

**PACIFIC GAS AND ELECTRIC COMPANY
San Bruno Gas Transmission Line Incident
Data Response**

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Date Sent:	March 17, 2011	Requestor:	Operations (Chhatre/Nicholson)

QUESTION 2

Provide all Dispatch center procedures including those for emergency and leak response.

ANSWER 2

Please see the attached procedures for emergency and leak responses:

- Utility Procedure: TD-6434P-01 Gas Leak and Odor Investigation Procedure
- Utility Procedure: TD-6436P-01 Universal Responsibilities
- Utility Procedure: TD-6436P-02 Handling Gas SMC, Electric TOU Meter Change, and GRRP Field Orders
- Utility Procedure: TD-6436P-03 Managing Field Automation System (FAS) Duplicate Field Orders
- Utility Procedure: TD-6436P-04 Creating FAS Field Orders
- Utility Procedure: TD-6436P-06 Redirecting Field Orders in FAS to Non-FAS Departments
- Utility Procedure: TD-6436P-07 FAS Tech Down
- Utility Procedure: TD-6436P-08 Reviewing Same-Day and Future-Dated Field Orders
- Utility Procedure: TD-6436P-09 On-Line Technology Down Process
- Utility Procedure: TD-6436P-10 Field Order Repository System (FORS)

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PACIFIC GAS AND ELECTRIC COMPANY
San Bruno Gas Transmission Line Incident
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- Utility Procedure: TD-6436P-11 Managing Critical Transition Periods Within Dispatch Operations
- Utility Procedure: TD-6436P-13 Handling FAS Alerts
- Utility Procedure: TD-6436P-14 Handling 911 Calls - Emergency Response
- Utility Procedure: TD-6436P-16 Handling Overtime Call-out for Emergency Calls and Regular Work Assignments
- Utility Procedure: TD-6436P-17 Fleet Loading Instructions
- Utility Procedure: TD-6436P-18 Order Completion for Field Services Alteration Crews
- Utility Procedure: TD-6436P-20 Customer Care and Billing On-Line Tech Down
- Utility Procedure: TD-6436P-21 Glossary of Terms



Gas Leak and Odor Investigation Procedure

Summary	<p>This procedure describes how field service dispatchers dispatch immediate response (IR) emergency gas service orders, and how field service personnel investigate gas leak and odor complaints when responding to IR emergency gas service orders.</p> <p>Level of Use: Informational Use</p>
Target Audience	<p>Directors, managers, supervisors, dispatchers, and personnel in field and dispatch services.</p>
Safety	<p>The potential hazards associated with gas leak and odor investigations include, but are not limited to, the following conditions and situations:</p> <ul style="list-style-type: none">• Traffic conditions.• Environmental surroundings.• Vegetation, including poison oak.• Explosion or ignition of escaping gas.• Unrestrained animals at a customer premise.• Personal injury that may occur when entering a customer premise due to tripping hazards, uneven ground, or hidden objects.
Before You Start	<p>Personal protective equipment (PPE): required when performing tasks described in this procedure include the following items:</p> <ul style="list-style-type: none">• Gloves• Hard hat (must be available)• Safety glasses (must be available)• FR traffic vest• Proper work footwear• FR clothing• Ear protection• Kneeling pad or knee pads <p>Qualifications: personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive</p>



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training by the Gas Service School to do such work.

In addition, personnel who perform steps in this procedure must become qualified on the following operator qualification (OQ) subtasks:

- [Operator Qualification Subtask 03-04, "Atmospheric Corrosion Inspection."](#)
- [Operator Qualification Subtask 09-03, "Field Service Leak Investigation."](#)

Tools and Equipment: personnel performing work described in this procedure must use only Company-approved tools and equipment. Tools and equipment required to perform this procedure include, but are not limited to, the following items:

- Combustible gas indicator (CGI)
- CGI bar probe attachment
- Impact bar or 12 inch screw driver (Phillips)
- 12-inch adjustable wrench
- Two pipe wrenches (14-inch and 18-inch)
- Squeezers for Polyethylene pipe (PE) Long handle emergency and a typical manual type squeezer (Squeezer For PE Pipe, M-12.1)
- Camera
- Blind end fittings - 1/2" & 1" cts (Plastic System Mechanical Fittings, B-91.1)
- Chamfering tools (Plastic System Mechanical Fittings, B-91.1)
- Marking pen (Sharpie)
- Plastic cutter (Cutters For PE Pipe, M-13.5)
- 3-Electrostatic grounding cables (Static Grounding Accessories For PE Pipe, M-14.1)
- Burlap (Static Grounding Accessories For PE Pipe, M-14.1)
- Grounding device (screw driver, metallic rod or shovel)
- Fire extinguisher
- Emergency Squeeze tag "Do Not Use" (Material code number-M621727)
- Leak detection solution
- Spray bottle

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- Pipe thread sealant
- Grease for meter and adapter threads
- Non-contact voltage tester
- Cell phones
- Pager

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Procedure Steps

1 Overview

- 1.1 Field service personnel must respond to gas immediate response (IR) emergency service orders in a prompt and timely manner.
- 1.2 Field service personnel must conduct an appropriate gas leak investigation when performing any of the following field activities:
 - Gas leak and odor complaints.
 - Gas pressure complaints.
 - Incident investigations.
 - Energy cost inquiry (ECI) complaints (when entry is required).

2 Dispatching An IR Field Service Order

- 2.1 Dispatch personnel must determine the appropriate field service personnel to receive the order.
- 2.2 When dispatching an IR field service order, perform the following steps:
 1. To minimize dispatching multiple IR orders to one gas service representative (GSR), consider all GSRs in the headquarters or division when determining a GSR to assign the IR order.
 2. When more than one IR order comes in from the same area, attempt to dispatch the IR order to the closest field service personnel before dispatching multiple IR orders to the same GSR. After hours, use the appropriate 212 list.
- 2.3 After determining the GSR, contact the GSR by performing the following steps.
 1. Call the GSR to get a verbal acknowledgement of receipt of the IR order (e-page as a last resort).
 2. If unable to contact the GSR (there is no mandated wait time), redirect the order to other field service personnel.
 3. Continue attempting to contact field service personnel until successful or until the list of personnel is exhausted.
 4. If no field service personnel are available, contact the dispatch supervisor for further instructions.



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2.4 When field service personnel respond, dispatch personnel must perform the following steps:

1. Confirm whether or not the Field Automation System (FAS) is available to the field service personnel.
2. Dispatch the field order (FO).

2.5 Dispatch personnel record the following information in the dispatcher remarks on the FO:

- All contact attempts.
- The estimated time of arrival (ETA) to the IR order site (for example, 13:40, not 30 min).

3 Closing Down Current Field Service Work To Proceed To An IR Site

3.1 IF an IR order is received while planning or conducting a Company (non-customer) work order,
THEN perform the steps in this section;

OTHERWISE, skip to Step 3.2 below.

1. Determine what to do with the current work order according to the following instructions:
 - a. IF work has not started,
THEN do not start the work order
AND proceed to Step 2 below.
 - b. IF work has started and can be completed in 10 minutes,
THEN finish the work order before proceeding to the IR site;
OTHERWISE, go to Step 1.c. below.
 - c. IF the work requires more than 10 minutes to complete,
THEN make the work site safe for a return visit according to the instructions in [Section 17, "Make Safe Actions."](#)
AND then return to Step 2 below.
2. IF the work is not completed,
THEN complete the order as an 0930 with the note, "Responding to an IR request."



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3.1 (continued)

3. Contact dispatch to request a follow-up service order or reassignment to other field service personnel for completion.
4. Press the en route button on the FAS unit.
5. Proceed to the IR site.
6. Continue with [Section 4](#).

3.2 If an IR order is received while conducting a customer appointment,

THEN take the following actions:

1. Determine what to do with the current work order according to the following instructions:
 - a. IF the customer work order can be completed within 10 minutes,
THEN complete the service request;
OTHERWISE, go to Step 1.b. below.
 - b. IF the customer work order cannot be completed in 10 minutes,
THEN perform the following steps:
 - (1) Explain to the customer that the work must be interrupted because an immediate response emergency order has been received.
 - (2) Notify dispatch of the need for follow-up or reassignment to other field service personnel to complete the work order.
 - (3) Complete the work order as an 0930 with the note, "Responding to an IR request."
 - (4) IF customer issues arise,

THEN contact dispatch to have a supervisor contact the customer to resolve the issues.
 - (5) Proceed to the IR site.
 - (6) Continue with [Section 4](#).



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4 Responding To An IR Field Order

4.1 Field service personnel perform the following steps after receiving the FO.

1. Answer the call from dispatch.
2. Give dispatcher the ETA at the IR site.
 - a. Field personnel must specify the arrival time, not the amount of time needed to reach the site. (For example, state, "13:40," not, "in 30 minutes.")

4.2 Acknowledge the IR order in FAS.

OR

IF access to FAS is not immediately available,

THEN advise dispatch personnel that FAS is not available.

4.3 Press the **En Route** button on the FAS unit.

4.4 Proceed to the IR site.

5 Responding To Multiple IR Field Orders

5.1 IF multiple IR orders are received in the same area and there are no additional field personnel able to respond within a reasonable time,

THEN perform the following steps:

1. Proceed to the closest IR site.
2. Make the first IR site safe as instructed in [Section 17, "Make Safe Actions."](#)
3. Complete the first order as an 0930, note how the premises have been made safe, and note, "Responding to a second IR request."
4. Advise dispatch that the first IR site is safe and request a non-emergency follow-up FO.
5. Proceed to the next IR site closest to the current location.



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6 Procedures To Apply To All Inspections

6.1 On all service visits, field service personnel must look for gas main and service leak indicators.

1. Check for gas main and service leakage with a CGI under the following circumstances:

- Odor persists following a thorough "full" leak investigation including a meter clock test.
- Gas odor is detected outdoors, regardless of the original nature of the service visit.
- Visual evidence exists of service or main leakage (for example, dead shrubs or grass, bubbling in wet soil).
- The service visit is for an area odor.
- The service visit is for outdoor leakage or leakage at the gas meter.

2. IF ruptured plastic gas service lines are discovered,

THEN perform the following steps to protect life and property:

- a. Squeeze off ruptured plastic gas service lines that are visible and can be accessed safely.
- b. Affix blind-end fitting as described in the job definition for field service personnel.
- c. Field service personnel are qualified to install 1/2 inch or 1 inch copper tubing size (cts) blind end fittings only.
- d. If an emergency P.E. pipe squeezer was used without set gap-stops, attach tag stating: "DO NOT USE, EMERGENCY SQUEEZER USED. CUT OUT AND REPLACE BEFORE CONNECTING PE PIPE," to the body of P.E. pipe next to blind-end fitting. See [Example 1, "Do Not Use Tag."](#)
 - (1) IF emergency squeeze point is not located in the same location of the repair (blind end) fitting,

THEN attach another tag at the emergency squeeze point location on the body of PE pipe or tubing.
- e. Initiate Gas Incident Report ([Form 62-4060, "Leak Survey, Repair, Inspection, and Gas Quarterly Report \(Form "A"\)."](#) and addendum [Form 61-0548, "Gas Dig-in Leak Survey Repair, Inspection and Gas Quarterly Incident Report \(Form "A1"\)."](#)
- f. Hand off gas incident report form to M&C personnel.

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6.1 (continued)



Example 1. Do Not Use Tag

6.2 Investigate all area odor complaints as follows:

1. Attempt to determine the source of the odor (for example, mains, services, garden sprays, lumber preservatives, excessive gas odorant).

NOTE

When the source of the odor is determined to be non-gas related; (for example, garden sprays, lumber preservatives), no further action is required.

2. Notify dispatch personnel in the Resource Management Center (RMC) of the findings and whether further action is warranted.
3. Record pertinent information on the FO as instructed in [Section 6.5](#).

6.3 Conduct outside gas leak investigations with a CGI to test for escaping gas according to the following instructions:

1. Check building ventilation openings, water meter boxes, gas meter locations, gas services, gas mains, and sewer vents (if practical to do so) for the presence of gas.
2. IF a gas leak is hazardous or could become hazardous (per Utility Procedure [TD-6434P-02, "Gas Leak Grading for Field Service"](#)),

THEN perform the steps in this section;

OTHERWISE, proceed to Step 3 below.

- a. Notify dispatch operations.
- b. Make the site safe according to the instructions in [Section 17, "Make Safe Actions."](#)
- c. Call the PBX field helpline at [REDACTED] and initiate a maintenance and construction (M&C) gas leak referral case.



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6.3 (continued)

- d. Record the gas leak referral reason, case ID number, and the PBX customer service representative's (CSR's) LAN ID on the FO (for example, "20% LEL or at foundation, stood by for M&C crew, Case #012345678, PBX CSR LAN ID ABC1").
 - e. Explain to the customer that field personnel are standing by until construction personnel respond.
 - f. Provide a Service Report form listing the case ID number to the customer.
3. IF a gas leak is non-hazardous, (per [Utility Procedure TD-6434P-02, "Gas Leak Grading for Field Service"](#)),
- THEN perform the following steps:
- a. Call the PBX field helpline at [REDACTED] and initiate an M&C gas leak referral case.
 - b. Record the gas leak referral reason, case ID number, and the PBX CSR's LAN ID on the FO (for example, "small leak under service valve that is located outside and is not migrating into premises, referred to M&C, case #012345678, PBX CSR LAN ID ABC1").
 - c. Provide a Service Report form to the customer containing the following information:
 - An explanation that the gas leak is non-hazardous and that Company construction personnel contact the customer within 3 business days.
 - The case ID number.
 - d. Fill out the required information on [Form 62-4060, "Leak Survey, Repair, Inspection, and Gas Quarterly Report \(Form "A"\)."](#)
 - e. Give [Form 62-4060 \(Form "A"\)](#) to the supervisor on the following workday.
- 6.4 When a gas leak source is identified as another utility's gas main or service, immediately notify dispatch personnel in the RMC or the appropriate field services supervisor so that dispatch personnel can contact the proper utility.



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6.5 Always include the following information on the FO:

- The gas meter number.
- The index reading.
- The results of pressure determination, when required.
- Meter information from a sub-meter.
- When a Company meter is used as a test meter, the Company meter number and read information.
- The location of each gas leak.
- The volume of leakage.
- The corrective action taken in the field.
- Inside and outside lower explosive limit (LEL) readings from the CGI.

7 Approaching The Site

7.1 For safety, always adhere to the following rules when conducting gas leak investigations:

- Upon entering a customer property, always check for tripping hazards, uneven ground, unrestrained animals, and other conditions that create the potential for injury.
- Never turn on unapproved flashlights or take portable or hand-held radios or pagers into a gaseous area. Only exceptions meeting the criteria specified in [Numbered Document M-83, "Explosion-Proof Lights."](#) are permitted.
- Carry cell phones and pagers at all times.
- Always turn off cell phones when in a gaseous atmosphere, and immediately turn on when deemed safe.
- Always presume a gas leak exists until proven otherwise.
- If a gas leak is found, do not assume it is the only one.
- Do not rely on a lack of odor as an indication that there is no gas leak. Even when gas is properly odorized, the odorant can be stripped from the gas when it migrates through the ground.
- Do not turn on or off any lights or electric appliances until sure it is safe to do so.

7.2 Park vehicles away from the influence of the leak but in the line-of-sight of the structure of concern.

7.3 Look for gas main and service leak indicators on all service visits.

7.4 Call and update dispatch personnel and the supervisor.



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7.5 IF there are multiple structures of concern that have been “taped up”

OR

IF there is a single structure of concern with multiple entry points,

THEN contact the supervisor to assess the need for additional resources to control the scene, depending on the scope of the event;

OTHERWISE, proceed to Step 7.6 below.

7.6 Take note of conditions when approaching the site by perform the following steps:

1. Be alert to indications that an outside leak may be causing an inside odor.
2. Look for indications of recent or current construction, sunken trenches, washouts, sinkholes, vegetation damage, any outside odors, etc.
3. Listen for the sound of hissing gas.
4. Check the gas meter for an indication of high consumption.

7.7 In an area free of natural gas, perform the following steps to prepare the CGI:

1. Check batteries,
2. Turn on the CGI.
3. Check the sensor cap (flow block).
4. Zero the CGI.

8 Contacting The Customer



WARNING

Ringling the doorbell could cause electricity in the doorbell circuit to ignite leaking gas, causing damage to property or injury to persons in the area.

8.1 Knock on the door.

8.2 While awaiting customer response, begin investigation by checking around the outside edges of the door, the keyhole, and, if present, the mail slot.



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- 8.3 IF no one answers the door,
THEN skip to [Section 9, "Inspecting when There Is No Customer Response:"](#)
OTHERWISE, continue with Step 8.4 below.
- 8.4 When the customer opens the door, without entering the structure, immediately test the environment for the presence of gas.
- 8.5 Request admittance to the structure only after first testing the environment for the presence of gas from outside the structure.
- 8.6 IF the customer grants admittance,
THEN skip to [Section 11, "Inspecting when Access Is Granted:"](#)
OTHERWISE, skip to [Section 10, "Inspecting when Access Is Denied."](#)

9 Inspecting When There Is No Customer Response

- 9.1 Perform a perimeter investigation of accessible areas, including but not limited to checking around windows, doors, crawl space vents, attic vents, and other available openings for indications of gas leakage.
- 9.2 With a CGI, check around the foundation wall and along the gas service at the gas service riser, sewer service entrance, and water service entrance, if available, within 5 feet of the structure.
- 9.3 IF gas is discovered with continuous readings of 20% LEL or greater,
THEN perform the steps in this section;
OTHERWISE, continue with Step 9.4 below.
1. Apply "Do Not Enter" tape across all accessible entrances (for example, front door, side door, garage door).
 2. Make the site safe according to the instructions in [Section 17, "Make Safe Actions."](#)
 3. Stand by.
- 9.4 IF the gas meter is accessible,
THEN perform the steps in this section;
OTHERWISE, skip to [Step 9.5](#) below.

Gas Leak and Odor Investigation Procedure

9.4 (continued)



To avoid injury or property damage, an inside sweep of the structure is required if the CGI detects gas leakage around the structure.

1. Be aware of potential sources of leakage or odors, including leakage in mains and services and in other units in multiple-unit buildings.
2. Perform a meter spot check.
3. Record the actual gas flow.
4. IF the gas flow is not normal,

THEN shut off and seal the gas meter

OTHERWISE, leave the gas meter on.
5. Take CGI readings around the structure where access can be gained.
6. Record LEL reads and locations on the FO.
7. Leave a Service Report form advising the customer of the gas leak condition and any required action (for example, calling the Customer Contact Center at **1-800-743-5000** to arrange for access to the premises) unless the premises are multi-unit apartments where a Service Report form cannot be left.
8. Record notes on the FO as appropriate (for example, when a Service Report form cannot be left, record that information and the reason on the FO).

9.5 IF the gas meter is not accessible,

THEN perform the following steps:

1. IF there is no indication of gas leakage (for example, odor, CGI LEL readings, main or service leakage, or where indicated on service order),

THEN leave a Service Report form at the premise advising the customer of the field condition;

OTHERWISE, skip to Step 2 below.



Gas Leak and Odor Investigation Procedure

9.5 (continued)

2. IF a hazardous leak is suspected,

THEN perform the following steps:

- a. Notify dispatch personnel in the RMC and request additional assistance (for example, from a crew, leak surveyor, supervisor, or public agency such as fire or police).
- b. Take corrective action to safeguard the property and public safety while assistance is en route (for example, evacuating the building, ventilating buildings, investigating main and service leakage, shutting off curb valves, securing the site from foot traffic).

10 Inspecting When Access Is Denied

10.1 Inform the customer that a perimeter investigation is taking place that includes but is not limited to, a check for gas leakage around the following places:

- Windows
- Doors
- Crawl space vents
- Attic vents
- Other available openings

10.2 With a CGI, check around the foundation and along the gas service at the following places within 5 feet of the structure:

- The gas service riser
- The sewer service entrance
- The water service entrance, if available.
- Underground conduit(s) which may be attached to structure

10.3 IF a gas leak is discovered with CGI readings greater than 40% LEL and the customer continues to refuse entrance for an inside leak investigation,

THEN perform the Steps 1 through 3 below;

OTHERWISE, continue with Step 10.4.

1. Advise the customer that Company personnel must shut off the gas meter and vent flammable gas from the house line.



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10.3 (continued)

2. Call dispatch operations to request 911 assistance.
3. Contact the supervisor to provide notification of the situation and request any necessary deviation from standard practice.

10.4 IF the gas meter is accessible,

THEN perform the steps in this section;

OTHERWISE, skip to Step 10.5 below.



WARNING

To avoid injury or property damage, an inside sweep of the structure is required if the CGI detects gas leakage around the structure.

1. Be aware of potential sources of leakage or odors, including leakage in mains and services and in other units in multiple-unit buildings.
2. Perform a meter spot check.
3. Record the actual gas flow.
4. IF the gas flow is not normal,
THEN shut the gas meter off;
OTHERWISE, leave the gas meter on.
5. Take CGI readings around the structure where access can be gained.
6. Record LEL reads and locations on the FO.
7. Leave a Service Report form advising the customer of the gas leak condition and any required action (for example, calling the Customer Contact Center at **1-800-743-5000** to arrange for access to the premises) unless the premises are multi-unit apartments where a Service Report form cannot be left.
8. Record notes on the FO as appropriate (for example, when a Service Report form cannot be left, record that information and the reason on the FO).



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10.5 IF the gas meter is not accessible,

THEN perform the following steps:

1. IF there is no indication of gas leakage (for example, odor, CGI LEL readings, main or service leakage, or where indicated on the service order),

THEN leave a Service Report form advising the customer of the field condition at the premises;

OTHERWISE, skip to Step 2 below.

2. IF a hazardous leak is suspected,

THEN perform the following steps:

- a. Notify dispatch personnel in the RMC and request additional assistance (for example, crew, leak surveyor, supervisor, public agency - fire, police).
- b. Take corrective action to safeguard the property and public safety while assistance is en route (for example, evacuate the building, ventilate buildings, investigate main and service leakage, shut off curb valves, secure the site from foot traffic).

11 Inspecting When Access Is Granted

11.1 Advise the customer not to turn on or off (or plug or unplug) any lights, televisions, or any other electrical appliance.

11.2 Immediately upon entry, sample the atmosphere for natural gas with the CGI.

11.3 IF a continuous reading of 20% LEL or greater is obtained, indicating a potentially hazardous situation,

THEN take the actions in this step;

OTHERWISE, skip to [Step 11.4](#) below.

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11.3 (continued)



When a hazardous situation exists, people in a structure are in imminent danger of serious injury or death.

1. Immediately evacuate all people from the structure.
2. If any customers refuse to vacate the premises OR cannot be vacated without additional assistance,

THEN immediately call 911

AND advise the 911 dispatcher of the hazardous condition and the need for assistance to evacuate the structure.

3. Make the site safe according to the instructions in [Section 17, "Make Safe Actions,"](#) then return to Step 11.4 below.

11.4 If initial tests indicate that a continuous reading is between 20% LEL and 40% LEL, which is considered safe for qualified field service personnel or emergency responders,

THEN take the actions in this section;

OTHERWISE, proceed to Step 11.5 below.

1. Shut off the gas supply.
2. If necessary, contact dispatch to request assistance from the fire department AND wait for the fire department to assist with initiating ventilation before proceeding with an inside investigation, starting with Step 11.5 below.

11.5 Perform the following tests inside the structure:

1. First test with a CGI where the customer indicates the odor has been most prominent.
2. IF a basement exists,

THEN, with a CGI, check for gas leaks from the top of the stairwell before going down into the basement to investigate it.
3. Check all rooms for potential accumulation of gas (for example, the kitchen, bathroom, laundry room, and family room).



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- 11.6 Take the appropriate action called for by CGI readings as follows:
1. IF any continuous readings between 20% LEL and 40% LEL are noted,
THEN take the following actions in this step;
OTHERWISE, proceed to Step 2 below.
 - a. Shut off the gas supply.
 - b. If necessary, contact dispatch to request assistance from the fire department AND wait for the fire department to assist with initiating ventilation before continuing with the investigation.
 2. IF the CGI reading is greater than 40% LEL,
THEN proceed directly to [Section 17, "Make Safe Actions."](#)
 3. IF neither of the above situations exists,
THEN proceed to Step 11.7.
- 11.7 With a CGI, perform a perimeter investigation for indications of gas leakage that includes checking:
1. Around windows, doors, crawl space vents, attic vents, and other available openings.
 2. The foundation wall AND along the gas service at the gas service riser, gas meter.
 3. Sewer and water service entrances to the structure, if available and within 5 feet of the structure.
- 11.8 Proceed to Section 12, "Selecting the Type of Gas Leak Investigation to Conduct," to choose and complete a full or modified leak investigation.
- 12 Selecting The Type Of Gas Leak Investigation To Conduct**
- 12.1 Based on the conditions that exist and the guidelines listed in this section, select the gas leak investigation method that best ensures customer and public safety.



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12.2 Consider the following information when determining whether to conduct a full or modified gas leak investigation:

1. Read the entire FO.

OR

When the FO is dispatched by telephone or radio, ask the dispatcher for the Service History and Remarks information to check for information that could be important in determining the type of gas leak investigation to conduct. (For example, the Service History section may list previous service calls at the premises or the Remarks section may indicate a second request, "cannot locate odor" notation, or other pertinent information.)

2. Talk to the customer to obtain additional information and ask the following questions:
 - a. Can you identify the source of the odor?
 - b. Have you called Pacific Gas and Electric Company in the past to investigate a gas leak?
 - c. Is the odor restricted to one location, or is the smell in the general area?
 - d. Did you notice whether the range burners flared up (delayed ignition) when turned on?
 - e. Do you have a spa, swimming pool, gas barbecue, or gas light on the premise?
3. Observe or ask about the following potential conditions of the premise:
 - a. Is a spa visible? If so, does the spa have a buried houseline to the heater?
 - b. Does the customer have knowledge of a buried houseline from the gas meter to the house or any other gas appliance on the premise?

12.3 When any of the following conditions exist, conduct a full gas leak investigation:

- The customer cannot identify the source of the odor.
- The responding field service personnel cannot identify the source of the odor.
- The gas houseline on the premises is buried.
- There has been a prior gas leak call at the premises, as determined by checking the order history.
- Dialog with customer indicates conditions requiring a full gas leak investigation.
- Odor is present at multiple appliances and/or locations.



Gas Leak and Odor Investigation Procedure

12.3 (continued)

- An over-pressuring condition is present (for example, the pilot flame is higher than usual when an appliance is on).
- A meter spot check indicates excessive gas flow.

13 Conducting A Full Gas Leak Investigation (With A Meter Clock Test)

13.1 At the gas meter location, check for gas flow.

13.2 Perform the appropriate steps below according to the results of the gas flow check:

1. IF gas flow is excessive, indicating a possible high-volume leak,
THEN shut off the meter.
2. Explain the gas leak procedure to the customer.
3. Enlist customer help in locating all gas-burning appliances to perform the following steps for each one:
 - a. Close all pilot and burner valves on connected appliances (it is not necessary to shut off 100% automatic shut-off valves).
 - b. Leave the main gas shut-off valve open.
 - c. Soap test all upstream fittings.
 - d. When deemed helpful in attempting to isolate leakage, turn off appliance valves.
 - e. Eliminate any leaks found.
4. IF there is a sub meter that does not have a test hand but does have swivels,
THEN temporarily substitute the Company meter for the meter clock test
OTHERWISE, proceed to Step 5 below.
5. IF the sub meter does not have a test hand or swivels,
THEN temporarily install the Company meter AND use the quick-change device for the meter clock test;
OTHERWISE, proceed to Step 6 below.
6. Observe the gas meter test hand to ensure that all gas appliances are off.



Gas Leak and Odor Investigation Procedure

13.2 (continued)

7. IF excessive gas flow is detected, which may be due to a missed appliance or high-volume leak,

THEN return to [Step 1](#) above;

OTHERWISE, continue with Step 8 below.
8. Determine the gas pressure in accordance with [Utility Procedure TD-6436P-28, "Servicing Gas Regulators and Determining Gas Pressures."](#)
9. Perform the following steps at the gas meter set:
 - a. Soap test the gas meter set for leakage.
 - b. Eliminate any leakage found.
 - c. Perform a gas meter clock test for leakage as instructed in [Section 18, "Conducting a Gas Meter Clock Test."](#)
 - d. IF leakage is detected,

THEN follow the procedure in [Section 15, "Options for Repairing Gas Leaks when Found;"](#)

OTHERWISE, continue with Step 10 below.
10. Perform the following steps for each appliance:
 - a. Relight the appliance.
 - b. Soap test all exposed fittings downstream of the pilot and burner valves.
 - c. Eliminate any gas leakage found.
 - d. Correct any faulty adjustments in accordance with [Utility Procedure TD-6436P-32, "Gas Burning Appliance and Equipment Inspection/Service."](#)
11. IF an odor still exists although no gas leaks are apparent,

THEN seek out other sources of leakage and/or odors.



Gas Leak and Odor Investigation Procedure

14 Conducting A Modified Gas Leak Investigation (No Meter Clock Test)

14.1 Spot check gas meter for excessive flow,

1. Check for buried houseline.

14.2 Inspect the suspected appliance to determine whether the pilot is out.

14.3 Perform the following steps to continue the inspection:

1. Conduct a soap test of exposed fittings, the houseline, and the gas meter assembly.
2. Use the CGI to identify and isolate the suspected leak.

14.4 Correct any faulty adjustments in accordance with [Utility Procedure TD-6436P-32, "Gas Burning Appliance and Equipment Inspection/Service."](#)

14.5 Take action according to whether a leak is found as follows:

1. IF a gas leak is found,

THEN follow the procedure in [Section 15, "Options for Repairing Gas Leaks when Found;"](#)

OTHERWISE, continue with Step 2 below.

2. IF no gas leak is found but the odor still exists,

THEN seek out other sources of leakage and/or odors as specified in [Section 13, "Conducting a Full Gas Leak Investigation \(with a Clock Meter Test\)"](#) and [Section 6, Step 6.2.](#)

14.6 Perform a meter spot check of actual gas flow as follows:

1. IF the gas flow is normal,

THEN record the clock test finding "actual gas flow" on the FO;

OTHERWISE, proceed to step 2 below.

2. IF the gas flow is not normal,

THEN conduct a gas meter clock test of the customer's houseline according to [Section 13](#) and [Section 18, "Conducting a Gas Meter Clock Test."](#)



Gas Leak and Odor Investigation Procedure

14.6 (continued)

3. Be aware of a possible “does not register” (DR) meter. During a spot check, a DR meter would not indicate known pilot flow, appliance main burner load, or flow created by loosening the meter outlet connection to induce a small flow.

14.7 Advise the customer of any required action.

15 Repairing Gas Leaks

15.1 Attempt to permanently eliminate gas leakage found at an appliance valve, control, exposed house line, or adjacent fittings by taking the following actions:

1. Tighten any loose fittings.
2. Remove, dope, and re-tighten fittings.
3. Re-flare leaking tubing.
4. Replace ferrules.
5. Tighten screws and bolts.
6. Advise the customer of any required action.

15.2 Perform the following steps when considering or making a temporary leak repair:

1. Consider making a temporary leak repair when doing so does not endanger persons or property and allows the customer to continue conducting business.
2. IF a temporary repair is not practical or effective,
THEN follow the procedures in [Step 15.3](#);
OTHERWISE, continue with Step 3 below.
3. Make the temporary repair.
4. Perform the following steps at the customer site after making a temporary repair:
 - a. Advise the customer of both Company and customer responsibilities when a temporary repair is made.
 - b. Explain the action taken to repair the gas leak to the customer.
 - c. Allow time for a permanent repair to be made.



Gas Leak and Odor Investigation Procedure

15.2 (continued)

- d. Tell the customer how to expedite the permanent repair (for example, by calling a plumber or appliance dealer).
 - e. Inform the customer to expect a follow-up service visit to determine whether the leak condition is worse.
 - f. Advise the customer that if repairs are not made, gas service may be discontinued or the appliance disconnected to ensure customer and public safety.
5. Issue a follow-up Multipurpose Customer Service Order to verify that required repairs are made.

15.3 Perform the following steps to deal with a hazardous gas leak that cannot be eliminated by making a permanent or temporary repair.



A hazardous gas leak in a customer houseline (including attached appliances) is determined by a clock test of 2 cubic feet per hour (cfh) or more, or less than 2 cfh if the GSR deems the leak of gas is hazardous.



A gas leak that is within 5 feet of a structure, or that is likely to migrate to within 5 feet of the outside wall of a building, poses a hazardous threat to life and property.

1. Advise the customer of the results of the investigation and the action required to correct the hazardous gas leak.
2. Tell the customer how to expedite the permanent repair (for example, by calling a plumber or appliance dealer).
3. Explain to the customer that disconnecting the hazardous appliance or houseline can eliminate the gas leakage AND request permission to do so.



Gas Leak and Odor Investigation Procedure

15.3 (continued)

4. IF the customer grants permission,
THEN disconnect the appliance or houseline segment;
OTHERWISE, continue with Step 5 below.
5. Explain to the customer that isolation of the leaking appliance or houseline is done to ensure safety without interrupting gas service.
6. IF the customer grants permission,
THEN disconnect the appliance or houseline segment;
OTHERWISE, proceed to Step 7 below.
7. Explain to the customer that because it is the Company's responsibility to protect customer and public safety, gas service to the premise must be discontinued.
8. Discontinue the gas service.
9. Perform a houseline pressure test (for example, solid swivels or other appropriate measure) to protect the meter against over-pressure.
10. Seal the meter in accordance with the instructions in [Utility Procedure WP6435-04, "Procedures for Discontinuing Gas Service."](#)
11. Issue a Hazard Notice.

15.4 Perform the steps in this section to deal with a non-hazardous gas leak that cannot be eliminated by making a permanent or temporary repair.

1. Advise the customer of the results of the investigation and the action required to correct the hazardous gas leak.
2. Tell the customer how to expedite the permanent repair (for example, by calling a plumber or appliance dealer)
3. Leave the gas service on.
4. Do not request a follow-up service order.



Gas Leak and Odor Investigation Procedure

16 Responding To Above-Grade Riser Leak Orders Generated By Customers

NOTE

The repair methods in this section apply to any leak where the service valve is attached to the riser.



WARNING

Attempting to loosen, dope, and retighten valves without proper safety equipment can result in injury.

16.1 Perform the following steps when responding to above-grade riser leak orders generated by customers:

1. Correct any leaks on the gas meter set using an approved leak repair method.
2. IF unable to make repairs because of a lack of equipment or training,

THEN perform the following steps:

- a. Contact dispatch to refer the order to a qualified GSR with the required repair equipment or training; stress the urgency of the order when there is a hazardous situation.
- b. IF the situation is hazardous,

THEN make the site safe according to the instructions in [Section 17. "Make Safe Actions:"](#) and

- (1) Field service personnel must also call the PBX field helpline at [REDACTED] and initiate an M&C gas leak referral case.
- (2) Record the gas leak referral reason, case ID number, and the PBX CSR's LAN ID on the field order (i.e., 20% LEL or at foundation, stood by for M&C crew, Case #012345678, PBX CSR LAN ID ABC1.).
- (3) Field personnel must explain to the customer that field personnel stand-by until construction personnel respond.
- (4) Field personnel provide a Service Report form to customer listing the case ID number.

Non-hazardous leaks must be rescheduled for monitoring or repair in accordance with [Utility Standard S4110, "Leak Survey and Repair of Gas Transmission and Distribution Facilities."](#)

Gas Leak and Odor Investigation Procedure

16.1 (continued)

- c. Field personnel provide the customer a Service Report form with the explanation that the gas leak is not dangerous and that construction personnel contact the customer within three business days (M-F). In this case, field personnel perform the following steps:
 - (1) Refer non-hazardous gas main and gas service line leaks to a crew for further investigation by calling the PBX field helpline at [REDACTED] and initiating an M&C gas leak referral case.
 - (2) Record the gas leak referral reason, case ID number, and the PBX CSR's LAN ID on the FO (for example, small leak under service valve that is located outside and is not migrating into premises, referred to M&C, case #012345678, PBX CSR LAN ID ABC1).
 - (3) Provide the customer a Service Report form with the explanation that the gas leak is not dangerous and that construction personnel will contact the customer within 3 business days (M-F). The Service Report form should also list the case ID number.
 - (4) If the leak is below the service valve, (i. e., at the riser threads) then initiate a [Form 62-4060 \(Form "A"\)](#) and fill out the required information.
 - (5) Give [Form 62-4060 \(Form "A"\)](#) to the supervisor no later than following work day for review.
3. Determine whether leaks that are on or below the service valve can be safely repaired with an approved leak repair method (i.e., the riser is not heavily corroded and no digging is required).
 - a. IF the leak can be repaired with an approved leak repair method,
THEN perform Steps (1) and (2) below;
OTHERWISE, skip to Step 3.b.
 - (1) Install the approved leak repair method.
 - (2) Proceed to Step 4 below.
 - b. IF the leak cannot be repaired with an approved leak repair method,
THEN perform the following steps:
 - (1) Refer the leak to gas M&C personnel.



