



Five Minute Meeting:

Topic: PG&E Applicant Installer Pre-Qualification Requirements Update on Scope and Applicability

Date: 8/15/2025

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

The key thing you need to know

PLEASE TAKE NOTE OF THE CHANGES TO SCOPE OF APPLICANT INSTALL WORK REQUIRING PRE_QUALIFICATION. THE CONTENTS OF THIS DOCUMENT HAVE ALSO BEEN UPDATED TO CLARIFY FREQUENTLY ASKED QUESTIONS AND IT'S ENCOURAGED TO REVIEW IN ITS ENTIRETY.

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 April 1, 2025, all Applicants and/or their Contractors installing electric facilities and associated civil work under a new business application (*Electric Applicant Installers*) must be Pre-Qualified by PG&E for the scopes of work identified on pages (4-6) of this document.

Effective March 1, 2025, all Applicants and/or their Contractors Utilizing Operator Qualifications (OQs) to install gas facilities under a new business application (*Gas Applicant Installers*) must be Pre-Qualified by PG&E **and** 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 for individuals holding OQs 0501, 0502, 0504 0507, and 0215

Why it matters to you

Applicant Installers will no longer be able to install certain Gas and/or Electric facilities after the effective date 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 in scope for pre-qualification, 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 7 of this document)

Key discussion points

- Each applicant installer performing tasks in scope for pre-qualification will be required to register and create an account with ITS (see job aid page 8 of this document) and complete an individual SQCA. In addition, individuals preparing and submitting gas asbuilt redlines need to complete the "PG&E Applicant Installer Gas As-Built training". Each individual successfully completing any assessments 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. 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 performing OQ covered tasks on live 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. (see job aid page 9 of this document) Individuals must register with ITS and complete the SQCA first prior to being approved to register with NCMS *(Note: NCMS is integrated with ITS and the following OQs that are performed on live gas facilities will show as unqualified without satisfactory drug and alcohol test results: 0501, 0502, 0504, 0507 and/or 0215)*
- The comprehensive list of Pre-Qualified Applicant Installers *(and designers)* can be found at [Applicant Designer and Installer Qualification Program \(pge.com\)](#)
- **PG&E reserves the right to revoke applicant installer pre-qualification and ability to install certain gas and/or electric facilities under a PG&E new business application 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 next 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 Owner needs to capture ITS administration costs through the blue bill process. Please refer to the internal PG&E Applicant Installer Pre-Qualification Teams page for up-to-date estimates.

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 the effective date. 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

Applicant Installer Pre-Qualification Scope and Applicability Table

Item	Tasks/Facilities	In Scope	Out of scope	Greenbook Section
1	Pre-Construction Meetings	<i>Recommended</i> to have pre-qualified installer present	Not Required	1
2	Gas Facilities	Gas Main, services, and appurtenances up to meter including excavation, backfill, and meter protection	Anything after the meter, Cabinets, closets, enclosures,	2
	Concrete Meter Pads	Subgrade, rebar, concrete		2.4.2
3	Underground Electric Facilities	Conduit, Substructures, vaults, boxes, up to meter panel including Excavation and backfill	Anything after and including the meter panel	3
	Transformer Pads	Subgrade, rebar, concrete, conduit risers, barrier posts, installation of pre-cast pads		045292, 051122
4	Overhead Electric Facilities	PG&E owned poles	point of attachment (weather head/periscope/service knob, etc.) Customer owned service poles	4
5	Temporary Service (OH/UG)	None	All facilities designed/utilized only as temporary power are out of scope	
6	Meter Pedestals	Conduit and riser only	All remaining items in this section are out of scope	8
7	Switchboards/Switchgear	Conduit and riser only	All remaining items in this section are out of scope	10/11
8	General			
	Pannel Boards	None	All Pannel board facilities are out of scope	065374
	Grounding	None	All grounding facilities are out of scope	5.8
	Restoration	None	Paving, Landscaping, etc.	
10	Streetlights	Conduit, risers, and substructures including excavation and backfill up to point of service including substructures at point of service	Downstream of meter pedestal or point of service	

