



Five Minute Meeting:

Topic: PG&E Applicant Installer Pre-Qualification Requirements

Date: 10/15/2024

Audience: PG&E Applicant Installers, Gas and Electric Inspectors, Job Owners, and Clerical teams supporting new business installations

The key thing you need to know

Natural Gas and Electricity are both hazardous commodities that can result in hazards to installers, the public, and the environment if not installed, tested, and commissioned in accordance with PG&E Standards and Procedures.

Effective March 1, 2025, all Applicants and/or their Contractors installing PG&E facilities (*Applicant Installers*) must be Pre-Qualified by PG&E in order to ensure the safety, quality and compliant installation of facilities to be owned and operated by PG&E. In addition, all applicant installers installing gas facilities must have programs and documentation in place to meet 49CFR Part 199 Subparts B and C of the Department of Transportation Pipeline and Hazardous Materials Safety Drug and Alcohol Testing.

Why it matters to you

Applicant Installers will no longer be able to install PG&E facilities without obtaining and maintaining PG&E's Pre-Qualification "Safety, Quality, and Conduct Assessment" (SQCA) in Onboard Learning Management System by Industrial Training Services (ITS).

Prior to performing inspections on applicant-installed facilities, PG&E inspectors must validate that applicant installer personnel have completed PG&E's pre-qualification assessment by scanning the individuals ITS wallet Card (see job aid page 4 of this document)

Key discussion points

- Each applicant installer contractor will be required to register and create an account with ITS (see job aid page 5 of this document) Each individual performing or documenting work to install PG&E facilities (laborers, operators, welders, fitters, field engineers, etc.) will be required to complete an individual SQCA, available starting 11/15/24. Each individual successfully completing the assessment will be issued an ITS Wallet Card with a QR code that can be scanned by PG&E inspectors using a smart phone device to view and validate the pre-qualification in the field. For individuals and homeowners installing PG&E facilities for which the applicant, installer, and customer are one in the same, please reach out to PG&EApplicantInstallerPreQual@pge.com to obtain an ITS profile 12 weeks prior to pre-construction meeting (*Note: applicant installers already maintaining OQs required for gas installations in ITS will be able to use their existing account and wallet cards by simply adding the SQCA to the student's profile*)
- Each Applicant installer installing gas facilities will also be required to register with National Compliance Monitoring System (NCMS) and submit documentation supporting a compliant drug and alcohol testing program for any individual performing an Operator Qualified (OQ) covered task. (see job aid page 6 of this document) You must register with ITS and complete the SQCA prior to being approved to register with NCMS (*Note: NCMS is integrated with ITS to provide evidence of the individuals compliance with drug and alcohol testing on the ITS wallet card*)

- The comprehensive list of Pre-Qualified Applicant Installers (*and designers*) can be found at [Applicant Designer and Installer Qualification Program \(pge.com\)](http://pge.com)
- **PG&E reserves the right to revoke applicant installer pre-qualification and ability to install PG&E assets for willful, serious, or repeated breaches of safety, poor quality, non-compliant work, or breaches of conduct. Breaches of conduct include, but are not limited to, disrespectful, offensive, or intimidating language or behavior towards PG&E personnel. Reinstatement of pre-qualification status will be considered upon submittal and adherence to a documented corrective action plan.**

Questions to ask for understanding

Q: How is the Pre-Qualification Safety, Quality, and Conduct Assessment administered?

- A. The assessment is a self-guided, web-based training in ITS followed by a short quiz. Upon passing the quiz, the individual's wallet card data will be updated to show the individual is pre-qualified to install PG&E facilities. The assessment is available in both English and Spanish and is designed to be completed in less than 30minutes.

Q: I'm a PG&E inspector, when should I scan the applicant installer's ITS wallet card?

- A. Ideally, scan the wallet card at the pre-construction meeting, but at a minimum the pre-qualification must be scanned prior to accepting work performed by the applicant installer.

Q: I'm a PG&E inspector, how often should I scan the applicant installer's ITS wallet card?

