc.)
4. Stray current on pipeline
5. Odor complaint
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Inspect Rectifier and Obtain Readings

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Inspect Buried Pipe and Components When Exposed, Including inspecting removed metal pipe or component for internal corrosion

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Inspect Buried Pipe and Components When Exposed

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Inspect Buried Pipe and Components When Exposed

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Damaged underground tank or pipe coating (e.g. localized vs. general corrosion – metal loss requiring remedial action, disbonded coating)
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Inspect Buried Pipe and Components When Exposed

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Inspect Installed Pipe and Components for Mechanical Damage

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Inspect Installed Pipe and Components for Mechanical Damage

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Inspect Installed Pipe and Components for Mechanical Damage

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Damaged pipe or coating, dents cracks gouges, etc
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Inspect Installed Pipe and Components for Mechanical Damage

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Locate Underground Pipelines

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # **Task**

_____ Locate Underground Pipelines

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Locate Underground Pipelines

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Inaccurate record and maps
6. Missing/broken tracer wires
7. Inadequate cover
8. Construction activity that may cause damage to pipeline
9. Conflict w/white line and excavation site
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Locate Underground Pipelines

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Install and Maintain Pipeline Markers

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Install and Maintain Pipeline Markers

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Install and Maintain Pipeline Markers

Task Abnormal Operating Condition(s)

1. Missing markers
2. Improperly located markers
3. Unreadable markers
4. Inaccurate information on marker
5. Odor complaints
6. Construction activities that may cause damage to pipeline
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Install and Maintain Pipeline Markers
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator

_____

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Pipe or coating damage including pipeline components
6. Poor compaction
7. Lack of support under pipe not provided
8. Confined space
9. Missing/broken tracer wire
10. Inaccurate maps and records
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Preventing Damage: Inspection During Third Party Excavation or Encroachment Activities As Determined Necessary By the Pipeline Operator

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Preventing Damage: Inspection During Third Party Excavation or Encroachment Activities

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Preventing Damage: Inspection During Third Party Excavation or Encroachment Activities

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Pipe or coating damage including pipeline components
6. Poor compaction
7. Lack of support under pipe not provided
8. Confined space
9. Missing/broken tracer wire
10. Inaccurate maps and records
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Preventing Damage: Inspection During Third Party Excavation or Encroachment Activities

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Install Meters and Regulator Sets

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Install Meters and Regulator Sets

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Install Meters and Regulator Sets

Task Abnormal Operating Condition(s)

1. Regular venting gas
2. No regulator installed on service line
3. Operating above proper pressure
4. Regulator vent in wrong position or not otherwise protected
5. Undersized regulator relief opening
6. Meter not level or plumb
7. Meter not adequately supported
8. Meter/Regulator in hazardous location
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Install Meters and Regulator Sets

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Weld on Steel Pipelines

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service Knowledge performance objectives limited to applicable 49 CFR Part 192, Subpart E regulations
☐ Oral Examination	(OE)	(Specify Name or Source) _____

☐ **and**
☐ **Only**

☑ Other Form of Assessment

Either: Current API-1104 Welder Certification, or
Current ASME Section IX Welder Certification

(Marking ☑ **and** above means a written or oral examination is required in addition to having a current pipeline welder certification. Marking ☑ **Only** means no written or oral examination is required—only a current pipeline weld certification is required.)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Weld on Steel Pipelines

Re-evaluation of task qualification will be at intervals as required in 49 CFR Part 192, Subpart E.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Weld on Steel Pipelines

Task Abnormal Operating Condition(s)

1. Use of a welder who is not certified and qualified per 49 CFR Part 192
2. Use of a welding process not suitable for the steel pipe specified
3. Failure to inspect and verify proper operating condition of welding equipment
4. Improper surface preparation and/or cleaning prior to or during the welding process
5. Improper alignment of surfaces to be welded
6. Interruption of or lack of suitable electrode protective shielding during the welding process
7. Failure to protect surfaces and welding equipment from rain, mud, or other contamination
8. Improper location or extension of welding beads
9. Failure to maintain proper welding inter-pass heating of welding work surfaces
10. Failure to inspect welding for defects during inter-pass cleaning
11. Failure to remove/repair or prevent extraneous pipe electrode strikes, burns, or other heat-related blemishes to pipe surfaces
12. Failure to properly inspect and clean welds at the completion of the welding process
13. Improperly attaching or applying corrosion protective coatings or system components
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Weld on Steel Pipelines

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Joining Steel Pipelines By Methods Other Than Welding

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Joining Steel Pipelines By Methods Other Than Welding

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Joining Steel Pipelines By Methods Other Than Welding

Task Abnormal Operating Condition(s)

1. Improper stab depth into the mechanical fitting
2. Split, damaged, improperly positioned, or improper sized mechanical press-on fitting
3. Scratched or gouged pipe or tubing
4. Split or crack in copper flare
5. Flare that does not properly fill brass fitting joint bevel
6. Flare too large to properly seat in brass fitting joint bevel
7. Leak at a copper tubing joint
8. Improper size pipe or tubing
9. Blowing gas
10. Damaged pipe or pipe coating
11. Fitting defect
12. Damaged thread on pipe or fitting
13. Improperly aligned, tightened or sealed flange joint
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Joining Steel Pipelines By Methods Other Than Welding

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Join Plastic Pipe With Heat Fusion

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Join Plastic Pipe With Heat Fusion

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Join Plastic Pipe With Heat Fusion

Task Abnormal Operating Condition(s)

1. Incomplete face off of the pipe ends to be joined
2. Improper alignment of the pipe ends, or pipe and fitting to be joined
3. Improper temperature of the heating element
4. Excessive melt of pipe ends
5. Excessive pressure applied during fusion joining
6. Incomplete fusion bead roll back
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Join Plastic Pipe With Heat Fusion

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Join Plastic Pipe (Tubing) With Mechanical Fittings

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Join Plastic Pipe (Tubing) With Mechanical Fittings

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Join Plastic Pipe (Tubing) With Mechanical Fittings

Task Abnormal Operating Condition(s)

1. Damaged PE tubing or fitting
2. Leaking PE tubing or fitting
3. Exposed/unprotected PE tubing
4. Lack of or improperly placed locating wire or conductive tape
5. Improper tubing stab depth into the mechanical fitting
6. Split, damaged, improperly positioned, or improper sized mechanical press-on fitting
7. Scratched or gouged pipe or tubing
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Join Plastic Pipe (Tubing) With Mechanical Fittings

