

## Field Guide - PI &amp; TC Distribution (QCD)

- **\*\* Any skipped locations must be approved by PG&E SCRC**
- ⊖ **\*\* Review Maps + for any PG&E Corporate Security Alerts (Level 1 or 2). Contact your Senior if the audit location is in a security alert area**
- ⊖ **\*\* Notify 1st alert code: make attempt to contact customer before proceeding to the location. If no response, ok to review if the location is accessible**
- ⊖ **\*\* PI Notify 1st alert code: Verbal permission from the customer is required before entering a property. If after two attempts there is no contact from the customer, contact your local SCRC for approval to skip the location**
- ⊖ **\*If you have location with a single unit(tree) for work and you're unable to locate the unit(tree) skip location and add the necessary comments**
- ⊖ **\*If you have a location that has multiple units (trees) listed and you're unable to locate one of them, Pass the **species** finding and enter "unable to locate" in the comments.**
- ⊖ **Flag (green & white) all Compliance, Conformance, and Work Performed findings. CR=Comment required PR=Picture Required**

## PI

Addressing	1	Much simpler way to address location. At least one tree is listed at the incorrect address. <b>CR</b>
	2	Location directions are not accurate or correct. Addressing is not accurate. <b>CR</b>
	3	Could not find after a reasonable amount of time (approx. 20 min.). <b>CR</b>
SRA/LRA	1	Is the SRA/LRA designation incorrect? If SRA/LRA designation differs from the RX Comment in bold <b>SRA/LRA Tier</b>
	2	accuracy must be confirmed Per GIS and field inspection. FRA=SRA. PRC 4292 and 4293 applies to FRA only when within USFS Boundaries.
Painting	1	- Tree(s) prescribed for work must be painted or flagged with the current years VM work execution assigned color
	2	- Paint or flagging must be visible on tree(s) prescribed for work. <i>The exception is if CNP/CNF or any other language that indicates as such are in the comments of the VMD record.</i> - Pictures and comments must be included with all findings <b>CR PR</b>
Species	1	Specific tree species available. Correct genus used but incorrect species. Obsolete (grayed out on species list) species used. <b>CR (Include correct code)</b>
	2	Incorrect genus ( <i>Pine, Oak, etc.</i> ). <b>CR (Include correct code)</b>
DBH	1	Not within removal class of listed removal. <b>CR (DBH / correct removal code)</b>
	3	Consider X-stem sum (all stems <6 inches apart). Tree must include one stem 4 inches or greater. Brush is all stems <4 inches.
*** <b>Bold Rx comment SRA/LRA/Tier data:</b> This data is provided by the database and is based on the coordinates of the tree record. If the bold information matches what PI chose for SRA/LRA, use the SRA/LRA/Tier data provided for the following clearance-based questions. If the two do not match, you must look up the location in GIS and use the correct layer information for your clearance-based assessments.		
<b>Priority***</b>		
		Routine priority = Will maintain conformance for the next four weeks. <b>CR (Note clearance)</b>
		Accelerate priority = Currently conformant but will not maintain conformance for the next four weeks. <b>CR (Note clearance)</b>
	2	Tree wire = routine priority/compliant if not in contact. Secondary should be Routine to be correct.
		<b>Priority 2, call your supervisor</b> For Priority 1 and Priority 2, add 'Operations has been notified of (Priority 1 or Priority 2) unit'. <b>PR</b> Picture required for Reportable only.
<b>Clearance***</b>		
	1	Clearance prescription and tree comments contradict one another.
	2	Additional cycles can be prescribed without impacting ANSI A300. (Prescribed clearance plus MOG, growth within last two years that impacts conformance.)
	4	Will not hold conformance for one year; six months if listed as biannual. <b>CR +Comment if Tree Wire is present.</b>
Environmental	3	No RP Restriction when required, ( $>\frac{1}{2}$ canopy, work within 25 feet of OHWM). <b>CR</b>
	4	Non-Riparian environmental finding. <b>CR</b> Elderberry flagging not present in vicinity. Elderberry not identified (ES code not checked and/or "Elderberry" not noted in comments). Bird nest (under 4 feet) not identified in handheld. Comment active or not. Large bird nest (greater than 4 feet) not identified in handheld. SOD comments not present in address and/or tree comments. Heavy prune to eliminate future trimming not prescribed.
<b>MWS***</b>		
	P	Must choose Pass if listed tree is correctly documented as MWS.
	1	Incorrect use of MWS code. Incorrect MWS type or tree outside clearance requirements. Review MWS Exempt Procedure. <b>CR</b> Note if Tree Wire is present.
	4	Listed tree does not qualify for MWSE or tree qualifies but is not documented with MWSE. Review MWS Exempt Procedure. <b>CR</b> Note if Tree Wire is present.
Additional Observation	1	Only to be used for the following: <b>CR</b> Non-listed Facility Protect trees rate Gray area (likely abate) or Work (abate) with HTRS. Note Matrix address and position in comment: Example "HTRS=4,2-Gray area. "Non-listed TRT (Review stump resprout procedure)
<b>Non-Listed Tree</b>		
		<b>Growth</b> - Tree will not maintain compliance before next cycle. Note if tree wire present. Include comments clarifying location of tree. <b>Priority 2 missed tree (no tree wire) call Guy or Eric.</b> <b>Secondary</b> - Tree is causing strain and/or abrasion to the conductor. <b>MWS</b> - Qualifying tree is not currently documented. Review MWS Exempt Procedure, note Tree Wire/Raychem requirements.