- A. Prior to accepting work on each and every inspection in case an applicant installer's pre-qualification status has been revoked.

Q: I'm a PG&E inspector, I scanned the applicant installer's wallet card, but no pre-qualification showed up and they are adamant they took and passed the assessment for pre-qualification.

- A. ITS is the system of record and the pre-qualification must be present when scanned to be valid. Refer the applicant installer back to their ITS administrator to resolve if the records are not populating.

Q: The applicant installer misplaced their badge, but they are adamant they are pre-qualified.

- A. The ITS GO app (available through the app store) can be used to validate the pre-qualification by searching for the individual by name and company. See separate communication for "5MM ITS GO App Release for OQ"

Q: Is the Pre-Qualification an individual or company level qualification?

- A. The assessment must be completed at an individual level, but the pre-qualification can be revoked at the individual and/or employer level.

Q: Where will these requirements be formally documented?

- A. The January publication of the Greenbook will include the pre-qualification requirements

Q: I'm a job owner, but I'm not sure how this impacts me. What should I expect?

- A. It's important to communicate with the applicants that you work with to ensure they are aware of the change in requirements when entering into contract, throughout the job progress, and again at the pre-construction meeting. It's also important to note that for jobs where the applicant, installer, and customer are one in the same, the Job Estimate needs to include ITS administration costs. Please refer to the internal PG&E Applicant Installer Pre-Qualification Teams page for up-to-date estimates. Impacted stakeholders will receive an invite to the page at a later date.

Q: My job is currently in construction but will not be finished before the effective date. Will these prequalification requirements apply to my project?

- A. Yes, these requirements will be effective for any work performed after March 1st. If an installer chooses not to proceed with becoming pre-qualified, then an alternate pre-qualified installer will need to be onboarded to the project. If there are extenuating project circumstances for electric only facilities, please reach out to PG&EApplicantInstallerPreQual@pge.com for guidance.

Q: What sort of activities could lead to pre-qualification removal?

- A. Willful safety violations that put any workers or facilities in a situation that is immediately hazardous to life and health.
- B. Repeated failures by the same individual/company documented on inspection logs where ample coaching by PG&E has been provided
- C. Bullying, intimidating, or arguing with an inspector for failing an inspection.
- D. Repeated instances of scheduling inspections and having no work to inspect or last-minute cancelations in an attempt to monopolize inspection time slots on the calendar.
- E. Over pressurized air test
- F. Willfully concealing damage to PG&E facilities caused by the installer
- G. Modifying or falsifying inspection records or installer qualifications/Span of Control

Who do I contact with questions?