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Join Copper Pipe (Tubing)

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # _____ Join Copper Pipe (Tubing)

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Join Copper Pipe (Tubing)

Task Abnormal Operating Condition(s)

1. Split or crack in copper flare
2. Flare that does not properly fill brass fitting joint bevel
3. Flare too large to properly seat in brass fitting joint bevel
4. Using a filling material with a melt temperature less than 1,000° F to braze copper tubing joints
5. Leak at a copper tubing joint
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Join Copper Pipe (Tubing)
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Install Service Lines

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Install Service Lines

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Install Service Lines

Task Abnormal Operating Condition(s)

1. Regulator venting gas
2. Improper size pipe
3. Blowing gas
4. Damaged pipe or pipe coating
5. Fitting defect
6. Failed pressure test
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Install Service Lines

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Test Service Lines

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # **Task**

_____ Test Service Lines

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # Test Service Lines

Task Abnormal Operating Condition(s)

1. Regulator venting gas
2. Improper size pipe
3. Blowing gas
4. Damaged pipe or pipe coating
5. Fitting defect
6. Failed pressure test
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Test Service Lines
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Investigate Leaks Inside Buildings or Structures

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Investigate Leaks Inside Buildings or Structures

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Investigate Leaks Inside Buildings or Structures

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping/grade one leak
3. Fire on a pipeline
4. Fire on LP tank/vaporizer
5. Under odorization
6. Under and Over pressure
7. Unplanned shut off of gas, no gas, no flow
8. Water or other liquids in the pipeline
9. Missing/broken tracer wire (unable to locate facility)
10. Multiple leaks
11. Erroneous reading from gas detection equipment
12. Inoperability/failure of a pipeline component
13. Flammable gas atmosphere
14. Blowing/escaping/grade one leak
15. Fire on a pipeline
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Investigate Leaks Inside Buildings or Structures
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Investigate Outside Leaks

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Investigate Outside Leaks

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Investigate Outside Leaks

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping/grade one leak
3. Fire on a pipeline
4. Fire on LP tank/vaporizer
5. Under odorization
6. Under and Over pressure
7. Unplanned shut off of gas, no gas, no flow
8. Water or other liquids in the pipeline
9. Missing/broken tracer wire (unable to locate facility)
10. Multiple leaks
11. Erroneous reading from gas detection equipment
12. Inoperability/failure of a pipeline component
13. Flammable gas atmosphere
14. Blowing/escaping/grade one leak
15. Fire on a pipeline
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Investigate Outside Leaks

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Make Permanent Field Repairs on Distribution Lines

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Make Permanent Field Repairs on Distribution Lines

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Make Permanent Field Repairs on Distribution Lines

Task Abnormal Operating Condition(s)

1. Uncontrolled escaping propane may result in fire – explosion – asphyxiation
2. Gas leakage at any point along a distribution line
3. Excessive corrosion of steel piping
4. Damage to PE piping, steel piping, or copper tubing requiring repair or replacement
5. Gas leakage after a repair operation
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Make Permanent Field Repairs on Distribution Lines

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: (Odorization Monitoring)
Periodic Sampling: Performing "Sniff Tests" at Bulk Plants &
At the Extremities of the Pipeline System

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #	Task
_____	Periodic Sampling: Performing "Sniff Tests" at Bulk Plants & At the Extremities of the Pipeline System

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Periodic Sampling: Performing “Sniff Tests” at Bulk Plants & At the Extremities of the Pipeline System

Task Abnormal Operating Condition(s)

1. Blowing/escaping/grade one leak
2. Fire on a pipeline
3. Odor complaint
4. Under odorization
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	
_____	Periodic Sampling: Performing “Sniff Tests” at Bulk Plants & At the Extremities of the Pipeline System

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Inspecting and Testing Pressure Limit Stations, Relief Devices, Pressure Regulators & Regulating Stations

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # _____ Inspecting and Testing Pressure Limit Stations, Relief Devices, Pressure Regulators & Regulating Stations

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Inspecting and Testing Pressure Limit Stations, Relief Devices, Pressure Regulators & Regulating Stations

Task Abnormal Operating Condition(s)

1. Gas leakage from a regulator vent or relief device vent
2. A regulator that will not maintain a proper set point
3. A regulator that will not properly lock-up according to manufacturer's specifications
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	
_____	Inspecting and Testing Pressure Limit Stations, Relief Devices, Pressure Regulators & Regulating Stations

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Purging With Gas

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Purging With Gas

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Purging With Gas

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Low oxygen atmosphere
6. Water or other liquids in the pipeline
7. Low flow/Low pressure
8. Under odorization
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Purging With Gas
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Purging With Air or Inert Gas

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Purging With Air or Inert Gas

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # Purging With Air or Inert Gas

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Low oxygen atmosphere
6. Water or other liquids in the pipeline
7. Low flow/Low pressure
8. Under odorization
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Purging With Air or Inert Gas
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Isolating, Abandoning & Deactivating Pipeline Facilities

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Isolating, Abandoning & Deactivating Pipeline Facilities

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Isolating, Abandoning & Deactivating Pipeline Facilities

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Odor complaint
5. Low oxygen atmosphere
6. Water or other liquids in the pipeline
7. Low flow/Low pressure
8. Under odorization
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Isolating, Abandoning & Deactivating Pipeline Facilities

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Tapping a Pipeline With a Built-In Cutter

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Tapping a Pipeline With a Built-In Cutter

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Tapping a Pipeline With a Built-In Cutter

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/Failure of a pipeline component (valve, regulator, relief valve, alarm, sensor, etc.)
5. Low oxygen atmosphere
6. Odor complaint
7. Water or other liquid in the pipeline
8. Damaged pipe
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Tapping a Pipeline With a Built-In Cutter

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Squeeze Off Plastic Pipe

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Squeeze Off Plastic Pipe

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Squeeze Off Plastic Pipe

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/Failure of a pipeline component (valve, regulator, relief valve, alarm, sensor, etc.)
5. Low oxygen atmosphere
6. Odor complaint
7. Water or other liquid in the pipeline
8. Damaged pipe
9. Inaccurate maps or records
10. Obvious misalignment of fitting or equipment
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Squeeze Off Plastic Pipe