Applicant Installer Pre-Qualification Scope and Applicability Delineation Diagrams

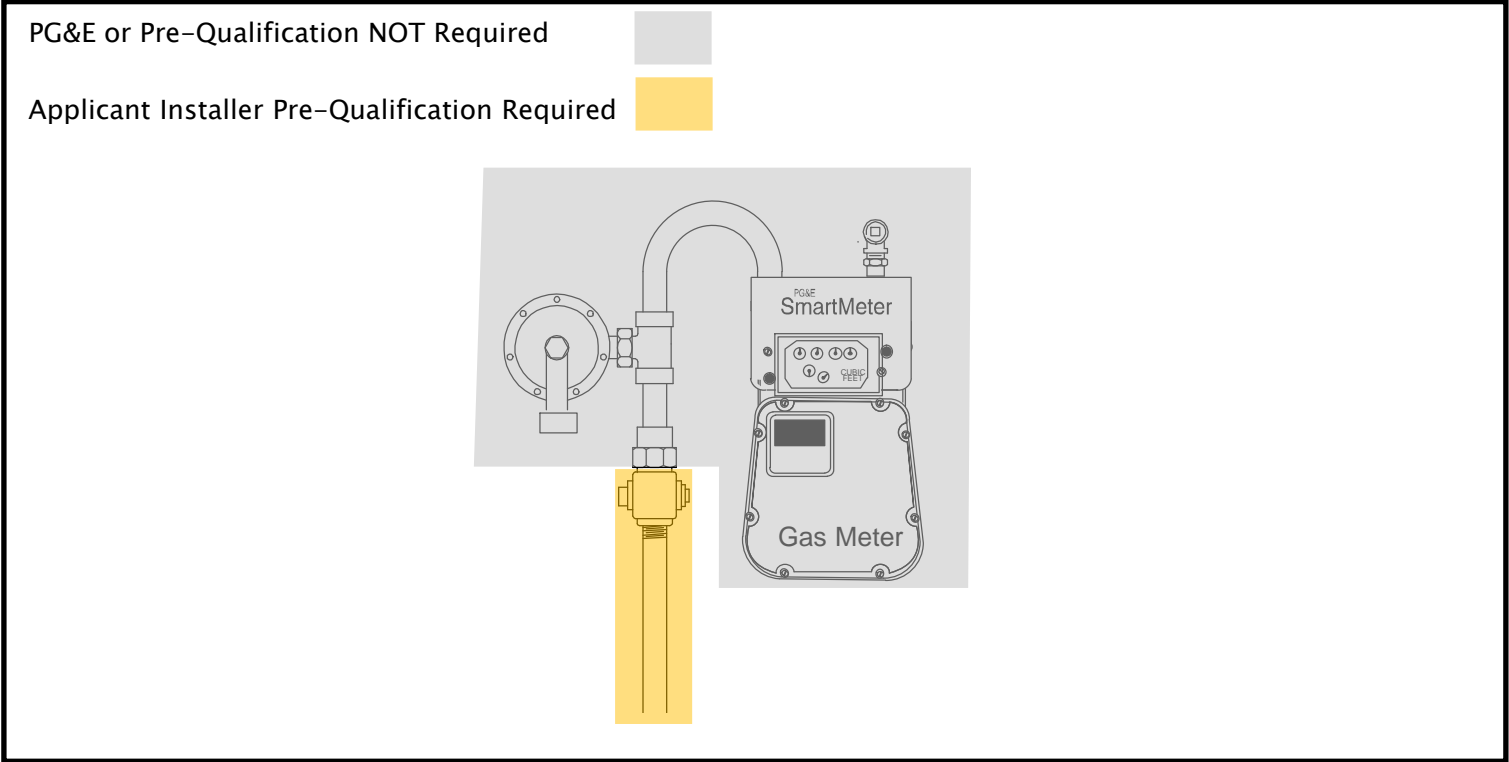


Figure 1.1 – Applicant Installer Pre-Qualification Delineation for Gas Facilities

