

## Training and Qualification - Operator Qualification

**1. Operator Qualification Plan and Covered Tasks (detail)** *Is there an OQ plan that includes covered tasks, and the basis used for identifying covered tasks? (TQ.OQ.OQPLAN.P) (detail)*

192.805(a) (192.801(b))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

YES, Cardinal FG OQ Manual revision 2A

**2. Reevaluation Intervals for Covered Tasks (detail)** *Does the process establish and justify requirements for reevaluation intervals for each covered task? (TQ.OQ.REEVALINTERVAL.P) (detail)*

192.805(g)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 2.3.7 and Section 5.12 Even though manual provides for longer than 3 years, Cardinal does not go longer than 3 years (gas is secondary job).

**3. Contractors Adhering to OQ Plan (detail)** *Does the process require the OQ plan to be communicated to contractors and ensure that contractors are following the plan? (TQ.OQ.OQPLANCONTRACTOR.P) (detail)*

192.805(b) (192.805(f); 192.805(c))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 3.3.3 Cardinal has gone to bid and now Tom Wilson, Brothers company doing their maintenance. Brothers has OQ plan, that has been reviewed by Cardinal (Bob) and it meets or exceeds Cardinals. Cardinal has Brothers OQ records; this is new since first of year. Bob meeting with Cardinal April 4, 2014 to ensure all records are there.

**4. Contractor and Other Entity Qualification (detail)** *Does the process require contractor organizations or other entities that perform covered tasks on behalf of the operator to be qualified? (TQ.OQ.OQCONTRACTOR.P) (detail)*

192.805(b) (192.805(c); 192.855(d); 192.805(e); 192.805(f))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 3.3.3

**6. Contractor and Other Entity Qualification (detail)** *Are adequate records maintained for contractor personnel qualifications that contain the required elements? (TQ.OQ.OQCONTRACTOR.R) (detail)*

192.807(a) (192.807(b))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 3.3.3 Brothers has adequate records see question 3 notes.

**7. Management of Other Entities Performing Covered Tasks (detail)** Do records document evaluation of the other entity (ies) performing covered task(s) on behalf of the operator (e.g., through mutual assistance agreements) prior to performing task? (TQ.OQ.OTHERENTITY.R) (detail)

192.805(b) (192.805(c); 192.803)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Section 3.3.4. No mutual assistance agreements. However, Gas Line is qualified to other direct sales companies with same plan and could be used in emergency.

**8. Evaluation Methods (detail)** Are evaluation methods established and documented appropriate to each covered task? (TQ.OQ.EVALMETHOD.P) (detail)

192.805(b) (192.803; 192.809(d); 192.809(e))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Section 5.3 and Section 2.2

**9. Evaluation Methods (detail)** Do records indicate evaluation methods are documented for covered tasks and consistent with personnel qualification records? (TQ.OQ.EVALMETHOD.R) (detail)

192.805(b) (192.803; 192.809(d); 192.809(e))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Only OQ tasks are to shut valve, recognizing AOCs and properties of natural gas. But cardinal requires them to take information training for 9 other tasks so they understand and appreciate gas system. Other tasks training are Odorization, prevention of accidental ignition, corrosion monitoring, locating pipelines, damage prevention; patrolling leak surveys leak investigation and pipeline markers. OQ training but not tested.

**10. Abnormal Operating Conditions (detail)** Does the process require: 1) individuals performing covered tasks be qualified to recognize and react to abnormal operating conditions (AOCs), 2) evaluation and qualification of individuals for their capability to recognize and react to AOCs, 3) AOCs identified as those that the individual may reasonably anticipate and appropriately react to during the performance of the covered task, and 4) established provisions for communicating AOCs for the purpose of qualifying individuals? (TQ.OQ.ABNORMAL.P) (detail)

192.803

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Section 6.1 & 6.2

**11. Abnormal Operating Conditions (detail)** Do records document evaluation of qualified individuals for recognition and reaction to AOCs? (TQ.OQ.ABNORMAL.R) (detail)

192.807(a) (192.807(b); 192.803)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Reviewed MEA training for Chuck Miller, Warren Krug and Monty Esslingen.

**12. Qualification Records for Personnel Performing Covered Tasks (detail)** *Do records document the evaluation and qualifications of individuals performing covered tasks, and can the qualification of individuals performing covered tasks be verified?* (TQ.OQ.RECORDS.R) (detail)

192.807

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

**Reviewed Cardinal personal OQ.** Chuck is required to be OQed on shut off valve, AOCs and properties of gas. In addition he has taken the training for 10 MEA tasks and prior to MEA had taken. Cardinal OQ personal are near recertification timeframe.

**13. Planning for Mergers and Acquisitions (Due Diligence re: Acquiring Qualified Individuals) (detail)** *Does the process adequately manage qualifications of individuals performing covered tasks during program integration following a merger or acquisition?* (TQ.OQ.MERGERACQ.P) (detail)

192.805(b) (192.803)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 1.2. 5. Was added, although this will probably never happen to Cardinal.

**14. Training Requirements (Initial, Retraining, and Reevaluation) (detail)** *Does the OQ program provide for initial qualification, retraining and reevaluation of individuals performing covered tasks?* (TQ.OQ.TRAINING.P) (detail)

192.805(h)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 6, Appendix E, Appendix F

**16. Covered Task Performed by Non-Qualified Individual (detail)** *Are there provisions for non-qualified individuals to perform covered tasks while being directed and observed by a qualified individual, and are there restrictions and limitations placed on such activities?* (TQ.OQ.NONQUALIFIED.P) (detail)

192.805(c)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 3.3.4

**17. Personnel Performance Monitoring (detail)** *Does the program include provisions to evaluate an individual if there is reason to believe the individual is no longer qualified to perform a covered task based on: covered task performance by an individual contributed to an incident or accident; other factors affecting the performance of covered tasks?* (TQ.OQ.PERFMONITOR.P) (detail)

192.805(d) (192.805(e))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Appendix E (Incidents), Appendix F (Lost Evaluation) **cross reference to O&M manual .**

**19. Program Performance and Improvement (detail)** *Does the process require evaluation of the OQ program and implementation of improvements to enhance the effectiveness of the program?* (TQ.OQ.PROGRAMEVAL.P) (detail)

192.605(a) (192.605(b)(8))

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**

Section 8.1

**21. Management of Changes (detail)** *Does the OQ program identify how changes to procedures, tools standards and other elements used by individuals in performing covered tasks are communicated to the individuals, including contractor individuals, and how these changes are implemented in the evaluation method(s)? (TQ.OQ.MOC.P) (detail)*

192.805(f)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Section 8

**22. Notification of Significant Plan Changes (detail)** *Does the process require significant OQ program changes to be identified and the Administrator or State agency notified? (TQ.OQ.CHANGENOTIFY.P) (detail)*

192.805(i)

Sat+	Sat	Concern	Unsat	NA	NC
	X				

**Notes**  
Section 8.2.6

**Acceptable Use:** Inspection documentation, including completed protocol forms, summary reports, executive summary reports, and enforcement documentation are for internal use only by federal or state pipeline safety regulators. Some inspection documentation may contain information which the operator considers to be confidential. In addition, supplemental inspection guidance and related documents in the file library are also for internal use only by federal or state pipeline safety regulators (with the exception of documents published in the federal register, such as advisory bulletins). Do not distribute or otherwise disclose such material outside of the state or federal pipeline regulatory organizations. Requests for such information from other government organizations (including, but not limited to, NTSB, GAO, IG, or Congressional Staff) should be referred to PHMSA Headquarters Management.