Gas Leak and Odor Investigation Procedure

16.1 (continued)

- (2) Call PBX at [REDACTED] to create a case number to be forwarded to M&C service personnel.
 - (3) Record the case number on the completed service order.
4. Whether continuing work on the current FO, taking over the order as reassigned through dispatch, or picking up the order at a later date, perform the following steps:
 - a. Complete the required leak repair work.
 - b. Complete documentation of the leak repair as follows:
 - (1) Enter the repair information into FAS with the proper code.
 - (2) Add completion remarks to the FAS order: "Leak Repair" and the repairs made.

For example, "Leak Repair, changed valve to correct leak."
 - (3) For a job requiring a graded leak repair, complete [Form 62-4060 \(Form "A"\)](#).
 - (4) Give [Form 62-4060 \(Form "A"\)](#) to the supervisor no later than following work day for review.
5. When the field work is completed, the field service supervisor must perform the following documentation tasks:
 - a. Contact a mapping department personnel to obtain the leak number.
 - b. Record the leak number on [Form 62-4060 \(Form "A"\)](#).
 - c. Review [Form 62-4060 \(Form "A"\)](#) for completeness and accuracy.
 - d. Sign and date all forms.
 - e. Because all completed repairs must be entered into the Integrated Gas Information System (IGIS) within 10 days, immediately forward the completed [Form 62-4060 \(Form "A"\)](#) to mapping personnel for entry into IGIS.
 - f. Review the weekly field service report generated with Business Objects Scorecard Drill Down to ensure that there is a completed [Form 62-4060 \(Form "A"\)](#) for each address listed.



Gas Leak and Odor Investigation Procedure

16.1 (continued)

6. Field service clerical personnel review FAS timecards for orders completed with Completion Codes 6202 and 4023 and process leak repair accounting as follows:
 - Completion Code 6202 (valve changes) orders are charged to accounting shown on FAS Timecard.

16.2 Perform the following steps when responding to above-grade riser leak orders generated by leak survey:

1. Determine whether leaks that are on or below the service valve can be safely repaired with an approved leak repair method (i.e., the riser is not heavily corroded and no digging is required).
 - a. IF the leak can be repaired with an approved method,

THEN perform Steps (1) and (2) below;

OTHERWISE, skip to Step 1.b.
 - (1) Install the approved leak repair method.
 - (2) Proceed to Step 2 below.
 - b. IF the leak cannot be repaired with an approved leak repair method,

THEN notify the field service supervisor, who then consults with the M&C supervisor to determine whether to initiate a non-automated hand-off so that M&C personnel can complete the leak repair.
2. Whether continuing work on the FO or taking it over, perform the following steps:
 - a. Complete the required leak repair work.
 - b. Complete documentation of the leak repair as follows:
 - (1) Document the leak repair in FAS with the proper code:
 - Comp Code 6202 (G Change SM SP Svc Valve) for valve changes.
 - (2) Add the completion remarks to the FAS order: "Leak Repair" and the repairs made.

For example, "Leak Repair, changed valve to correct leak."



Gas Leak and Odor Investigation Procedure

16.2 (continued)

- (3) For a job requiring a graded leak repair, complete [Form 62-4060, "Leak Survey, Repair, Inspection, and Gas Quarterly Report \(Form A\)."](#)
 - (4) Turn any [Form 62-4060 \(Form "A"\)](#) in to the field service supervisor by the next workday for review.
 3. When the field work is completed, the field service supervisor must perform the following documentation tasks:
 - a. Advise field service clerical personnel of completed orders for graded leaks and instruct them to charge repair time to PM accounting listed on [Form 62-4060 \(Form "A"\)](#) for each order.
 - b. Review [Form 62-4060 \(Form "A"\)](#) for completeness and accuracy.
 - c. Sign and date all forms.
 - d. Because all completed repairs must be entered into IGIS within 10 days, immediately forward the completed [Form 62-4060 \(Form "A"\)](#) to mapping personnel for entry into IGIS.
 4. M&C supervisors must perform the following tasks:
 - a. Review the IGIS Open Leaks Report monthly and request mapping personnel to print information on all Grade 2+ leaks required to be repaired within the next 90 days.
 - b. Review each [Form 62-4060 \(Form "A"\)](#) to identify all riser and valve leaks that can be repaired by a GSR.
 - c. Forward the identified Grade 2+ leaks to M&C clerical personnel to issue a Customer Care and Billing (CC&B)/FAS order for field service.
 - d. After verifying the CC&B entry after clerical personnel enter it, deliver every identified [Form 62-4060 \(Form "A"\)](#) to the field service supervisor.
 5. M&C clerical personnel enter Grade 2+ leaks into CC&B as undated orders with the following information:
 - A follow-up date 90 days from the date the leak was discovered.
 - The leak number.



Gas Leak and Odor Investigation Procedure

16.2 (continued)

- The required repair in Office Remarks on the order. The following is an example of remarks for an order for a leak found on 1/2/09:

1/2/09, Leak # 1234567, PM#8765432, fuzz leak on riser threads per leak survey.

6. The field service supervisor coordinates with the scheduler and the dispatcher to ensure that field service personnel are identified and have corresponding FAS orders and [Forms 62-4060 \(Form "A"\)](#).

17 Make Safe Actions

17.1 When there is a continuous reading of 40% LEL or greater inside a structure or within 5 feet from the structure, all field service personnel and first responders must perform the following actions:

1. Evacuate the structure.
2. Remembering the fire triangle (oxygen, fuel, ignition), eliminate sources of ignition and fuel before ventilating the building.
3. Turn off the gas at the meter or curb meter valve, if accessible.
4. Contact dispatch to request 911 assistance.
5. Isolate ignition sources (for example, electric appliances, fixtures, telephone).



WARNING

Do not shut off electric service at the panel. Do not pull the electric meter to disconnect service.

6. Have the electric service cut off at the pole or splice box.
7. Notify the supervisor of the situation.
8. Attach "Do Not Enter" tape across all entryways (i.e., garage, basement) to prevent entry into the structure.
9. Wait for the fire department to assist with initiating ventilation.
10. With a CGI, check buildings in the immediate area for any indications of gas where evacuated persons have been taken.
11. With a CGI, check nearby buildings, available underground openings (such as sewers and check valve boxes), and any areas of recent excavation activities.



Gas Leak and Odor Investigation Procedure

17.1 (continued)

12. IF gas is indicated,

THEN attempt to vent manholes, meter boxes, or similar confined spaces.

18 Conducting A Gas Meter Clock Test

18.1 Check the gas meter for the ability to register small flow according to the time requirements listed in Table 1 below.

Table 1. Time Requirements for Testing Small Flow

Test Hand Dial Size	Minimum Observation Time after Dial Gears are Engaged
¼	10 seconds
½	15 seconds
1	15 seconds
2	25 seconds
5	25 seconds

18.2 Shut off all pilot and burner valves.

18.3 Leave the main appliance shut-off valves on.

18.4 Observe the gas meter test hand on the upsweep.

18.5 Meter clock test for leakage for at least the time specified in Table 2 below.

Table 2. Meter Clock Test Times

Meter size (cubic feet)	Test hand time
¼	2 minutes
½	2 minutes
1	2 minutes
2	3 minutes
5	5 minutes
10	10 minutes



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19 When To Conduct Soap Tests

- 19.1 Perform a soap test for gas leakage on all meter set assemblies, the houseline, or gas appliance connections that have been loosened, disconnected, or reconnected during the course of work or are suspected of leakage by the customer.
- 19.2 When a gas leak complaint indicates a suspected leak at a specific appliance and the clock test indicates no gas leakage, soap test the fittings downstream of the main burner and pilot valves (if accessible).
- 19.3 On manifold installations, soap test all adjacent meters and all plumbing from the service riser valve inlet to the manifold.

END of Instructions

Definitions

Lower Explosive Limit (LEL): The lowest concentration (percentage) of gas exposed to air that is needed for the gas to ignite and explode in the presence of an ignition source.

Upper Explosive Limit (UEL): The highest concentration (percentage) of gas exposed to air capable of producing an explosion in the presence of an ignition source. Together, LEL and UEL are known as the *flammable limits* of a combustible gas.

Implementation Responsibilities

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Governing Document.

[Utility Standard TD-6434S, "Gas Leak and Odor Response."](#) governs this document.

Compliance Requirement/Regulatory Commitment

[Code of Federal Regulations \(CFR\), Title 49, Subpart M—Maintenance, Section 192.703 \(c\).](#)

Reference Documents

Developmental References:

[Form 62-4060, "Leak Survey, Repair, Inspection, and Gas Quarterly Report \(Form 'A'\)."](#)



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[Form 61-0548, "Gas Dig-in Leak Survey Repair, Inspection and Gas Quarterly Incident Report \(Form 'A1'\)."](#)

[Numbered Document M-83, "Explosion-Proof Lights."](#)

[Utility Procedure TD-6434P-02, "Gas Leak Grading for Field Service."](#)

[Utility Procedure TD-6436P-28, "Gas Regulator Servicing and Pressure Determination."](#)

[Utility Procedure TD-6436P-32, "Gas Burning Appliance and Equipment Inspection/Service."](#)

[Utility Procedure WP6435-04, "Procedures for Discontinuing Gas Service."](#)

Supplemental References:

[Code of Safe Practices.](#)

Utility Procedure WP4110-12, [Attachment 1, "Gas Leak Grades."](#)

[Utility Procedure WP6436-32, "Gas Burning Appliance and Equipment Inspection/Servicing."](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

Appendices

Conversion Chart	
% LEL	% Gas in Air
80	4
60	3
40	2
20	1

To convert % LEL to % Gas in Air, divide by 20. Example: 100% LEL divided by 20 = 5% Gas in Air.

Attachments

Attachment 1, "Commonly Asked Questions."



Gas Leak and Odor Investigation Procedure

Document Recision This document supersedes Work Procedure WP6434-01, "Gas Leak and Odor Investigation," issued 06/2009.

Approved By Jimmy Morales
Manager

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Revision Notes

Where?	What Changed?
Section 7	Addition of vehicle parking guidelines and instruction regarding controlling the investigation scene.
Section 16	Addition of nonhazardous situations to be scheduled in accordance with Utility Standard S4110, "Leak Survey and Repair of Gas Transmission and Distribution Facilities." Addition of requirement of Company construction personnel to contact customer regarding nonhazardous gas leak within 3 business days (M-F).
All	Procedure moved to new format



Universal Responsibilities

Summary

This procedure provides universal responsibility guidelines for personnel who perform field service work, as well as dispatch and scheduling work.

Personnel must adhere to the work practices listed in this procedure. Failure to follow these work practices could result in disciplinary action.

Level of Use: Informational Use

Target Audience

Directors, managers, supervisors, and personnel in dispatch and scheduling and field service.

Safety

Personnel directed by this procedure must adhere to Pacific Gas & Electric (Company) standards regarding implementation of proper office and field ergonomics and the use of personal protective equipment (PPE) to minimize the risk of workplace injury.

Before You Start

Field personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by the Gas Service School to do such work.

Dispatch and scheduling personnel directed by this procedure must earn qualification to do such work or be under the direction of personnel so qualified.



Universal Responsibilities

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Universal Responsibilities

Procedure Steps

1 Using Company-Issued Personal and Other Protective Equipment

- 1.1 This section outlines the use of the following protective equipment items for gas service personnel when performing field service work:
- Personal protective equipment (PPE).
 - Company-issued flame-resistant (FR) clothing work apparel.
 - Environmental protection preparations.
- 1.2 Gas service personnel are responsible for determining the appropriate work apparel or PPE to mitigate a potential hazard that a task exposes.
- 1.3 These guidelines provide general parameters, boundaries, and limits that serve to minimize gas service personnel’s exposure to potential hazards and unsafe work conditions.
- 1.4 Gas service personnel minimize exposure to hazards and unsafe work conditions by using PPE in accordance with the following reference documents:
- [Utility Standard Practice \(USP\) 22, “Safety and Health Program.”](#)
 - [Code of Safe Practices \(CSP\).](#)
 - [Basic Safety Requirements.](#)
 - Rule P-17, “Control and Elimination of Hazards.”
- 1.5 Using personal and other protective equipment as identified and described in Table 1, “List of Personal and Other Protective Equipment,” below creates a temporary barrier between personnel and a potential hazard.

Table 1. List of Personal and Other Protective Equipment

PPE	Work Activity	Comments
Dust masks	Optional, but strongly recommended, for protection from nuisance dust/particulate. Refer to the Company’s respirator program.	CSP Section 1, General Rules, Rule #7, “Respiratory Protection.” Order Code 206757 (Dust & Mist)
Ear plugs	Required when conditions involve blowing gas or when the noise level may equal or exceed 85 decibels.	CSP Section 1, General Rules, Rule #6, “Hearing Conservation.” Approved PPE can be found in the company’s Safety Equipment Guide.



Universal Responsibilities

PPE	Work Activity	Comments
Gloves	Required when installing or removing electric meters. Optional when crawling, wrenching, and removing inspection doors unless the potential for injury is evident (such as scrapes, punctures, or exposure to broken glass).	Approved PPE can be found in the Company's safety equipment guide.
Goggles	Required when work conditions expose personnel's eyes to foreign material (such as dust, blowing dirt, or fragments). May be worn over prescription glasses in place of safety glasses when installing or removing electric meters.	<p>CSP Section 1, General Rules, Rule #4, "Face and Eye Protection."</p> <p>Approved PPE is found in the Company's safety equipment guide.</p>
Hard cap Hard hat	Required when work exposes personnel to energized conductors or apparatuses, falling or flying objects, or while working at a construction site.	<p>CSP Section 1, General Rules, Rule #3, "Head Protection."</p> <p>PPE replacement should occur once a year for suspension parts and at least every 5 years from the date of issuance for the shell.</p>
Kevlar arm guards	Optional, but strongly recommended, when work exposes personnel to open flames (for example, when adjusting oven burners or pilots).	<p>Protection is available from Grainger.</p> <ul style="list-style-type: none"> Stock #3JW56 (10" sleeve w/o thumb hole) Stock #3JW57 (10" sleeve w/ thumb hole) Stock #3JW58 (14" sleeve w/o thumb hole) Stock #3JW59 (14" sleeve w/ thumb hole) Stock #3JW60 (18" sleeve w/o thumb hole) Stock #3JW61 (18" sleeve w/ thumb hole) Stock #3JW62 (24" sleeve w/o thumb hole)



Universal Responsibilities

PPE	Work Activity	Comments
Knee pads Kneeling pad	Required when tasks involve kneeling (meter sets, appliance servicing) or crawling.	Code 20-0856 (Heavy duty knee pad) Code 01-6343 (Knee pads)
Safety glasses	Required when installing and removing electric meters, when performing work conditions that expose personnel's eyes to foreign materials (such as dust, flying particles, or electricity), or when the potential for an unexpected arc (flash) exists.	CSP Section 1, General Rules, Rule #4, Face and Eye Protection. Approved PPE is found in the Company's Safety Equipment Guide.

2 Wearing Company-Issued Apparel

- 2.1 Gas service personnel minimize the potential for injury by wearing the appropriate work apparel (outerwear), as described below in Table 2, "List of Work Apparel."

Table 2. List of Work Apparel

Apparel	Work Activity	Comments
FR coveralls	Required when work tasks involve crawling in an attic or under a structure, or when a potential hazard exists.	CSP Section 1, General Rules, Rule #11, "Clothing & Jewelry."
FR clothing	Required when work tasks involve working with voltage of 50 volts or more or exposure to open flames. Personnel performing pilot relights (not covered by the Company uniform program) must wear personal clothing made of 100% cotton or natural fiber.	CSP Section 1, General Rules, Rule #11, "Clothing & Jewelry." Natural fiber and flame-resistant clothing are not considered PPE by the State of California. However, optional long-sleeve uniform shirts offer some mechanical protection from rough or sharp surfaces.
Safari sun hat	Optional but recommended when work tasks involve prolonged exposure to direct sunlight.	NA



Universal Responsibilities

3 Using Environmental Protection Preparations

3.1 Gas service personnel minimize exposure to the environment by applying or using environmental protection preparations described in the following table:

Table 3. List of Protective Environmental Preparations

Protection	Work Activity	Comments
Animal repellent	Required when work exposes personnel to a dangerous animal (such as an aggressive dog on customer premise).	NA
Insect repellent	Optional but strongly recommended when work exposes personnel to biting or stinging insects, such as ticks, mosquitoes, fleas, bees, or wasps.	Code 62-2704 (Lotion) Code 62-2705 (Pump)
Pre-exposure poison oak barrier lotion Post-exposure poison oak cleanser and cream	Barrier lotion is optional; however, applying the lotion before poison oak exposure may help prevent irritating rashes. Post-exposure cleanser is optional; however, if used within 2 to 8 hours after exposure, it may prevent rash. Post-exposure cream is optional; however, it does provide relief from itching caused by poison oak.	CSP Section 2, "First Aid, #222, Poison Oak."
Sun block Sunscreen	Optional but strongly recommended for tasks involving prolonged exposure to the sun.	Order Code 20-5144 (SPF 30, sunscreen)



Universal Responsibilities

4 Adhering to Safety Procedures

- 4.1 Personnel performing field service, and dispatch and scheduling work, must thoroughly understand and comply with the [Code of Safe Practices](#) and safety and health procedures.
- 4.2 Personnel must work by the "Safety Pledge" (I always put safety first. I look for and act to resolve unsafe situations. I help and encourage others to act safely), and follow the [Safety Accountability Model](#).
- 4.3 When working, personnel must avoid self-injury, and injury to other personnel, customers, and the public.
- 4.4 When working, personnel must avoid damaging Company and third-party property.

5 Managing Work Performance

- 5.1 In addition to working safely, personnel must consistently complete daily work assignments according to established best practices and productivity and quality requirements. To manage daily work activities, personnel must perform the following work steps:
 - 1. Log on to the Field Automation System (FAS) laptop computer within 15 minutes from the start of a work shift unless attending a scheduled tailboard or safety meeting.
 - 2. Enter accurate and timely **En route**, **Onsite**, and **Completion** times in FAS.
 - 3. Log out of the FAS laptop computer no earlier than 15 minutes before the end of the work shift.
 - 4. If, at the end of the work shift, FAS is down or personnel completed FOs that have not transmitted away, personnel must switch to "local" status and not log off or shut down the laptop until all completed orders have uploaded.

NOTE

Refer to the monthly report cards for field services and dispatch and scheduling, and gas service representative (GSR) training reviews for additional details.



Universal Responsibilities

6 Managing Customer Appointments

- 6.1 Personnel must comply with all instructions on the field order (FO), especially the “Date Wanted” and “Time Wanted,” as outlined in [Utility Standard S6436, “Gas and Electric Field Services and Dispatch and Scheduling Operating Practices.”](#)
1. Notify the work and resource dispatcher in time for re-dispatching (such as 1 hour before the end of the appointment window) to comply with the FO instructions.
 2. If the appointment cannot be re-dispatched within the appointment window, perform the following steps:
 - Advise the customer that appointments are behind schedule.
 - Provide an estimated time of arrival.
 - Phone the customer before arriving for the appointment to notify the customer of the expected time of arrival.
- 6.2 When an appointment is missed because of a Level 2 or higher emergency or immediate response FO, the work and resource dispatcher must perform the following steps:
1. Attempt to contact the impacted customer.
 2. On contact with the customer, tell the customer why the appointment will be missed.
 3. Attempt to reschedule the appointment for the next day or at end of the emergency event.
 4. Update the FO by adding a note about the customer contact.

7 Using Personal Identification Cards

- 7.1 According to [California Public Utilities Code, Section 708](#), when requesting entry into any building or structure on a customer premise, personnel must perform the following steps:
1. Identify self.
 2. State the purpose of the visit.
 3. Show Company identification (ID) card.

8 Maintaining Customer Relations

- 8.1 Personnel must maintain neat personal appearance while performing duties.
- 8.2 Gas service mechanics and gas service representatives must wear Company-issued uniforms, as referenced in [Utility Standard S6019, “Pacific Gas and Electric Company Uniforms.”](#)



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- 8.3 Call the customer before the appointment.
- Call as early in the day as possible for all work requiring entry to a premise.
 - Inform the customer of the approximate time of arrival.
 - Confirm how to contact the customer if the time commitment cannot be met.
- 8.4 Respect customer property.
- Do not smoke or have lunch on a customer premise.
 - Do not take shortcuts over fences or through flowerbeds.
- 8.5 Do not enter a customer premise unless a legally liable adult is present.
- 8.6 Field service personnel must comply with [USP 1, "Personnel Conduct,"](#) as well as the following provisions:
1. Be courteous, polite, and helpful whenever possible.
 2. Make every effort to keep promises and commitments.
 3. At the conclusion of the service visit, provide the customer with a legible Service Report form that clearly indicates what work was performed and includes any other relevant information as a record of actions taken on the job.
 4. Discuss with the customer any actions taken while on the premise.

NOTE

Refer to the Code of Conduct Handbook,
*Standards for Personal Conduct and Business
Decisions*, for additional guidance.

9 Responding to Customer Inquires

- 9.1 If a customer inquiry cannot be answered, or if a customer requires payment arrangements, instruct the customer to call the Customer Contact Center at **1-800-743-5000**.
- 9.2 Do not debate or argue with a customer.



Universal Responsibilities

- 9.3 Do not blame other departments or make derogatory comments about the Company, its policies, procedures, equipment, or technology.

NOTE

Information concerning customers is confidential and is not to be discussed. Do not use information obtained from a customer record to discuss usage comparisons with another customer.

10 Maintaining Company-Assigned Measurement Instruments

- 10.1 Field service supervisors must maintain all gas-leak detection and carbon monoxide (CO) equipment inspection and calibration maintenance records. Maintain instruments, including continual routine calibration, according to manufacturer's specifications at a minimum. Perform equipment maintenance according the following schedule:

- Maintain monthly for carbon monoxide (CO) instruments.
- Maintain monthly for methane/gas leak detection instruments.
- Perform equipment inspection or maintenance more frequently if specified by the manufacturer.

11 Using Field Automation System (FAS) Laptop Computer

- 11.1 Use and maintain the laptop computer equipment, including care and cleaning, according to the manufacturer's specifications.
- 11.2 Ensure that the laptop computer is not damaged or destroyed due to improper use or abuse.
- 11.3 Secure the laptop computer against loss and/or theft.

12 Using SmartMeter Programming Device

- 12.1 Use and maintain the programming device, including care and cleaning, according to the manufacturer's specifications.
- 12.2 Ensure that the programming device is not damaged or destroyed due to improper use or abuse.
- 12.3 Secure the programming device against loss and/or theft.



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13 Operating Company Vehicles

13.1 Personnel must comply with the following rules when operating a Company vehicle:

1. Possess a valid California driver's license when operating a Company vehicle.
2. Field service personnel must report any change in license status to their immediate supervisor as soon as is practically possible.
3. Be familiar with and obey all state vehicle codes, local traffic rules and ordinances, traffic control signs, posted speed limits, parking restrictions, and all Company rules governing vehicle operation. ([Code of Safe Practices, Section 3, Rule 302.](#))
4. Keep the FAS laptop computer in the closed position when the Company vehicle is in operation.
5. Place cones at the front and rear bumpers of the Company vehicle whenever parked. Keep the cones in place until all FAS work is complete.
6. Perform a visual walk around inspection of the Company vehicle and the immediate area before removing the cones and moving the Company vehicle.

14 Maintaining Company-Assigned Vehicles and Equipment

14.1 Personnel must safeguard, maintain, and inspect all Company tools and equipment. Take the following steps to maintain Company-assigned vehicles and equipment:

1. Keep the vehicle neat and orderly.
2. Clean litter from the vehicle bed and cab.
3. Properly secure equipment and materials in the vehicle.
4. Stock fitting boxes, etc., with items necessary to perform job duties. To prevent overloading, do not carry unnecessary stock.
5. Arrange vehicle meter stock so that the oldest gas and electric meters are set first.
6. Tag, cap, and place all meters removed from the field in the appropriate meter cages for transportation to the gas and electric meter plant (GEMP) at the earliest opportunity or at a minimum, once a week.
7. Lock all vehicle doors and bins when the vehicle is not in use.
8. When taking Company vehicles home, remove and store the FAS laptop computer in the residence or a locked storage bin.
9. Park the Company vehicle at the residence or other agreed upon secure area.



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15 Inspecting and Servicing Customer-Owned Appliances and Equipment

- 15.1 Ensure safe and efficient use of energy supply by safely accessing and servicing customer-owned gas burning and/or electric appliances.
- 15.2 If appliance inspection/service cannot be performed, notify the supervisor for a resolution to the issue.
- 15.3 Contact the supervisor before deviating from a utility standard.

16 Referring Customers to a Specific Dealer, Contractor, or Service Agent

- 16.1 When servicing exceeds the provisions outlined in [Utility Standard S6436, Field Service Procedure, "Gas Burning Appliance and Equipment Inspection/ Servicing,"](#) and [Field Service Procedure, Electric Service and Electric Range/Water Heater Servicing "Electric Service and Electric Range/Water Heater Servicing,"](#) do not refer the customer to any specific service agent, plumber, or dealer.
- 16.2 If the appliance is within the warranty period, refer the customer to a dealer or plumber, or the classified section of the telephone book, even if the customer insists on a specific dealer/contractor recommendation.

17 Completing In-Field Service Requests

- 17.1 Complete a multipurpose customer service order form for all in-field customer requests.
- 17.2 Investigate all immediate response in-field service requests that indicate the existence of a hazard, according to the service guarantee (Quality Assurance Standards) guidelines.

18 Handling Incomplete Field Orders

- 18.1 If an FO cannot be completed because of access problems, facilities not installed, facilities not ready, or facilities not inspected, perform the following steps:
 - 1. Complete the FO as a "can't get in" (CGI).
 - 2. Indicate on the order the reason that the FO could not be completed.
 - 3. Leave a Service Report form at the customer premise advising the customer to call the Customer Contact Center at **1-800-743-5000**, as outlined in the [Customer Service Support Field Procedures, "Establishing Electric Service,"](#) and ["Establishing Gas Service."](#)



Universal Responsibilities

- 18.2 If future arrangements are made with the customer or contractor (because the original commitment could not be met due to a scheduling conflict), perform the following steps:
1. Complete the FO as a "CGI."
 2. Notify the appropriate resource management center (RMC) so the "Date Wanted" on the original FO can be changed in Customer Care & Billing (CC&B).
- 18.3 If the customer initiates an appointment change, perform the following steps:
1. Complete the FO as a "cancel per customer."
 2. Advise the customer to call the Customer Contact Center at **1-800-743-5000** to schedule a new appointment.
- 18.4 If technology becomes unavailable and work is dispatched via radio, complete a multipurpose customer service order form that day and submit it to the immediate supervisor.

NOTE

Record complete street and city names (do not abbreviate on multipurpose customer service form).

- 18.5 If the individual field terminal becomes temporarily unavailable and work is still available via FAS, perform the following steps:
1. Complete the work using a multipurpose customer service order form until the individual field terminal becomes available.
 2. When the individual field terminal becomes available, enter the completion data for work performed that was documented on paper into FAS.
 3. Document actual en route, onsite, and completion times in the remarks section of the FAS order.
 4. Notify the appropriate RMC so the remarks section of the FO(s) can be updated by the work and resource dispatcher to reflect that the individual field terminal was unavailable for correct time stamping of the FO.
- 18.6 If a hazard notice is left while technology is unavailable, advise the appropriate RMC to post a note in CC&B.

19 Handling Hazards at Company Facilities or Property

- 19.1 Be alert for hazards on Company facilities/property. Field service personnel must take immediate, appropriate action to eliminate such hazards, as outlined in [Field Service Procedure, "Unsafe or Hazardous Conditions."](#)



Universal Responsibilities

20 Atmospheric Corrosion Inspection

20.1 Field personnel must inspect all gas meter sets for atmospheric corrosion and take the appropriate action when their job duties bring them to the gas meter.

1. If there is surface rust or oxidized metal and the original pipe wall thickness has not diminished, re-coat (paint or wrap) the affected parts.
2. If there is severe rust with scaling, pitting or blistering, the integrity of the metal is compromised, the original pipe wall thickness has diminished, the gas meter is set below the minimum ground clearance required or the service valve or regulator is buried or making soil contact take the following actions:
 - Replace all affected parts, rebuild the meter set to standards and re-coat (paint or wrap).
 - If the affected parts are up-stream of the service valve or on the service riser, create a request for maintenance and construction personnel to make the appropriate repairs.

NOTE

For installation, paint, and pipe wrap references, see the following gas numbered documents:

- [J-12, "Hard Case Meter Installation."](#)
- [E-25, "Field Wrapping With Cold Applied Tape."](#)
- [E-31, "Specifications for Application of Protective Coating to Meters, Regulators Valves, and Connected Piping."](#)

21 Handling Complete Electric Outs

21.1 If the electric service cannot be restored, and is not a customer issue, perform the following steps:

1. Notify the appropriate RMC and request troubleman.
2. Advise the customer of estimated arrival time of troubleman.

NOTE

Troublemens must provide customer(s) with an estimated time of repair (ETOR) and leave a Service Report form.

Universal Responsibilities

21.1 (continued)

NOTE

The RMC must issue an assist (ZZ) FO for troubleman to complete.

3. Make a note on the FO indicating the estimated arrival time of troubleman personnel.

END of Instructions

Definitions	NA
Implementation Responsibilities	NA
Governing Document	Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices," governs this document.
Compliance Requirement/ Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>California Public Utilities Code, Section 708</p> <p>Code of Safe Practices.</p> <p>Customer Service Support Field Procedures:</p> <p>"Electric Service and Electric Range/Water Heater Servicing"</p> <p>"Establishing Electric Service."</p> <p>"Establishing Gas Service."</p> <p>"Gas Burning Appliance and Equipment Inspection/ Servicing"</p>



Universal Responsibilities

[“Unsafe or Hazardous Conditions”](#)

Numbered Documents:

[E-25, “Field Wrapping With Cold Applied Tape”](#)

[E-31, “Specifications for Application of Protective Coating to Meters, Regulators Valves, and Connected Piping”](#)

[J-12, “Hard Case Meter Installation”](#)

[Standards for Personal Conduct and Business Decisions](#)

[USP 1, “Personnel Conduct”](#)

[USP 22, “Safety and Health Program”](#)

[Utility Standard S6019, “Pacific Gas and Electric Company Uniforms”](#)

Supplemental References:

NA

Appendices NA

Attachments NA

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Universal Responsibilities

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Revision Notes

Where?	What Changed?
NA	Document placed in new template.



Handling Gas SMC, Electric TOU Meter Change, and GRRP Field Orders

Summary This procedure outlines the process for managing gas scheduled meter changes (SMC), electric time of use (TOU) meter changes, and gas regulator replacement program (GRRP) field orders.

Level of Use: Information Use

Target Audience Managers, supervisors, and dispatch personnel who assign SMC, electric TOU meter change, and GRRP field orders.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must either work under the direction of qualified personnel, or receive training by qualified personnel to do such work.



Handling Gas SMC, Electric TOU Meter Change, and GRRP Field Orders

Procedure Steps

1 Handling SMC, TOU, and GRRP Field Orders

1.1 Dispatchers perform the following duties:

1. In the field automation system (FAS) Dispatch Application, use the "Order Status" (dated file) and "Undated Order" (undated file) viewports, along with the weekly compliance plan, to manage the distribution of SMC, TOU, and GRRP field orders.
2. Communicate deviations to the SMC, TOU, and GRRP weekly compliance plan to local field service and dispatch supervisors.

NOTE

Field service and dispatch supervisors and work and resource schedulers adjust the weekly compliance plan as needed.

3. Dispatch field orders to the lowest-cost resource available that has the skill level to complete the requested field activity.
4. Notify field personnel of the pending appointment window before dispatching an SMC, TOU, or GRRP field order with a scheduled appointment.
5. Return any incomplete dispatched SMC, TOU, and GRRP field orders to the undated file.

NOTE

Do not cancel any SMC, TOU, or GRRP field orders. They will not be returned to FAS.

6. Advise the dispatch supervisor of changes to the plan as they occur.

END of Instructions



Handling Gas SMC, Electric TOU Meter Change, and GRRP Field Orders

Definitions

NA

**Implementation
Responsibilities**

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.

**Governing
Document**

[Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices,"](#) governs this document.

**Compliance
Requirement/
Regulatory
Commitment**

NA

**Reference
Documents**

Developmental References:

NA

Supplemental References:

NA

Appendices

NA

Attachments

NA



Handling Gas SMC, Electric TOU Meter Change, and GRRP Field Orders

**Document
Revision**

NA

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Revision Notes

Where?	What Changed?
NA	Document was moved to new format.



Managing Field Automation System (FAS) Duplicate Field Orders

Summary

This procedure outlines the steps for managing duplicate field automation system (FAS) field orders (FO) in the FAS dispatch application.

Managing duplicate FOs includes creating and deleting them from the FAS dispatch application.

Level of Use: Informational Use

Target Audience

Dispatch personnel

Safety

Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start

Personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by qualified personnel to do such work.



Managing Field Automation System (FAS) Duplicate Field Orders

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4	Completing Duplicate Field Orders	10
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Procedure Steps

1 General Information

1.1 Duplicate FOs conform to the following naming conventions:

- The first character of a duplicate field order identification number (FO ID) must be an alpha character (excluding "T").
- The character changes on December 1st of each year to eliminate redundant FO IDs, and it corresponds to the time period in which the duplicate FO was created. For example, "A" = 12/06/02 – 11/30/03, "B" = 12/01/03 – 11/30/04, "C" = 12/01/04 – 11/30/05, and so on.
- Handle duplicate FOs like any other FO.

1.2 Use duplicate FOs under the following conditions:

- Field personnel need assistance.
- The dispatcher creates a duplicate FO for field personnel providing assistance. For example, when field personnel need help from other field personnel to complete a large gas meter change.
- Field work for master-metered account when work is requested at sub-metered or un-metered premises.

1.3 Dispatchers cancel the originally issued Customer Care and Billing (CC&B) FO on a master-metered account for work requested at sub-metered or un-metered premises (this does not include Outage Information System Outage Management Tool [OIS-OMT] outage orders). An example of this kind of FO cancelation is when a structural fumigation shut-off or carbon monoxide (CO) investigation is requested at sub-metered or un-metered premises. The duplicate FO ensures that field personnel are dispatched.

Managing Field Automation System (FAS) Duplicate Field Orders

2 Creating Duplicate Field Orders

NOTE

Do not create a duplicate FO for an OIS-OMT outage order (9000 series job code).

2.1 To create duplicate FOs, perform the following steps:

1. From any order status viewport in the FAS dispatch application, double-click the selected **Field Order Summary** line (row) for the FO that is to be duplicated. The dispatch application displays the order detail screen as shown in Figure 1 below.