For General Applicant Installer Pre-Qualification Questions

PG&EApplicantInstallerPreQual@pge.com

For Gas DOT Compliance

DOTContractorCompliance@pge.com

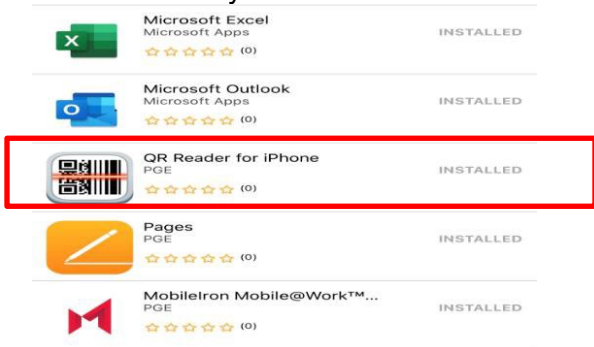
For Gas Operator Qualifications

OQPgmMgr@pge.com

Job aid: How to scan ITS wallet Cards

Audience: Applicant Installers, PG&E Gas and Electric Inspectors

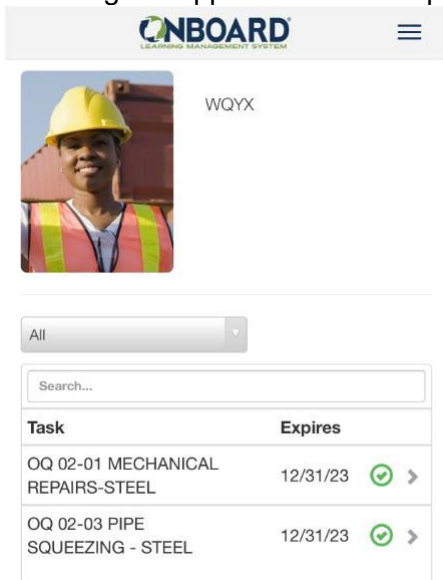
Step 1 – Download “QR reader for iPhone” app from Apps@Work (PG&E employees only) or simply utilize the camera on your smart device



Step 2 – Scan the QR code on the applicant installers e-wallet card using the QR reader or Camera



Step 3 – The qualification details will be displayed on the smart device after the e-wallet card is scanned including the applicant installers pre-qualification and DOT status



Job aid: How to create an account and register with Industrial Training Services (ITS)

Audience: Applicant Installers

Skip this step if you already have an ITS account for Operator Qualifications when installing gas facilities; simply profile your students for the SQCA

- PG&E Applicant Installers will need to contact Sales@ITS-Training.com or call 270-753-2150 Ext 100 to begin the agreement process.
- ITS Contracts Department will send an information form to each contractor to complete in Panda Docs.
- Once completed, ITS will send an agreement for signature.
- Contractor must provide a copy of their Certificate of Insurance (COI) showing a minimum of \$1,000,000 per occurrence for General Liability Insurance.
- Set-Up Fee \$350 (must be paid prior to account creation plus a minimum of 1 Admin)
- Fees: Admin \$150, Student \$80, Inactive \$10, eWallet card \$10 + Shipping
- Questions for ITS regarding set-up? Email Sales@ITS-Training.com
- Once the set-up fee is paid, the company will be created. The Admin will need to attend an Admin Training session before gaining full access to OnBoard.

Job aid: How to create an account and register with National Compliance Monitoring System (NCMS)

Audience: Gas Applicant Installers



Who We Are:

National Compliance Management Service (NCMS) provides contractor monitoring services for Pacific Gas & Electric (PG&E). We will review your company's drug testing program to ensure it meets the DOT/PHMSA expectations, which PG&E is held to. If your company does not already maintain an acceptable testing program, we can help guide you in the direction of starting an acceptable testing program.

Monitoring Process:

Before we can monitor your company, we need the approval of PG&E. Upon successful completion of the Safety, Quality, and Conduct Assessment in ITS, your company contacts will receive an engagement email from pipelinesafety@nationalcompliance.com within 10 business days. The email your company will receive will provide step by step directions on how to obtain access to our website and complete our online audit process.

The first step in this process is subscribing to the NCMS website – www.nationalcompliance.com (this process will be detailed in the engagement email sent from NCMS). Once subscribed, your company will receive a username and a website link, via email. The website link will need to be utilized to establish a password for your new NCMS website credentials. Once credentials have been established, your company will be able to access the audit request and supply NCMS with the requested information. All information your company supplies will be reviewed and either be approved or rejected. If rejected, NCMS representatives will provide guidance on the shortfalls and your company will have the opportunity to resolve any issues.

Once the audit has been completed, your company must continue to maintain their NCMS platform and complete any NCMS requests, which will be sent from NCMS throughout the year via email.

Contractors that are not familiar with running a compliant DOT testing program often choose to utilize a third-party administrator (TPA), who assists contractors in establishing and maintaining a compliant drug and alcohol testing program and also assists contractors in completing the NCMS program review. NCMS works closely with Pipeline Testing Consortium (PTC), who has established a number of processes that aid their contractor clients with their testing programs. If your company is interested in the services PTC offers, contact info@pipelinetesting.com or call 800-294-8758 Ext 1.

National Compliance Management Services (NCMS)

Pipelinesafety@nationalcompliance.com

620-669-0954