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Tapping a Steel Pipeline (tap diameter 2 inch & less)

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Tapping a Steel Pipeline (tap diameter 2 inch & less)

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Tapping a Steel Pipeline (tap diameter 2 inch & less)

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/Failure of a pipeline component (valve, regulator, relief valve, alarm, sensor, etc.)
5. Low oxygen atmosphere
6. Odor complaint
7. Water or other liquid in the pipeline
8. Damaged pipe
9. Inaccurate maps or records
10. Obvious misalignment of fitting or equipment
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Tapping a Steel Pipeline (tap diameter 2 inch & less)

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Tapping a Steel Pipeline (tapping diameter greater than 2 inch)

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Tapping a Steel Pipeline (tapping diameter greater than 2 inch)

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Tapping a Steel Pipeline (tapping diameter greater than 2 inch)

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/Failure of a pipeline component (valve, regulator, relief valve, alarm, sensor, etc.)
5. Low oxygen atmosphere
6. Odor complaint
7. Water or other liquid in the pipeline
8. Damaged pipe
9. Inaccurate maps or records
10. Obvious misalignment of fitting or equipment
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Tapping a Steel Pipeline (tapping diameter greater than 2 inch)

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Stopper (Stopple) Pipe

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Stopper (Stopple) Pipe

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Stopper (Stopple) Pipe

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/Failure of a pipeline component (valve, regulator, relief valve, alarm, sensor, etc.)
5. Low oxygen atmosphere
6. Odor complaint
7. Water or other liquid in the pipeline
8. Damaged pipe
9. Inaccurate maps or records
10. Obvious misalignment of fitting or equipment
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Stopper (Stopple) Pipe

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
0	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Manually Opening and Closing Valves

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Manually Opening and Closing Valves

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Manually Opening and Closing Valves

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/failure of a valve
5. Low oxygen atmosphere
6. Odor complaint
7. Unplanned shutoff
8. Inaccurate maps and records
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Manually Opening and Closing Valves

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Visually Inspecting & Partially Opening Valves

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Visually Inspecting & Partially Opening Valves

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Visually Inspecting & Partially Opening Valves

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/failure of a valve
5. Low oxygen atmosphere
6. Odor complaint
7. Unplanned shutoff
8. Inaccurate maps and records
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Visually Inspecting & Partially Opening Valves

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Performing Valve Maintenance

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Performing Valve Maintenance

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Performing Valve Maintenance

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Fire on a pipeline
4. Inoperable/failure of a valve
5. Low oxygen atmosphere
6. Odor complaint
7. Unplanned shutoff
8. Inaccurate maps and records
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Performing Valve Maintenance
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Prevent Accidental Ignition

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	**Code**	**Documentation of Method**
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Prevent Accidental Ignition

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # Prevent Accidental Ignition

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Blowing/escaping gas/grade one leak
3. Odor complaint
4. Failure to control static electricity during PE pipe repair operations
5. Failure to eliminate or control ignition sources in propane transfer areas
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Prevent Accidental Ignition

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Operating & Maintaining Propane Vaporizers

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Operating & Maintaining Propane Vaporizers

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Operating & Maintaining Propane Vaporizers

Task Abnormal Operating Condition(s)

1. Flammable gas atmosphere
2. Fire on a pipeline
3. Inoperable/failure of a valve or component
4. Pressure exceeding normal operating parameters
5. Temperature exceeding normal operating parameters
6. Gas leakage in vaporizing equipment and connective piping
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

Approved by:

Signature	Title	Date

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Operating & Maintaining Propane Vaporizers

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: Operating & Maintaining Propane/Air Mixers

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID # Operating & Maintaining Propane/Air Mixers

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID # _____ Operating & Maintaining Propane/Air Mixers

Task Abnormal Operating Condition(s)

1. Propane/Air mixtures outside normal specific gravity parameters
2. Gas or gas/air leakage
3. Flammable gas atmosphere
4. Fire on a pipeline
5. Inoperable/failure of a valve or component
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.

List of Qualified Evaluators:

_____ _____

_____ _____

_____ _____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID #	Operating & Maintaining Propane/Air Mixers
_____	

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment A.2 Covered Task Evaluation Form

No. _____ Task Name: _____

(Mark all that apply ☑ and fill in the blanks, as appropriate.)

Task ☐ is a covered task for the pipeline.
☐ is **not** a covered task for the pipeline.

Personnel designated to perform the covered task: (Check both boxes if both apply.)
☐ Qualified Company Employees
☐ Qualified Contractor Employees

Designated Operating Company Employee Job Titles or Descriptions (if Applicable):

_____ _____
_____ _____
_____ _____

Method(s) of Evaluation Selected for This Identified Task:

Method	Code	Documentation of Method
☐ Written Examination	(WE)	☐ SIF Knowledge Exam ☐ (*ITS) OQ Series* and Third-Party Testing Service ☐ Other Written Exam (Specify Name or Source)
☐ Oral Examination	(OE)	(Specify Name or Source)
Observation During:		
☐ Performance on the Job	(OOJ)	☐ SIF Skills & Abilities Evaluation ☐ (*ITS) Skill and Ability Verification Checklist* ☐ Other (Specify Name or Source)
☐ On-the-Job Training	(OJT)	
☐ Simulation	(OS)	
☐ Other Form of Assessment		(Specify)

Documentation of Method Used to Determine Task Qualification Re-Evaluation Intervals

Task ID #

☐ **Method 1** Coordination with DOT Hazmat Employee Training, OSHA Training and NFPA 58 Personnel Qualification Requirements

After initial task qualification:

- ☐ Re-qualification for this task is required annually.
- ☐ Re-qualification for this task is required every other year.
- ☐ Re-qualification for this task is required every 3 years.

☐ **Method 2** DIF Calculation Basis

Assign a value to each of the first 3 columns (DIF) relative to the identified covered task.
1st column: A difficult (complex) task should have a score of 5; a simple task a score of 1.
2nd column: If the safety consequence of improper performance of the task is serious the score should be 5; if minor the score should be 1.
3rd column: A frequently performed task should have a score of 1; an infrequently performed task should have a score of 5.
Add across columns 1-3 to obtain the Total Rating.