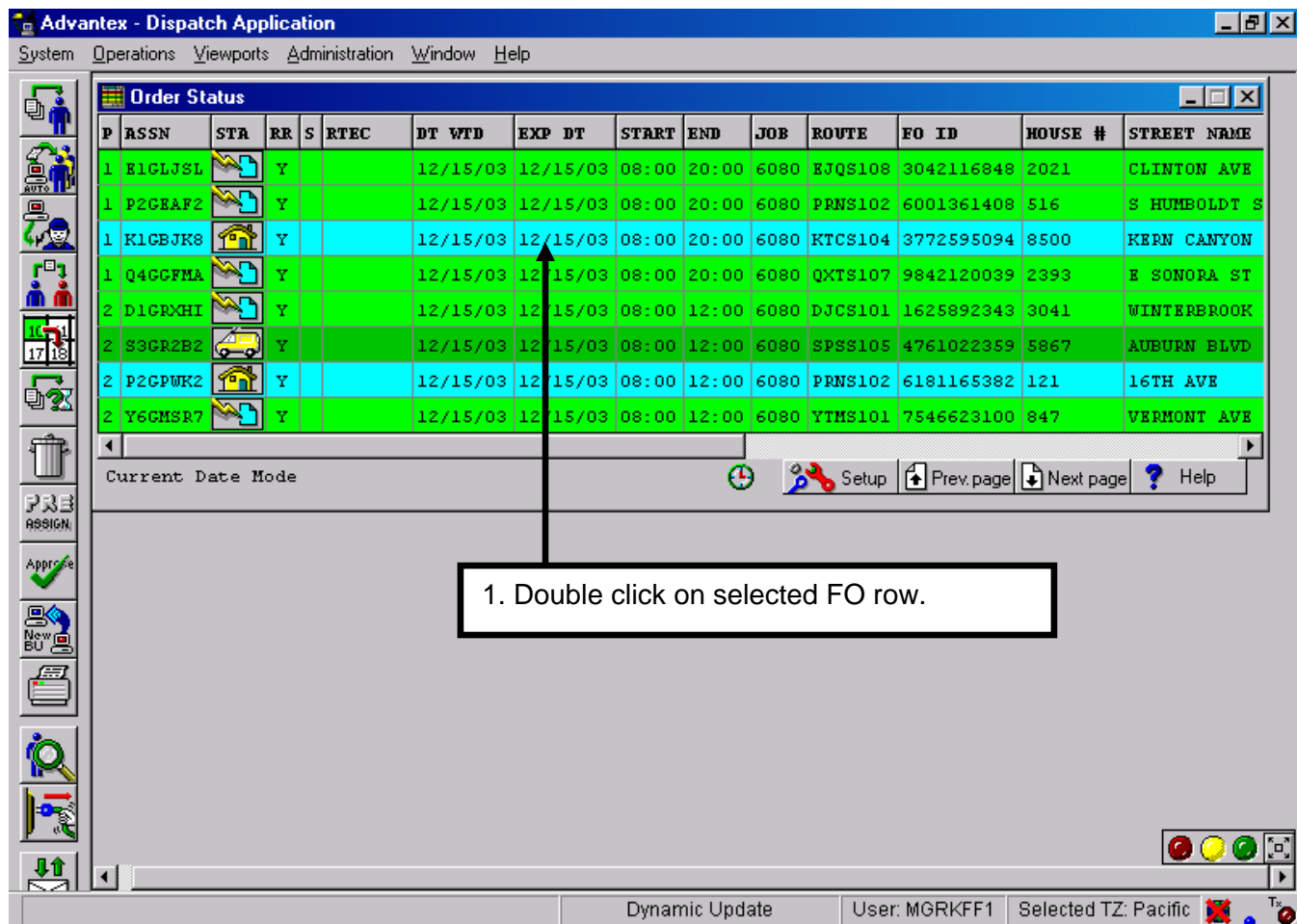


Figure 1. Dispatch Application – Order Status Screen

2. At the bottom of the order detail screen, click the **Dupl.** button. The duplicate order dialog box appears as shown in [Figure 2, “Order Detail Screen and Duplicate Order Dialog Box.”](#)

Managing Field Automation System (FAS) Duplicate Field Orders

2.1 (continued)

3. Enter the **Tech #** of the field personnel assigned to the duplicate FO.

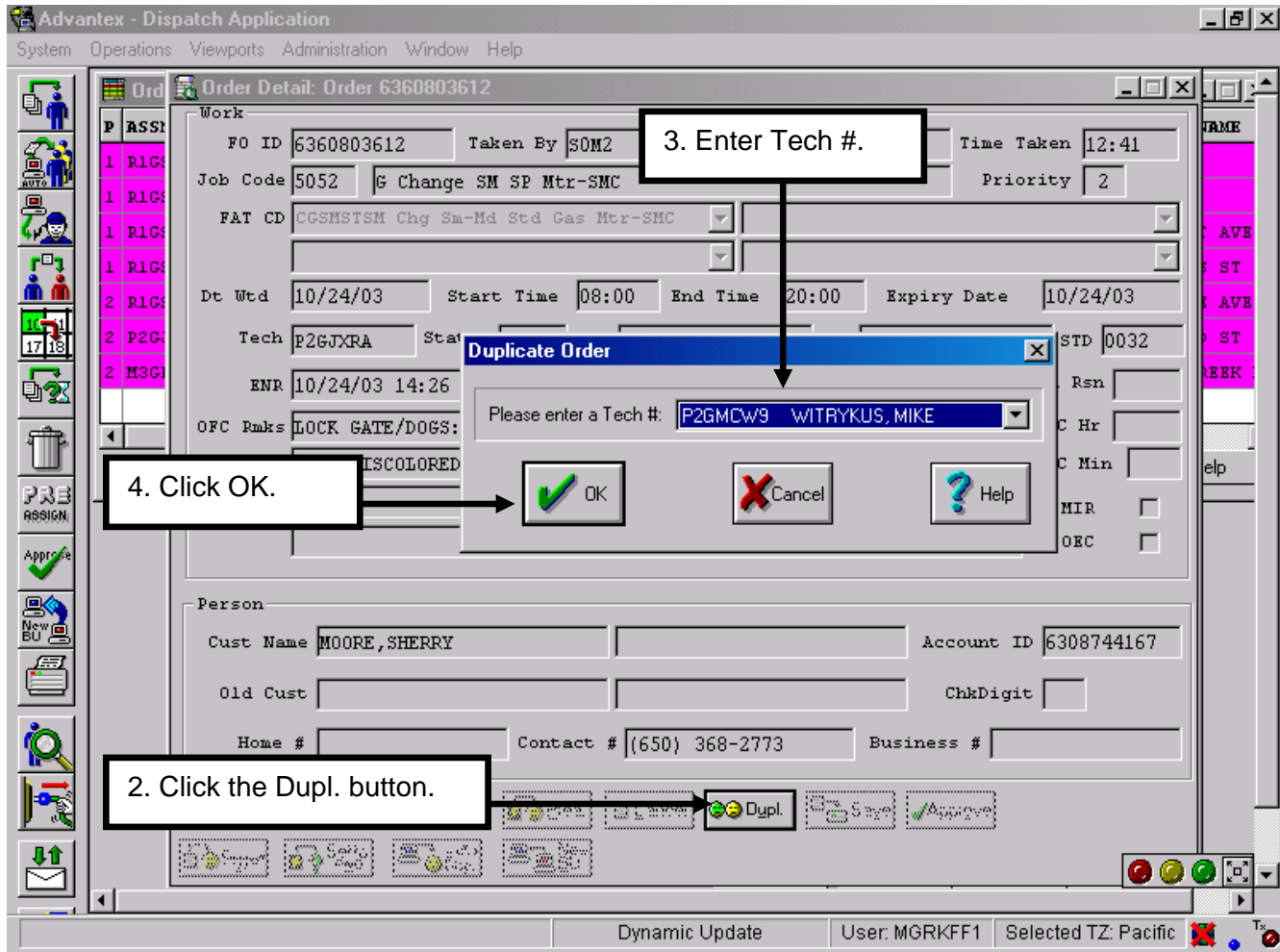


Figure 2. Order Detail Screen and Duplicate Order Dialog Box

4. Click **OK**. The operation confirmation dialog box appears.
5. In the operation confirmation dialog box, verify that the correct field personnel is assigned on the duplicate FO as shown in [Figure 3, "Operation Confirmation Dialog Box."](#)
6. Click **OK**. The application displays the "Attention!" dialog box to confirm the creation of a duplicate FO.

Managing Field Automation System (FAS) Duplicate Field Orders

2.1 (continued)

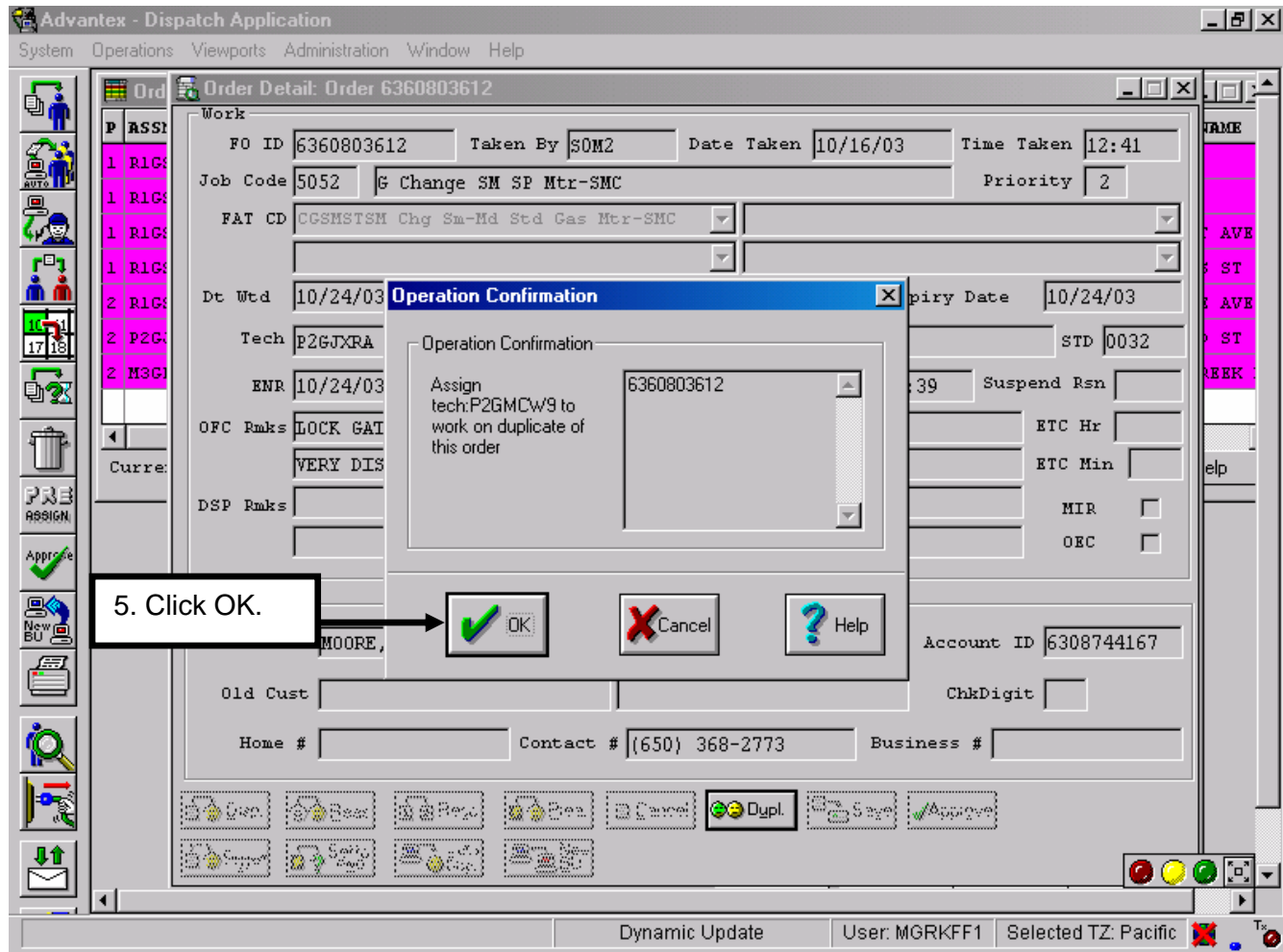


Figure 3. Operation Confirmation Dialog Box

7. Click **OK** to close the “Attention!” dialog box as shown in [Figure 4, “Attention Dialog Box.”](#)
8. Click the “X” in upper right corner of the order detail screen to close the window.

Managing Field Automation System (FAS) Duplicate Field Orders

2.1 (continued)

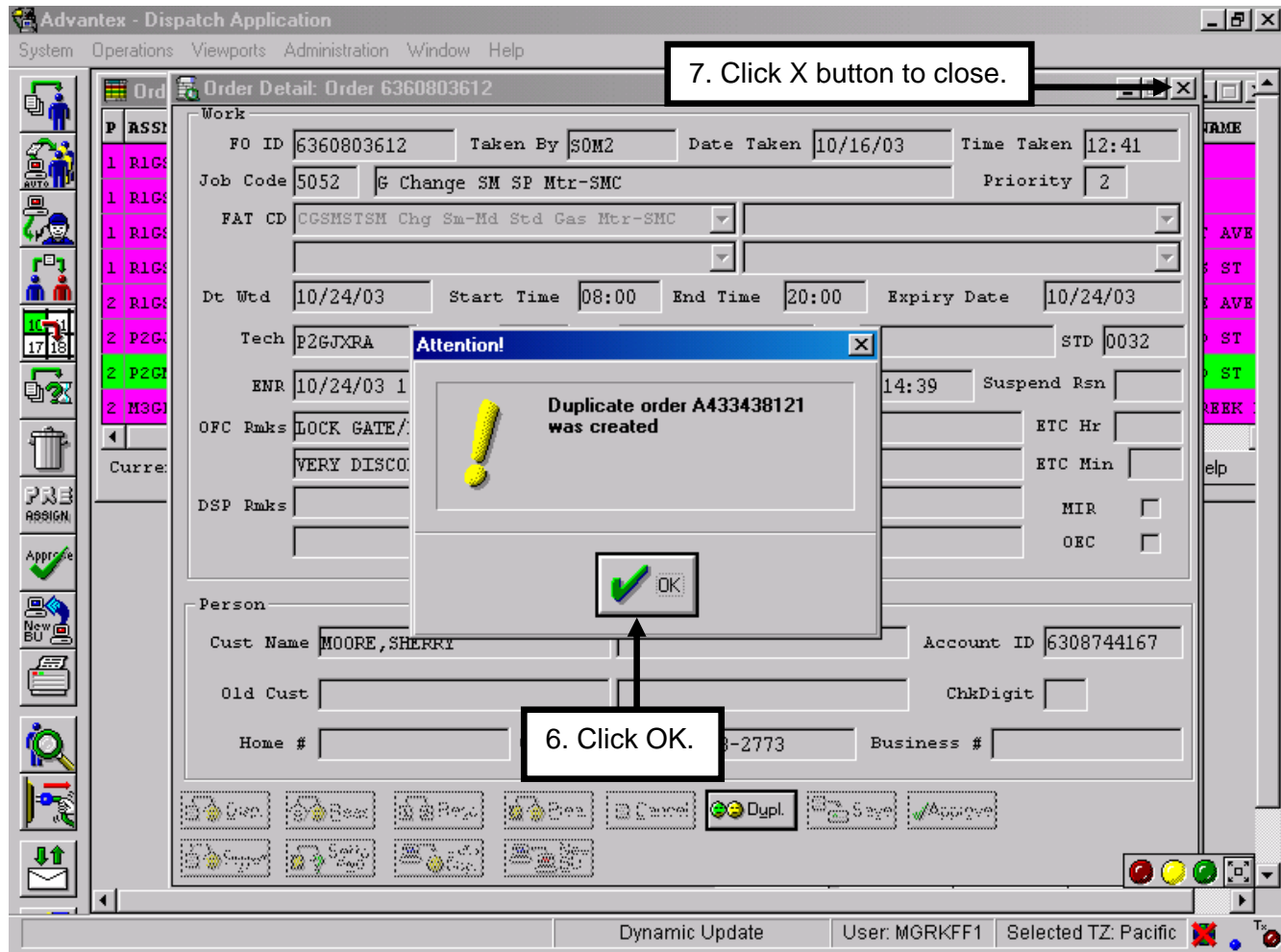


Figure 4. Attention Dialog Box

9. The duplicate FO appears in dispatched status in all order status viewports as shown in [Figure 5, "Duplicate Order in Order Status Viewport."](#)

Managing Field Automation System (FAS) Duplicate Field Orders

2.1 (continued)

Order Status

P	ASSN	STA	RR	S	RTEC	DT	WTD	EXP DT	START	END	JOB	ROUTE	FO ID	HOUSE #	STREET NAME
1	R1GSJN4	✓	Y			10/24/03						RRGS108	5919391692	357	28TH ST
1	R1GSJN4	✓	Y			10/24/03						RRGS109	6024982560	1214	YORK ST
1	R1GSJN4	✓	Y			10/24/03	10/24/03	08:00	20:00	5052	RRGS109	5753975855	323	PROSPECT AVE	
1	R1GSJN4	✓	Y			10/24/03	10/24/03	08:00	20:00	5052	RRGS110	5629086609	607	PRENTISS ST	
2	R1GSJN4	✓	Y			10/24/03	10/24/03	08:00	12:00	5052	RRGS111	6438518739	126	DEL VALE AVE	
2	P2GJXRA	✓				10/24/03	10/24/03	08:00	20:00	5052	PRNS108	6360803612	1737	MARYLAND ST	
2	P2GMCW9	✓	Y			10/24/03	10/24/03	08:00	20:00	5052	PRNS108	A433438121	1737	MARYLAND ST	
2	M3GLABF	✓	Y			10/24/03	12/31/03	01:00	23:59	5052	MJNS102	2453129589	294	BIRCH CREEK DR	

Current Date Mode Setup Prev. page Next page Help

Duplicate order created. Dynamic Update User: MGRKFF1 Selected TZ: Pacific

Figure 5. Duplicate Order in Order Status Viewport

Managing Field Automation System (FAS) Duplicate Field Orders

3 Using the Task Bar to Create Duplicate Field Orders

3.1 To create a duplicate FO using the task bar, perform the following steps:

1. From the order status screen in the dispatch application, select **Operations / Duplicate Order...** The duplicate order dialog box appears as shown in Figure 6 below.

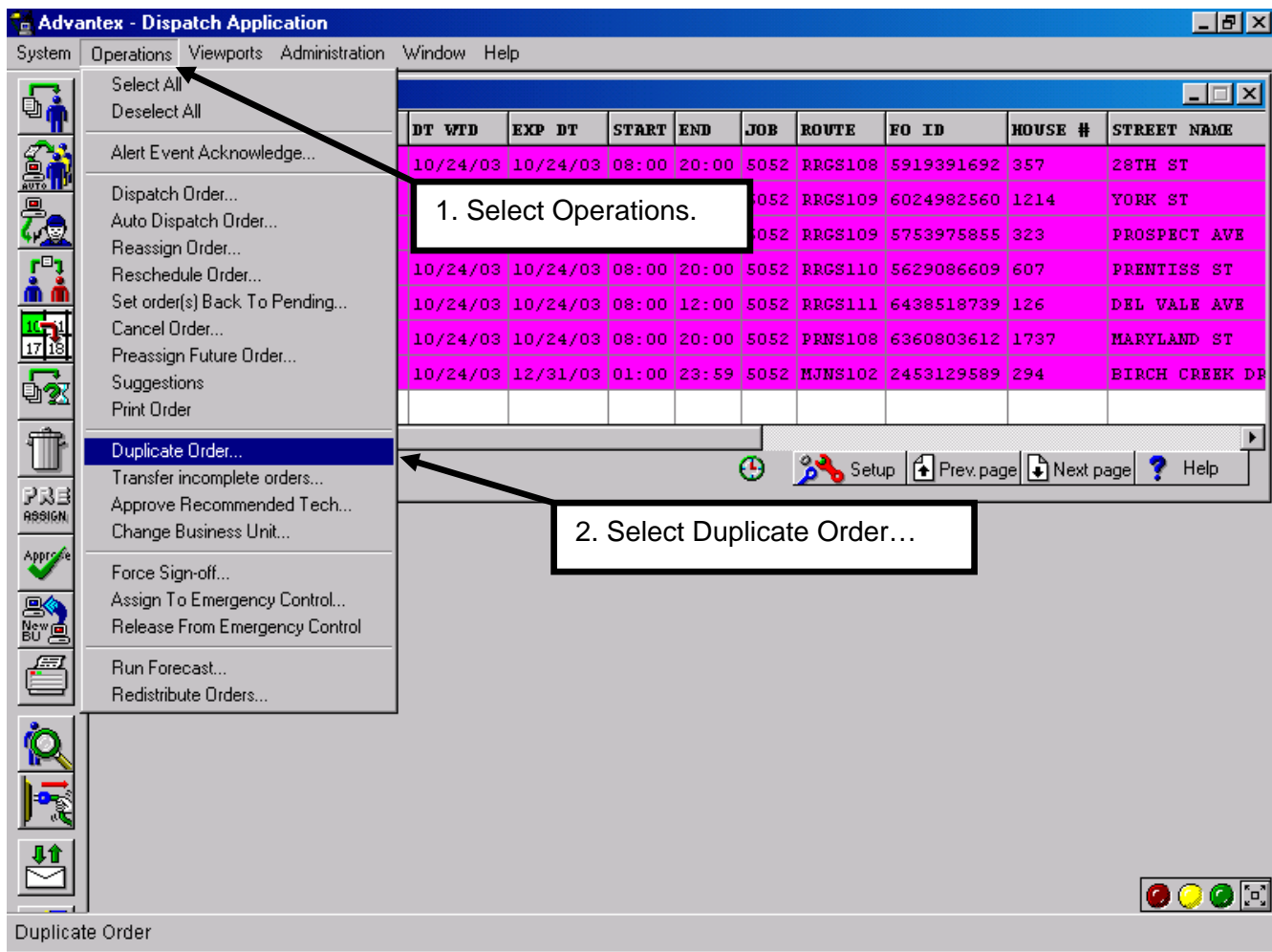


Figure 6. Operations / Duplicate Order Menu Item

2. Enter the FO ID for the FO to duplicate as shown in [Figure 7, "Duplicate Order – FO ID Dialog Box."](#)
3. Click **OK**. The order detail screen appears.

Managing Field Automation System (FAS) Duplicate Field Orders

3.1 (continued)

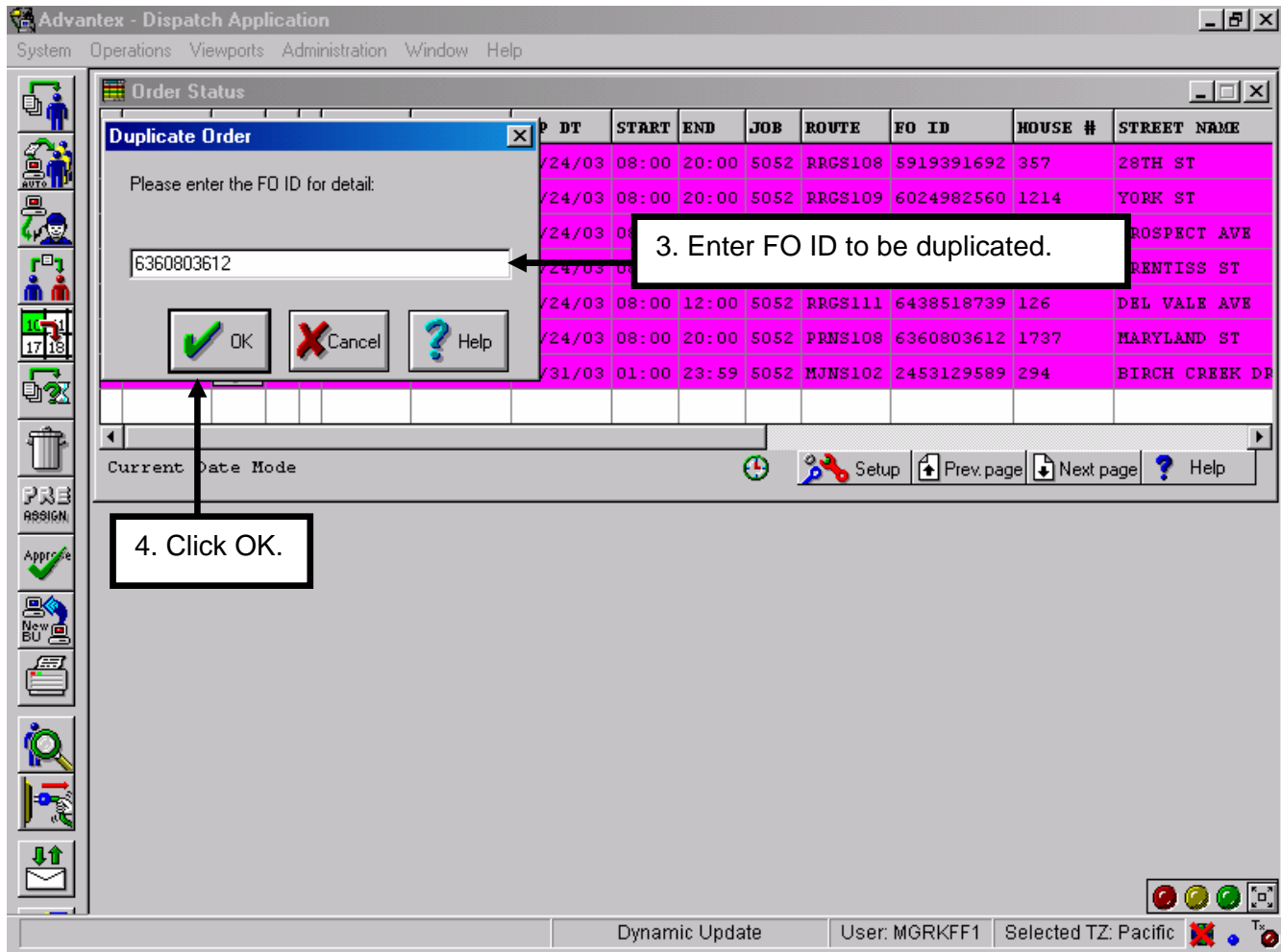


Figure 7. Duplicate Order – FO ID Dialog Box

4. At the bottom of the order detail screen, click the **Dupl.** button.
5. Enter the **Tech #** of the assigned field personnel for the duplicate FO.
6. Click **OK**. The operation confirmation dialog box appears.
7. In the operation confirmation dialog box, verify that the correct field personnel is assigned on the duplicate FO.
8. Click **OK**. The application displays the “Attention!” dialog box to confirm the creation of a duplicate FO.
9. Click **OK** to close the “Attention!” dialog box. Click “X” in upper right corner of the order detail screen to close the window.



Managing Field Automation System (FAS) Duplicate Field Orders

4 Completing Duplicate Field Orders

4.1 Dispatchers should complete the following steps for duplicate FOs:

- At the person level in CC&B, make a note of any hazards.
- If a meter was changed out, issue a meter change request to the field personnel.
- At the person level in CC&B, make a notation of any access issues, such as Can't Get In (CGI).
- For any activity, except for start service orders (turn-ons, set meter) that affects billing, issue a new FO. The customer contact center is responsible for created start service orders.

4.2 Entering Duplicate Field Order Completion Information

- Enter all field activity completion information related to billing or metering, except for completion information for the sub-metered or un-metered premises on the original FO.
- Enter completion information for sub-metered or un-metered premises on the duplicate FO.

4.3 Viewing Duplicate Field Order Completion Information

Use FAS Online Query to view duplicate FOs. Duplicate FOs are not linked to CC&B, therefore the FAS system does not upload completion information entered on a duplicate FO to the CC&B.

5 Canceling Duplicate Field Orders

5.1 To cancel duplicate FOs, perform the following steps:

NOTE

Sorting information on the order status "Sort By Address" viewport allows easier viewing of duplicate FOs. For information on how to filter and group information on the order status "Sort By Address" viewport, refer to [Utility Procedure WP6436-05, "Using the FAS Order Status Sort By Address Viewport."](#)

1. From any "Order" viewport, select the duplicate FO line item (usually the last one issued) to be canceled as shown in [Figure 8, "Order Status Sort By Address – Cancel Order Icon."](#)

Managing Field Automation System (FAS) Duplicate Field Orders

5.1 (continued)

NOTE

More than one line item can be selected.

2. For the selected FO line, press and hold down the right mouse button.
3. Drag the selected FO line and drop it on the **Cancel Order** icon. The system displays the operation confirmation dialog box.

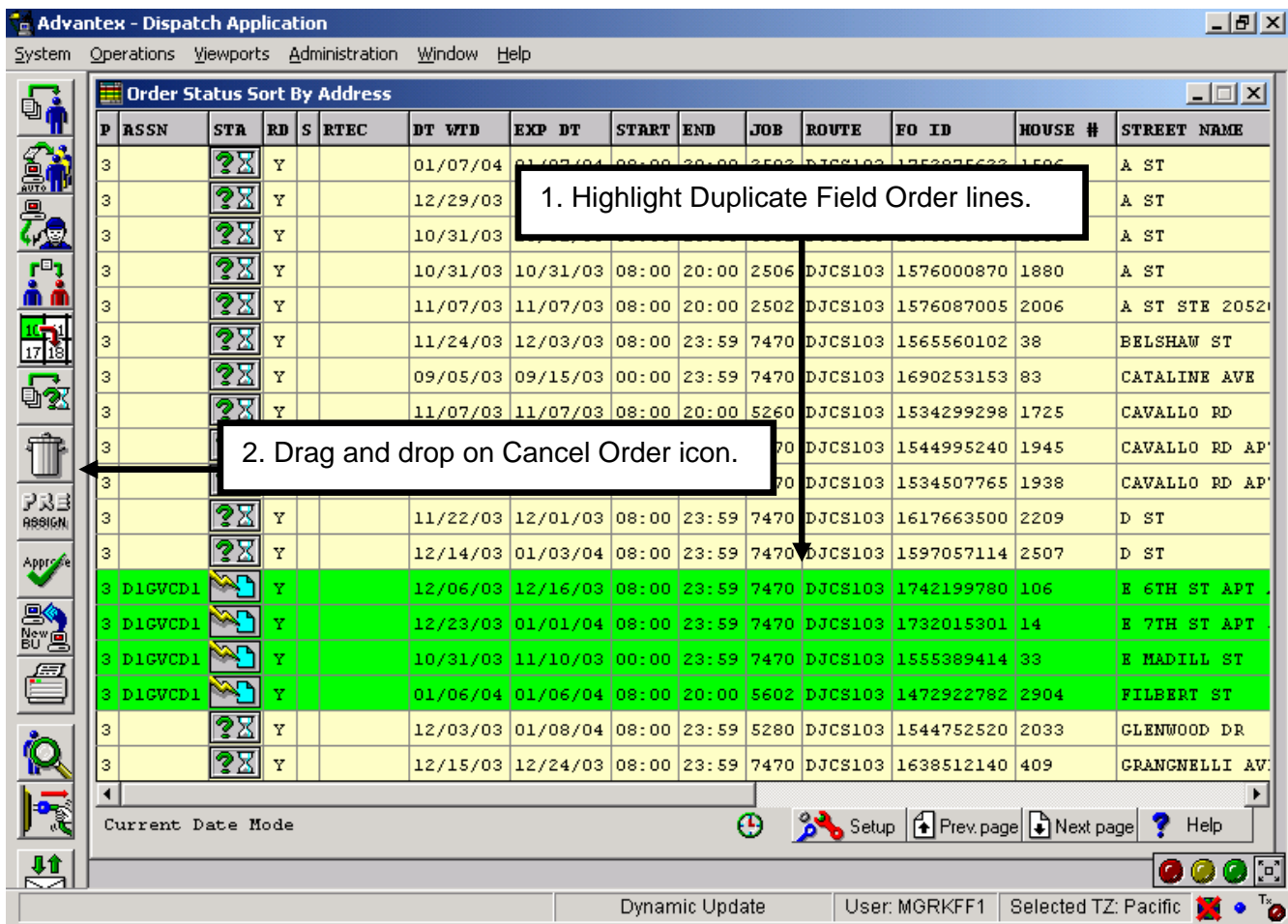


Figure 8. Order Status Sort By Address – Cancel Order Icon

4. In the operation confirmation dialog box, verify that the FO number is the number for the FO that is to be canceled as shown in [Figure 9, "Operation Confirmation Dialog Box."](#)
5. Click **OK**. The system displays the cancellation reason code dialog box.

Managing Field Automation System (FAS) Duplicate Field Orders

5.1 (continued)

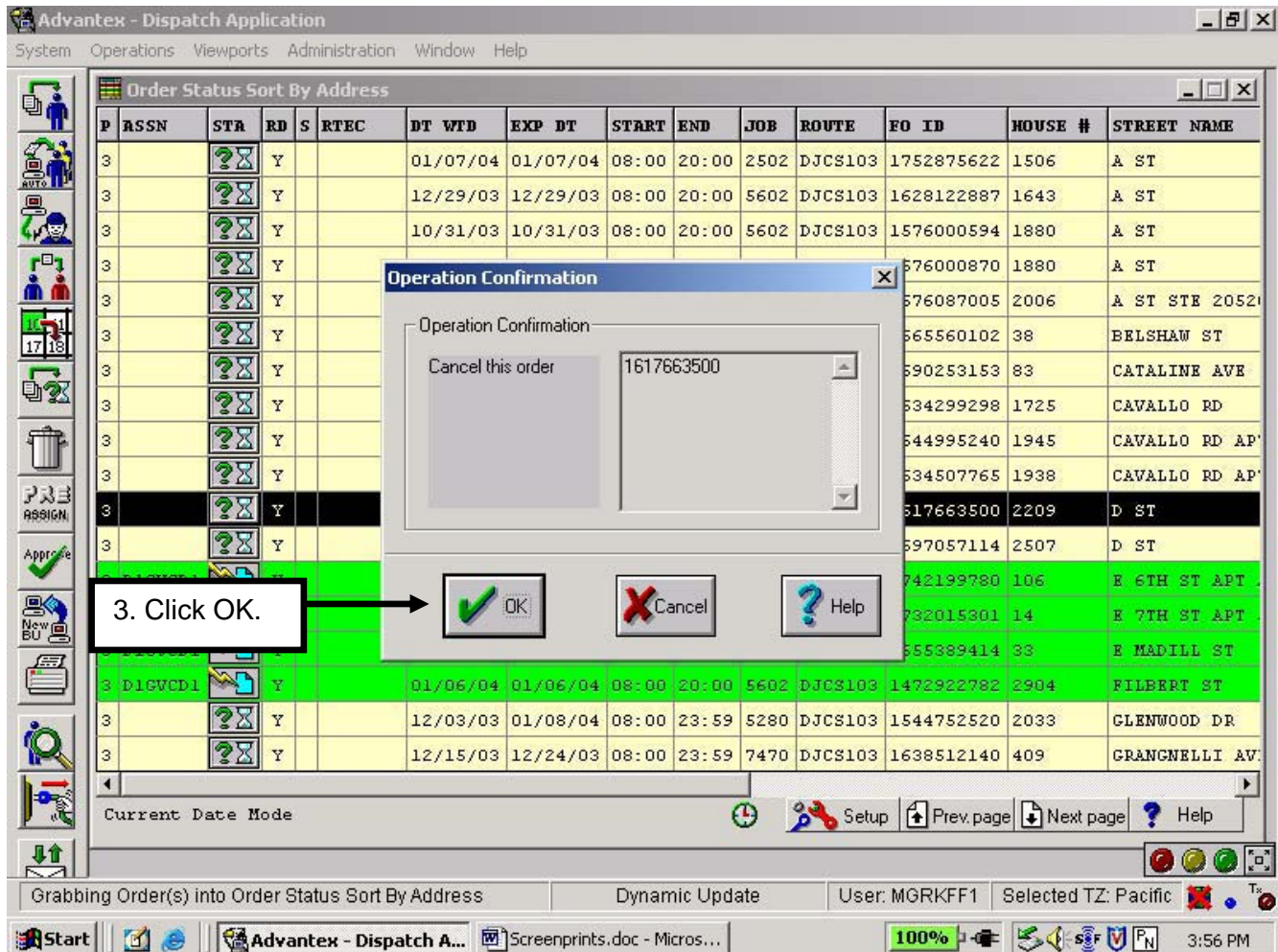


Figure 9. Operation Confirmation Dialog Box

6. Select the reason code from the drop-down list as shown in [Figure 10, "Cancellation Reason Dialog Box – Reason Code."](#)
7. To apply the reason code to multiple FOs, select the **All** checkbox option as shown in [Figure 11, "Cancellation Reason Dialog Box – Notes."](#)

Managing Field Automation System (FAS) Duplicate Field Orders

5.1 (continued)

The screenshot shows the Advantex - Dispatch Application window. A table of order data is visible, with columns for P, ASSN, STR, RD, S, RTEC, DT, WTD, EXP DT, START, END, JOB, ROUTE, FO ID, HOUSE #, and STREET NAME. A dialog box titled 'Cancellation Reason for Order 1617663500' is open, displaying a list of reason codes. The code '00005 Cancel-Duplicate Orders' is highlighted. A callout box with the text '4. Select Cancel Reason Code.' points to this selection.

P	ASSN	STR	RD	S	RTEC	DT	WTD	EXP DT	START	END	JOB	ROUTE	FO ID	HOUSE #	STREET NAME
3			Y			01/07/04	01/07/04	08:00	20:00	2502	DJCS103	1752875622	1506	A ST	
3			Y			12/29/03	12/29/03	08:00	20:00	5602	DJCS103	1628122887	1643	A ST	
3			Y								DJCS103	1576000594	1880	A ST	
3			Y								DJCS103	1576000870	1880	A ST	
3			Y			11/07/03	11/07/03	08:00	20:00	2502	DJCS103	1576087005	2006	A ST STE 20520	
3														BELSHAW ST	
3														CATALINE AVE	
3														25 CAVALLO RD	
3														45 CAVALLO RD AP'	
3														98 CAVALLO RD AP'	
3														09 D ST	
3														07 D ST	
3	D1GVCD1														E 6TH ST APT
3	D1GVCD1		Y										82015301	14	E 7TH ST APT
3	D1GVCD1		Y			10/31/03	11/10/03	00:00	23:59	7470	DJCS103	1555889414	33	E MADILL ST	
3	D1GVCD1		Y			01/06/04	01/06/04	08:00	20:00	5602	DJCS103	1472922782	2904	FILBERT ST	
3			Y			12/03/03	01/08/04	08:00	23:59	5280	DJCS103	1544752520	2033	GLENWOOD DR	
3			Y			12/15/03	12/24/03	08:00	23:59	7470	DJCS103	1638512140	409	GRANCNELLI AV.	