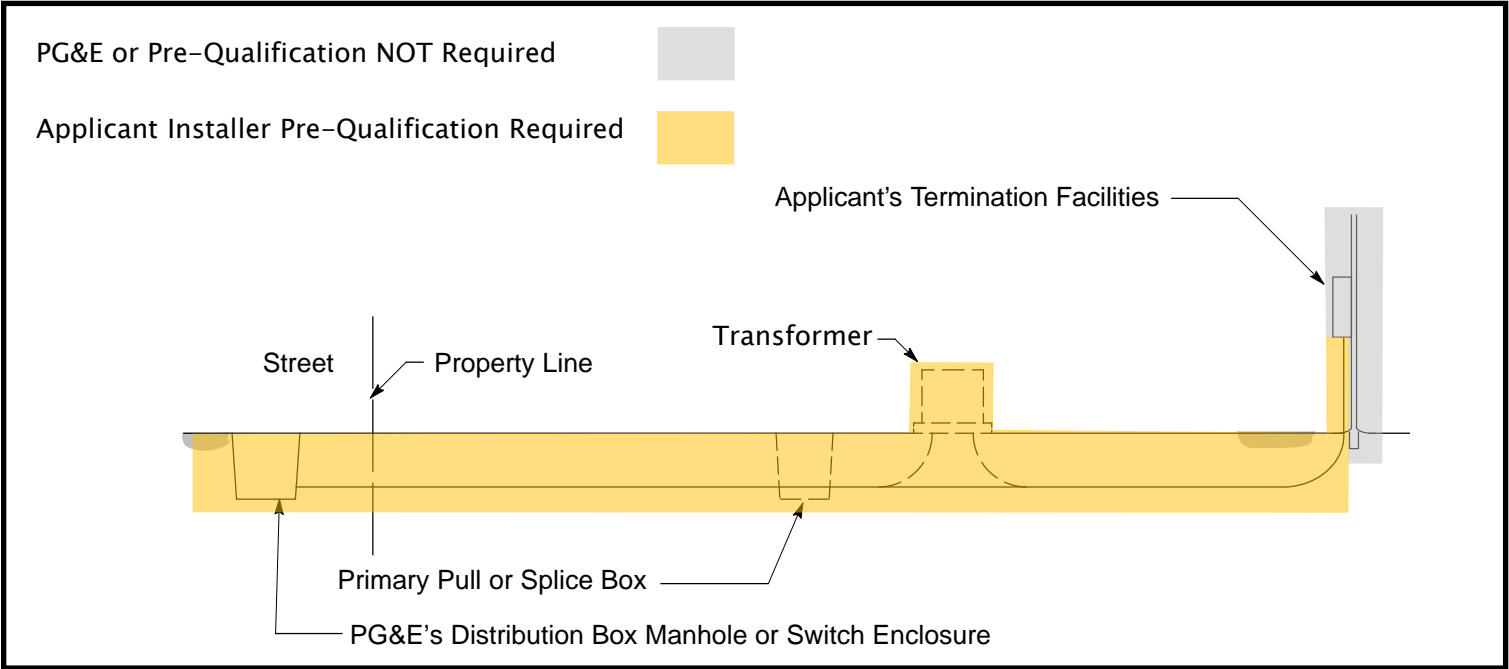


Figure 1.2 Applicant Installer Pre-Qualification Delineation for Underground Electric Facilities

Applicant Installer Pre-Qualification Scope and Applicability Delineation Diagrams