Difficulty Rating (complexity)	**Importance Rating** (safety consequences)	Frequency Rating (how often performed)	Total Rating	Re-Evaluation Interval **(after initial task qualification)**

If the Total Rating is:
Less than 6, the Re-evaluation Interval is 36 months.
Less than 12 but greater than 6, the Re-evaluation Interval is 24 months.
Greater than 12, the Re-evaluation Interval is 12 months.

Documentation of Abnormal Operating Conditions Determination

Task ID #	Task Abnormal Operating Condition(s)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	

List of Qualified Evaluators:

_____	_____
_____	_____
_____	_____

Approved by:

Signature	Title	Date
_____	_____	_____

Covered Task Span of Control Determination (Ratio of unqualified persons allowed to perform this task under the direct observation and supervision of a qualified person)

Task ID # _____

Span of Control Ratio

Maximum Number of Unqualified Persons	**To**	**One Qualified Person**
_____	**:**	**1**

Attachment B: Evaluation Methods Incorporated by Reference

[NOTE: This list must be customized by the operator. Enter each covered task for the pipeline system in the left columns, and the evaluation methods in the right column. Delete this bracketed instruction note when completing the OQ Plan.]

EXAMPLE:

The following evaluation methods have been reviewed by the Plan Administrator and determined to be accepted for qualification in the tasks indicated:

Covered Tasks:	**Accepted 3rd Party Evaluation Methods:**
Inspecting for atmospheric corrosion	1. SIF (Security and Integrity Foundation) OQ Task Evaluation Program 2. Industrial Training Services OQS Evaluation Program 3. NACE Corrosion Technician certification 4. [List other(s), or remove this line]
Measuring pipe-to-soil potential	1. SIF (Security and Integrity Foundation) OQ Task Evaluation Program 2. Industrial Training Services OQS Evaluation Program 3. NACE Corrosion Technician certification 4. [List other(s), or remove this line]
Conducting gas leakage surveys	1. SIF (Security and Integrity Foundation) OQ Task Evaluation Program 2. Industrial Training Services OQS Evaluation Program 3. Heath Consultants Leak surveyor certification 4. [List other(s), or remove this line]

Attachment C: Incorporation by Reference of Qualification Evaluation Requirements of Companies (Mutual Aid Partners) for Performing Certain Covered Tasks in Emergencies (Mark the applicable box ☑ and fill in the blanks, as appropriate; if no mutual aid agreements exist, deleted everything below the first sentence.)

☐ The Pipeline Operator has **no mutual aid agreements** for emergency assistance.

☐ The Pipeline Operator has mutual aid agreements for emergency assistance as described in the following table of covered tasks.

The company has identified the following companies upon whom it might call for emergency assistance. The Plan Administrator has reviewed the evaluation methods used by these companies to qualify persons in the following tasks and has determined that these qualification requirements are acceptable alternative methods for evaluating qualifications to perform these tasks on the pipeline operator's system:

[NOTE: Each operator that has mutual aid agreements must customize this list. Enter each covered task for the pipeline system included in mutual aid agreements in the left columns, and the mutual aid partner(s) in the right column. Delete this bracketed instruction note when completing the OQ Plan.]

Covered Tasks:	**Mutual Aid Partner(s)**
Inspect for Atmospheric Corrosion	1. 2.
Measure Structure-to-Soil (Electrolyte) Potential	1. 2.
Inspect Rectifier and Obtain Readings	1.
Inspect Buried Pipe and Components When Exposed, Including inspecting removed metal pipe or component for internal corrosion	1.
Inspect Installed Pipe and Components for Mechanical Damage	1.
Locate Underground Pipelines	1.
Install and Maintain Pipeline Markers	1.
Preventing Damage During Excavation Activities By or On Behalf of the Pipeline Operator	1.
Installing Meters and Regulator Sets	1.
Weld on Steel Pipelines	1.
Joining Steel Pipelines By Methods Other Than Welding	1.
Join Plastic Pipe With Heat Fusion	1.
Join Plastic Pipe With Mechanical Fittings	1.
Join Copper Pipe	1.
Install Service Lines	1.
Test Service Lines	1.

Investigating leak/odor complaints on company piping	1.
Purging air from a pipeline	1.

Etc.

1.0 Purpose

The purpose of this Plan is to comply with the pipeline safety regulations defined in 49 CFR Part 192, Subpart N Qualification of Pipeline Personnel. This document outlines the methodology to be used in maintaining a comprehensive OQ Plan.

2.0 Scope

This Plan is applicable to AmeriGas as an operator of its own pipelines and also where it has contractually agreed to act as an operator for other entities owning pipelines coming under the requirements 49 CFR 192, Subpart N. This plan also includes the procedures that will be followed when outside contractors are retained to perform covered tasks.

3.0 General

3.1 The stated purpose will be accomplished by the following:

3.1.1 Identifying Covered Tasks;

3.1.2 Establishing objective criteria for determining qualifications;

3.1.3 Establishing the proper evaluation methods used to determine worker's initial qualification and subsequent re-evaluation to perform a Covered Task and to recognize and react to abnormal operating conditions (AOCs) encountered during the performance of that task;

3.1.4 Maintaining sufficient records to ensure continued compliance; and

3.1.5 Identifying the organizational responsibilities required to ensure a qualified work force.

3.2 The Field Evaluation/Qualification Report Form and Task Evaluation Form are noted within this Plan.

3.3 The AOCs for the Company are noted on each individual task.

4.0 Definitions

4.1 *Abnormal Operating Condition (AOC)* means a condition identified by the operator that may indicate a deviation from normal operations that may:

4.1.1 Indicate a condition exceeding design limits; or

4.1.2 Result in a hazard(s) to persons, property, or the environment.

4.2 *Covered Task* is an activity, identified by the operator, that:

4.2.1 Is performed on a pipeline facility;

4.2.2 Is an operations or maintenance task;

4.2.3 Is performed as a requirement of 49 CFR 192; and

4.2.4 Affects the operation or integrity of the pipeline.

4.3 *Directed and observed* means that a qualified individual is at the work site and is directly watching each step of the work to ensure it is performed correctly when the Covered Task is being performed by an individual(s) not qualified for the task. It is not sufficient that the qualified individual be in the general vicinity, but observing each step of the task. Except with respect to welding and plastic fusion, individuals qualified in a Covered Task being performed will direct and observe any non-qualified individuals performing the Covered Task.