Figure 10. Cancellation Reason Dialog Box – Reason Code

8. In the Notes text box, enter “DUPLICATE” and your LAN ID (Figure 11).
9. Click OK.

Managing Field Automation System (FAS) Duplicate Field Orders

5.1 (continued)

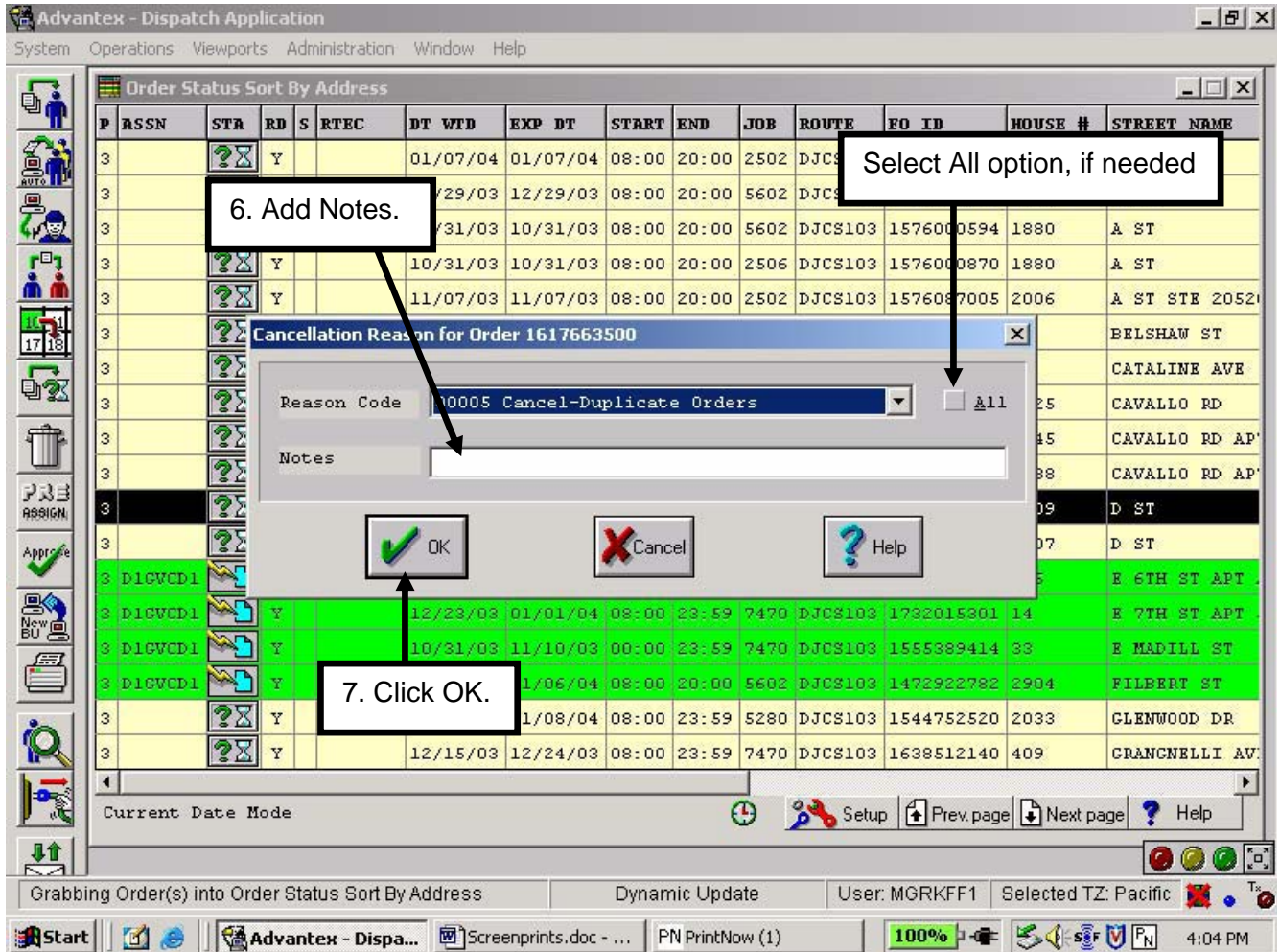


Figure 11. Cancellation Reason Dialog Box – Notes

END of Instructions



Managing Field Automation System (FAS) Duplicate Field Orders

Definitions

NA

Implementation Responsibilities

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors ensure that dispatch personnel are trained and knowledgeable about this procedure.

Governing Document

[Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices,"](#) governs this document.

Compliance Requirement/ Regulatory Commitment

NA

Reference Documents

Developmental References:

[Utility Procedure WP6436-05, "Using the FAS Order Status Sort By Address Viewport."](#)

Supplemental References:

[Code of Safe Practices.](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

Appendices

NA

Attachments

NA



Managing Field Automation System (FAS) Duplicate Field Orders

Document Recision This document supersedes Work Procedure WP6436-03, "Managing Field Automation System (FAS) Duplicate Field Orders," issued 10/2006.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	This is a new procedure.



Creating Field Automation System (FAS) Field Orders

Summary This procedure outlines the process for creating Field Automation System (FAS) field orders using the “Order Entry” function in the Advantex Dispatch Application.

NOTE

The term “FAS” is used interchangeably with “Advantex Dispatch Application” throughout this document.

Level of Use: Informational Use

Target Audience The primary audiences for this procedure are managers, supervisors, and dispatch employees who create Field Automation System (FAS) field orders using the “Order Entry” function in the Advantex Dispatch Application.

Safety Employees working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Employees who perform tasks in accordance with this procedure must work either under the direction of a qualified employee or have been trained by a qualified employee to do such work.

Table of Contents

Subsection	Title	Page
1	General Information.....	2
2	Creating FAS Field Orders	3



Creating Field Automation System (FAS) Field Orders

Procedure Steps

1 General Information

- 1.1 FAS typically downloads field orders from the Customer Care and Billing (CC&B) system. However, there are situations, such as a technology down event, when it is necessary to use the Advantex Dispatch Application to create an FAS field order.

NOTE

Field orders created in FAS cannot be viewed in CC&B;
however, they can be viewed in FAS Online Query.

- 1.2 FAS field orders must conform to the following naming conventions and rules:

- FAS field orders are sent to the system and assigned a unique order number. The first character of an FAS field order identification number (FO ID) is an alpha character (excluding "T").
- The character changes on December 1 of each year to eliminate redundant FO IDs and corresponds to the time period in which the FAS field order was created. For example, "A" = 12/06/02 – 11/30/03, "B" = 12/01/03 – 11/30/04, "C" = 12/01/04 – 11/30/05, and so on.

- 1.3 Create FAS field orders for any current or future date or for no specific date (undated).

- Current orders may be dispatched.
- Future field orders may be pre-assigned.

- 1.4 Field employees must observe the following rules:

- Field employees should not look for work in the field or proactively look to assist other field employees.
- Field employees should contact the dispatcher if they are able to accept additional work.
- The dispatcher reviews all pending orders by priority and determines how the work is distributed to the field employee.
- The field employee should contact the dispatcher when additional assistance is required.

The dispatcher decides if assistance will be provided and determines the appropriate employees to perform the work based on the pending work in FAS.

Creating Field Automation System (FAS) Field Orders

2 Creating FAS Field Orders

To create a FAS field order, perform the following steps:

NOTE

Do not create FAS field orders for billing and/or metering-related work because FAS-created field orders are not uploaded to CC&B. Additionally, do not create FAS Field Orders for 9000 series job codes (OIS Outage Orders) or those 1000 series job codes related to OIS Outage Orders (i.e., 1000, 1010, 1020, 1030, 1040, 1080, 1090, 1110, 1130, 1140, 1150, 1170, 1190, 1250, 1260).

- 2.1 From the FAS Dispatch Application screen, select **Orders / Create Order** on the upper toolbar to open the Order Entry screen ([Figure 1](#)).

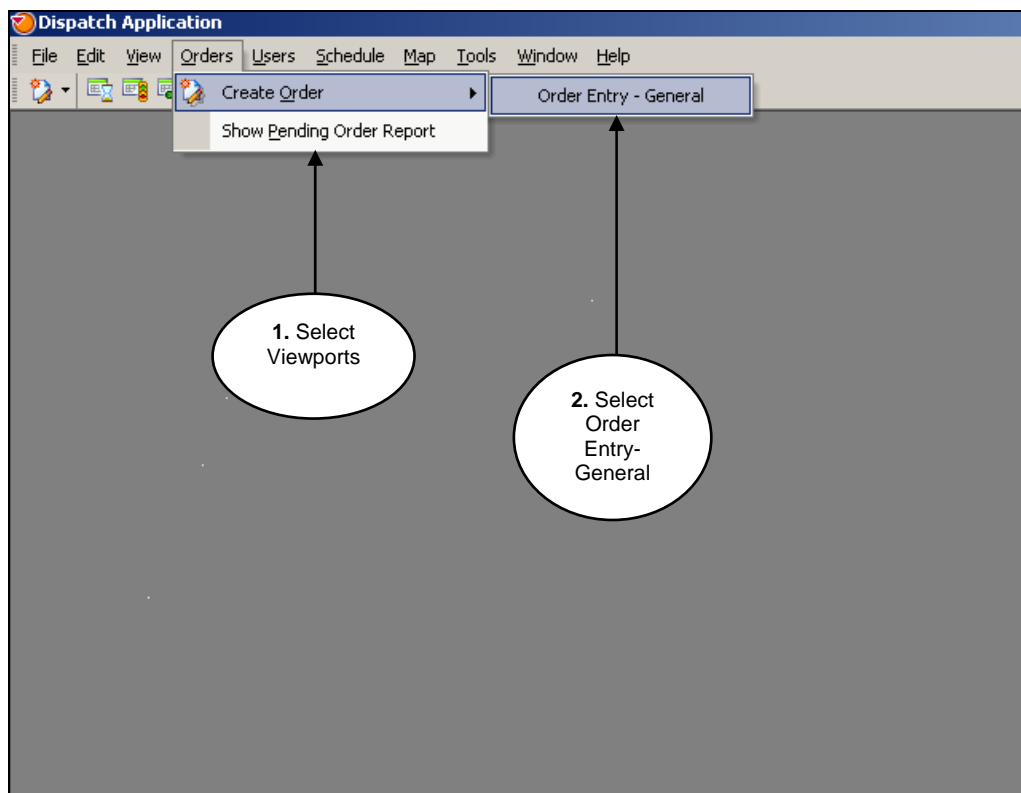


Figure 1. Dispatch Application – Opening the Order Entry Screen

- 2.2 From the Order Entry screen, select the appropriate order type tab.

NOTE

Information is entered most frequently on the Order Entry – General tab.

Creating Field Automation System (FAS) Field Orders

- 2.3 Enter the required information in each field or select the appropriate option from the field's drop-down list ([Figure 2](#)).

Some fields, such as the AREA field, require a specific input format and other fields are mandatory. The system displays either a message at the bottom of the window to indicate missing information or the correct data entry format when data is entered incorrectly.

The screenshot shows a software window titled "Order Entry - General" with the identifier "DA1.1.2". The window is divided into two main sections. The top section contains several fields: "JOB", "AREA", "BUS UNIT", "SUB AREA", and "PRIORITY" are on the left, each with a red error icon to its right. "DT WTD", "START", and "END" are on the right. The bottom section contains "CUST NAME", "ADDRESS", "CITY", "CONTACT #", "TKN BY", and "OFC RMKS". The "ADDRESS", "CITY", and "TKN BY" fields also have red error icons. The "OFC RMKS" field is a multi-line text area.

Figure 2. Dispatch Application Order Entry – General Tab

Creating Field Automation System (FAS) Field Orders

2.4 Click **Save** ([Figure 3](#)) to save the Order Entry field order.

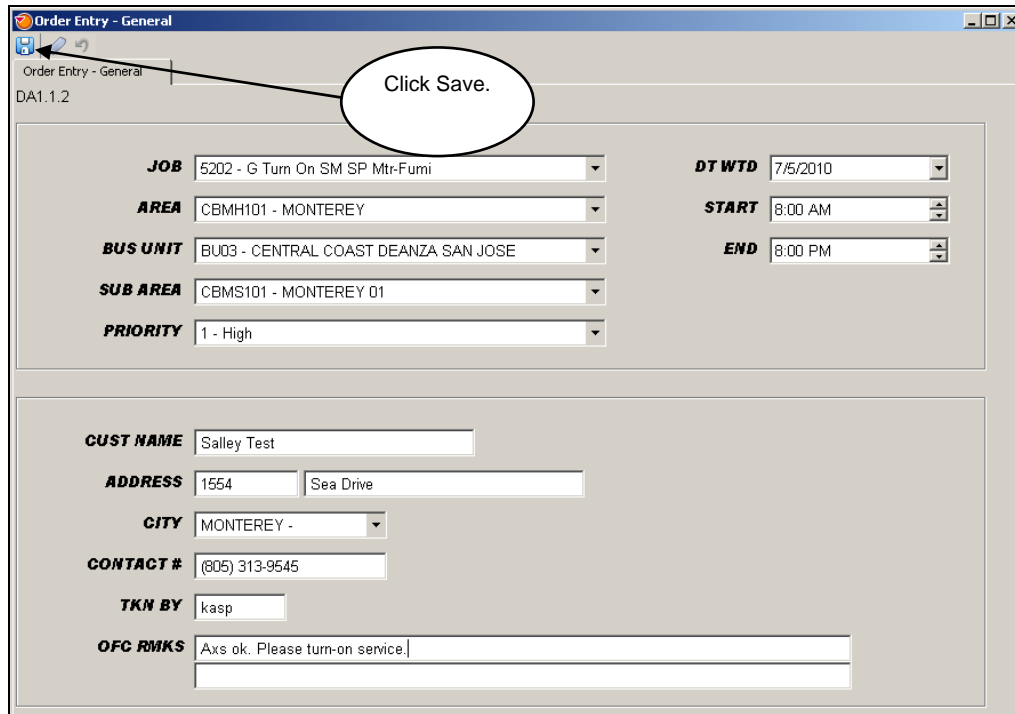


Figure 3. Order Entry-General

2.5 Click **OK** to close the Dispatch Application – Information dialog box confirming that the duplicate field order is created ([Figure 4](#)).

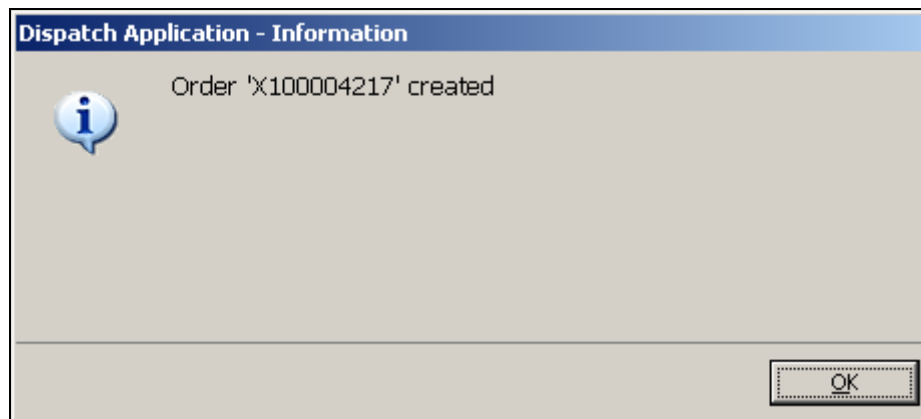
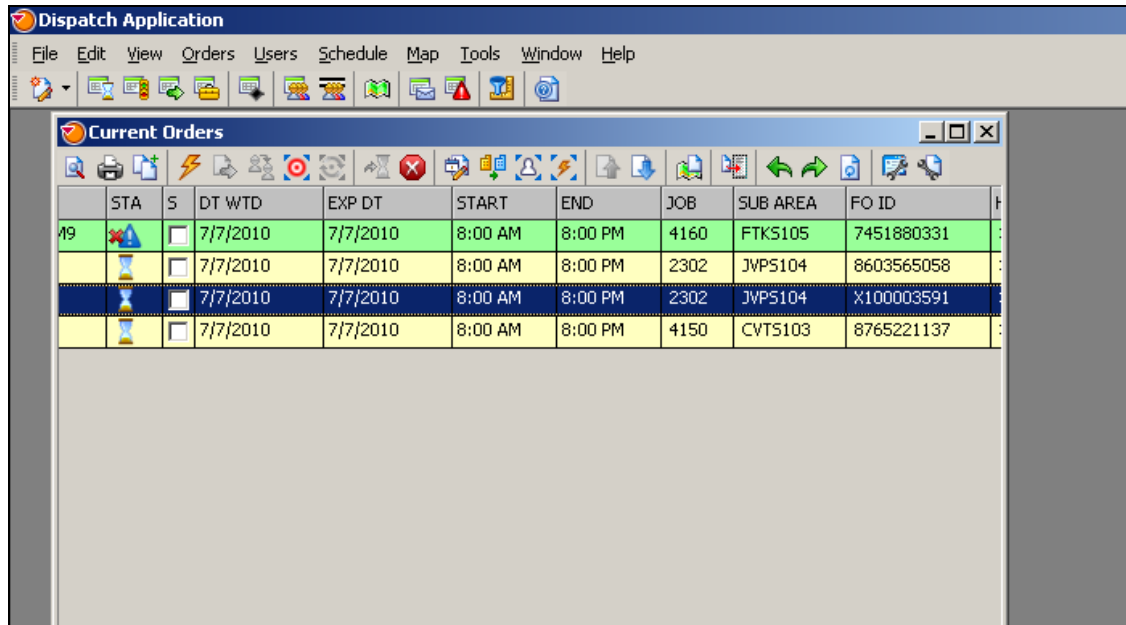


Figure 4. Dispatch Application – Information Dialog Box

Creating Field Automation System (FAS) Field Orders

- 2.6 Review the newly created FAS field order on the Dispatch Application – Current Orders screen. FAS displays new field orders in pending status ([Figure 5](#)).



	STA	S	DT WTD	EXP DT	START	END	JOB	SUB AREA	FO ID
19		<input type="checkbox"/>	7/7/2010	7/7/2010	8:00 AM	8:00 PM	4160	FTK5105	7451880331
		<input type="checkbox"/>	7/7/2010	7/7/2010	8:00 AM	8:00 PM	2302	JVPS104	8603565058
		<input type="checkbox"/>	7/7/2010	7/7/2010	8:00 AM	8:00 PM	2302	JVPS104	X100003591
		<input type="checkbox"/>	7/7/2010	7/7/2010	8:00 AM	8:00 PM	4150	CVTS103	8765221137

Figure 5. Dispatch Application – Current Orders Screen

Implementation Responsibilities

The senior director in charge of customer field services is responsible for reviewing, authorizing, and issuing this procedure.

The director in charge of field services is responsible for ensuring that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors are responsible for ensuring that field services employees are trained and knowledgeable about this procedure.

Governing Document

[Utility Operations \(UO\) Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices."](#)

Compliance Requirement/Regulatory Commitment

NA



Creating Field Automation System (FAS) Field Orders

Reference Documents

Developmental References:

NA

Supplemental References:

[Work Procedure WP6436-09, "On-line Technology Down \(OLTD\) Process"](#)

Appendices

NA

Attachments

NA

Document Recision

This utility procedure cancels and supersedes Utility Procedure TD-6436P-04, "Creating Field Automation System (FAS) Field Orders," issued 06/11/2010.

Approved By

Jimmy Morales, Manager

Document Owner

Barry Knapp, Compliance Supervisor

Document Contact

John Freeman, Compliance Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format and updated screen shots and text to incorporate FAS Version 8.1 screens.



Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

Summary This procedure explains how to redirect field orders (FOs) intended for departments that currently do not use the field automation system (FAS).

When the FO is canceled in FAS and redirected to a non-FAS department, dispatchers include a note in the dispatch remarks sections of an FO that is worked on paper.

Level of Use: Information Use

Target Audience Managers, field services supervisors, and field service dispatchers that redirect FOs to departments that currently do not use FAS.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by qualified personnel to do such work.

Procedure Steps

1 Canceling FOs in FAS and Redirecting Them to Non-FAS Departments

1.1 From any **Order Viewport**, perform the following steps:

1. Click the appropriate line (row) to highlight the FO to be canceled.
2. Drag and drop the selected FO to the **Cancel Order** icon as shown in [Figure 1, "Current Orders Screen – Cancel Order Icon."](#)
 - a. The system displays the **Operation Confirmation** dialog box.

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

1.1 (continued)

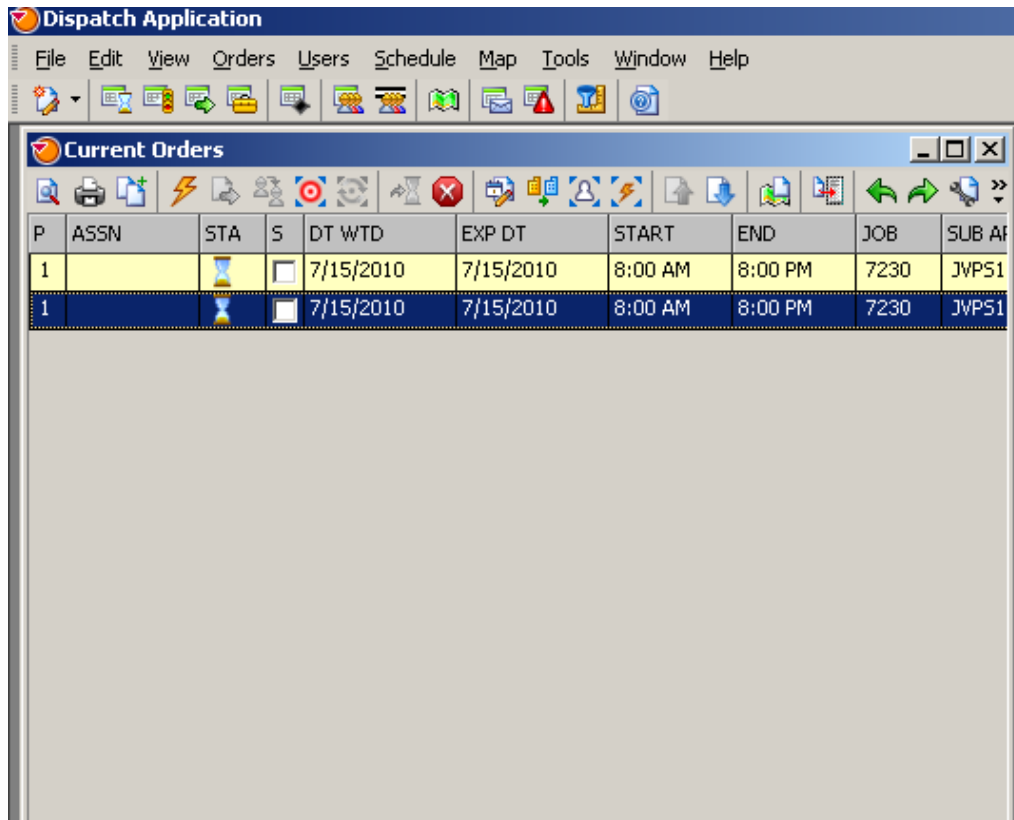


Figure 1. Current Orders Screen – Cancel Order Icon

- After confirmation, the system displays the Cancel dialog box as shown in [Figure 2, "Cancel Dialog Box."](#)

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

1.1 (continued)

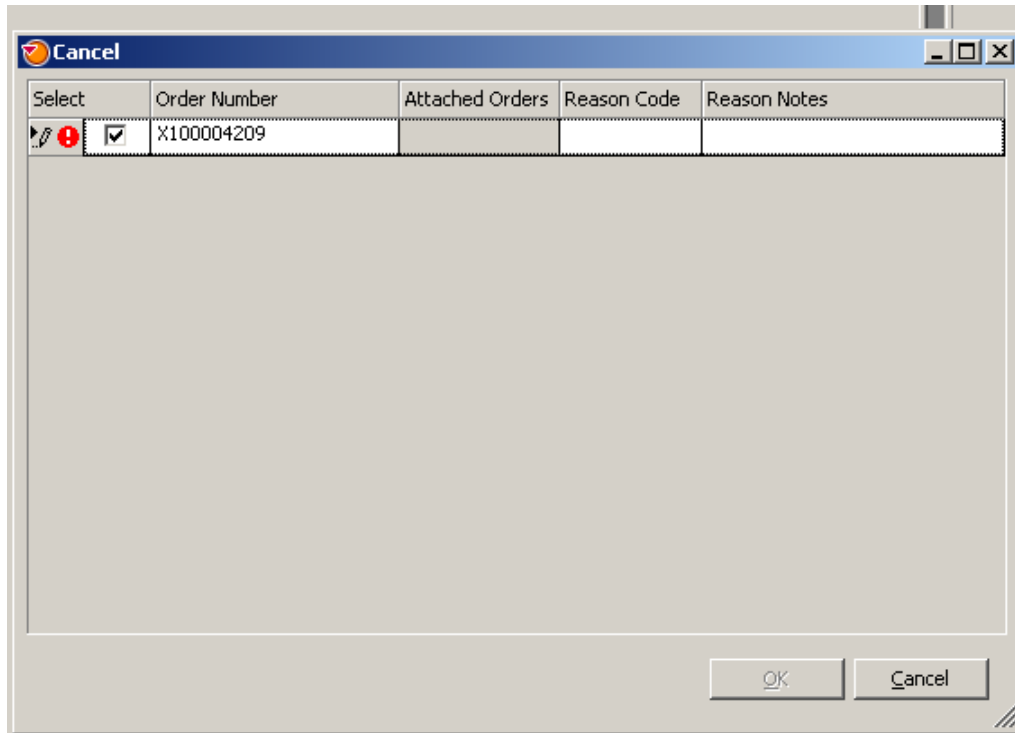


Figure 2. Cancel Dialog Box

4. Select the reason for canceling the FO from the **Reason Code** drop-down list as shown in [Figure 3, "Cancellation Reason for Order Dialog Box."](#)
5. In the **Notes** field, enter the department's name for the reassigned location and the dispatcher's local area network identification (LAN) ID.

NOTE

If the reason and information in the **Notes** field applies to several FOs, select the **All** option.

6. Click the **OK** button ([Figure 3](#)).

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

1.1 (continued)

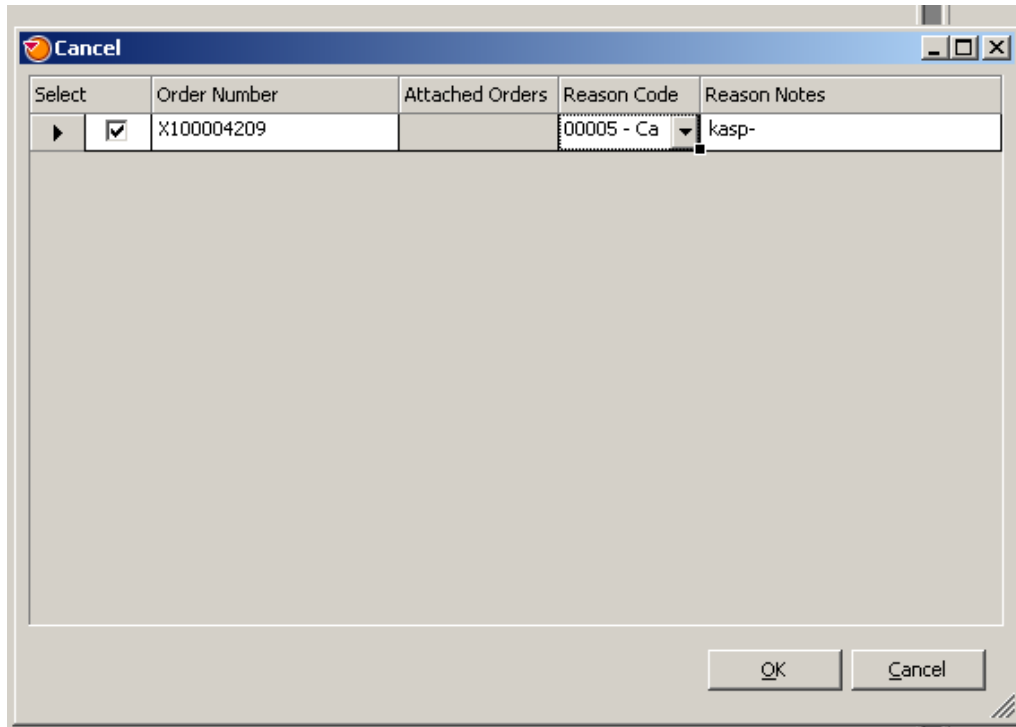


Figure 3. Cancellation Reason for Order Dialog Box

- 1.2 To filter the information displayed in **Current Orders** as shown in [Figure 4, "Current Orders Filter Box."](#) perform the following steps:
1. Click on the **Setup Filter for Displayed Orders** button to open the **Current Orders Filter** dialog box.
 2. Using the following example. Change the criteria described in this example, as needed.
 - In the **Order Status** list box, select the appropriate filter options, such as **CAN – Canceled**.
 - In the Area list box, specify the appropriate areas.
 3. Click **OK**.

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

1.2 (continued)

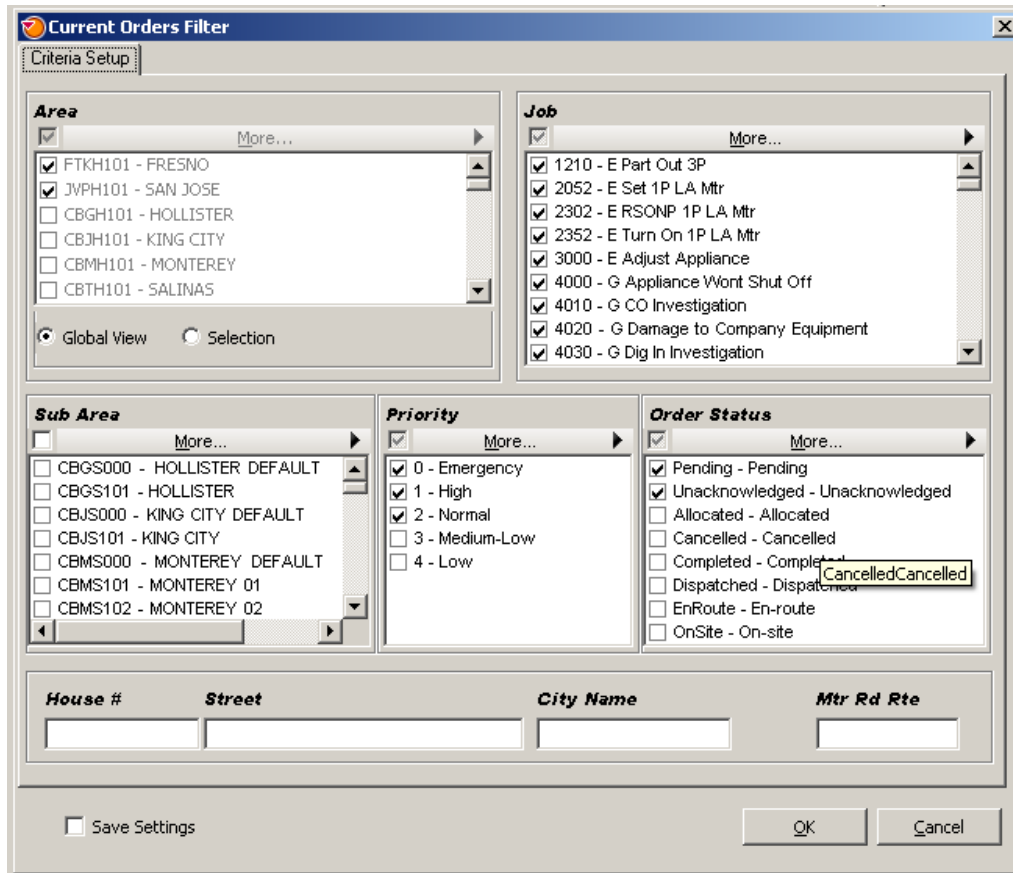


Figure 4. Current Orders Filter Box

2 Redirecting Field Order Printing (Preferred Method)

2.1 To direct the FOs to print to a specified location, perform the following steps:

1. From the Microsoft taskbar, select **Start > Settings > Printers** to open the printers dialog box.
2. Select the printer location.
3. Select **Set** as default printer option.

2.2 If your desktop has shortcut icons for specific printer locations, perform the following steps:

1. Double-click the shortcut icon.
2. From the dialog box task bar, click **Printer**.

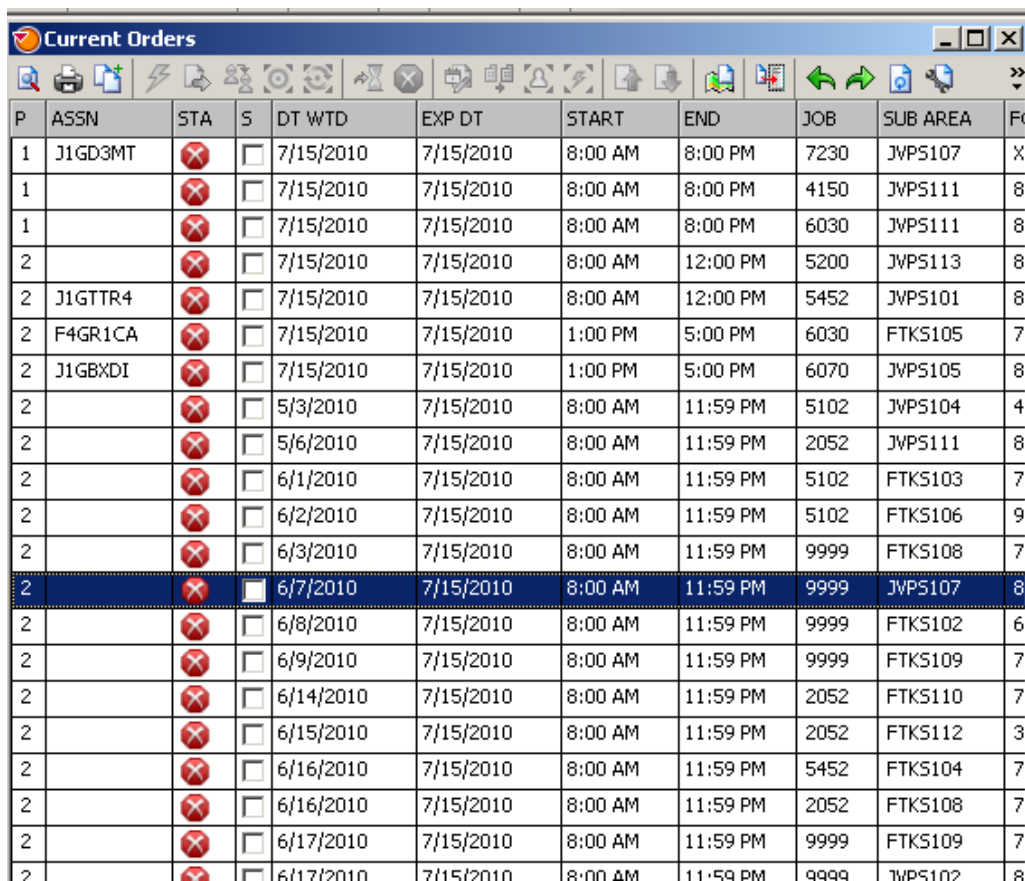
Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

2.2 (continued)

3. Select the **Set as Default Printer** option.

2.3 To print canceled FOs at default printer location, perform the following steps:

1. For a highlighted FO line(s), click and hold down the right mouse button as shown below in Figure 5.



P	ASSN	STA	S	DT WTD	EXP DT	START	END	JOB	SUB AREA	P
1	J1GD3MT	✗	<input type="checkbox"/>	7/15/2010	7/15/2010	8:00 AM	8:00 PM	7230	JVPS107	X
1		✗	<input type="checkbox"/>	7/15/2010	7/15/2010	8:00 AM	8:00 PM	4150	JVPS111	8
1		✗	<input type="checkbox"/>	7/15/2010	7/15/2010	8:00 AM	8:00 PM	6030	JVPS111	8
2		✗	<input type="checkbox"/>	7/15/2010	7/15/2010	8:00 AM	12:00 PM	5200	JVPS113	8
2	J1GTTR4	✗	<input type="checkbox"/>	7/15/2010	7/15/2010	8:00 AM	12:00 PM	5452	JVPS101	8
2	F4GR1CA	✗	<input type="checkbox"/>	7/15/2010	7/15/2010	1:00 PM	5:00 PM	6030	FTKS105	7
2	J1GBXDI	✗	<input type="checkbox"/>	7/15/2010	7/15/2010	1:00 PM	5:00 PM	6070	JVPS105	8
2		✗	<input type="checkbox"/>	5/3/2010	7/15/2010	8:00 AM	11:59 PM	5102	JVPS104	4
2		✗	<input type="checkbox"/>	5/6/2010	7/15/2010	8:00 AM	11:59 PM	2052	JVPS111	8
2		✗	<input type="checkbox"/>	6/1/2010	7/15/2010	8:00 AM	11:59 PM	5102	FTKS103	7
2		✗	<input type="checkbox"/>	6/2/2010	7/15/2010	8:00 AM	11:59 PM	5102	FTKS106	9
2		✗	<input type="checkbox"/>	6/3/2010	7/15/2010	8:00 AM	11:59 PM	9999	FTKS108	7
2		✗	<input type="checkbox"/>	6/7/2010	7/15/2010	8:00 AM	11:59 PM	9999	JVPS107	8
2		✗	<input type="checkbox"/>	6/8/2010	7/15/2010	8:00 AM	11:59 PM	9999	FTKS102	6
2		✗	<input type="checkbox"/>	6/9/2010	7/15/2010	8:00 AM	11:59 PM	9999	FTKS109	7
2		✗	<input type="checkbox"/>	6/14/2010	7/15/2010	8:00 AM	11:59 PM	2052	FTKS110	7
2		✗	<input type="checkbox"/>	6/15/2010	7/15/2010	8:00 AM	11:59 PM	2052	FTKS112	3
2		✗	<input type="checkbox"/>	6/16/2010	7/15/2010	8:00 AM	11:59 PM	5452	FTKS104	7
2		✗	<input type="checkbox"/>	6/16/2010	7/15/2010	8:00 AM	11:59 PM	2052	FTKS108	7
2		✗	<input type="checkbox"/>	6/17/2010	7/15/2010	8:00 AM	11:59 PM	9999	FTKS109	7
2		✗	<input type="checkbox"/>	6/17/2010	7/15/2010	8:00 AM	11:59 PM	9999	JVPS107	8

Figure 5. Current Orders Screen – Using Drag and Drop to Print a Field Order

2. Drag and drop selected FO on to the **Print Order** icon.

a. The application displays a printing dialog box to confirm the FO print as shown in [Figure 6. "Printing Field Order."](#)

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

2.3 (continued)

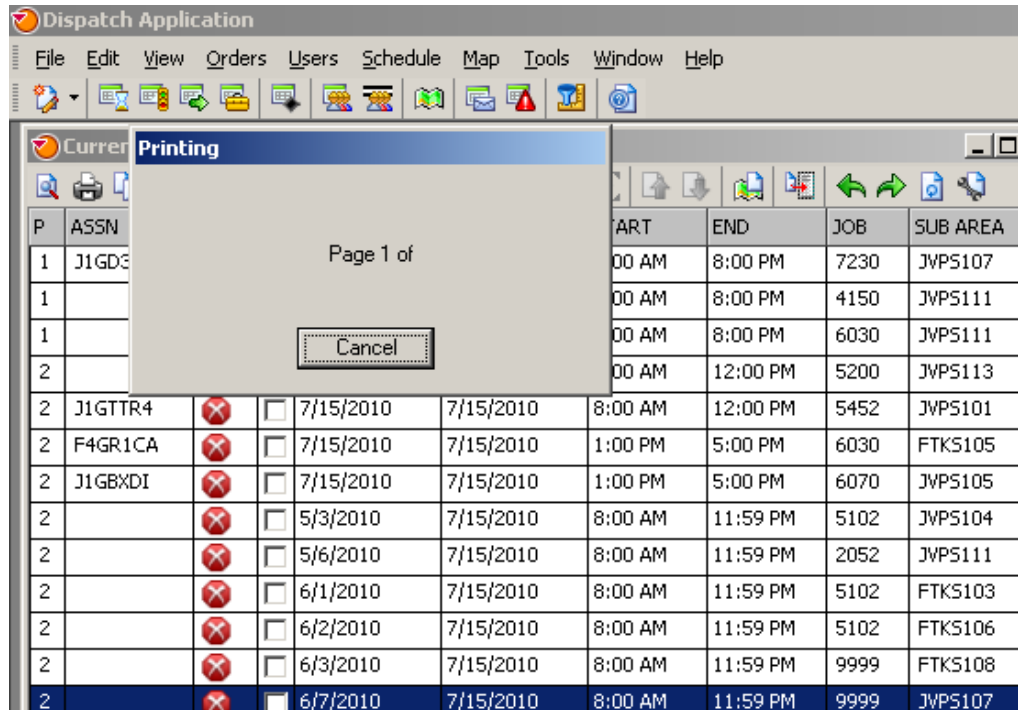


Figure 6. Printing Field Order (Figure 6).