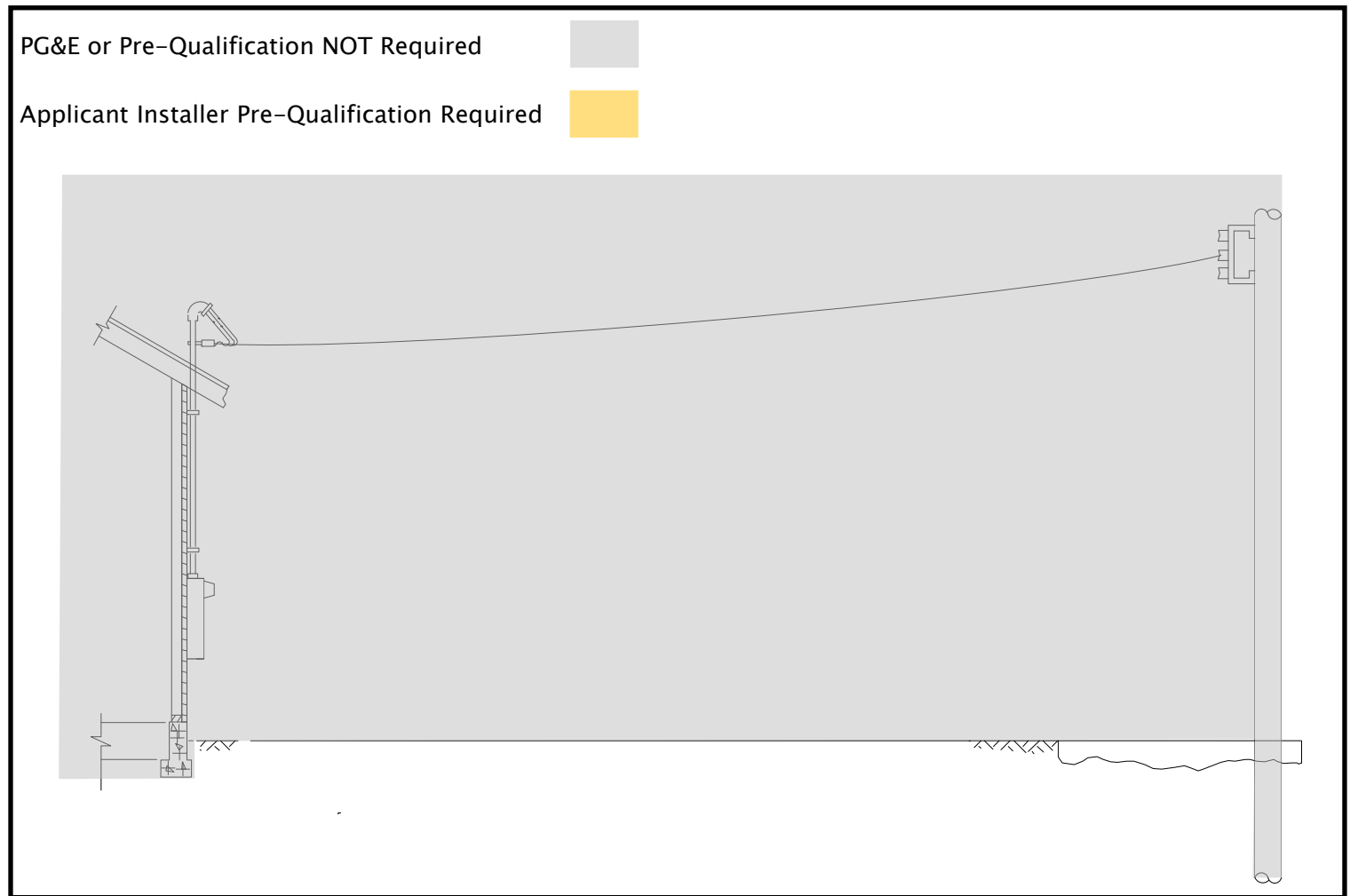
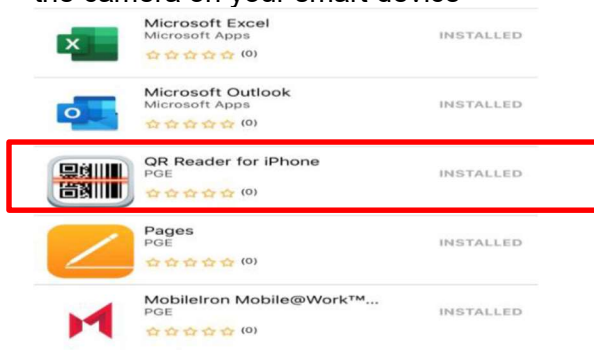


Figure 1.3 Applicant Installer Pre-Qualification Delineation for Overhead Electric Facilities