4.4 *Evaluation* means a process, established and documented by the operator, to determine an individual's ability to perform a covered task by any of the following:

4.4.1 Written examination;

4.4.2 Oral examination;

4.4.3 Observation during:
A. Performance on the job (not a sole method for initial qualification),
B. On-the-job training, or
C. Simulations

4.4.4 Computer-based training

4.4.5 Other forms of assessment determined to be appropriate by the Company.

4.5 *Qualification* means that an individual has been evaluated and is able to:

4.5.1 Properly perform assigned Covered Tasks;

4.5.2 Recognize and react to AOCs; and

4.5.3 Direct and observe non-qualified individuals, as necessary.

4.6 *Re-qualification Frequency* is the nominal duration between one's required re-qualifications for any one specific Covered Task. Re-qualification frequencies are typically multiples of 12 month time spans. It is noted that a qualified individual's qualifications (except for plastic fusion) will be valid for a grace period of 90 days from the qualification expiration date.

4.6.1 Plastic fusion qualifications are only valid for exactly one year from the qualification date.

4.6.2 Welding Qualification must be completed at least once each calendar year but not to exceed 15 months or at least every six months but not to exceed seven and one-half months.

5.0 Roles and Responsibilities

5.1 The Director of Safety and Technology has the overall responsibility for the program, its implementation and operation. This Director is also responsible for assigning the duties of the OQ Administrator to the appropriate individual.

5.2 The OQ Administrator is responsible for the following:

5.2.1 Prepare, maintain, revise, distribute, implement, audit, and enforce the OQ program as detailed in the Plan. An annual review of the Plan will be conducted to evaluate the effectiveness of the OQ program. The review will evaluate performance trends, which may require modification to the OQ program, including but not limited to, training module outlines, methods of evaluation and subsequent qualification frequencies.

5.2.2 Determine members of the OQ Core Committee and Task Evaluation Committees;

5.2.3 Schedule and chair meetings of the OQ Core Committee;

5.2.4 Serve as a contact point for both internal personnel and outside entities (including regulatory bodies);

5.2.5 Maintain accountability of the OQ program;

5.2.6 Distribute up-to-date Plan information to appropriate personnel;

5.2.7 Maintain records electronically, including, but not limited to, employee and contractor qualification and re-qualification records, that will also be accessible to field operating personnel and management.

5.2.8 Communicate changes to the OQ Plan as stated in 12.0.

5.3 The OQ Core Committee must meet the following requirements:

5.3.1 The OQ Core Committee will be appointed by the OQ Administrator.

5.3.2 At a minimum, the Committee will include the following members:

A. OQ Administrator (Chair)
B. Safety Training Manager
C. In-House Counsel
D. Director of Centralized Pipeline Systems
E. Other members may be added to provide technical background in any aspect of operations as needed.

5.4 The OQ Core Committee has the following duties:

5.4.1 Identify Covered Tasks, as per Section 6.0, including additions to the task list;

5.4.2 Review the Field Evaluation/Qualification Report Form and Task Evaluation Form prepared or revised by the Evaluation Committees; and

5.4.3 Make revisions to the written OQ Plan as needed.

5.5 The Evaluation Committees must meet the following requirements and perform the following duties:

5.5.1 Groups of individuals will be established as needed to determine the qualification requirements for a specific Covered Task and the appropriate

methods to evaluate personnel to ensure they are qualified to perform that task.

5.5.2 For each task, effort will be made to assemble an Evaluation Committee consisting of the following members:

A. Functional work group representative from the OQ Core Committee (Chair);

B. Managerial representative(s) familiar with the specific Covered Task; and

C. At least two experienced workers who currently perform the task or have recently performed the task and are considered to have the required expertise.

D. Members should be selected so that effort is made to provide balanced representation across AmeriGas.

5.5.3 On new tasks, complete the evaluation of Covered Tasks Form including procedures, expected AOCs, initial evaluation methods, re-evaluation intervals and methods, and any other applicable information.

5.5.4 Review the steps and information on the Field Evaluation/Qualification Report Form when a task is revised due to regulatory or procedural changes.

5.6 Qualifiers have the following responsibilities:

5.6.1 Possess the required knowledge, through training or experience, to ascertain that a worker is able to perform the Covered Task and recognize and react to AOCs that might surface while performing the task;

5.6.2 Attend a “Train the Trainer” session provided through AmeriGas or through an approved course; and

5.6.3 Conduct the evaluations required to qualify or re-qualify individuals on Covered Tasks and be responsible for supplying qualification records.

5.7 Local managers must ensure that there are an adequate number of qualified individuals present for each task to perform the work.

5.8 Local managers that direct individuals performing Covered Tasks have the following responsibilities:

5.8.1 Ensure that Covered Tasks are being performed by qualified individuals or by non-qualified individuals under the direction and observation of a qualified individual.

5.8.2 Ensure that individuals reporting to them maintain current qualifications on all applicable Covered Tasks. Review a summary of each individual's qualifications with each employee on an annual basis.

5.8.3 Forward the name of any individual to the local management that the supervisor observes or believes is no longer qualified to perform a Covered Task because of performance.

5.8.4 Forward the name of any individual to the OQ Administrator that the supervisor observes or believes whose actions performing a Covered Task may have contributed to an incident or accident.

5.8.5 Ensure training, or other required activities, as stated in the notification of a change to a Covered Task by a qualified individual.

5.8.6 Shut down a job in which a Covered Task is being performed by a non-qualified individual that is not under the direct control of a qualified individual; or a job where a task that must be performed by a qualified individual is being performed by a non-qualified individual; or a job where the individual is not performing the task properly.

5.9 Employees (qualified individuals) have the following responsibilities:

5.9.1 Know those Covered Tasks that he is or is not qualified to perform under this Plan. Review a list of his qualifications annually with his manager;

5.9.2 Be aware that he must not perform a Covered Task for which he is not qualified without direction and observation by a qualified person;

5.9.3 Report to his manager any situation when he is scheduled to perform a Covered Task for which he is not qualified and will not have the direction and observation of a qualified person. The employee shall refuse to perform the task if scheduled to do so.

5.9.4 Report to his manager any situation where he observes a Covered Task being performed on the Company's pipeline facilities by a non-qualified person who is not under the direct supervision of a qualified person.

6.0 Covered Task Identification

6.1 The OQ Core Committee is responsible for identifying the Company Covered Tasks. Refer to the current covered task list.