3. Click the **Next Page** button and repeat Steps 1 through 3.
4. Verify with non-FAS department personnel that the FO(s) was received.
5. Reset the default printer to the local printer location.

3 Printing, Canceling, and/or Reassigning Field Orders to Non-FAS Departments When Printing Is Not Redirected

3.1 To print cancelled FOs at the local printer location, perform the following steps:

1. Click the FO line(s) and hold down the right mouse button.
2. Drag and drop the selection on **Print Order** icon.
 - a. The application displays the printing dialog box to confirm the FO(s) print as shown in [Figure 7. "Current Orders Screen and Printing Dialog Box."](#)

Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

3.1 (continued)

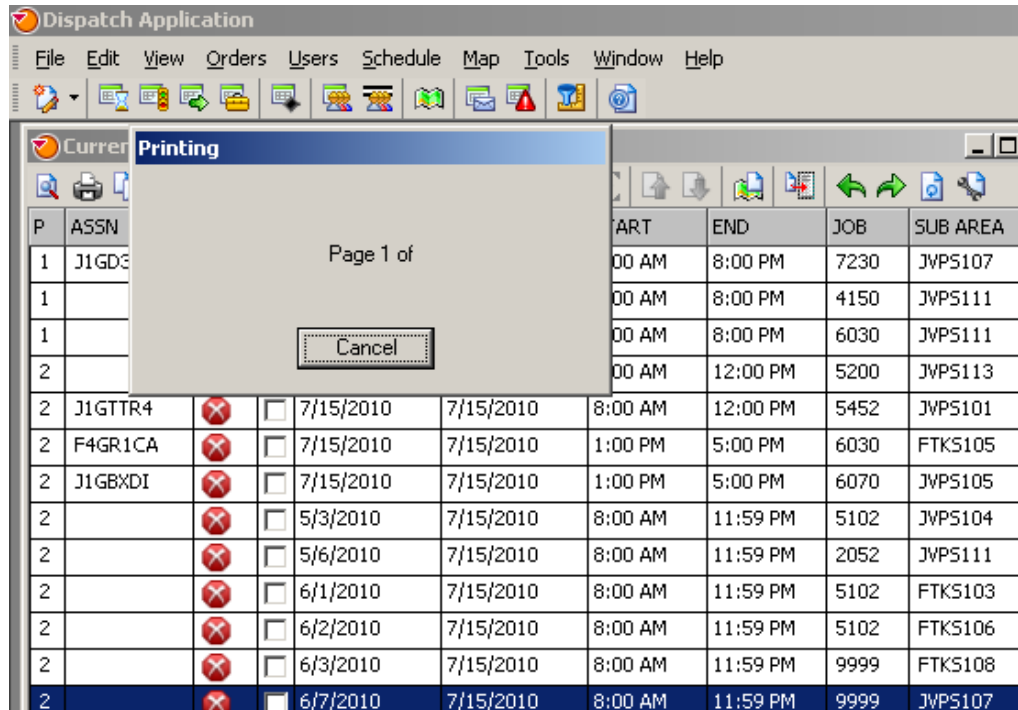


Figure 7. Current Orders Screen and Printing Dialog Box

- Fax or print directly to the appropriate location all printed FOs to the appropriate non-FAS department(s).

NOTE

If the FO is faxed, contact the non-FAS department(s) to verify that the FO was received.

END of Instructions



Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

Definitions	NA
Implementation Responsibilities	<p>The senior director in charge of customer field services reviews, authorizes, and issues this procedure.</p> <p>The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.</p> <p>Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.</p>
Governing Document	<p>Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices," governs this procedure.</p>
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>NA</p> <p>Supplemental References:</p> <p>NA</p>
Appendices	NA
Attachments	NA



Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments

Document Recision This document supersedes Work Procedure WP6436-06, "Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments," issued 10/06.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format with inclusion of FAS 8.1 screenshots.



Field Automation System (FAS) Technology Down

Summary This procedure describes how Pacific Gas and Electric Company (Company) field service dispatchers are to notify personnel that the system is down and dispatch field orders (FOs) when the Field Automation System (FAS) technology is not operational.

Level of Use: Informational Use

Target Audience Director, managers, supervisors, and field service dispatchers whose work includes handling FOs when FAS is not available.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must either work under the direction of qualified personnel or receive training from qualified personnel to do such work.

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3	Action When FAS Dispatch is Available, Communication Down During Field Personnel Log-on	5
4	Action When FAS Dispatch is Down, Field Personnel are Logged On	7
5	Action When FAS Dispatch is Down, Log-on Down Before Work Shift Starts	9



Field Automation System (FAS) Technology Down

Procedure Steps

1 Major Dispatcher Functions When FAS is Down

- 1.1 Via email or epage, notify the appropriate dispatch centers and the Customer Traffic Control Center (CTCC) that the FAS technology is down. (Address: UO CS FAS Notifier).
- 1.2 Assess the cause and scope of the problem.
- 1.3 Provide all affected organizations with continued updates, including an estimated time of restoration (ETR).
- 1.4 When the FAS technology becomes available, send email to the appropriate dispatch centers and the CTCC to notify them that the FAS technology is available and operational (Address: UO CS FAS Notifier).

2 Action When FAS Dispatch is Available, Communication Down

- 2.1 Follow the instructions in this section when the FAS dispatch application is available to dispatchers, but the FAS communication technology is not available and multiple field personnel are affected. The current work status under these conditions is summarized as follows:
 - Some FOs have been completed in FAS. However, the FOs fail to leave individual terminals.
 - Cingular Interactive area (backup of 2-3 FOs within 15 minutes).
 - Wireless matrix (formerly Nor Com) area (backup of 1 FO within 15 minutes).
 - Field personnel are not receiving acknowledgments from the server after sending check messages.
- 2.2 When the FAS dispatch application is available to dispatchers, but the FAS communication technology is not available, notify personnel as follows:
 1. Notify the on-call FAS system administrator (identified on the Intranet website) that the FAS technology (i.e., the communication tower) is not operational.
 2. Notify all appropriate field personnel by radio, cellular phone, or group page that FAS is down.
- 2.3 Do not force off any field personnel via the FAS Dispatch Application unless advised to do so by the on-call FAS system administrator or after verifying with the field personnel that there are no pending FOs left on the personnel's terminal.
- 2.4 Cover the topics below with field personnel.
 1. The estimated time of restoration (ETR) if known.



Field Automation System (FAS) Technology Down

2.4 (continued)

2. Ask for their signal strength. (A good strength is above 10 for satellite users and above 30 for radio users.)
3. Advise them to perform the following tasks:
 - a. Continue using FAS on their terminals to complete FOs.
 - b. Document the following information in the appropriate section of the multipurpose customer service [Form 62-3458, "Multipurpose Customer Service Order:"](#)
 - All emergency FOs.
 - En-route and onsite times.
 - Hazard notices issued.
 - "Can't get ins" (CGIs).
 - Gas/electric meter reads.
 - c. Avoid signing off unless all completed FOs have left the terminal.
 - d. Sign on normally at the start of the next work shift.
 - e. (Optional advice) Use local/remote functionality if FOs are not leaving the individual terminals at the end of the work shift.
4. On the following morning, perform the following tasks:
 - a. Optionally, advise those field personnel who are still signed on to "check message" (one time only).
 - b. IF communication is not restored,

THEN advise the affected field personnel to stay signed on and follow the Mobile Application User Trouble Shooting Tips Guide.

2.5 Track dispatched orders by one of the following methods:

- The print screen function.
- The service operator's "technology down" log.
- The print order icon in the FAS Dispatch Application.



Field Automation System (FAS) Technology Down

- 2.6 IF a hazard notice is left while the FAS technology is not available,
THEN post a note at the “person” level in the Customer Care and Billing (CC&B) system.
- 2.7 Record the following information in the dispatch remarks section of the FO:
- “FAS down.”
 - The technical identification (tech ID) of the field personnel who received the FO.
 - The local area network (LAN) ID of the dispatcher.
- 2.8 When FAS is operational again, perform the following steps:
1. IF completed FOs roll back to the FAS Pending file after FAS refreshes itself,
THEN perform the following steps:
 - a. Re-dispatch each FO to the field personnel who originally completed it.
 - b. Advise the field personnel to complete and submit [Form 62-3458, “PG&E Multipurpose Customer Service Order,”](#) for each cancelled FO.
 2. Cancel noncompliance FOs.
 3. For each noncompliance FO, record the following in the dispatch remarks section of the FO:
 - “Worked on Paper.”
 - The dispatcher’s LAN ID.
- 2.9 The appropriate supervisors must perform the following tasks: when FAS is operational again:
1. Forward all work completed on paper to the Credit and Records Center (C&RC) at 8110 Lorraine Avenue, Stockton, for processing.
 2. When FAS is operational again, perform the following steps:
 - a. Direct personnel to complete any compliance-related FOs (i.e., scheduled gas meter changes, TOU meter changes, and gas regulator replacements) in FAS.
 - b. Ensure that the completion date and time are noted in the Dispatch Remarks section of the FO.



Field Automation System (FAS) Technology Down

- 3 **Action When FAS Dispatch is Available, Communication Down During Field Personnel Log-on**
 - 3.1 Follow the instructions in this section when the FAS dispatch application is available to dispatchers, but the FAS communication technology is not available to field personnel during their logon process. The current work status under these conditions is summarized as follows:
 - Dispatchers have the FAS Dispatch Application available.
 - Some field personnel are able to log onto FAS, but more than one field personnel cannot.
 - Some field personnel can see FOs and some cannot.
 - Some field personnel do not have "Order Detail" available.
 - 3.2 Notify personnel as follows:
 1. Notify the on-call FAS system administrator (identified on the Intranet website) that the FAS technology is not operational.
 2. Notify all appropriate field personnel by radio, cellular phone, or group page that FAS is down.
 - 3.3 Print FOs by one of the following methods:
 - IF FOs are to be dispatched by radio or phone,
THEN use the Print Order icon in the FAS dispatch application.
 - IF FOs are to be picked up by field personnel,
THEN use the Field Order Repository System (FORS) application.
 - 3.4 Dispatch the new printed FOs to the appropriate field personnel via radio, pager, cellular phone, FAX, hand delivery, or redirected printing.
 - 3.5 Cover the topics in this step with field personnel.
 1. Provide the following instructions:
 - They are required to work on paper until the FAS communication technology becomes available.
 - They must complete FOs on paper; once a FO is completed on paper, it remains on paper.
 - On the same day a FO is received, they must submit a completed [Form 62-3458, "PG&E Multipurpose Customer Service Order."](#) for the FO to their immediate supervisor.



Field Automation System (FAS) Technology Down

3.5 (continued)

2. Provide the following information:

- The FO ID.
- The badge number.
- The customer name.
- The contact telephone number.
- The complete street and city names.
- The field activity type.

3. On the following morning, perform the following tasks:

- a. Optionally, advise those field personnel who are still signed on to “check message” (one time only).
- b. IF communication is not restored,

THEN advise the affected field personnel to stay signed on and follow the Mobile Application User Trouble Shooting Tips Guide.

3.6 Track dispatched orders by one of the following methods:

- The print screen function.
- The service operator’s “technology down” log.
- The print order icon in the FAS Dispatch Application.

3.7 IF a hazard notice is left while the FAS technology is not available,

THEN post a note at the “person” level in the CC&B system.

3.8 Record the following information in the dispatch remarks section of the FO:

- “FAS down.”
- The tech ID of the field personnel who received the FO.
- The LAN ID of the dispatcher.



Field Automation System (FAS) Technology Down

3.9 When FAS is operational again, perform the following steps:

1. For each FO, do the following:
 - a. Re-dispatch the FO to the field personnel who originally completed it.
 - b. Advise the field personnel to complete and submit [Form 62-3458, "PG&E Multipurpose Customer Service Order."](#) for the FO.
2. Cancel noncompliance FOs.
3. For each noncompliance FO, record the following in the dispatch remarks section of the FO:
 - "Worked on Paper."
 - The dispatcher's LAN ID.

3.10 The appropriate supervisors must perform the following tasks:

1. Forward all work completed on paper to the C&RC at 8110 Lorraine Avenue, Stockton, for processing.
2. When FAS is operational again, perform the following steps:
 - a. Direct personnel to complete any compliance-related FOs (i.e., scheduled gas meter changes, TOU meter changes, and gas regulator replacements) in FAS.
 - b. Ensure that the completion date and time are noted in the dispatch remarks section of the FO.

4 Action When FAS Dispatch is Down, Field Personnel are Logged On

- 4.1 Follow the instructions in this section when the FAS dispatch application is down, field personnel are logged onto the system, and FOs are downloaded to individual terminals.
- 4.2 Notify personnel as follows:
 1. Notify the on-call FAS system administrator (identified on the Intranet website) that the FAS technology is not operational.
 2. Notify local supervisors that the FAS technology is down.
- 4.3 Monitor the FORS application for any additional "immediate response" and "same day" (Priorities 10 and 20) FOs.
- 4.4 Dispatch the new printed FOs to the appropriate field personnel via radio, pager, cellular phone, FAX, hand delivery, or redirected printing.



Field Automation System (FAS) Technology Down

4.5 Cover the topics in this step with field personnel.

1. Provide the following instructions:

- They are required to work on paper until the FAS communication technology becomes available.
- They must complete FOs on paper; once a FO is completed on paper, it remains on paper.
- On the same day a FO is received, they must submit a completed [Form 62-3458, "PG&E Multipurpose Customer Service Order."](#) for the FO to their immediate supervisor.

2. Provide the following information:

- The FO ID.
- The badge number.
- The customer name.
- The contact telephone number.
- The complete street and city names.
- The field activity type.

4.6 IF the FAS Dispatch Application becomes available later in the day,

THEN perform the following steps:

1. Cancel only noncompliance-related FOs worked on paper.

2. For each noncompliance FO, note the following in the Dispatch Remarks section of the FO:

- "FAS down."
- The tech ID of the field personnel who received the FO.
- The dispatcher's LAN ID.

4.7 The appropriate supervisors must perform the following tasks:

1. Forward all work completed on paper to the C&RC at 8110 Lorraine Avenue, Stockton, for processing.



Field Automation System (FAS) Technology Down

4.7 (continued)

2. When FAS is operational again, perform the following steps:
 - a. Direct personnel to complete any compliance-related FOs (i.e., scheduled gas meter changes, TOU meter changes, and gas regulator replacements) in FAS.
 - b. Ensure that the completion date and time are noted in the dispatch remarks section of the FO.

5 Action When FAS Dispatch is Down, Log-on Down Before Work Shift Starts

5.1 Follow the instructions in this section when the FAS dispatch application is down and no one is able to log onto the system before the work shift starts.

5.2 Notify personnel as follows:

1. Notify the on-call FAS system administrator (identified on the Intranet website) that the FAS technology is not operational.
2. Notify local supervisors in their respective headquarters that the FAS technology is down.

5.3 Start printing "immediate response" and "same day" (Priorities 10 and 20) FOs in the FORS application.

5.4 Dispatch new printed FOs to the appropriate field personnel via radio, pager, cellular phone, fax, hand delivery, or redirected printing.

5.5 Cover the topics in this step with field personnel.

1. Provide the following instructions:
 - They are required to work on paper until the FAS communication technology becomes available.
 - They must complete FOs on paper; once a FO is completed on paper, it remains on paper.
 - On the same day a FO is received, they must submit a completed [Form 62-3458, "PG&E Multipurpose Customer Service Order,"](#) for the FO to their immediate supervisor.
2. Provide the following information:
 - The FO ID.
 - The badge number.
 - The customer name.

Field Automation System (FAS) Technology Down

5.5 (continued)

- The contact telephone number.
- The complete street and city names.
- The field activity type.

5.6 The appropriate supervisors must perform the following tasks:

1. Forward all work completed on paper to the C&RC at 8110 Lorraine Avenue, Stockton, for processing.
2. When FAS is operational again, perform the following steps:
 - a. Direct personnel to complete any compliance-related FOs (i.e., scheduled gas meter changes, TOU meter changes, and gas regulator replacements) in FAS.
 - b. Ensure that the completion date and time are noted in the Dispatch Remarks section of the FO.

END of Instructions

Definitions	NA
Implementation Responsibilities	The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.
Governing Document	Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices"
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	Developmental References: Form 62-3458, "PG&E Multipurpose Customer Service Order."



Field Automation System (FAS) Technology Down

Supplemental References:

[Code of Safe Practices.](#)

[TD-6436P-02, "Handling Gas Scheduled Meter Change \(SMC\), Electric Time of Use \(TOU\) and Gas Regulator Replacement Program \(GRRP\) Field Orders."](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

Appendices NA

Attachments NA

Document Recision This document supersedes Work Procedure WP6436-07, "Field Automation System (FAS) Technology Down," issued 10/2006.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Procedure was moved to new format.



Reviewing Same-Day and Future-Dated Field Orders

Summary This procedure describes how Pacific Gas and Electric Company (Company) field service dispatchers review “same-day” and “future-dated” field orders in the field automation system (FAS).

Level of Use: Information Use

Target Audience The director in charge of customer field services, field service managers and supervisors, and field service dispatchers who handle same-day and future-dated field orders.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must have completed the dispatcher-in-training program or work under the direction of qualified personnel.

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2	Reviewing “Future Day” Field Orders.....	9

Reviewing Same-Day and Future-Dated Field Orders

Procedure Steps

1 Reviewing “Same-Day” Field Orders

- 1.1 From the FAS Dispatch Application upper task bar, select **View—Current Orders** (Figure 1).

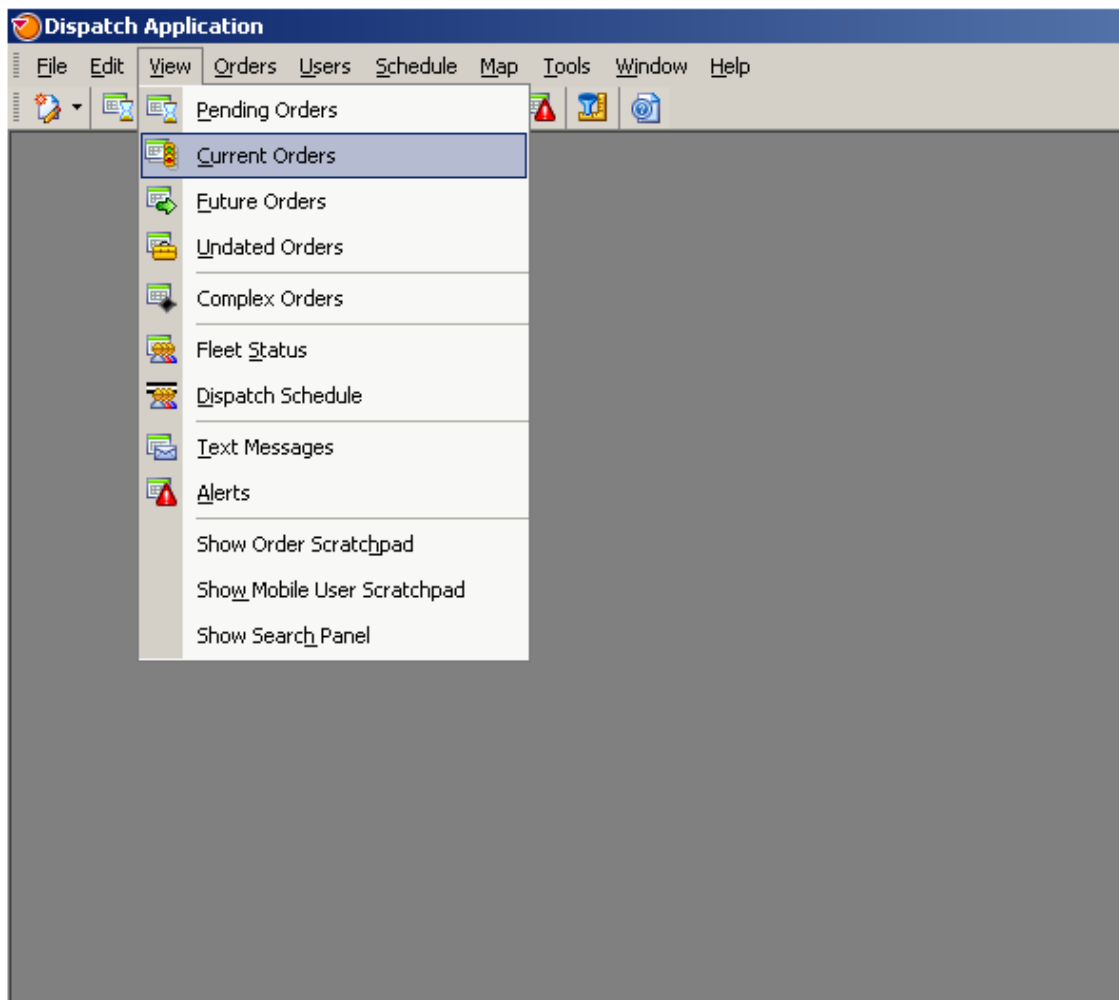


Figure 1. FAS Dispatch Application—Current Orders



Reviewing Same-Day and Future-Dated Field Orders

1.2 The system displays the Current Orders view (Figure 2).

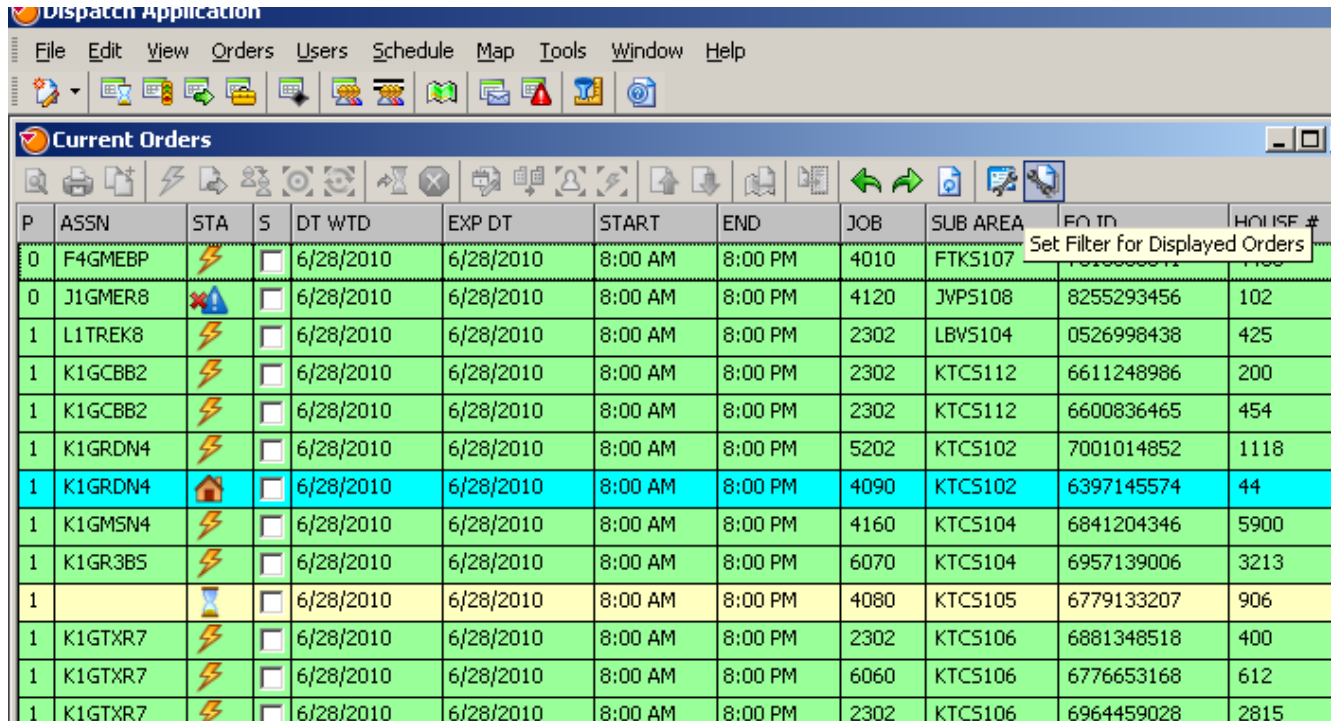
P	ASSN	STA	S	DT WTD	EXP DT	START	END	JOB	SUB AREA
0	F4GMEBP	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4010	FTKS107
1	G1GPJL6	🏠	<input type="checkbox"/>	6/27/2010	6/27/2010	8:00 AM	8:00 PM	6030	GWV5108
1	L1TREK8	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	LBV5104
1	K1GCBB2	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112
1	K1GCBB2	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112
1	K1GRDN4	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	5202	KTCS102
1	K1GRDN4	🏠	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4090	KTCS102
1	K1GMSN4	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4160	KTCS104
1	K1GR3B5	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	6070	KTCS104
1		🕒	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4080	KTCS105
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS106
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	6060	KTCS106
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS106
1	K1GDJBF	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2352	KTCS107
1	K1GMLMG	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	6030	KTCS107
1	K1GMLMG	🚗	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4120	KTCS107
1	K1GMSN4	🏠	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS110
1	K1GMSN4	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4160	KTCS110
1	K1GDXA1	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112
1	K1GCBB2	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112

Figure 2. FAS Dispatch Application–Current Orders

Reviewing Same-Day and Future-Dated Field Orders

1.3 To limit the information displayed in the Viewport, click the **Set Filter** icon (Figure 3).

1. Click the icon to open the Current Orders Filter dialog box (Figure 4).



P	ASSN	STA	S	DT WTD	EXP DT	START	END	JOB	SUB AREA	FO ID	HOUSE #
0	F4GMEBP	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4010	FTKS107		
0	J1GMER8	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4120	JVP5108	8255293456	102
1	L1TREK8	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	LBV5104	0526998438	425
1	K1GCBB2	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112	6611248986	200
1	K1GCBB2	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS112	6600836465	454
1	K1GRDN4	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	5202	KTCS102	7001014852	1118
1	K1GRDN4	🏠	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4090	KTCS102	6397145574	44
1	K1GMSN4	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4160	KTCS104	6841204346	5900
1	K1GR3B5	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	6070	KTCS104	6957139006	3213
1		🕒	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	4080	KTCS105	6779133207	906
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS106	6881348518	400
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	6060	KTCS106	6776653168	612
1	K1GTXR7	⚡	<input type="checkbox"/>	6/28/2010	6/28/2010	8:00 AM	8:00 PM	2302	KTCS106	6964459028	2815

Figure 3. Set Filter icon

Reviewing Same-Day and Future-Dated Field Orders

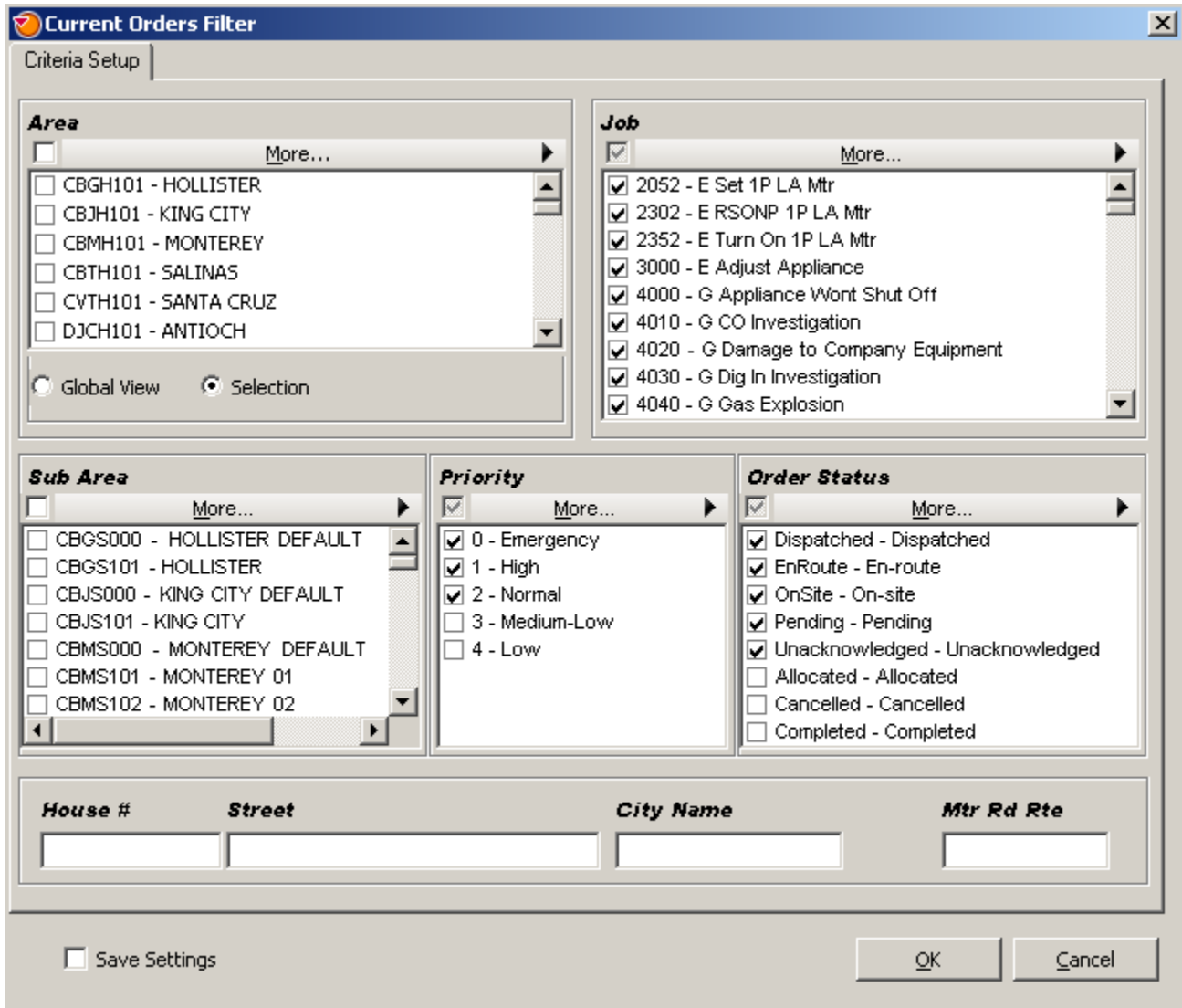


Figure 4. Current Orders Filter Dialog Box

1.4 In the Current Orders Filter dialog box, specify the criteria for selecting the field orders to display, including the selections listed below. In list boxes containing selections, left-click on list items to select them.

1. **Priority** – Select all.
2. **Order Status** – Select the status of the field orders to display. For example:
 - Dispatched – Dispatched
 - EnRoute – En-route
 - OnSite – On-site



Reviewing Same-Day and Future-Dated Field Orders

1.4 (continued)

- Pending – Pending
- Unacknowledged– Unacknowledged
- Allocated - Allocated (not used)
- Cancelled – Cancelled
- Completed - Completed

3. **Area** – Select the areas for which to display field orders.
4. To view the field orders for only one “sub area,” select the appropriate area under Sub Area
5. Click the **OK** button.

The system displays the Current Order View listing the field orders meeting the specified criteria.

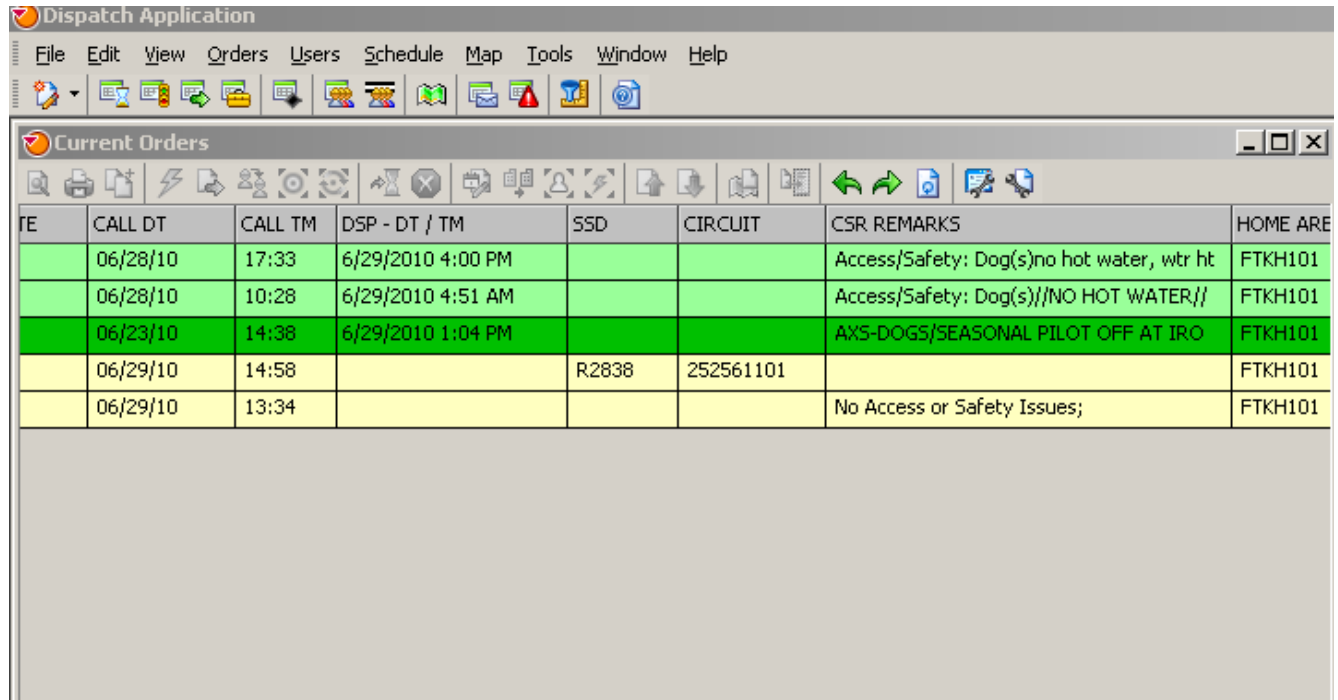
1.5 In Current Orders, perform the following steps:

1. For each field order with the current date in the DT WDT field, perform the following steps:
 - a. Scroll over to the right to view the CSR Remarks. ([Figure 5](#))
 - b. Review the remarks for any special instructions.
 - c. IF the remarks on job Codes 5350 (Gas Shutoff – RGSO) or 7470 (GE RGSO SM SP S/O 1 P LA Mtr) specify “No RGSO,”

THEN, to comply with the field order instructions, the field order must be dispatched and worked as scheduled.