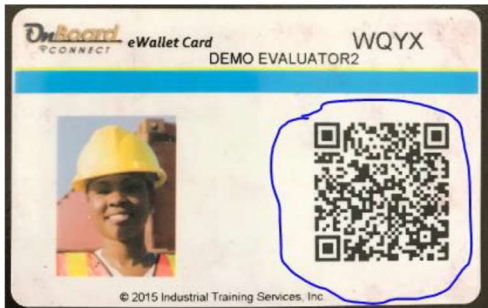
Job aid: How to scan ITS wallet Cards

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

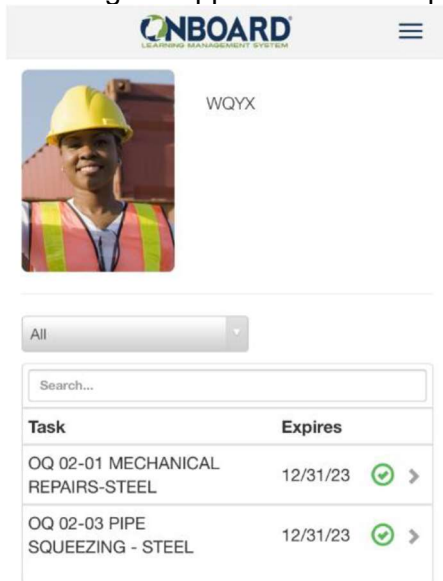
Step 1 – Download “QR reader for iPhone” app from Apps@Work (PG&E employees only) or simply utilize the camera on your smart device



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 start the pre-qualification process, 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

- First, Reach out to PG&EApplicantInstallerPreQual@pge.com with the following information to validate the work being performed requires pre-qualification and to start the registration process;
 - A. Company Name
 - B. Primary Contact Information responsible for coordinating prequalification
 - I. Name:
 - II. E-mail:
 - III. Phone :
 - C. Scope of work typically performed by your company
- Once confirmed, PG&E will notify ITS to proceed with registration.
- 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 by and OQ's individual, 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



Applicant Installer Pre-Qualification

Frequently Asked Questions Rev. 8/15/2025

This document is intended to answer the most frequently asked questions regarding the Applicant Installer Pre-Qualification program. For questions not addressed by this FAQ, please contact PG&EApplicantInstallerPreQual@pge.com

Q1: Does Pre-Qualification apply to Gas or Electric or both?

- A. The pre-qualification SQCA applies to both gas and electric. Any individual performing work to install facilities identified as “in scope” on the “Applicant Installer Pre-Qualification Scope and Applicability Table” and associated diagrams will be required to complete the pre-qualification Safety, Quality, and Conduct Assessment

Q2: How do I become pre-qualified?

Step 1: Reach out to PG&EApplicantInstallerPreQual@pge.com and provide:

- A. Company Name
- B. Primary Contact Information responsible for coordinating prequalification
 - I. Name:
 - II. E-mail:
 - III. Phone :
- C. Scope of work typically performed by your company

Step 2: Respond to ITS onboarding and complete registration with ITS

Step 3: Complete the Safety, Quality, and Conduct Assessment (SQCA) in ITS

Step 4: Register with National Compliance Monitoring System (NCMS) and provide the required DOT Drug and Alcohol testing documentation (*Step 3 is only required for individuals utilizing OQ’s 0215, 0501, 0502, 0504, and/or 0507 to complete the work*)

- A. See Five Minute Meeting Titled: “PG&E Applicant Installer Pre-Qualification Requirements” for additional details on each step

Q3: How can I prepare for the SQCA? Is there a study guide?

- A. The SQCA is a web-based training consisting of 7 slides followed by 4 questions and is targeted to be completed in less than 30 minutes without any specific pre-study required. The assessment is available in both English and Spanish.

Q4: Are there scopes of work that are exempt from the Pre-Qualification?