6.3 The OQ Core Committee will evaluate all new tasks created by changes or additions to the AmeriGas Operating and Maintenance Manual or revisions to federal or state regulations. Any tasks that are determined to be Covered Tasks will be added to the list and sent to the appropriate Task Evaluation Committee for evaluation as required in Section 7.0.

7.0 Covered Task Evaluation Procedures

7.1 The Evaluation Committee must complete the following when creating a new Covered Task:

7.1.1 Identify the steps, skills, knowledge and safety requirements needed to perform each Covered Task;

7.1.2 Identify potential AOCs and reaction associated with the Covered Task;

7.1.3 Identify the method(s) of initial evaluation for each Covered Task;

7.1.4 Establish the appropriate time period and method(s) for subsequent re-evaluations. The Committee(s) will evaluate and recommend requalification intervals for specific tasks based on their experience and other relevant factors including the following:

A. Frequency of performance
B. Critical nature of the task
C. Complexity of the task
D. Difficulty or physical requirements of the task
E. Statutory requirements

7.2 For tasks that need to be revised, the Evaluation Committee must review the Field Evaluation/Qualification Report Form and/or Task Evaluation Form and revise information as needed.

7.3 The OQ Core Committee shall complete the following:

7.3.1 Review all new and revised Forms created by the Evaluation Committees and approve.

7.3.2 Assist the OQ Administrator in the implementation of new or revised tasks including communicating changes as per 12.0.

7.4 Records will include the OQ Task Evaluation Form and the OQ Field Evaluation/Qualification Form.

8.0 Training and Evaluation of Personnel

8.1 Note: Work performance history as of October 28, 2002 will no longer be acceptable as single means of initial qualification.

8.2 AmeriGas and contractor employees will receive appropriate training for each Covered Task before being initially qualified or re-qualified on that task. Appropriate training may consist of any of the following methods:

8.2.1 Classroom training;

8.2.2 Task simulation exercises;

8.2.3 On-the-job training (cannot be the sole method of qualifications for initial qualifications);

8.2.4 Manufacturer's training program;

8.2.5 Other training conducted by industry or outside associations.

8.2.6 Computer Based Training (CBT)

8.3 The appropriate training required for a task will be indicated on the Task Evaluation Form for the task. If no specific training is indicated, the individual should be trained on-the-job for the task by a qualified individual.

8.4 All training must be reviewed and approved by the OQ Core Committee before being used for this Program.

8.5 All training will include the necessary knowledge and skills required to perform each task in a safe and proper manner according to the procedures listed on the Field Evaluation/Qualification Report Form. The training should include the knowledge necessary to identify and react to the appropriate AOCs listed for the task.

8.6 Initial and subsequent qualifications will verify that the worker or contractor performing a Covered Task has the skills to perform the task, knowledge to recognize and respond to AOCs listed for the task, and the ability to direct and observe unqualified individuals on appropriate Covered Tasks. Initial evaluations and subsequent re-evaluations should be completed by the methods indicated on the Task Evaluation Form for the specific task.

8.7 Qualifiers have the responsibility for evaluating a worker's or contractor's initial and subsequent qualifications to perform Covered Tasks. Managers who are qualified in the Covered Task are required to approve a worker's initial qualification. Managers or Training Instructors may approve a subsequent qualification.

8.8 Evaluations may be completed through several different methods, but must follow the requirements noted on the Task Evaluation Form. The evaluation methods are as follows:

8.8.1 Performance evaluations – The Qualifier will observe the employee performing the task either on-the-job or in a simulation and complete the Field Evaluation/Qualification Report Form. Any steps not observed may be accepted by asking the employee to explain the unobserved step. The Field Evaluation/Qualification Report Form contains questions concerning AOCs. The Qualifier should ask these questions and check the appropriate AOC on the Field Evaluation/Qualification Report Form when answered correctly by the employee.

8.8.2 Written examinations – The completion of a written examination will be observed by a Qualifier. The written examination will be developed and approved by the OQ Core Committee. The passing score of 80% must be achieved on a written examination. ***All incorrect answers will be reviewed by the qualifier and the student to ensure the student has a clear understanding of the question(s) that were missed on the written examination.***

8.8.3 Oral examination – An oral examination shall use the same questions as a written examination. The oral examination will be given by a Qualifier. The oral examination will be developed and/or approved by the OQ Core Committee.

8.8.4 Computer-based training – Midwest Energy Association's (MEA) Energy U program or equivalent approved by the OQ Administrator.

8.8.5 Work performance review – On some newly developed product tasks, work performance reviews may be used. The manager will confirm that the individual has been performing the task in the appropriate manner. A written examination must be used in addition to work performance review to qualify the individual on the Covered Task.

8.9 The OQ Administrator and OQ Core Committee may accept contractor personnel qualifications that have been obtained under the programs of outside consultants, contractors, industry organizations and other gas distributors. The Committee shall consider the following factors:

8.9.1 The program's compliance with all provision of 192 Subpart N;

8.9.2 The standards used for qualification and re-qualifications are comparable to AmeriGas's standards and accepted by other gas distribution companies;

8.9.3 Covered Task protocols and associated skills unique to AmeriGas are addressed through AmeriGas-provided evaluations or training prior to initiating related work activities. Contractors shall also provide a list, with names and means of identification, of qualified individuals and associate those individuals with the Covered Task(s) they will be performing. Those records, including the evaluation activity, will be retained by AmeriGas.

8.10 Local managers will verify that the qualifications of individuals of other operators or other entities providing mutual aid and/or performing Covered Tasks for AmeriGas are consistent with AmeriGas procedures. Additional training and/or evaluations will be performed as indicated by the results of the verification process. This verification will be performed prior to the performance of any Covered Task.

9.0 Procedures for the Use of Non-Qualified Personnel

9.1 Workers who are not qualified to perform a Covered Task may do so only as assigned by a supervisor when a qualified individual directs and observes the performance and is able to take immediate corrective action when necessary. The qualified individual is responsible for the performance of the task.

9.2 There are certain tasks that must be performed only by qualified individuals. These tasks include plastic fusion and steel pipe welding.