Reviewing Same-Day and Future-Dated Field Orders

1.5 (continued)



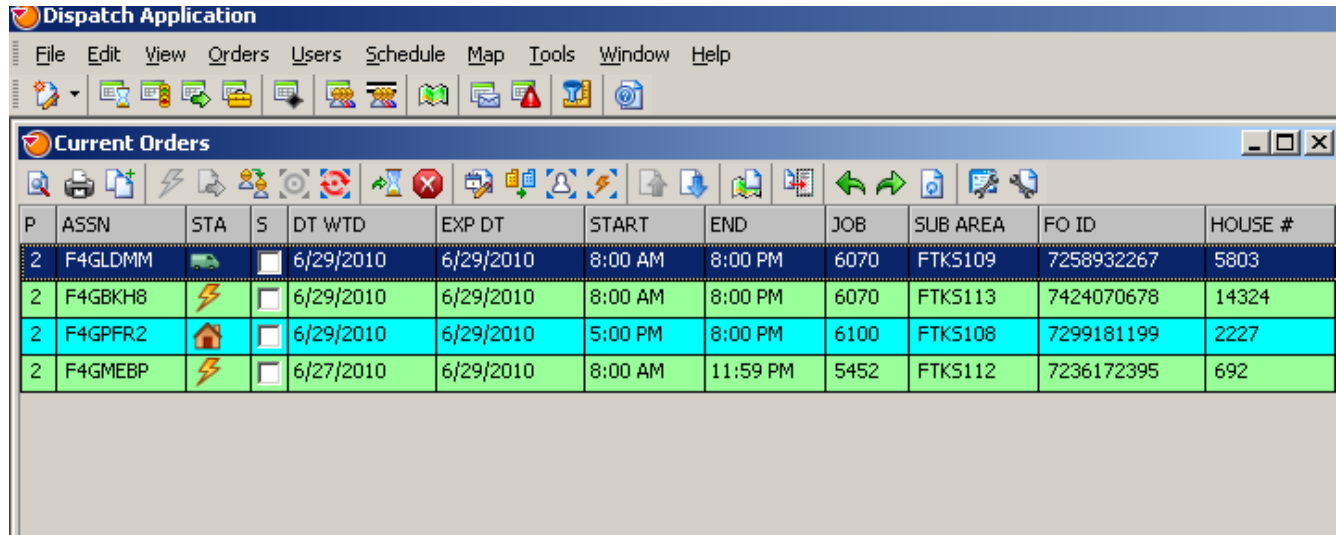
TE	CALL DT	CALL TM	DSP - DT / TM	SSD	CIRCUIT	CSR REMARKS	HOME ARE
	06/28/10	17:33	6/29/2010 4:00 PM			Access/Safety: Dog(s)no hot water, wtr ht	FTKH101
	06/28/10	10:28	6/29/2010 4:51 AM			Access/Safety: Dog(s)//NO HOT WATER//	FTKH101
	06/23/10	14:38	6/29/2010 1:04 PM			AXS-DOGS/SEASONAL PILOT OFF AT IRO	FTKH101
	06/29/10	14:58		R2838	252561101		FTKH101
	06/29/10	13:34				No Access or Safety Issues;	FTKH101

Figure 5. Field Order Remarks

2. For any field orders that were issued incorrectly, perform the following steps:
 - a. Click on the appropriate field order and hold down the shift button to select multiple field orders to print.
 - b. Click on the Printer Icon (Figure 6).
 - c. Give printed field orders to the supervisor.

Reviewing Same-Day and Future-Dated Field Orders

1.5 (continued)



The screenshot shows the 'Dispatch Application' software interface. The 'Current Orders' window is active, displaying a table with the following data:

P	ASSN	STA	S	DT WTD	EXP DT	START	END	JOB	SUB AREA	FO ID	HOUSE #
2	F4GLDMM		<input type="checkbox"/>	6/29/2010	6/29/2010	8:00 AM	8:00 PM	6070	FTK5109	7258932267	5803
2	F4GBKH8		<input type="checkbox"/>	6/29/2010	6/29/2010	8:00 AM	8:00 PM	6070	FTK5113	7424070678	14324
2	F4GPFR2		<input type="checkbox"/>	6/29/2010	6/29/2010	5:00 PM	8:00 PM	6100	FTK5108	7299181199	2227
2	F4GMEBP		<input type="checkbox"/>	6/27/2010	6/29/2010	8:00 AM	11:59 PM	5452	FTK5112	7236172395	692

Figure 6. Print Field Order

- Dispatch field orders according to Utility Procedure [TD-6436P-17, "Fleet Loading Instructions."](#)



Reviewing Same-Day and Future-Dated Field Orders

2 Reviewing “Future Day” Field Orders

- 2.1 From the FAS Dispatch Application upper task bar, select Tools—Set Future Date (Figure 7).

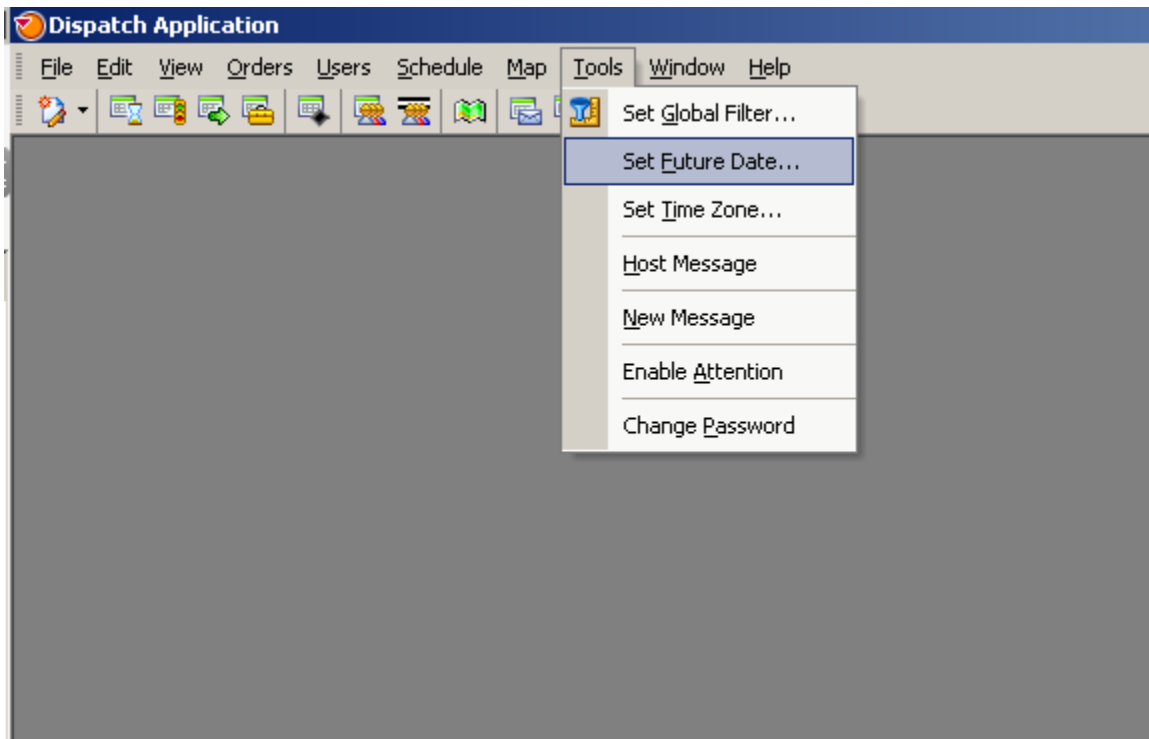


Figure 7. Tools—Set Future Date

- 2.2 The system displays the Set Future Date dialog box ([Figure 8](#)).

Reviewing Same-Day and Future-Dated Field Orders

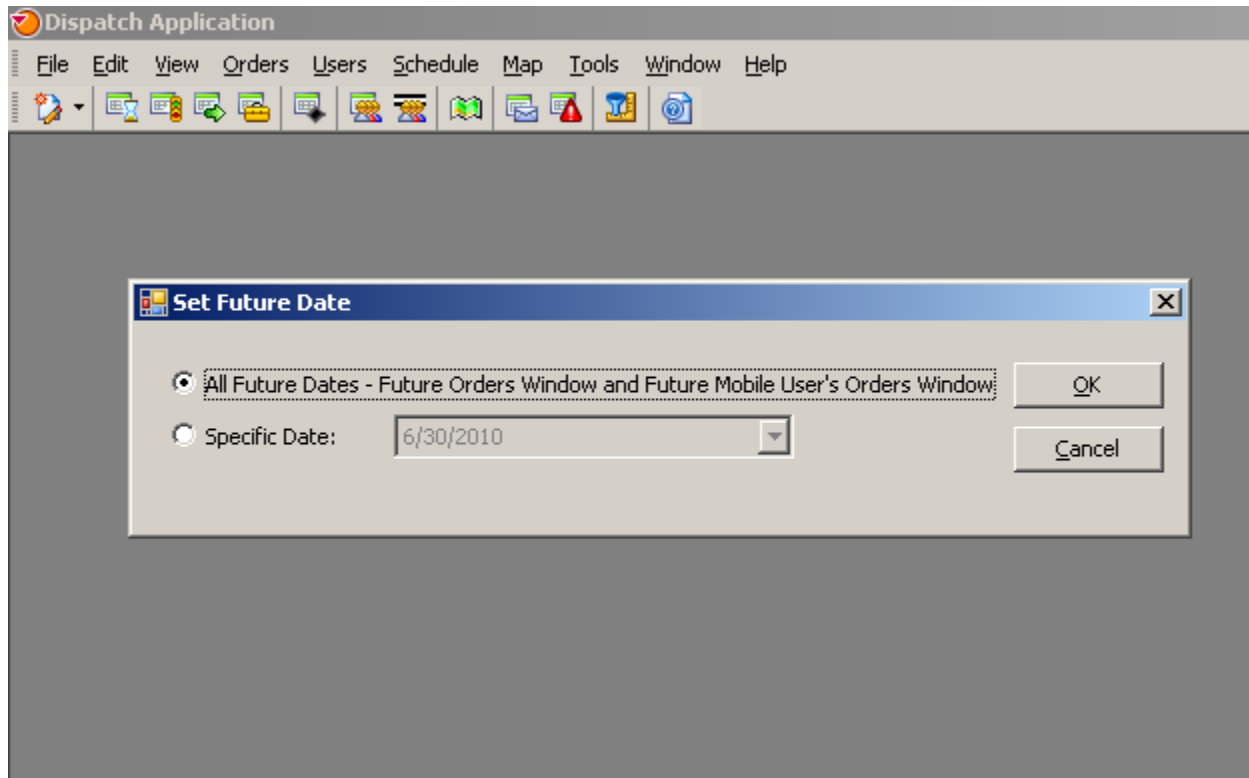


Figure 8. Set Future Date Dialog Box

- 2.3 To view all pending future field orders, leave the **All Future Dates** box selected,
OR
To view selected pending future field orders, perform the following steps:
1. From the upper task bar, select **View Future Order** ([Figure 9](#)):

Reviewing Same-Day and Future-Dated Field Orders

2.3 (continued)

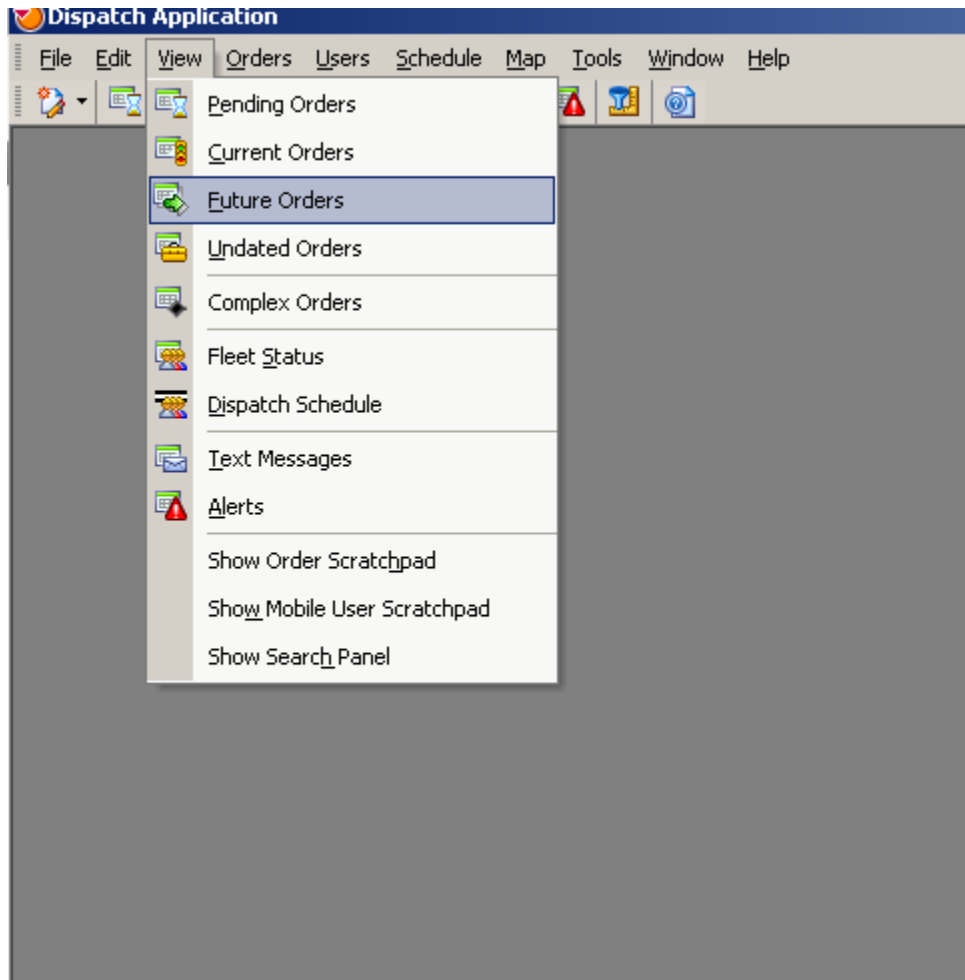
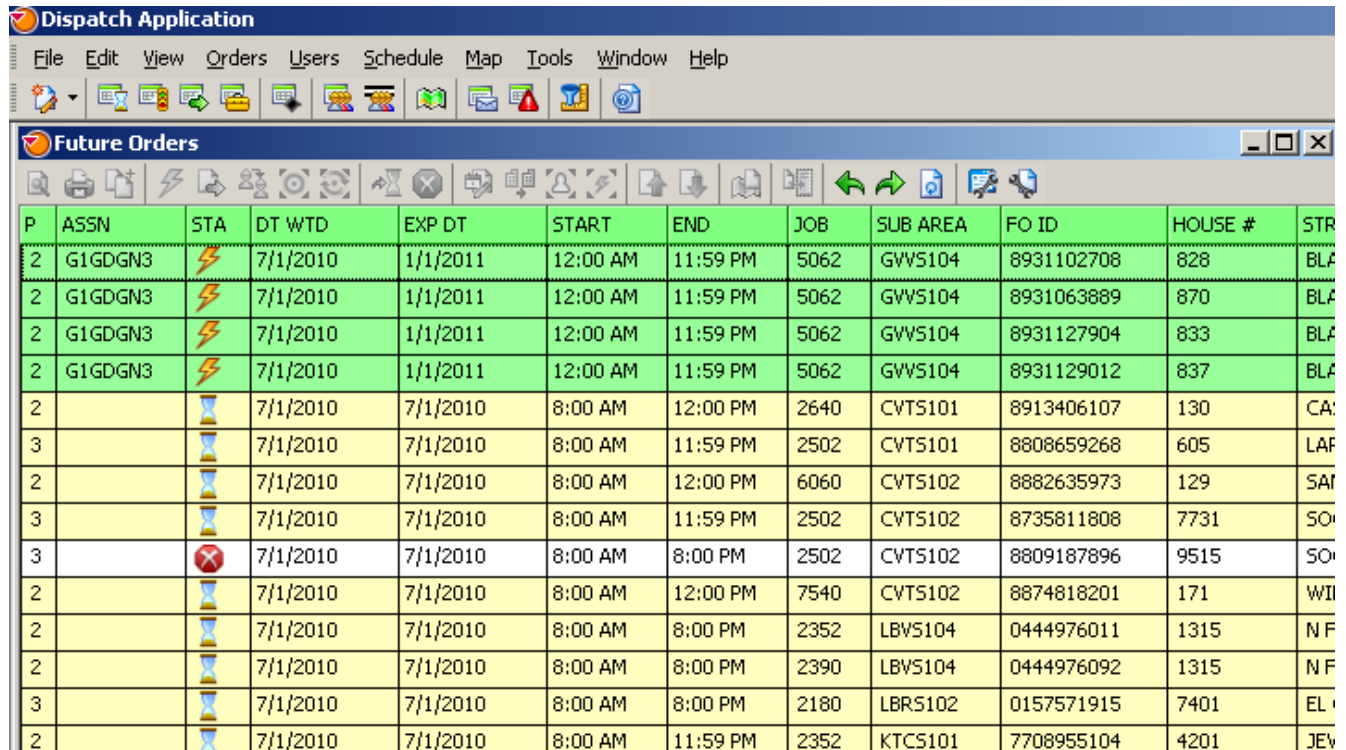


Figure 9. FAS Dispatch Application—View—Future Order Filter

2. The system displays the Future Order List viewport ([Figure 10](#)).

Reviewing Same-Day and Future-Dated Field Orders

2.3 (continued)



P	ASSN	STA	DT WTD	EXP DT	START	END	JOB	SUB AREA	FO ID	HOUSE #	STR
2	G1GDGN3	⚡	7/1/2010	1/1/2011	12:00 AM	11:59 PM	5062	GWV5104	8931102708	828	BLA
2	G1GDGN3	⚡	7/1/2010	1/1/2011	12:00 AM	11:59 PM	5062	GWV5104	8931063889	870	BLA
2	G1GDGN3	⚡	7/1/2010	1/1/2011	12:00 AM	11:59 PM	5062	GWV5104	8931127904	833	BLA
2	G1GDGN3	⚡	7/1/2010	1/1/2011	12:00 AM	11:59 PM	5062	GWV5104	8931129012	837	BLA
2		⌚	7/1/2010	7/1/2010	8:00 AM	12:00 PM	2640	CVTS101	8913406107	130	CA
3		⌚	7/1/2010	7/1/2010	8:00 AM	11:59 PM	2502	CVTS101	8808659268	605	LAF
2		⌚	7/1/2010	7/1/2010	8:00 AM	12:00 PM	6060	CVTS102	8882635973	129	SAI
3		⌚	7/1/2010	7/1/2010	8:00 AM	11:59 PM	2502	CVTS102	8735811808	7731	SO
3		⊗	7/1/2010	7/1/2010	8:00 AM	8:00 PM	2502	CVTS102	8809187896	9515	SO
2		⌚	7/1/2010	7/1/2010	8:00 AM	12:00 PM	7540	CVTS102	8874818201	171	WII
2		⌚	7/1/2010	7/1/2010	8:00 AM	8:00 PM	2352	LBVS104	0444976011	1315	N F
2		⌚	7/1/2010	7/1/2010	8:00 AM	8:00 PM	2390	LBVS104	0444976092	1315	N F
3		⌚	7/1/2010	7/1/2010	8:00 AM	8:00 PM	2180	LBR5102	0157571915	7401	EL
2		⌚	7/1/2010	7/1/2010	8:00 AM	11:59 PM	2352	KTCS101	7708955104	4201	JEV

Figure 10. Future Order Filter

3. Click on the **Set Filter** button.
4. The system displays the Criteria Setup dialog box ([Figure 11](#)).

Reviewing Same-Day and Future-Dated Field Orders

2.3 (continued)

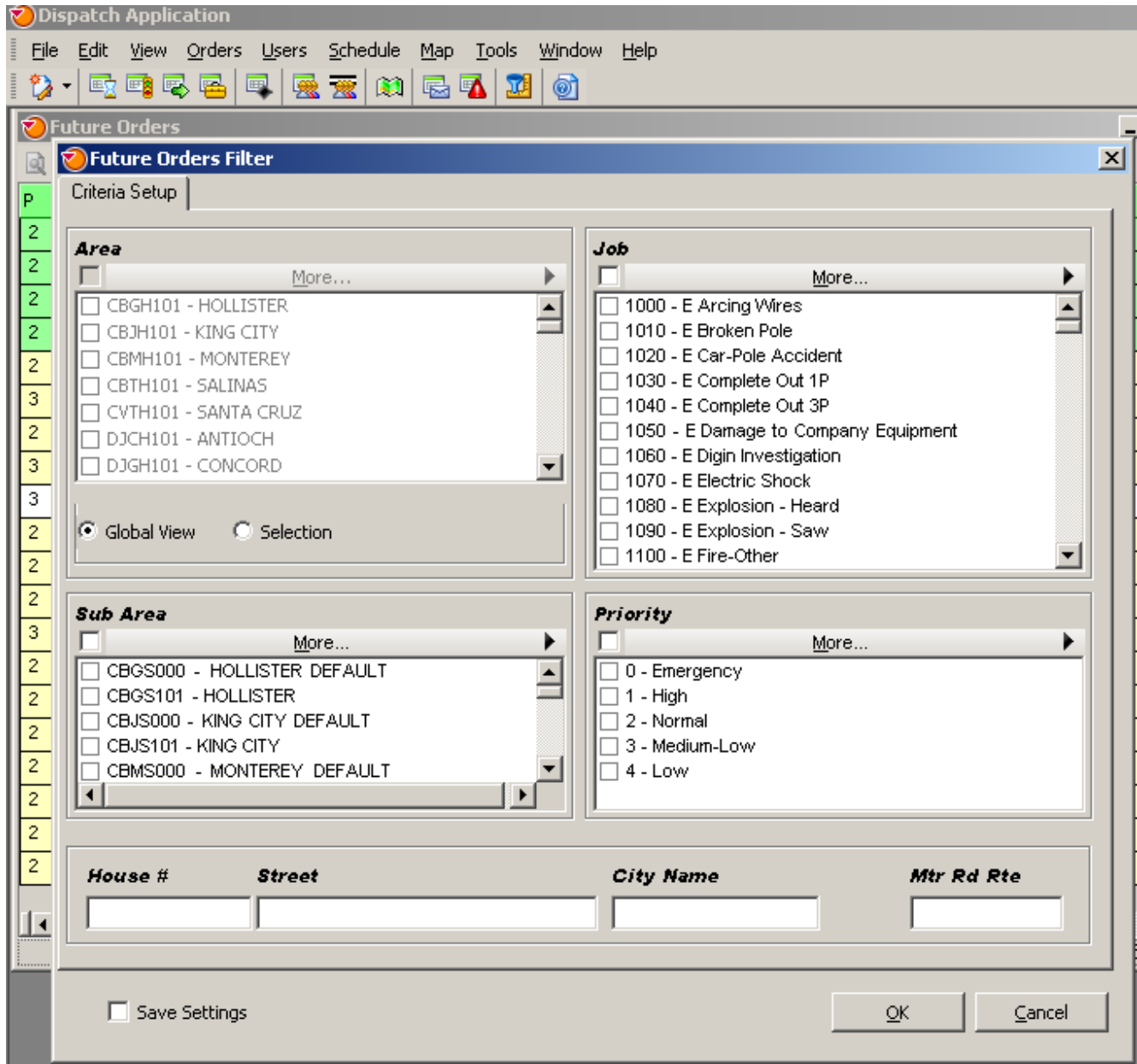


Figure 11. Future Order List -- Criteria Setup Dialog Box

5. In the Criteria Setup dialog box, specify the criteria for selecting the field orders to display, including the selections listed below. In list boxes containing selections, left-click on list items to select them.
 - a. **Area** – Select the areas for which to display field orders.
 - b. **Priority** – Select all.



Reviewing Same-Day and Future-Dated Field Orders

2.3 (continued)

- c. To view the field orders for only one “sub area,” select the appropriate area under Sub Area

Click the **OK** button.

The system displays the Future Orders listing the field orders meeting the specified criteria (Figure 12).

P	ASSN	STA	DT WTD	EXP DT	START	END	JOB	SUB AREA	FO ID	HOUSE #	STR
3			7/1/2010	7/1/2010	8:00 AM	8:00 PM	5210	CBMS103	0077793593	DOLORES	2NE
3			7/1/2010	7/1/2010	8:00 AM	8:00 PM	7010	CBMS103	0078293553	DOLORES	4 N
2			7/1/2010	7/1/2010	5:00 PM	8:00 PM	5452	CBMS103	0120487920	TORRES	4 S
2			7/1/2010	7/1/2010	5:00 PM	8:00 PM	6030	CBMS103	0066862813	1063	MA

Figure 12. Future Order List

2.4 For each field order, perform the following steps:

1. Select the appropriate field order and scroll to the right to display the CSR Remarks (Figure 12).
2. Review the remarks for any special instructions.
3. Cancel and redirect field orders to non-FAS departments in accordance with Utility Procedure [TD-6436P-06, “Redirecting Field Orders in the Field Automation System \(FAS\) to Non-FAS Departments.”](#)

END of Instructions



Reviewing Same-Day and Future-Dated Field Orders

Definitions	NA
Implementation Responsibilities	The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.
Governing Document	Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices." governs this document.
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	Developmental References: TD-6436P-06, "Redirecting Field Orders in the Field Automation System (FAS) to Non-FAS Departments." TD-6436P-17, "Fleet loading Instructions." Supplemental References: Code of Safe Practices. Utility Standard Practice (USP) 22, "Safety and Health Program."
Appendices	NA
Attachments	NA
Document Recision	This procedure supersedes Utility Procedure WP6436-08, "Reviewing Same-Day and Future-Dated Field Orders," issued 10/06.



Reviewing Same-Day and Future-Dated Field Orders

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format and screenshots updated to reflect FAS 8.1.



On-Line Technology Down (OLTD) Process

Summary This procedure describes how Pacific Gas and Electric Company (Company) field service dispatchers perform the On-Line Technology Down (OLTD) process to receive and dispatch field orders (FOs) when the Field Automation System (FAS), the Customer Care and Billing (CC&B) system, or both are not operational.

The OLTD uses a single, on-line system for input, storage, and real-time distribution of “same day” and “immediate response” FOs.

Level of Use: Information Use

Target Audience Directors in charge of customer field services, field service managers and supervisors, and field service dispatchers.

Safety To ensure safety when responding to any FO, personnel must perform all work in accordance with applicable precautions and requirements in [Utility Standard Practice \(USP 22\)](#), [“Safety and Health Program,”](#) the [Code of Safe Practices](#), Company numbered documents, and utility standards and procedures.

Before You Start Personnel who perform tasks in accordance with this procedure must first complete the Dispatcher in Training program or work under the direction of qualified personnel.

Procedure Steps

1 Monitoring For and Receiving Field Orders when CC&B System is Not Available

1.1 When notified by the Customer Traffic Control Center (CTCC) that the CC&B system is not available, perform the following steps:

1. Open the OLTD mailbox and view the tag alert location for pending FO dispatches.
2. Continuously monitor the assigned OLTD mailbox for service requests generated by Customer Contact Center Operations.
3. Continuously monitor fax machines and printers for FOs.



On-Line Technology Down (OLTD) Process

2 Dispatching Field Orders When FAS is Available, but CC&B System is Not Available

- 2.1 Perform the following steps to dispatch “immediate response” and “same-day” FOs when FAS is available but the CC&B system is not:
1. Open the appropriate tag alert mailbox in Microsoft Outlook.
 2. Monitor email for incoming attachments.
 3. Print each attachment received in the tag alert mailbox.
 4. Create a FAS FO for each non-billing related customer service request with the order entry function in the FAS dispatch application.
 5. Dispatch each FAS FO to the appropriate field personnel.
 6. Delete the email from the in-box and the deleted items box.

3 Dispatching Field Orders when Both FAS and the CC&B System are Not Available

- 3.1 Upon receipt of “immediate response” and “same-day” FOs emailed or faxed from the Customer Contact Center, perform the following steps:
1. Review each email attachment or fax.
 2. Notify all appropriate field personnel that FAS is unavailable and that new work must be dispatched via radio, pager, or cellular phone.
 3. When dispatching FOs, advise each field representative to perform the following tasks:
 - a. Document the FO on [Form 62-3458, “Multipurpose Customer Service Order.”](#)
 - b. For all FOs worked on paper, complete them on paper, even if FAS becomes available.
 - c. On the same day an FO is received, submit a completed [Form 62-3458, “Multipurpose Customer Service Order.”](#) for the FO to the immediate supervisor.
 4. Note the following information in the dispatch remarks section of the FO:
 - “FAS down.”
 - The technical identification (tech ID) of the field representative who received the FO.
 - The local area network (LAN) ID of the dispatcher.
 5. Cancel, print, and retain FOs and faxes for reference.



On-Line Technology Down (OLTD) Process

- 3.2 Supervisors must forward all work completed on paper to the Credit and Records Center (C&RC) at 8110 Lorraine Avenue, Stockton, for processing.
- 4 Dispatching Field Orders When Both FAS and CC&B System are Unavailable One Full Day or More**
- 4.1 Perform the following steps when dispatching “future-day” FOs when both FAS and the CC&B system are unavailable for one day or more:
 - 1. Immediately notify the dispatch supervisor that FAS is unavailable for one full day or more.
 - 2. Monitor the field order repository system (FORS).
 - 3. Print next day FOs.
 - 4. Distribute next day FOs in accordance with the local work distribution strategy.
 - 5. Open the appropriate tag alert mailbox in Microsoft Outlook.
 - 6. Monitor email for incoming attachments.

END of Instructions

Definitions

NA

Implementation Responsibilities

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Governing Document

[Utility Standard TD-6436S, “Gas and Electric Field Service and Dispatch and Scheduling Operating Practices,”](#) governs this document.

Compliance Requirement/ Regulatory Commitment

NA

Reference Documents

Developmental References:
[Code of Safe Practices.](#)



On-Line Technology Down (OLTD) Process

[Company Form 62-3458, "Multipurpose Customer Service Order."](#)

[USP 22, "Safety and Health Program."](#)

Supplemental References:

NA

Appendices NA

Attachments NA

Document Recision This document supersedes Work Procedure WP6436-09, "On-Line Technology Down (OLTD) Process," dated 10-06.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format.



Field Order Repository System (FORS)

Summary This procedure describes how personnel use the Field Order Repository System (FORS) database, which stores all active field orders (FOs) currently in progress or scheduled to begin in the future.

FORS may be used to generate reports and paper copies of FOs by geographic areas or by work group.

Level of Use: Informational Use

Target Audience Managers, field services supervisors, and field service representatives who dispatch work to either field groups when the field automation system (FAS) is down, or to field groups that do not have FAS.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by qualified personnel to do such work.

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Field Order Repository System (FORS)

Procedure Steps

1 Overview

1.1 FORS is accessible 24 hours a day, and is used in the following manner:

- Personnel using FAS use FORS when FAS is unavailable for dispatching.
- Transmission and distribution (T&D) and transmission and regulation (T&R) personnel that do not use FAS use FORS to access all of their FOs.

1.2 This utility procedure describes how to perform the following steps:

- Access FORS.
- Choose the proper selection criteria.
- Print FOs and FO reports.

2 Accessing FORS

2.1 To access the FORS login dialog box, perform the following steps:

1. On the Windows desktop, double-click the FORS icon (Figure 1).

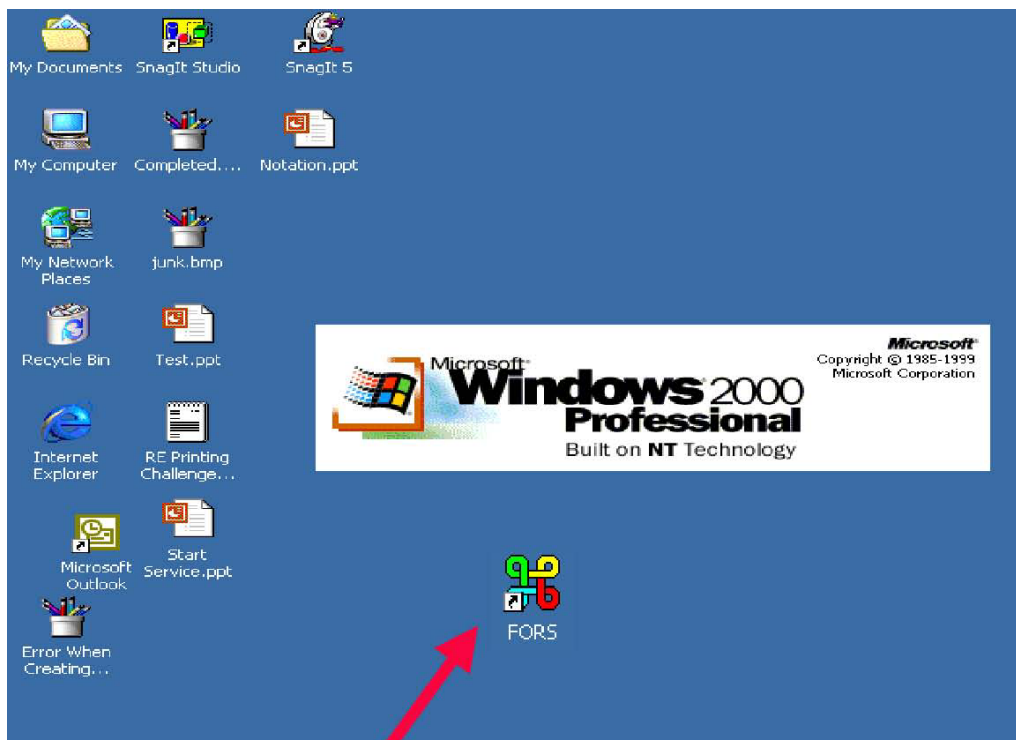


Figure 1. FORS Icon on the Windows Desktop

Field Order Repository System (FORS)

2.1 (continued)

2. In the FORS login dialog box (Figure 2), enter the following information:
 - a. In the **User Name** field, type the assigned group code (e.g., SF15, OAK05, SJ06, etc.).
 - b. In the **Password** field, type the assigned password (e.g., SFFORS, OAKFORS, SJFORS, etc.).



Figure 2. FORS Login Dialog Box

- c. Click **OK**. The system displays the field order repository selection screen as shown in [Figure 3, "FORS Selection Screen," on Page 4.](#)

3 Searching for Field Orders

- 3.1 The FORS system allows for the creation of a list of FOs for an entire business unit, or for a division, office, or work group.
- 3.2 The search criteria may include multiple areas. For example, five offices may be selected for one report. To complete the search criteria, make the selections as follows:
 1. In the **Scope** section, select the business unit and, as needed, select the division, office(s), and sub-area(s).
 - a. To search more than one office (up to a maximum of five), hold the control key (CTRL) down and select the desired offices. In [Figure 3](#), BU02, Diablo, both offices (Antioch and Concord), and all sub-areas were selected.
 2. In the **Priority** section, select the priority numbers (Priorities 10, 20, 40, or 90) of the requested FOs by checking the designated boxes. Select all of the priority numbers needed or the desired data will not be displayed.

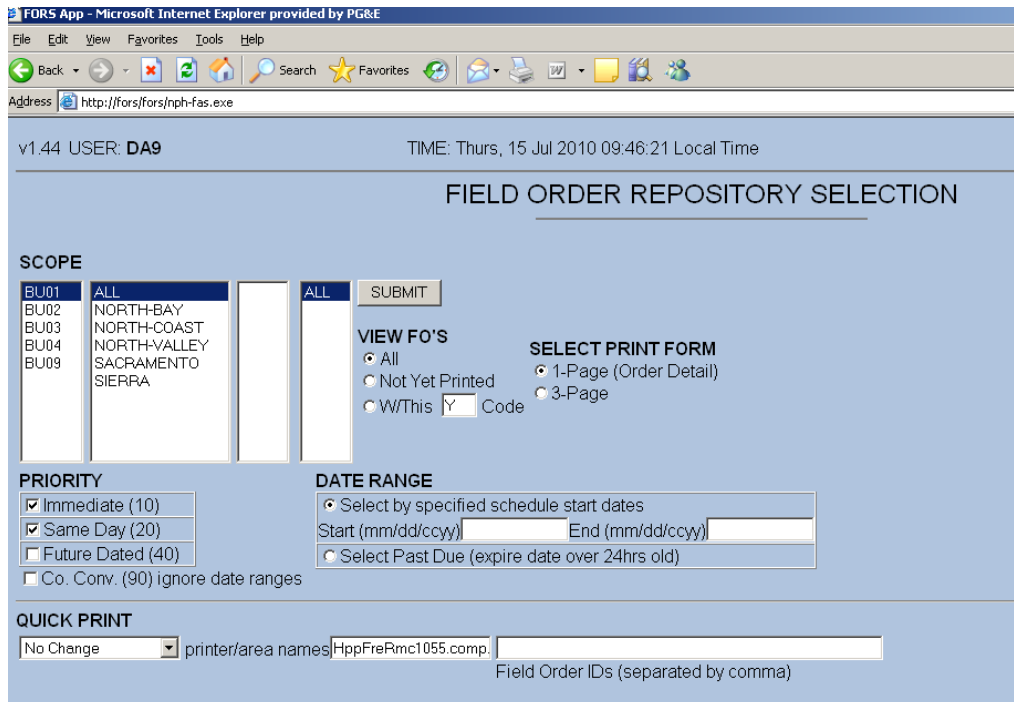
Field Order Repository System (FORS)

3.2 (continued)

NOTE

Priorities 10 and 20 are default values.