## \*Reportable Checklist:

☐ Abnormal Field Conditions ☐ Priority 1 / 2 ☐ Tree Not Worked ☐ Observation – FYI ☐ 4292 Non-Com Pole ☐ Century Plant ☐ Customer Issues

# Field Guide - PI & TC Distribution (QCD)

WMP-Discovery2022\_DR\_CalAdvocates\_018-Q04Atch05  
Revised 3/25/2022

- **\*\*Any skipped locations must be approved by PG&E SCRC**

\*\* Review Maps + for any PG&E Corporate Security Alerts (Level 1 or 2). Contact your Senior if the audit location is in a security alert area

- ≠ **\*\* Notify 1st alert code: make attempt to contact customer before proceeding to the location. If no response, ok to review if the location is accessible**
- ≠ **\*\* PI Notify 1st alert code: Verbal permission from the customer is required before entering a property. If after two attempts there is no contact from the customer, contact your local SCRC for approval to skip the location**
- ≠ **Flag (green & white) all Compliance, Conformance, and Work Performed findings. CR=Comment required PR=Picture Required**

## TC

		If a Line Item Refusal exists at a multi-line item location, comment on Refusal trees current clearance, state of conformance, and what state of the refusal process that the tree is currently in. <b>CR</b>
	1,3,4	If unit is not worked (levels 1, 3 or 4 below) N/A must be selected for Clearance, ANSI and Enviro on the QCD Findings Form.
Work Performed	1	TRT work completion submitted as "No Work".
	3	Work completion submitted as "No Work", will not hold cycle. <b>CR</b>
	4*	<b>Tree/TRT does not appear worked, submitted as worked. CR PR (Reportable) Review inspection record and click on the tree coordinates(google map link) to confirm location in the field. If search result is not accurate, send email with the following information to the appropriate SVPM: Circuit name, current clearance, MOG, SSD, SSD Rtc/Loc, address(from inspection record) and tree line number.</b>
Clearance	1	Did not achieve prescribed (achievable) clearance but will hold equal cycles. Did not achieve 15-foot OV (regardless of prescription). <b>CR</b>
	LRA 18"	Did not achieve prescribed (achievable) clearance which would have resulted in additional cycle(s). Achieved clearance + MOG (most annual growth within last two years that impacts conformance) = Final clearance. Is final clearance achievable without impacting ANSI A300? (Consider structure & tree health.) <b>Secondary:</b> PASS if Strain/Abrasion is alleviated regardless of prescription.
	LRA Tier 2,3 4'	
	SRA 4'	
	SRA Tier 2,3 4'	
ANSI A300	4	Will not hold conformance for one year; six months if listed as biannual. <b>CR +Comment if Tree Wire is present.</b> PRC 4292 and 4293 applies to FRA only when within USFS Boundaries.
	3	Visible stub(s) from current work (where structure allows) and/or tears left. <b>CR</b>
Site Clean	2	Level 2 - Brush left from current work with chipper access within 100 feet and does not satisfy any requirement for Level 3. <b>CR PR</b>
		Where one or more of the following are true (regardless of chipper access): <b>CR PR</b> Averages >18-inch depth
	3	Customer satisfaction Safety - Debris in path (tripping hazard) or Hanger over people or property. Riparian - Satisfies BMP #12 A or B requirements.
Environmental	3	Riparian BMP Issue. <b>CR</b>
	4	Incorrect per BMPs ( <i>Non-Riparian environmental finding</i> ). <b>CR</b>
Additional Observation	1	Only to be used for the following: <b>CR</b> Non-listed Facility Protect trees that rate Gray area (likely abate) or Work (abate) with HTRS. Note Matrix address and position in comments: Example "HTRS 4,2 - Gray area" Non-listed TRT (Review stump resprout procedure)
		<b>CR</b> - Include Species in comment on TC review.
Non-Listed Tree		<b>Growth</b> - Tree will not maintain compliance before next cycle. Note if tree wire present. Include comments clarifying location of tree. <b>Priority 2 missed tree (no tree wire) call Guy or Eric.</b> <b>Secondary</b> - Tree is causing strain and/or abrasion to the conductor. <b>MWS</b> - Qualifying tree is not currently documented. Review MWS Exempt Procedure, note Tree Wire/Raychem requirements.
	LRA 18"	
	LRA Tier 2,3 4'	
	SRA 4'	
	SRA Tier 2,3 4'	

**CR=Comment required PR=Picture Required**

### \*Reportable Checklist:

☐ Abnormal Field Conditions ☐ Priority 1 / 2 ☐ Tree Not Worked ☐ Observation – FYI ☐ 4292 Non-Com Pole ☐ Century Plant ☐ Customer Issues