- A. Any of the following are out of scope for the applicant installer pre-qualification
 - a. Any work that is listed as “out of scope” on the “Applicant Installer Pre-Qualification Scope and Applicability Table” and associated diagrams



Applicant Installer Pre-Qualification

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- b. Any work that is not governed by Greenbook requirements subject to approval by PG&E personnel (inspectors, QEWS, Gas Mechanics, etc)
- c. Work performed outside of a new business application

Examples include;

- i. Equipment and facilities on the customers side of the meter
- ii. Installing adjacent facilities in joint trench (I.E. the worker installing communication conduits/cables)
- iii. Civil work once PG&E backfill requirements have been met that does not require excavation within the tolerance zone of PG&E facilities (paving, landscaping, etc)
- iv. Back office admin and clerical tasks (timekeeping, accounting, material ordering, contracts, etc)

Q5: Who on the crew must have the Pre-Qualification? Is it just the foreman or superintendent?

- A. Anyone performing work to install gas and/or electric facilities identified as “in scope” must have the pre-qualification. There is no “Span of Control” for the pre-qualification that allows one individual to work under the pre-qualification of another. In addition, anyone completing and submitting gas as-builts will need to complete the Gas Asbuilt Web Based Training and assessment.

Q6: Where can I find a list of Pre-Qualified Applicant Installers?

- A. The list of pre-qualified applicant installer contractors is available at [Applicant Designer and Installer Qualification Program \(PGE\)](#). Make sure to scroll down to the applicant installer portion of the page. The list will be routinely updated as installers complete pre-qualification.

Q7: I’m a PG&E Job owner, Can I forward the 5MM Applicant Installer Pre-Qualification Requirements? Who received the original communication?

- A. Yes, the 5MM is suitable for distribution to external 3rd parties. The original communication went out to all inspectors, job owners, clerical, affected leaders, the applicant designer community, and all applicant installers that are currently regularly engaged in performing work to install PG&E facilities.

Q8: I already have an ITS account, but I cannot find the Safety, Quality, and Conduct Assessment. Where can I find it?

- A. Reach out to ITS and request access to the “Applicant Installer Series”. Once granted, you will have access to profile your workers for the SQCA.



Applicant Installer Pre-Qualification

Frequently Asked Questions Rev. 8/15/2025

Q9: Are project managers, designers, or company owners and similar roles required to be pre-qualified?

- A. No, only those workers in the field directly engaged with performing the work.

Q10: How do I sign up for ITS or NCMS?

- A. Please follow the instructions on pages 8 and 9 of the document titled “5MM Applicant Installer Pre-Qualification Requirements” for contacts and direction. **Do not reach out to PG&E OQ team**

Q11: I’m only installing electric facilities, do I need to be in a drug and alcohol testing program?

- A. No, applicant installers who are solely installing electric facilities do NOT need to be in a drug and alcohol testing program. If you received an e-mail from NCMS to register it’s only because an individual in your company with current OQs for performing covered gas tasks has completed the SQCA. OQ’s 0507 and 0215 are only required when performing work to install gas facilities and are not required for electric work. If you hold these OQs and do not need them for the work you are performing you can remove them from the workers profile. If you choose not to remove them, it will not impact your ability to install electric facilities.

Q12: I’m only installing electric facilities, do I need to complete the PG&E Applicant Installer Gas As-Built training?

- A. No, only individuals preparing and submitting Gas As-Built Redlines need to take this training. It will show up in ITS as *available* to profile your workers, but you do not need to include it in their profile if they are not preparing or submitting Gas As-Built Redlines.

Q13: Do PG&E employees need to be pre-qualified if they are performing their own gas and or electric work at their own residence under a new business application?

- A. No, PG&E employees do not need to be pre-qualified. Simply present your valid company ID badge and ITS card (if installing gas facilities) to the onsite inspector.

Q14: I had previously registered with ITS and obtained Pre-Qualification, however it is no longer needed based on the scope clarifications. How do I cancel my account with ITS?

- A. After reviewing the revised scope of the pre-qualification program, reach out to PG&EApplicantInstallerPreQual@pge.com to confirm if your planned scope of work does not require pre-qualification and cancel your account if desired. Contractors will have 30 days from the date of this publication to contact PGE to request a refund if your scope of work does not require pre-qualification. Anything requested after the 30-Day window will not be considered for a refund. Any refund approvals will be communicated to ITS by PGE only.