3. In the **Date Range** section, enter the start and end dates in the designated fields. Leave these fields blank to request FOs for all dates. If desired, check **Select Past Due**.
4. In the **Quick Print** section, click the **Submit** button to begin searching for the requested FOs. If desired, narrow the search to FOs not yet printed or to those with a specific code. The search results appear on the **Field Order Repository Query Result** screen as shown in [Figure 4, "FORS Query Results Screen," on Page 5](#).



v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 09:46:21 Local Time
FIELD ORDER REPOSITORY SELECTION

SCOPE
 BU01 ALL SUBMIT
 BU02 NORTH-BAY
 BU03 NORTH-COAST
 BU04 NORTH-VALLEY
 BU09 SACRAMENTO
 SIERRA

VIEW FO'S
 All
 Not Yet Printed
 W/This Code

SELECT PRINT FORM
 1-Page (Order Detail)
 3-Page

PRIORITY
 Immediate (10)
 Same Day (20)
 Future Dated (40)
 Co. Conv. (90) ignore date ranges

DATE RANGE
 Select by specified schedule start dates
 Start (mm/dd/ccyy) End (mm/dd/ccyy)
 Select Past Due (expire date over 24hrs old)

QUICK PRINT
 No Change printer/area names HppFreRmc1055.comp.
 Field Order IDs (separated by comma)

Figure 3. FORS Selection Screen

Field Order Repository System (FORS)

3.2 (continued)

v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:38:51 Local Time

FIELD ORDER REPOSITORY QUERY RESULT

CRITERIA
 GRP1=BU01 GRP2=ALL GRP3=ALL GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

DESTINATION
 No Change printer/area names: HppFreRmc1055.comp Update Print Status to: Y **SELECT PRINT FORM**
 1-Page (Order Detail)
 3-Page

RESULT LIST
 Print # -

Returning 100 of 147 rows

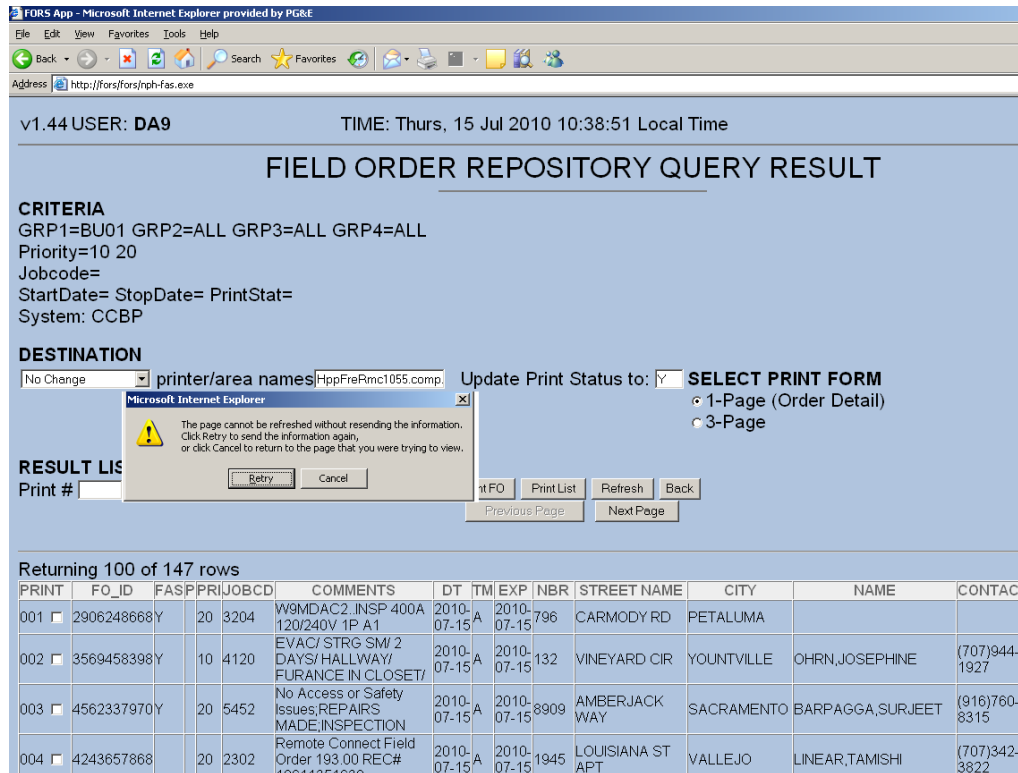
PRINT	FO_ID	FASP	PRI	JOB	CD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT
001	2906248668	Y	20	3204		W9MDAC2.INSP 400A 120/240V 1P A1	2010-07-15	A	2010-07-15	796	CARMODY RD	PETALUMA		
002	3569458398	Y	10	4120		EVAC/ STRG SM/ 2 DAYS/ HALLWAY/ FURANCE IN CLOSET/	2010-07-15	A	2010-07-15	132	VINEYARD CIR	YOUNTVILLE	OHRN,JOSEPHINE	(707)944-1927
003	4562337970	Y	20	5452		No Access or Safety Issues,REPAIRS MADE,INSPECTION	2010-07-15	A	2010-07-15	8909	AMBERJACK WAY	SACRAMENTO	BARPAGGA,SURJEET	(916)760-8315
004	4243657868		20	2302		Remote Connect Field Order: 193.00 REC#	2010-07-15	A	2010-07-15	1945	LOUISIANA ST APT	VALLEJO	LINEAR,TAMISHI	(707)342-3822

Figure 4. FORS Query Results Screen

- To search for any new FOs entered after performing the initial query, click the **Refresh** button (Figure 4) and then click the **Retry** button as shown in [Figure 5, "Dialog Box for Retrying the FORS Query Screen," on Page 6](#). The new query results only include FOs not yet printed.

Field Order Repository System (FORS)

3.2 (continued)



The screenshot shows the FORS App interface in Microsoft Internet Explorer. The browser address bar shows 'http://fors/nph-fas.exe'. The page title is 'v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:38:51 Local Time'. The main heading is 'FIELD ORDER REPOSITORY QUERY RESULT'. Below this, the 'CRITERIA' section lists: GRP1=BU01 GRP2=ALL GRP3=ALL GRP4=ALL, Priority=10 20, Jobcode=, StartDate= StopDate= PrintStat=, and System: CCBP. The 'DESTINATION' section shows a dropdown menu set to 'No Change', a text field with 'printer/area names', and an 'Update Print Status to:' field with a dropdown menu set to 'SELECT PRINT FORM'. Below this, there are radio buttons for '1-Page (Order Detail)' and '3-Page'. A 'RESULT LIST' section is partially visible with a 'Print #' field. A dialog box is overlaid on the screen, containing a warning icon and the text: 'The page cannot be refreshed without resending the information. Click Retry to send the information again, or click Cancel to return to the page that you were trying to view.' The dialog box has 'Retry' and 'Cancel' buttons. Below the dialog box, there are buttons for 'Print List', 'Refresh', 'Back', 'Previous Page', and 'Next Page'. At the bottom, a table shows the first four rows of the query result.

PRINT	FO_ID	FAS	PRI	JOB	CD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT
001	2906248668	Y	20	3204		W9MDAC2_INSP 400A 120/240V 1P A1	2010-07-15	A	2010-07-15	796	CARMODY RD	PETALUMA		
002	3569458398	Y	10	4120		EVAC/ STRG SW/ 2 DAYS/ HALLWAY/ FURANCE IN CLOSET/	2010-07-15	A	2010-07-15	132	VINEYARD CIR	YOUNTVILLE	OHRN, JOSEPHINE	(707)944-1927
003	4562337970	Y	20	5452		No Access or Safety Issues; REPAIRS MADE; INSPECTION	2010-07-15	A	2010-07-15	8909	AMBERJACK WAY	SACRAMENTO	BARPAGGA, SURJEET	(916)760-8315
004	4243657868		20	2302		Remote Connect Field Order 193.00 REC# 19R11351630	2010-07-15	A	2010-07-15	1945	LOUISIANA ST APT	VALLEJO	LINEAR, TAMISHI	(707)342-3822

Figure 5. Dialog Box for Retrying the FORS Query Screen

4 Selecting Report Items

- 4.1 Columns with blue, underlined headings contain lists that may be sorted in either ascending or descending order.
- 4.2 To sort by priority number, date (DT), FA type, etc., click the appropriate heading. Up to five cities may be selected for each report.
- 4.3 FOs may be coded with a single alphanumeric character before printing by placing an alphanumeric character in the **Update Print Status** field before printing.

5 Working with Business Unit 9 (BU09)

- 5.1 Business unit 9 (BU09) is a category used to find FOs that have incorrect information and might otherwise get lost in a search, such as FOs with meter route errors.
- 5.2 Check BU09 FOs daily to ensure that they are assigned in a timely manner.

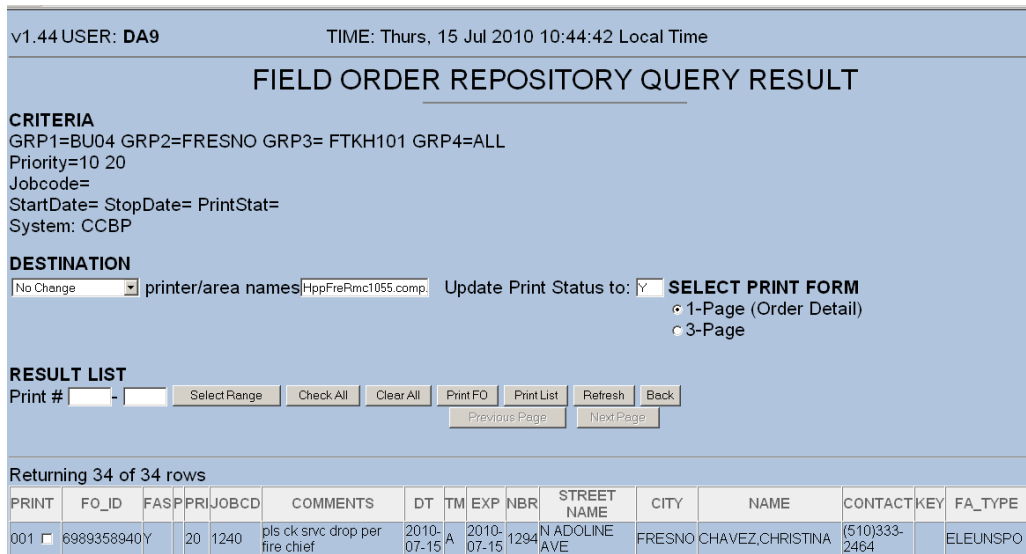
Field Order Repository System (FORS)

6 Printing Field Orders and Field Order Lists

6.1 The following query results may be printed from FORS:

- FO list (Figure 6)
- Single FO ([Figure 7](#))
- Range of FOs
- Several selected FOs
- All FOs

6.2 After print requests have been submitted, the **Field Order Repository Print Submitted** screen appears as shown in [Figure 11, "Field Order Repository Print Submitted Screen."](#)



v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:44:42 Local Time

FIELD ORDER REPOSITORY QUERY RESULT

CRITERIA
 GRP1=BU04 GRP2=FRESNO GRP3= FTKH101 GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

DESTINATION
 No Change printer/area names HppFreRmc1055.comp Update Print Status to: **SELECT PRINT FORM**
 1-Page (Order Detail)
 3-Page

RESULT LIST
 Print # [] - []

Returning 34 of 34 rows

PRINT	FO_ID	FASP	PRI	JOB	CD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT	KEY	FA_TYPE
001 <input type="checkbox"/>	6989358940	Y	20	1240		pls ck svc drop per fire chief	2010- 07-15	A	2010- 07-15	1294	N ADOLINE AVE	FRESNO	CHAVEZ,CHRISTINA	(510)333- 2464		ELEUNSP0

Figure 6. Printing the Field Order List from the FORS Query Result Screen

Field Order Repository System (FORS)

6.2 (continued)

v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:44:42 Local Time

FIELD ORDER REPOSITORY QUERY RESULT

CRITERIA
 GRP1=BU04 GRP2=FRESNO GRP3= FTKH101 GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

DESTINATION
 No Change printer/area names HppFreRmc1055.comp. Update Print Status to: **SELECT PRINT FORM**
 1-Page (Order Detail)
 3-Page

RESULT LIST
 Print # -

Returning 34 of 34 rows

PRINT	FO_ID	FASP	PRI	JOBCD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT	KEY	FA_TYPE
001 <input type="checkbox"/>	6989358940	Y	20	1240	pls ck svcs drop per fire chief	2010-07-15	A	2010-07-15	1294	N ADOLINE AVE	FRESNO	CHAVEZ,CHRISTINA	(510)333-2464		ELEUNSP0

Figure 7. Printing a Field Order by Using the Print FO Button

6.3 Changing the Printer Destination

- To change the printer destination before printing, click the drop-down arrow under **Destination** and then select the desired printer (Figure 8).

v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:44:42 Local Time

FIELD ORDER REPOSITORY QUERY RESULT

CRITERIA
 GRP1=BU04 GRP2=FRESNO GRP3= FTKH101 GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

DESTINATION
 No Change printer/area names HppFreRmc1055.comp. Update Print Status to: **SELECT PRINT FORM**
 1-Page (Order Detail)
 3-Page

RESULT LIST
 Print # -

Returning 34 of 34 rows

PRINT	FO_ID	FASP	PRI	JOBCD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT	KEY	FA_TYPE
001 <input checked="" type="checkbox"/>	6989358940	Y	20	1240	pls ck svcs drop per fire chief	2010-07-15	A	2010-07-15	1294	N ADOLINE AVE	FRESNO	CHAVEZ,CHRISTINA	(510)333-2464		ELEUNSP0
002 <input type="checkbox"/>	7240263984	Y	20	8590	ISSUE TO F4MAMSC (SIGUENZA)	2010-07-02	A	2010-07-02	5955	S ELM AVE	FRESNO	IMMANUEL LUTHERAN CHUR	(559)237909		

Figure 8. Example of How to Change the Printer Destination



Field Order Repository System (FORS)

6.4 Printing a Single Field Order

- 1. Click the Print FO button on the Field Order Repository Query Result screen.
2. Also, single FOs may be printed from the field order repository selection (entry) screen
3. To print more than one FO, type additional FO numbers separated by commas.

6.5 Printing a Range of Field Orders

- 1. Type the desired start and end numbers in the Print # field on the Field Order Repository Query Result screen.

6.6 Printing Several Field Orders

- 1. In the Print column, click the box adjacent to each desired FO and then click the Print FO button (Figure 9).

6.7 Printing All Field Orders

- 1. Click the Check All button and then click the Print FO button (Figure 10).

Figure 9 screenshot showing the 'FIELD ORDER REPOSITORY QUERY RESULT' interface. It includes a criteria section, a destination dropdown, a 'SELECT PRINT FORM' section with radio buttons for '1-Page (Order Detail)' and '3-Page', and a 'RESULT LIST' table with columns for PRINT, FO_ID, FASP, PRI, JOB CD, COMMENTS, DT, TM, EXP, NBR, STREET NAME, CITY, NAME, CONTACT, and KEY. The table shows 4 rows of field order data.

Figure 9. Example of How to Print Several Field Orders

Field Order Repository System (FORS)

6.7 (continued)

v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:44:42 Local Time

FIELD ORDER REPOSITORY QUERY RESULT

CRITERIA
 GRP1=BU04 GRP2=FRESNO GRP3= FTKH101 GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

DESTINATION
 No Change printer/area names HppFireRmct1055.comp Update Print Status to: **SELECT PRINT FORM**
 1-Page (Order Detail)
 3-Page

RESULT LIST
 Print # -

Returning 34 of 34 rows

PRINT	FO_ID	FAS	PRI	JOB	CD	COMMENTS	DT	TM	EXP	NBR	STREET NAME	CITY	NAME	CONTACT	KEY	FA_TYF
001	6989358940	Y	20	1240		pls ck svrc drop per fire chief	2010-07-15	A	2010-07-15	1294	N ADOLINE AVE	FRESNO	CHAVEZ,CHRISTINA	(510)333-2464		ELEUNS
002	7240263984	Y	20	8590		ISSUE TO F4MAMSC (SIGUENZA)	2010-07-02	A	2010-07-02	5955	S ELM AVE	FRESNO	IMMANUEL LUTHERAN CHUR	(559)237-7909		REMOTS
003	6989360172	Y	20	1240		pls ck svrc drop per fire chief	2010-07-15	A	2010-07-15	1274	N ADOLINE AVE	FRESNO	CAMPOS,ADRIENNE	(559)412-4385		ELEUNS
004	7433772817	Y	20	1240		chk 4 bypasses behind ele mtr & w/h trx.ross	2010-07-15	A	2010-07-15	2321	N CAROL AVE	FRESNO	WILLIAMS,DENE			ELEUNS

Figure 10. Example of How to Print All Field Orders

FORS App - Microsoft Internet Explorer provided by PG&E

v1.44 USER: DA9 TIME: Thurs, 15 Jul 2010 10:50:53 Local Time

FIELD ORDER REPOSITORY PRINT SUBMITTED

PRINT SUBMIT INFO

NUM OF ORDERS PRINTED: 1

CRITERIA USED
 GRP1=BU04 GRP2=FRESNO GRP3= FTKH101 GRP4=ALL
 Priority=10 20
 Jobcode=
 StartDate= StopDate= PrintStat=
 System: CCBP

Print session=GF105053.W0AF5D3.WEF086C


Figure 11. Field Order Repository Print Submitted Screen

Field Order Repository System (FORS)

7 Using Form 62-3458, "PG&E Multipurpose Customer Service Order"

7.1 Use [Form 62-3458, "PG&E Multipurpose Customer Service Order."](#) instead of the following older forms:

- Dated Form 62-3458, "Multipurpose Customer Service Order." (Versions other than Rev 03/23/07.)
- Form 62-5681, "TOU Billing/Metering Order."
- Form 62-3588, "St and Outdoor Lighting Tag Cont."
- Form 62-5640, "St Lt and Outdoor Lighting Outage Tag."
- Form 62-3212, "Power Billing Order."
- Form 62-3131, "D&C Meter Transaction Order."



PG&E Multipurpose Customer Service Order 62-3458 (Rev 03/23/07)

DATE WANTED _____ TIME WANTED _____ AREA/SUB AREA _____
 TIME DISPATCHED _____ INSPECTION DATE _____ PM# _____

FIELD ACTIVITY

1. _____ 3. _____
 2. _____ 4. _____

DATE TAKEN _____ TIME TAKEN _____ TAKEN BY _____ FIELD ORDER ID _____

Figure 12. PG&E Multipurpose Customer Service Order Form – Top Portion of Page 1

END of Instructions



Field Order Repository System (FORS)

Definitions	NA
Implementation Responsibilities	<p>The senior director in charge of customer field services reviews, authorizes, and issues this procedure.</p> <p>The director in charge of field services ensures this procedure is communicated and properly implemented in all service areas.</p> <p>Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.</p>
Governing Document	<p>Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices." governs this document.</p>
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>Form 62-3458, "PG&E Multipurpose Customer Service Order."</p> <p>Supplemental References:</p> <p>Code of Safe Practices.</p> <p>Utility Procedure WP5449-03, "Procedures to Ensure Accurate Billing for Large Gas Meter Installation and Service Initiation."</p> <p>Utility Standard Practice (USP) 22, "Safety and Health Program."</p>
Appendices	NA
Attachments	NA



Field Order Repository System (FORS)

Document Recision This document supersedes Work Procedure WP6436-10, "Field Order Repository System (FORS)," issued 10/2006.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format.



Managing Critical Transition Periods Within Dispatch Operations

Summary This procedure defines dispatch personnel work duties during critical transition periods.

A critical transition period is defined as the hour and a half (90 minutes) before the end of an appointment window. During these periods, dispatch personnel ensure that all work commitments to customers are completed as scheduled.

Level of Use: Informational Use

Target Audience Managers, field service supervisors, and field service personnel who dispatch work to field groups during critical transition periods.

Safety Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must either work under the direction of qualified personnel or receive training by qualified personnel to do such work.

Procedure Steps

1 Overview

1.1 The three critical transition periods within the dispatch operations process occur during the following time frames:

- Morning (AM) = 8:00 a.m. – 12:00 noon
- Afternoon (PM) = 1:00 p.m. – 5:00 p.m.
- Night man (NM) = 5:00 p.m. – 8:00 p.m.

NOTE

When the dispatch center is notified of a Level 2 or higher emergency, dispatch personnel must determine which customer appointments may be missed.



Managing Critical Transition Periods Within Dispatch Operations

2 Managing Critical Transition Periods and Customer Appointments

2.1 Dispatch personnel must perform the following tasks when managing critical transition periods and customer appointments:

1. Monitor the Field Automation System (FAS) to ensure that all field personnel are logged on and off during the same work shift. Note any discrepancies in the dispatch log sheet.
2. Manage the daily work plan between 6:00 a.m. and 7:00 a.m. by performing the following tasks:
 - Obtain information from the previous shift, if applicable.
 - Review field orders (FOs) handled by field personnel who are signed off of the system.
 - Reassign any dispatched “must do” FOs from signed-off field personnel, as appropriate.
 - Assign any pending “must do” FOs.
 - Review and evaluate route assignments. Make any necessary adjustments.
 - Note any personnel exceptions in the dispatch log (i.e., doctor appointments, rest periods, etc.). Manage absence notification forms.
 - Ensure that all NM FOs are routed to NM field personnel.
 - Dispatch the AM FOs.
 - Perform additional duties as assigned, such as previewing future FOs and handling 911 calls, reportable incidents, and FAS emergency alerts.

3 Managing the Daily Work Plan Between 10:30 a.m. and 12:00 noon

3.1 During the AM transition period, dispatch personnel must perform the following tasks:

- In the FAS dispatch application, use the FAS fleet status to ensure that all customer appointments are kept.
- If any AM appointments (any FOs) appear likely to be missed, contact appropriate field personnel for a status update using the FAS dispatch application text messaging feature, a radio, or a cellular phone. After contacting field personnel, determine if the FOs could be completed in a timely manner if they were assigned to other field personnel.

NOTE

For guidance, refer to [Section 6, “Reassigning Field Orders to Meet Customer Appointments.”](#)



Managing Critical Transition Periods Within Dispatch Operations

3.1 (continued)

- If an AM appointment (an FO) cannot be reassigned, notify field personnel. Request that field personnel inform the customer of the revised, same-day arrival time. If requested by field personnel, contact the customer and attempt to reschedule the FO to a PM appointment, if appropriate.

NOTE

Do not update the original time stated in the FO to reflect the appointment change. Instead, note in the FAS **General Order Detail** screen **DSP Remarks** field that the appointment time was changed. Sign the note with personal Pacific Gas and Electric (Company) local area network identification (LAN ID).

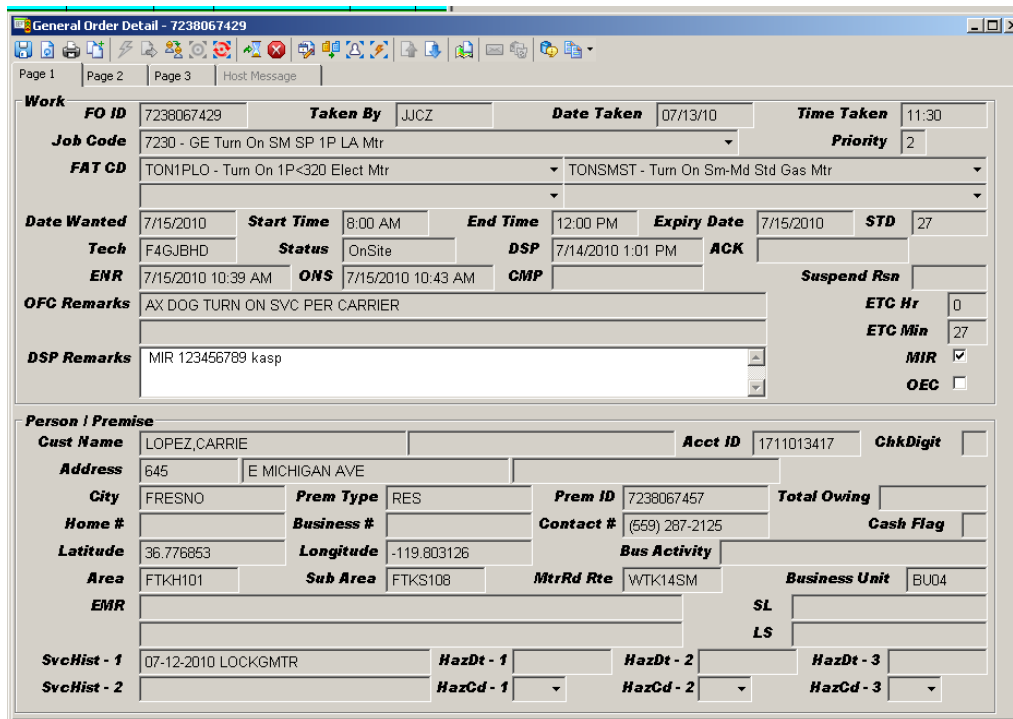
- If “immediate response” (IR) FOs are assigned and/or a Level 2 or higher emergency is declared, and AM customer appointments are likely to be missed, either re-dispatch the pending FOs so that the AM appointments are kept, or notify the customer(s) of the revised, same-day arrival time.

NOTE

Do not reschedule appointments during a Level 2 or higher emergency until notified that the operations emergency center (OEC) is open.

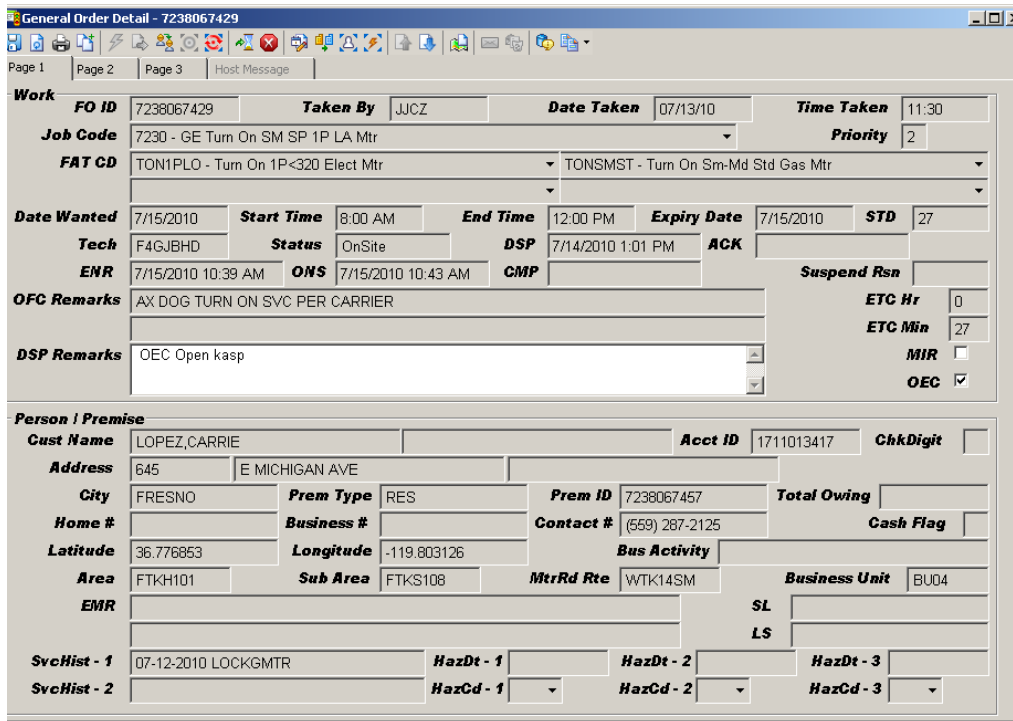
- Before assigning IR FOs or releasing field personnel to work on a Level 2 or higher emergency, review currently assigned FOs to check which appointments may be affected by reassignments. If a customer appointment cannot be kept, field personnel must attempt to contact the impacted customer.
 - For changes caused by IR FOs, in the FAS **General Order Detail** screen **DSP Remarks** field, type “MIR” followed by the tag number and Company LAN ID. Select the **MIR** box. (See [Figure 1, “FAS – Example of MIR, Tag Number, and LAN ID in the DSP Remarks Field.”](#))
 - For changes caused by Level 2 or higher emergencies, in the FAS **General Order Detail** screen **DSP Remarks** field, type “OECOPEN” and Company LAN ID. Select the **OEC** box (See [Figure 2, “FAS – Example of OEC Open Comment with LAN ID in the DSP Remarks Field.”](#))
- Perform additional duties as assigned, such as handling 911 calls, reportable incidents, FAS emergency alerts, and previewing future FOs.

Managing Critical Transition Periods Within Dispatch Operations



General Order Detail - 7238067429											
Page 1 Page 2 Page 3 Host Message											
Work	FO ID	7238067429	Taken By	JJCZ	Date Taken	07/13/10	Time Taken	11:30			
	Job Code	7230 - GE Turn On SM SP 1P LA Mtr			Priority	2					
	FAT CD	TON1PLO - Turn On 1P<320 Elect Mtr			TONSMST - Turn On Sm-Md Std Gas Mtr						
	Date Wanted	7/15/2010	Start Time	8:00 AM	End Time	12:00 PM	Expiry Date	7/15/2010	STD	27	
	Tech	F4GJBHD	Status	OnSite	DSP	7/14/2010 1:01 PM	ACK				
	ENR	7/15/2010 10:39 AM	ONS	7/15/2010 10:43 AM	CMP			Suspend Rsn			
	OFC Remarks	AX DOG TURN ON SVC PER CARRIER						ETC Hr	0		
	DSP Remarks	MIR 123456789 kasp						ETC Min	27	MIR	<input checked="" type="checkbox"/>
								OEC	<input type="checkbox"/>		
Person / Premise											
	Cust Name	LOPEZ,CARRIE			Acct ID	1711013417	ChkDigit	<input type="checkbox"/>			
	Address	645 E MICHIGAN AVE									
	City	FRESNO	Prem Type	RES	Prem ID	7238067457	Total Owing				
	Home #		Business #		Contact #	(559) 267-2125	Cash Flag	<input type="checkbox"/>			
	Latitude	36.776853	Longitude	-119.803126	Bus Activity						
	Area	FTKH101	Sub Area	FTKS108	MtrRd Rte	WTK14SM	Business Unit	BU04			
	EMR				SL						
					LS						
	SvcHist - 1	07-12-2010 LOCKGMTR	HazDt - 1		HazDt - 2		HazDt - 3				
	SvcHist - 2		HazCd - 1		HazCd - 2		HazCd - 3				

Figure 1. FAS – Example of MIR, Tag Number, and LAN ID in the DSP Remarks Field



General Order Detail - 7238067429											
Page 1 Page 2 Page 3 Host Message											
Work	FO ID	7238067429	Taken By	JJCZ	Date Taken	07/13/10	Time Taken	11:30			
	Job Code	7230 - GE Turn On SM SP 1P LA Mtr			Priority	2					
	FAT CD	TON1PLO - Turn On 1P<320 Elect Mtr			TONSMST - Turn On Sm-Md Std Gas Mtr						
	Date Wanted	7/15/2010	Start Time	8:00 AM	End Time	12:00 PM	Expiry Date	7/15/2010	STD	27	
	Tech	F4GJBHD	Status	OnSite	DSP	7/14/2010 1:01 PM	ACK				
	ENR	7/15/2010 10:39 AM	ONS	7/15/2010 10:43 AM	CMP			Suspend Rsn			
	OFC Remarks	AX DOG TURN ON SVC PER CARRIER						ETC Hr	0		
	DSP Remarks	OEC Open kasp						ETC Min	27	MIR	<input type="checkbox"/>
								OEC	<input checked="" type="checkbox"/>		
Person / Premise											
	Cust Name	LOPEZ,CARRIE			Acct ID	1711013417	ChkDigit	<input type="checkbox"/>			
	Address	645 E MICHIGAN AVE									
	City	FRESNO	Prem Type	RES	Prem ID	7238067457	Total Owing				
	Home #		Business #		Contact #	(559) 267-2125	Cash Flag	<input type="checkbox"/>			
	Latitude	36.776853	Longitude	-119.803126	Bus Activity						
	Area	FTKH101	Sub Area	FTKS108	MtrRd Rte	WTK14SM	Business Unit	BU04			
	EMR				SL						
					LS						
	SvcHist - 1	07-12-2010 LOCKGMTR	HazDt - 1		HazDt - 2		HazDt - 3				
	SvcHist - 2		HazCd - 1		HazCd - 2		HazCd - 3				

Figure 2. FAS – Example of OEC Open Comment with LAN ID in the DSP Remarks Field



Managing Critical Transition Periods Within Dispatch Operations

4 Managing the Daily Work Plan Between 2:00 p.m. and 5:00 p.m.

4.1 During the PM transition period, dispatch personnel must perform the following tasks:

- In the FAS Dispatch Application, monitor fleet status to ensure that all customer appointments are kept.
- If any PM appointments appear likely to be missed, contact appropriate field personnel for a status update using the FAS Dispatch Application text messaging feature, a radio, or a cellular phone. After contacting field personnel, determine if FOs could be completed in a timely manner if they were assigned to other field personnel.

NOTE

For guidance, see [Section 6, "Reassigning Field Orders to Meet Customer Appointments."](#)

- If a PM appointment cannot be reassigned, notify field personnel. Request field personnel to inform the customer of the revised, same-day arrival time. If requested by field personnel, contact the customer and attempt to reschedule the FO to a NM appointment, if appropriate.

NOTE

Do not update the original time stated in the FO to reflect the appointment change. Instead, note in the FAS **DSP Remarks** field that the appointment time was changed. Sign the note with personal Company LAN ID.

- If IR FOs are assigned and/or a Level 2 or higher emergency is declared, and PM customer appointments are likely to be missed, either re-dispatch the pending FOs so that the PM appointments are kept, or notify the customer(s) of the revised, same-day arrival time.

NOTE

Do not reschedule appointments during a Level 2 or higher emergency until notified that the OEC is open.

- Before assigning IR FOs or releasing field personnel to work on a Level 2 or higher emergency, review currently assigned FOs to check which appointments may be affected by reassignments. If a customer appointment cannot be kept, attempt to contact the impacted customer. Note the contact (or attempts) in the FAS **General Order Detail** screen **DSP Remarks** field of the affected FO ([Figure 1](#)).
 - For missed appointments caused by IR FOs, type "MIR" on the FAS Order Detail screen followed by the tag number and personal Company LAN ID. Select the **MIR** box ([Figure 1](#)).



Managing Critical Transition Periods Within Dispatch Operations

4.1 (continued)

- For missed appointments caused by Level 2 or higher emergencies, type “OECOPEN” and LAN ID on the FAS Order Detail screen. Select the **OEC** box ([Figure 2](#)).
- Perform additional duties as assigned, such as handling 911 calls, reportable incidents, and FAS emergency alerts, and previewing future FOs.

5 Managing the NM Work Plan Between 5:00 p.m. and 8:00 p.m.

5.1 During the NM transition period, dispatch personnel must perform the following tasks:

- Obtain appropriate information from the previous shift.
- Review and evaluate route assignments. Make any necessary adjustments.
- Note any personnel exceptions in the dispatch log (i.e., doctor appointments, rest periods, etc.). Manage absence notification forms.
- In the FAS Dispatch Application, monitor the FAS fleet status to help ensure that all customer appointments are kept.
- Periodically review the FAS **Current Orders** to monitor FO progression and to check that the workload is balanced between field personnel.
- If any NM appointments appear likely to be missed, contact appropriate field personnel for a status update using the FAS Dispatch Application text messaging feature, a radio, or a cellular phone. After contacting field personnel, determine if FOs could be completed in a timely manner if they were assigned to other field personnel.

NOTE

For guidance, see [Section 6, “Reassigning Field Orders to Meet Customer Appointments.”](#)

- If an NM appointment (an FO) cannot be reassigned, notify field personnel. Request that field personnel inform the customer of the revised, same-day arrival time. If requested by field personnel, contact the customer and attempt to reschedule the FO for the following day, if appropriate.