10.0 Evaluation Following an Incident or Accident

10.1 Personnel responsible for the investigation of any incident or accident are identified in the AmeriGas Operating and Maintenance Manual, and include the Market Manager and Region Safety Manager, who may appoint other managerial or safety personnel to assist in the investigation. An appropriate Qualifier is responsible for re-evaluating the worker or contractor involved in any incident or accident.

10.2 Should the investigating personnel have reason to believe an individual's performance of a Covered Task contributed to an incident or accident, he shall immediately forward the name of the individual(s) to the OQ Administrator and the Director of Safety and Technology.

10.3 The OQ Administrator, as soon as practical, will have the individual evaluated for the specific Covered Task.

10.3.1 In the event that the individual's performance is determined to be satisfactory by the Qualifier, no change in status will be indicated.

10.3.2 If the individual's performance is determined to be unsatisfactory, the OQ Administrator will remove/suspend the individual's qualification. The OQ Administrator will report his determination to the Director of Safety and Technology.

A. The individual must complete all of the requirements for initial qualification, including the appropriate training, before the individual can be qualified on the task again.

10.4 Summary results from evaluations performed following an incident or accident will be maintained as part of the OQ records for that worker or contractor.

11.0 Qualification Suspension

11.1 If there is reason to believe an individual is no longer qualified to perform a Covered Task, then the individual's qualification must be suspended. The qualification of a Company or contractor individual shall be suspended for reasons that include, but are not limited to:

11.1.1 Failure to perform Covered Tasks in accordance with established policies or procedures;

11.1.2 Violation of Company policy regarding drugs or alcohol;

11.1.3 Physical impairment that prevents the individual from performing the Covered Tasks for which he is qualified with or without reasonable accommodation as required by the Americans with Disabilities Act.

11.1.4 A scheduled or random evaluation uncovers reason to believe an individual is no longer qualified to perform a Covered Task;

11.1.5 The individual does not complete the subsequent qualification activity when required (qualification expires);

11.1.6 The individual will no longer be assigned to perform the Covered Task; and/or

11.1.7 Any other reason that indicates an individual may no longer be able to perform the Covered Task.

11.2 If the supervisor wishes to have the worker or contractor requalified, the worker or contractor will be evaluated by a Qualifier chosen by the Local manager or OQ Administrator.

11.2.1 If the individual is to be re-qualified on a Covered Task within 24 months from the last qualification due date, the evaluation methods for a subsequent evaluation may be used.

11.2.2 If the individual is to be re-qualified on a Covered Task more than 24 months from the last qualification due date, the evaluation methods for an initial qualification must be used.

11.2.3 Regardless of the re-qualification method, the individual may not be considered qualified on the Covered Task until the re-qualification is fully completed and the individual is determined to be qualified for the tasks he needs to perform.

11.3 In the event that the individual's performance is determined to be satisfactory by the Qualifier, the individual will be qualified to perform the task and the Local manager or the OQ Administrator will update the records accordingly.

11.4 If the individual's performance is determined to be unsatisfactory, the qualifier will notify the OQ Administrator for further appropriate action.

11.5 The individual must complete all of the requirements for initial qualification, including the appropriate training, before the individual can be qualified on the task again.

11.6 Summary results from evaluations performed following the reasons noted in 11.1 will be maintained as part of the OQ records for that individual.

12.0 Changes Impacting Covered Tasks

12.1 The OQ Administrator, or designee, is responsible for communicating changes to AmeriGas work procedures so individuals performing the affected Covered Task(s) will be made aware of appropriate changes and the resulting requirements. This communication will be provided to all OQ qualified employees and contractors.

12.2 Minor changes to the OQ program may be communicated to involved parties' representatives depending on the nature of the change. A minor change is a revision to the OQ program that does not affect the procedures/steps of a Covered Task or the identification or reaction of AOCs associated with a task. Examples of minor changes include a change in fitting manufacturer that does not change the installation procedures.

12.3 Substantive changes will be communicated in writing to all parties' representatives involved. The communication will identify required follow-up actions that are necessary including identified requalification or training needs and appropriate documentation. A substantive change is a revision to the OQ program that affects one or more steps of a Covered Task or Tasks and may or may not require a requalification of individuals.

12.4 Significant changes will be communicated in writing to all parties' representatives, and the appropriate regulatory jurisdiction. The communication will identify the change made and the effective date for the change. A significant change is a revision to the OQ program that includes adding or removing Covered Tasks, revisions as a result of changes to the state or federal regulations, or revisions to the procedures or evaluation methods included in the program.

13.0 Record Keeping

13.1 The OQ Administrator is responsible for maintaining records as required by regulation. All records maintained will satisfy the following minimum requirements:

13.1.1 Records will include identifying information (name, employee number, etc.);

13.1.2 Records will include the name of the Covered Task(s) the individual is qualified to perform, the qualification dates, and the method of qualification/evaluation;

13.1.3 All records will be maintained as active while the individual is qualified to perform the Covered Task;

13.1.4 All previous records will be retained for a period of five (5) years;

13.1.5 Record keeping will be documented electronically (preferred) or on paper;

13.1.6 Records will be changed only under the direction of the OQ Administrator;

14.0 Mergers and Acquisitions

14.1 In the event AmeriGas merges with or acquires another Propane Marketer, the following procedures will be conducted:

14.1.1 The other company's qualification and evaluation methods for each Covered Task will be verified by the OQ Administrator as being compatible with AmeriGas's OQ program, thereby indicating that all qualified individuals from the other company will be qualified under the AmeriGas OQ program.

14.1.2 If the qualification program evaluation reveals any additional or inadequate task qualifications, AmeriGas will, for each Covered Task where existing qualifications are determined to be to be inadequate:

A. Train, as appropriate, and re-evaluate acquired individuals; and

B. Ensure that no new individual is allowed to independently perform any Covered Task for which they are determined to be not qualified unless under the direction and observation of a qualified individual.

14.1.3 Contractor qualifications of the newly acquired company will undergo the same review and qualification process to determine whether they may continue performing Covered Tasks on Company facilities.

14.0 Operator Qualification

14.1 The list of Covered Tasks can be found on page 16.

15.0 References

Federal Regulations

49 CFR 192.227 Qualification of welders
49 CFR 192.229 Limitations on welders
49 CFR 192.285 Plastic pipe: Qualifying persons to make joints
49 CFR 192.801 Scope
49 CFR 192.803 Definitions
49 CFR 192.805 Qualification program
49 CFR 192.807 Recordkeeping
49 CFR 192.809 General

Task ID #	CORE Tasks	Hyperlink
1	Investigating Leak/Odor Complaints	
2	Excavating Gas Lines - Damage Prevention	
3	*Reserved*	
4	Restore Service (Planned and Unplanned Shutdown)	
5	Monitor Propane Odorization Levels	
6	Meter Installation	
7	Inspect Piping for Atmospheric Corrosion - Above Ground Piping	
8	Propane Barhole Survey	
9	Service and Main Line Walking	
10	Routine line Locating and Marking	
11	Key Valve Inspection	
12	Installation and Inspection of a Monitoring Regulator System	
13	Install/Replace Regulator	
14	Install Stab Fitting on PE Pipe	
15	Install Threaded Fitting	
16	Performing a Pressure Test on Existing Pipe	
17	Abandonment or Deactivation of Services or Mains	
18	Apply/Repair Enamel Coating and/or Cold Tape	
Task ID #	**OTHER Tasks**	**Hyperlink**
19	Tapping Tees	
20	Saddle Fusion	
21	Mechanical Butt Fusion	
22	*Reserved*	
23	Electrofusion Coupling	
24	Install an Electrofusion Tee on Plastic Main	
25	Socket Fusion	
26	Applying Cathodic Protection	
27	Ensure Operation of a Rectifier	
28	Conducting Interference Test	
29	Pipe To Soil Potential	
30	*Reserved*	
31	Reserved	
32	*Reserved*	
33	Butt Weld	
34	Fillet Weld	
35	Non-Destructive Testing of Welds	

AmeriGas
America's Propane Company

OQ FIELD EVALUATION/QUALIFICATION REPORT FORM

Task No. 8

Event: *(check at least one)* Initial Qualification ☐ Requalification ☐ Inspection ☐
Type of Evaluation *(check one):* On the Job ☐ Simulation ☐
Task ID 8 Task Title: Propane Barhole Survey
Person Being Qualified: _____
Company: _____ Area: _____
Qualified By: _____ Date: _____
Location of Work: _____

Code No	Step	Critical Step	Not Observed	Acceptable	
				Yes	No
1	Location of line to be inspected via maps/records or electronic means	X			
2	Perform equipment operations check on CGI in accordance with manufacturers' instructions. • Battery strength • Clean filters • Instruments calibrated • Bump test (Check with a known gas) • Demonstrate proper use	X			
3	Conduct all leak surveys in accordance with training guides. • Proper survey techniques. o At or below the depth and to the sides (within 6 inches) of the pipe o Bar-holes at least every 15 to 18 feet o Hold sample cone over bar-hole for a count of at least 4 seconds o Have Conversion chart if necessary If it is above ground or exposed piping leakage, confirm with bubble solution.	X			
4	Leak area centering and test hole placement Zero-out in all directions	X			
5	Company leak classification guidelines / Propane Manual • Able to define what a hazardous leak is Classify leakage "2" or "3".	X			
6	Complete proper documentation.				
7	Have names and phone numbers of company representatives to contact in the event that a hazardous condition is found.				
8	Written Examination (80 % score is acceptable)	X			

	Critical Steps	Task Total Steps	Abnormal Conditions	Associated Skills	Safety Requirements
Total	6	8	3		
Number Acceptable:					
% Acceptable:					

(For qualification: 100% of all critical steps acceptable, 80% of all steps acceptable, and 80% of abnormal operating conditions acceptable)

Qualified : Y _____ N _____

Task ID 8 Task Title: Propane Barhole Survey

Abnormal Operating Conditions Question and Answers

1. How would you know if you had ***ESCAPING GAS*** while performing this covered task?

Answers: Hear, Feel, Smell & Visual

While performing this task you detect gas, what would you do?

Answers: Make safe until repairs can be made. Notify your supervisor.

2. How would you know if you had a ***FIRE/EXPLOSION*** while performing this covered task?

Answers: Hear, Feel, Smell & Visual

While performing this task you detect a fire or explosion, what would you do?

Answers: Evacuate site and call your supervisor to notify of incident and request help.

9. How would you know if you had ***DAMAGE TO FACILITY*** while performing this covered task?

Answers: Hear, Feel, Smell and Visual

What would your reaction be?

Notify your Supervisor and report conditions, make safe by shutting off gas supply if possible or evacuate.

Task ID __8___ Task Title: _____Propane Barhole Survey
Person Being Qualified: _____
Company: _____ Area: _____
Qualified By: _____ Date: _____

Code No	Step	Applicable	Not Observed	Acceptable	
				Yes	No
	Abnormal Conditions				
AC-1	**Escaping Gas**	**X**			
AC-2	**Fire/Explosion**	**X**			
AC-3	**No Gas**				
AC-4	**Excessive Pressure**				
AC-5	**Inadequate Pressure**				
AC-6	**Improper Odorization**				
AC-7	**Environmental Incident**				
AC-8	**Atmospheric Change**				
AC9	**Damage to Facility**	**X**			
AC-10	**Component Failure**				

Comments:

_____
Signature of Evaluator

Task ID #: 8 [x] **Covered Task**

Task Name: Propane Barhole Survey

Task Description: A walking type leak survey of propane mains and services using a Combustible Gas Indicator (CGI) detection unit. Survey is performed by barholeing directly over and to the sides of the buried pipelines.

Related DOT Codes

192.706, 192.723

Requalification Frequency

[X] Requalification should be administered every 60 months. *(Indicate Interval)*
[ ] Requalification is not required.

Evaluation Methods

Type	Initial Qualification		Subsequent Qualification	
	Primary	**Secondary**	**Primary**	**Secondary**
Written Examination	✓		✓	
Oral Examination	✓	✓	✓	✓
On-the-Job Observation	✓	✓	✓	✓
Simulation Observation				
Computer-Based Testing	✓		✓	
Other *Please Specify:*				

Note: Attach relevant exams and/or observation checklists to this examination form.

Task Name: Propane Barhole Survey

Recommended Training

Type	Primary	Secondary
Classroom	✓	
On-the-Job Training	✓	✓
Simulation		✓
Computer-Based Training	✓	
Other *Please Specify:*		

Task Name: Propane Barhole Survey

Evaluation Committee Participants

Name: _____ Title:_____ Date: _____

Name: _____ Title:_____ Date: _____

Name: _____ Title:_____ Date: _____