Managing Critical Transition Periods Within Dispatch Operations

5.1 (continued)

NOTE

Do not update the original time stated in the FO to reflect the appointment change. Instead, note in the FAS **General Order Detail** screen **DSP Remarks** field that the appointment time was changed, and sign the note with personal Company LAN ID ([Figure 1](#)).

- If IR FOs are assigned and/or a Level 2 or higher emergency is declared, and NM customer appointments are likely to be missed, either re-dispatch the pending FOs so that the NM appointments are kept or notify the customer(s) of the revised, next-day arrival time.

NOTE

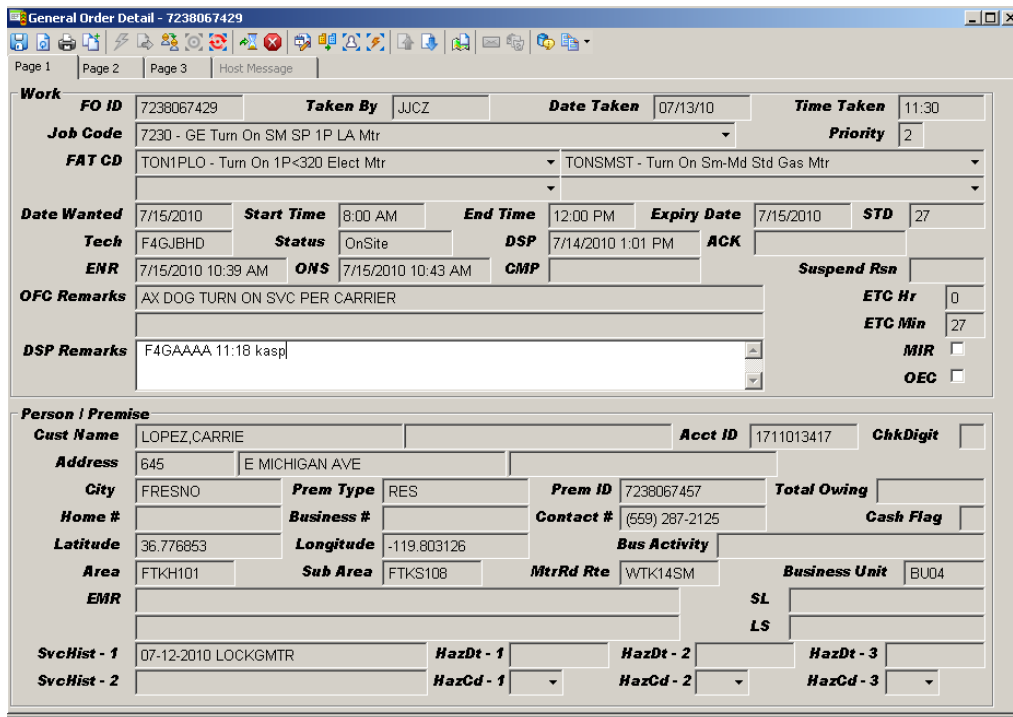
Do not reschedule appointments during a Level 2 or higher emergency until notified that the OEC is open.

- Before assigning IR FOs or releasing field personnel to work on a Level 2 or higher emergency, review currently assigned FOs to check which appointments may be affected by reassignments. If a customer appointment cannot be kept, attempt to contact the impacted customer. Note the contact (or attempts) in the FAS **General Order Detail** screen **DSP Remarks** field of the affected FO ([Figure 1](#)).
 - For changes caused by IR FOs, type "MIR" on the FAS Order Detail screen followed by the tag number and personal Company LAN ID. Click the **MIR** box ([Figure 1](#)).
 - For changes caused by Level 2 or higher emergencies, type "OECOPEN" and personal Company LAN ID on the FAS Order Detail screen. Click the **OEC** box ([Figure 2](#)).
- Perform additional duties as assigned, such as handling 911 calls, reportable incidents, and FAS emergency alerts, and previewing future FOs.

Managing Critical Transition Periods Within Dispatch Operations

6 Reassigning Field Orders to Meet Customer Appointments

- 6.1 To reassign FOs, enter the following information in the **General Order Detail / DSP Remarks** field for the FO to be reassigned (See Figure 3, “FAS – Example of a Reassigned Field Order”):
1. The technical identification number (tech ID) of the field personnel to whom the FO was originally assigned.
 2. The “original” or “previous” dispatched time.
 3. Personal Company LAN ID.
 4. Click the **Save and Reassign** buttons.



General Order Detail - 7238067429												
Work		FO ID	7238067429	Taken By	JJCZ	Date Taken	07/13/10	Time Taken	11:30			
		Job Code	7230 - GE Turn On SM SP 1P LA Mtr			Priority	2					
		FAT CD	TON1PLO - Turn On 1P<320 Elect Mtr				TONSMST - Turn On Sm-Md Std Gas Mtr					
		Date Wanted	7/15/2010	Start Time	8:00 AM	End Time	12:00 PM	Expiry Date	7/15/2010	STD	27	
		Tech	F4GJBHD	Status	OnSite	DSP	7/14/2010 1:01 PM	ACK				
		ENR	7/15/2010 10:39 AM	ONS	7/15/2010 10:43 AM	CMP		Suspend Rsn				
		OFC Remarks	AX DOG TURN ON SVC PER CARRIER						ETC Hr	0		
		DSP Remarks	F4GAAAA 11:18 kasp						ETC Min	27	MIR	<input type="checkbox"/>
									OEC	<input type="checkbox"/>		
Person Premise												
Cust Name			LOPEZ,CARRIE			Acct ID	1711013417	ChkDigit	<input type="checkbox"/>			
Address			645 E MICHIGAN AVE									
City	FRESNO	Prem Type	RES	Prem ID	7238067457	Total Owing						
Home #		Business #		Contact #	(559) 287-2125	Cash Flag		<input type="checkbox"/>				
Latitude	36.776853	Longitude	-119.803126	Bus Activity								
Area	FTKH101	Sub Area	FTKS108	MtrRd Rte	WTK14SM	Business Unit	BU04					
EMR								SL				
								LS				
SvcHist - 1	07-12-2010 LOCKGMTR	HazDt - 1		HazDt - 2		HazDt - 3						
SvcHist - 2		HazCd - 1		HazCd - 2		HazCd - 3						

Figure 3. FAS – Example of a Reassigned Field Order

END of Instructions



Managing Critical Transition Periods Within Dispatch Operations

Definitions

Level 2 emergency: An area-wide or high-profile emergency involving large numbers of customers and/or requiring other resources from outside the impacted organization but still within the affected area. The contact centers may augment staffing, extend hours of coverage, or use technology (for example, 21st Century, interactive voice response unit [IVRU], etc.). This level of emergency is expected to result in increased media and/or governmental interest and may affect multiple major customers.

A Level 2 emergency occurs whenever a local OEC or specialized emergency center (Pipeline Restoration Center [PRC], Transmission Operation Center - Emergency Support Team [TOC-EST], Computer and Telecommunications Restoration Center [CTRC], etc.) is activated. The emergency response coordinator of the affected OEC assumes responsibility for managing the emergency.

Level 2 emergencies include the following situations:

- Flooding
- Major forest fires
- Area-wide storms
- Cyber disruptions
- Localized electric and/or gas transmission emergencies

Level 3 emergency: A multiple-area emergency involving large numbers of customers and may or may not require the movement of construction and other business unit resources across area boundaries although, depending on the severity of the event, it could require the full mobilization of Company resources to respond.

A Level 3 emergency may impact Company and/or customer ability to conduct normal business functions. The volume of customer inquiries resulting from a Level 3 emergency may cause customer contact and credit operations personnel to activate a customer contact emergency coordination center (CCECC), additional contact centers, and use additional contact center support options.

This emergency is expected to result in extensive inquiries from major media organizations, including some at the national level, as well as county and state agencies.

A Level 3 emergency occurs whenever the operations coordination center (OCC) is activated. The OCC chief is responsible for managing the emergency.

Level 3 emergencies include the following situations:



Managing Critical Transition Periods Within Dispatch Operations

- Major storms impacting large areas.
- Significant cyber disruptions.
- Involuntary electric outages.
- Major gas and/or electric transmission outages.

Implementation Responsibilities

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.

Governing Document

[Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices."](#) governs this document.

Compliance Requirement/Regulatory Commitment

NA

Reference Documents

Developmental References:

NA

Supplemental References:

[Code of Safe Practices.](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

Appendices

NA



Managing Critical Transition Periods Within Dispatch Operations

Attachments NA

Document Recision This document supersedes [Utility Procedure WP6436-11, "Managing Critical Transition Periods Within Dispatch Operations."](#) issued 10/2006.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document moved to new format and includes FAS 8.1 screenshots.

Handling FAS Alerts

Summary This procedure facilitates the management of field personnel emergency alerts and field automation system (FAS) alerts.

Level of Use: Information Use

Target Audience Managers, field services supervisors, and field service dispatchers that handle emergency and FAS alerts.

Safety Personnel must follow all applicable precautions and requirements when responding to any gas and/or electric field order to ensure safety as detailed in [Utility Standard Practice \(USP 22\), "Safety and Health Program,"](#) the [Code of Safe Practices](#), numbered documents, and utility procedures.

Before You Start NA

Procedure Steps

1 Tech Emergency Alert

1.1 When a tech emergency alert appears in the FAS dispatch application within the operator's responsibility, perform the following actions:

1. If within the operator's area of responsibility, click **OK** to acknowledge the alert as shown in [Figure 1, "FAS Dispatch Application – Attention Dialog Box."](#)

NOTE

If outside the area of the operator's responsibility, click **Quiet**. (No further action required.)

Handling FAS Alerts

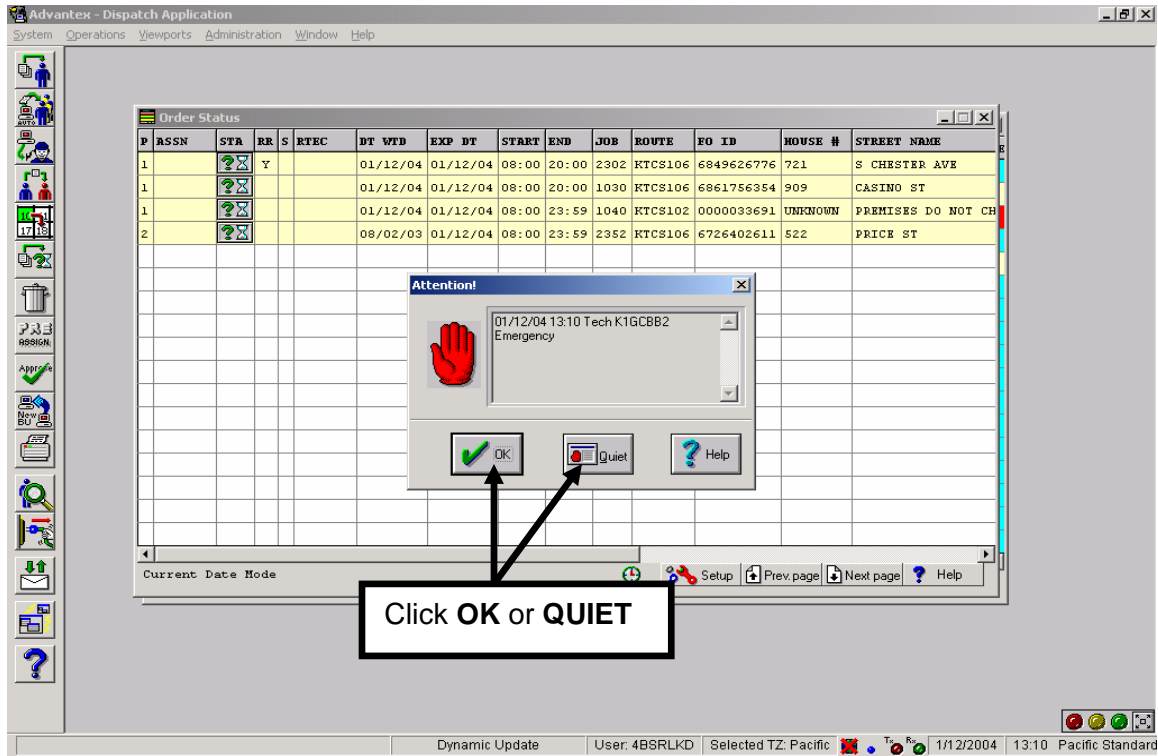


Figure 1. FAS Dispatch Application – Attention Dialog Box

2. Immediately contact the field personnel by using the FAS text messaging feature, a radio, a cellular phone or by replying to a field text message sent by the field personnel. See [Figure 2, “FAS Field Dispatch Application – Fleet Status Viewport Indicating Tech Emergency Status.”](#)

NOTE

Field personnel must clear the alert before a field text message can be sent.

Handling FAS Alerts

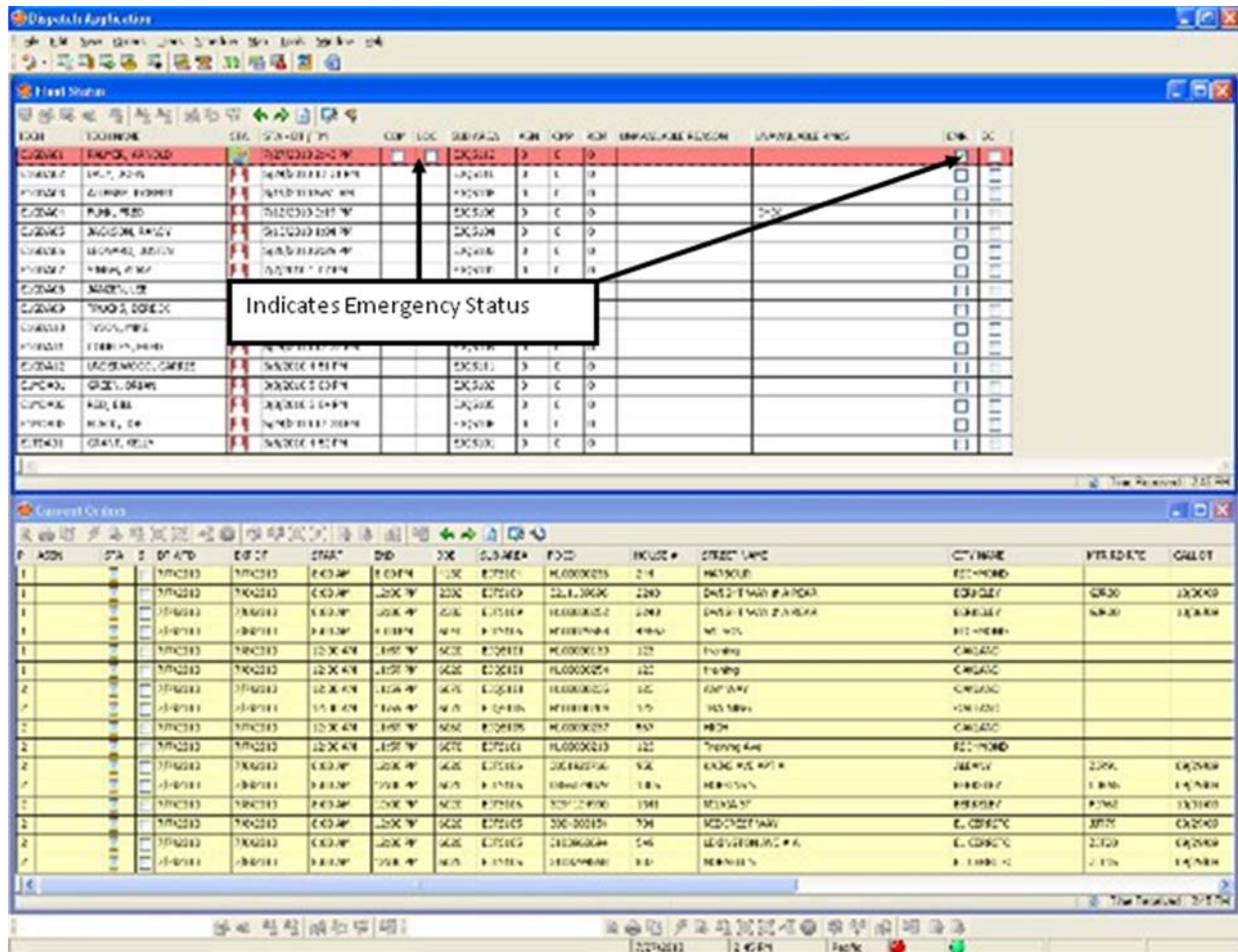


Figure 2. FAS Field Dispatch Application – Fleet Status Viewport Indicating Tech Emergency Status

3. After contacting field personnel, determine if there is an actual emergency or if the alert was unintentional.
4. If field personnel need assistance, notify local emergency personnel (i.e. fire department or police) and the local supervisor and/or send other field personnel working nearby to assist.

NOTE

Do not arbitrarily send other field personnel since doing so may send personnel into a dangerous situation.



Handling FAS Alerts

5. If contact with field personnel cannot be made, notify local emergency personnel and the local supervisor. Provide both parties with the last known location of Company personnel. The local supervisor provides further instruction. If in doubt, err on the side of safety.

2 Emergency Field Order Pending / Manual Acknowledgement Time Out

2.1 For Priority 0, "Immediate Response Field Orders," dispatchers perform the following tasks:

1. Read the field order (FO) and determine the severity of the field situation.
2. Dispatch the FO to the appropriate field personnel.
3. Notify the local supervisor about all reportable incidents.
4. Use the FAS text messaging feature, a radio, or a cellular phone to notify field personnel of the immediate response FO.
5. Reassign the FO to the next available field personnel based on the following criteria:
 - The severity of the immediate response FO.
 - If the field personnel does not manually acknowledge the FO or if the personnel cannot be contacted within 5 to 10 minutes.
6. Note in the dispatch remarks section of the FO who was notified, when contact was notified, and how the notification was made. Include your local area network identification (LAN ID).

2.2 For Priority 1, "Non-Immediate Response Field Orders," dispatchers perform the following tasks:

1. Read the FO. If the FO needs escalating, follow the procedure outlined in [Section 2.1, "For a Priority 0, Immediate Response Field Order."](#)
2. Based on the current scheduling availability, determine the appropriate field personnel to dispatch.
3. In the FAS Dispatch Application, review the **Fleet Status Viewport** to determine which appointments are likely to be missed.
4. Dispatch the Priority 1, non-immediate response FO, as scheduled.

3 Tech Out of Touch Alert

3.1 Dispatchers perform these steps when a "Tech Out of Touch" alert for field personnel who use Velocita Wireless is received:

1. Note the field personnel's LAN ID and acknowledge the alert.

Handling FAS Alerts

3.1 (continued)

2. If the field personnel remains out of touch for an extended period of time, attempt to contact the personnel by radio or cellular phone.
3. If several “Tech Out of Touch” alerts are received within a short period of time, contact the FAS on-call to determine if this is a system problem.

NOTE

Refer to the [FAS website](#) for more details.

3.2 Dispatchers perform these steps when a “Tech Out of Touch” alert for field personnel who use Wireless Matrix (satellite) is received:

1. In the FAS dispatch application, on the **Fleet Status Viewport** screen, verify if the field personnel is out of coverage based on the status indicated in the COM column, where the following values apply:
 - I = In Touch
 - O = Out of Touch
 - U = Unavailable
2. Contact the field personnel and verify that the signal strength is 12 or higher.
3. If signal strength is 12 or higher, request that the field personnel park their company vehicle and send a “Check Message” or other transmission (if driving).

NOTE

When the system acknowledges the message, the COM status will indicate that the field personnel is back in coverage.

END of Instructions

Definitions

NA

Implementation Responsibilities

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors ensure that field services personnel



Handling FAS Alerts

are trained and knowledgeable about this procedure.

Governing Document

[Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices,"](#) governs this document.

**Compliance Requirement/
Regulatory Commitment**

NA

Reference Documents

Developmental References:

[Code of Safe Practices.](#)

[USP 22, "Safety and Health Program."](#)

Supplemental References:

NA

Appendices

NA

Attachments

NA

Document Recision

This document supersedes WP6436-13, "Handling Field Automation System (FAS) Emergency Alerts and FAS System Alerts," issued 10/2006.

Approved By

Jimmy Morales
Manager



Handling FAS Alerts

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document placed in new template.



Handling 911 Calls – Emergency Response

Summary	<p>This procedure describes how to handle 911 emergency response calls.</p> <p>Level of Use: Informational Use</p> <hr/>
Target Audience	<p>All personnel involved in the handling of 911 emergency response calls.</p> <hr/>
Safety	<p>To ensure safety, when handling or responding to any gas or electric field order (FO), personnel must follow all applicable precautions and requirements as described in the following documents:</p> <ul style="list-style-type: none">• Applicable utility procedures.• Code of Safe Practices.• Pacific Gas and Electric Company (Company) gas design standards.• Utility Standard Practice (USP) 22, “Safety and Health Program.” <hr/>
Before You Start	<p>The 6-month Dispatcher in Training course provides training for the work described in this procedure.</p> <hr/>



Handling 911 Calls – Emergency Response

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Procedure Steps

1 General Information

1.1 This procedure covers the following 911 emergency response work practices:

- Emergency levels – what are the emergency levels and how are they defined.
- Overview of dispatch operations, including the sequencing plan for taking 911 calls and the staffing and contingency staffing plans for prolonged emergency events.
- How to answer a 911 call and create a trouble report.
- How to handle calls at each level of emergency.
- How to complete an agency referral form.

1.2 [Figure 1, “911 Emergency Scenarios”](#) shows the following Company emergency level conditions:

- Normal
- Level 1

Handling 911 Calls – Emergency Response

1.2 (continued)

- Level 1+
- Level 2–3

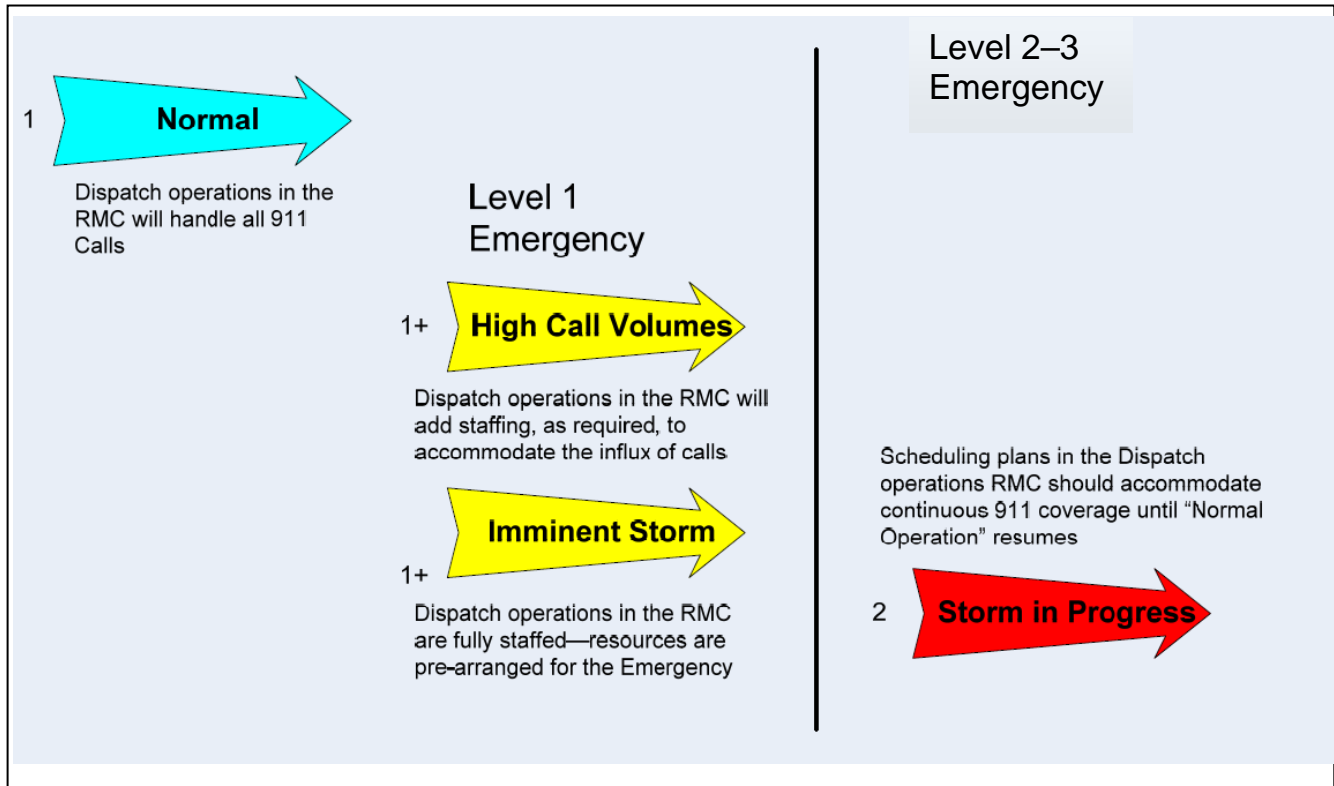


Figure 1. 911 Emergency Scenarios

- 1.3 For dispatchers, the most challenging emergency level is likely to be Level 1+ because of increased calls and resource needs.
- 1.4 It takes time to increase the number of personnel needed to handle additional calls in each resource management center (RMC). When a storm or other emergency is anticipated, the Company may keep additional personnel on duty to handle the potential incoming calls.
- 1.5 [Figure 2. "Current Scope of Dispatch Operations"](#) is an overview of the Company's two dispatch centers. The Company currently serves about 13 million customers and has over 8.5 million gas and electric accounts.

Handling 911 Calls – Emergency Response

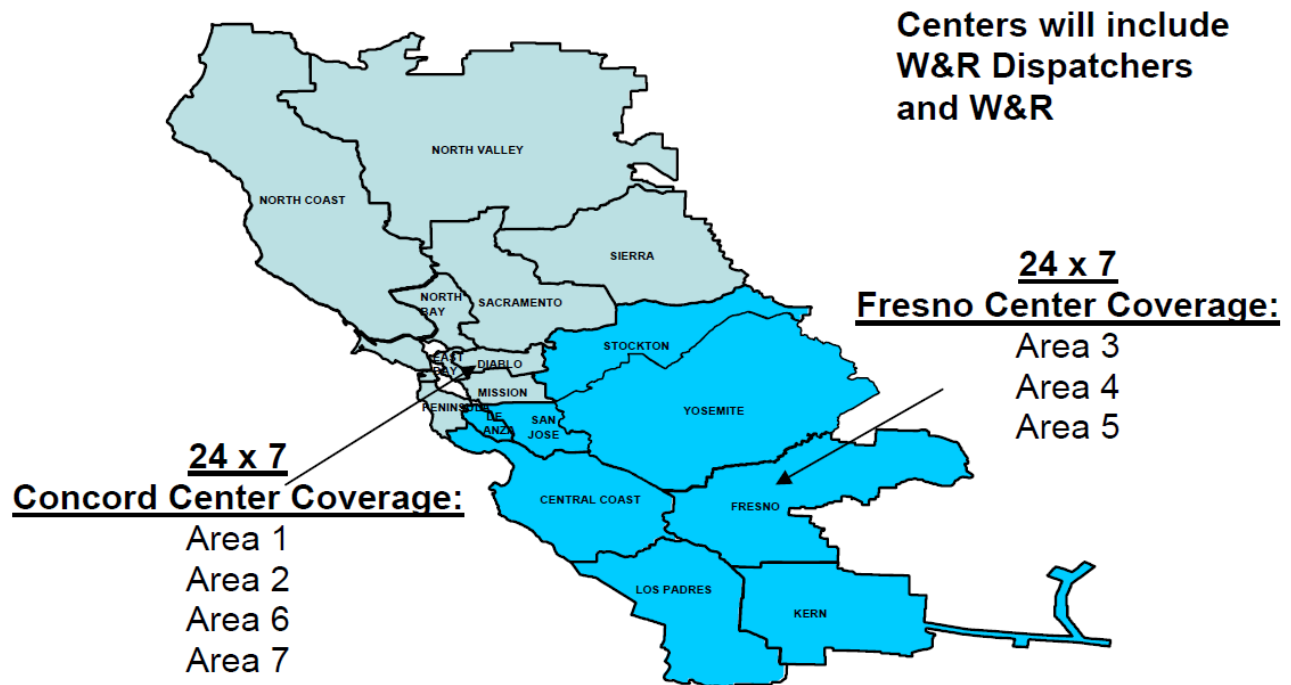


Figure 2. Current Scope of Dispatch Operations

1.6 Dispatch Notes

1. Currently, both centers are staffed 24 hours a day, 7 days a week. Dispatchers use the field automation system (FAS) dispatch application to plan and schedule work with input from planners and schedulers. These centers use the FAS dispatch application to dispatch work to approximately 1,100 to 1,200 field technicians.
2. The following work must be dispatched:
 - Same-day activity; immediate response FOs.
 - All work performed by service personnel, Title 200/300 construction crews, and estimators.
 - All priorities of work.
 - Technicians routed in the most effective manner.



Handling 911 Calls – Emergency Response

1.5 (continued)

3. Dispatcher positions include the following classifications:

- **Work and Resource Dispatcher:** a dispatcher working a regular assigned shift
- **Work and Resource Relief Dispatcher:** a relief dispatcher for vacant dispatcher shifts that could work days, swing, grave shifts. Unlike today's relief service operator, this position is exclusive to the dispatch center.
- **Work and Resource Dispatcher-in-Training:** a new dispatcher in a 6-month training period. This dispatcher attends dispatch training class and on-the-job training.

1.7 [Figure 3, "Illustration of 911 AT&T "Megacom 800" Diagram"](#) illustrates how calls are received and processed in the AT&T Megacom 800 system. The following steps describe the process flow:

1. Agencies call the 1-888 toll-free Company number.
2. Calls are directed to the AT&T "cloud" (phone system).
3. Callers hear a message stating that toll-free number is only for 911 agency uses, and if the caller is not an emergency agency, they should call the **1-800-743-5000** Company phone number.
4. The call is routed back (by area code) to the appropriate RMC by phone switches/gears.

Handling 911 Calls – Emergency Response

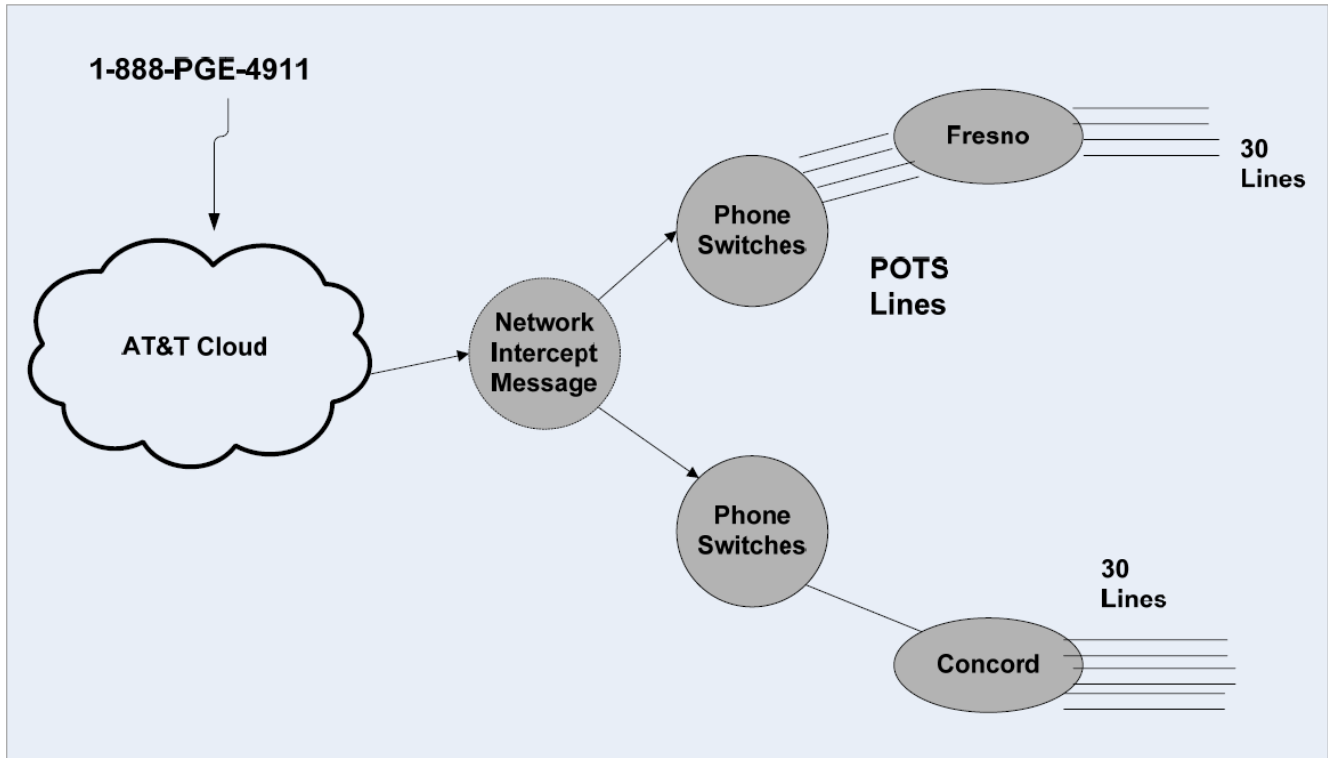


Figure 3. Illustration of 911 AT&T “Megacom 800” Diagram

1.8 [Figure 4, “Sample 911 Call Report”](#) is an example of the 911 call report. This report is given to supervisors on a monthly basis.

1. The call report contains the following information:

- Time of the call
- What number initiated the call to the Company emergency line.
- The call duration
- The call outcome

2. Number codes in the **Call Disposition Code** column on the far right of the report indicate the following information:

- The call was successful (Code 0).
- The caller was unable to reach a Company representative (“ring no answer” Codes 33 and 34).
- The caller received a courtesy message that all lines were busy (Code 50).



Handling 911 Calls – Emergency Response

Connect Date	Connect Time	Calling Number	Dialed Number	RTN	Minutes	Minutes (seconds)	Call Disposition Code
05/04	9:13		8887434911	8057849549	0:01:27	87	0
05/04	13:02		8887434911	8057849549	0:00:57	57	0
05/05	13:53		8887434911	8057849549			33
05/05	13:58		8887434911	8057849549	0:00:48	48	0
05/07	14:51		8887434911	8057849549	0:01:44	104	0
05/10	6:21		8887434911	8057849549	0:01:00	60	0
05/10	13:34		8887434911	8057849549	0:01:16	76	0
05/14	6:12		8887434911	8057849549			33
05/14	6:14		8887434911	8057849549	0:01:03	63	0
05/14	14:59		8887434911	8057849549	0:01:38	98	0
05/17	7:47		8887434911	8057849549	0:01:25	85	0
05/24	13:35		8887434911	8057849549	0:00:48	48	0
05/26	8:40		8887434911	8057849549	0:02:12	132	0
Total					0:14:18		

Call Disposition Codes:

- 0 = Complete
- 31 = Busy / RNA
- 32 = RNA 2-4
- 33 = RNA > 4
- 50 = Retry
- 80 = Nwk Cond
- NAB = Network Abandoned (caller gets into the system and somewhere along the prompter they hang up)

Figure 4. Sample 911 Call Report

1.9 911 – Contingency Staffing Plans

1. The scheduled staff follows local call out guidelines. If additional dispatchers are needed in either center, RMCs follow local call out Policy 212. Staffing may be pre-arranged as well.
2. If the dispatchers need additional resources, local clerical personnel may be asked to assist with handling 911 calls to perform the following tasks:
 - Call out additional staffing resources from existing personnel.
 - Use “Call Routing Sequence Plan” to contact the other RMC.
 - Use contingency staff personnel, if necessary.

1.10 Role of Call Centers

1. Call centers may receive 911 calls.
2. Call center personnel receiving such calls prepare trouble reports in Customer Care and Billing (CC&B).



Handling 911 Calls – Emergency Response

1.9 (continued)

3. If the agency needs information, or wants to be referred to the local emergency response coordinator, call center personnel contact dispatch. Dispatch personnel handle the agency referral for the call center.
4. During Level 1 conditions, the call center may refer questions to the area dispatcher after creating the trouble report in CC&B. Call center personnel perform the following tasks:
 - a. Use CC&B to prepare a trouble report.
 - b. If agency referral is required, contact dispatch personnel. Dispatch personnel handle all agency referrals, per guidelines.

NOTE

This scenario may occur during Level 1 or
Level 2–3 conditions.

2 Answering a 911 Call

2.1 Dispatchers perform the following steps when answering 911 agency calls:

1. Answer the call by saying, “PG&E Emergency.” Because calls can originate from anywhere in the system, answering the call in this manner does not indicate where the call is being answered, and thus callers will not become confused. The agency calling should get the same response regardless of which center answers.
2. Get all of the appropriate information as needed to complete a trouble report in CC&B or an “unknown premise” trouble report.
3. Obtain as much information as possible by asking questions and requesting basic information, such as the following details:
 - Names and contact phone numbers.
 - Meter number.
 - Cross street for unknown addresses.
4. Ask any additional questions necessary for locating the trouble or hazard.
5. Ask if there are 911 agency personnel standing by, and ask if they need any further information such as an estimated time of arrival (ETA).

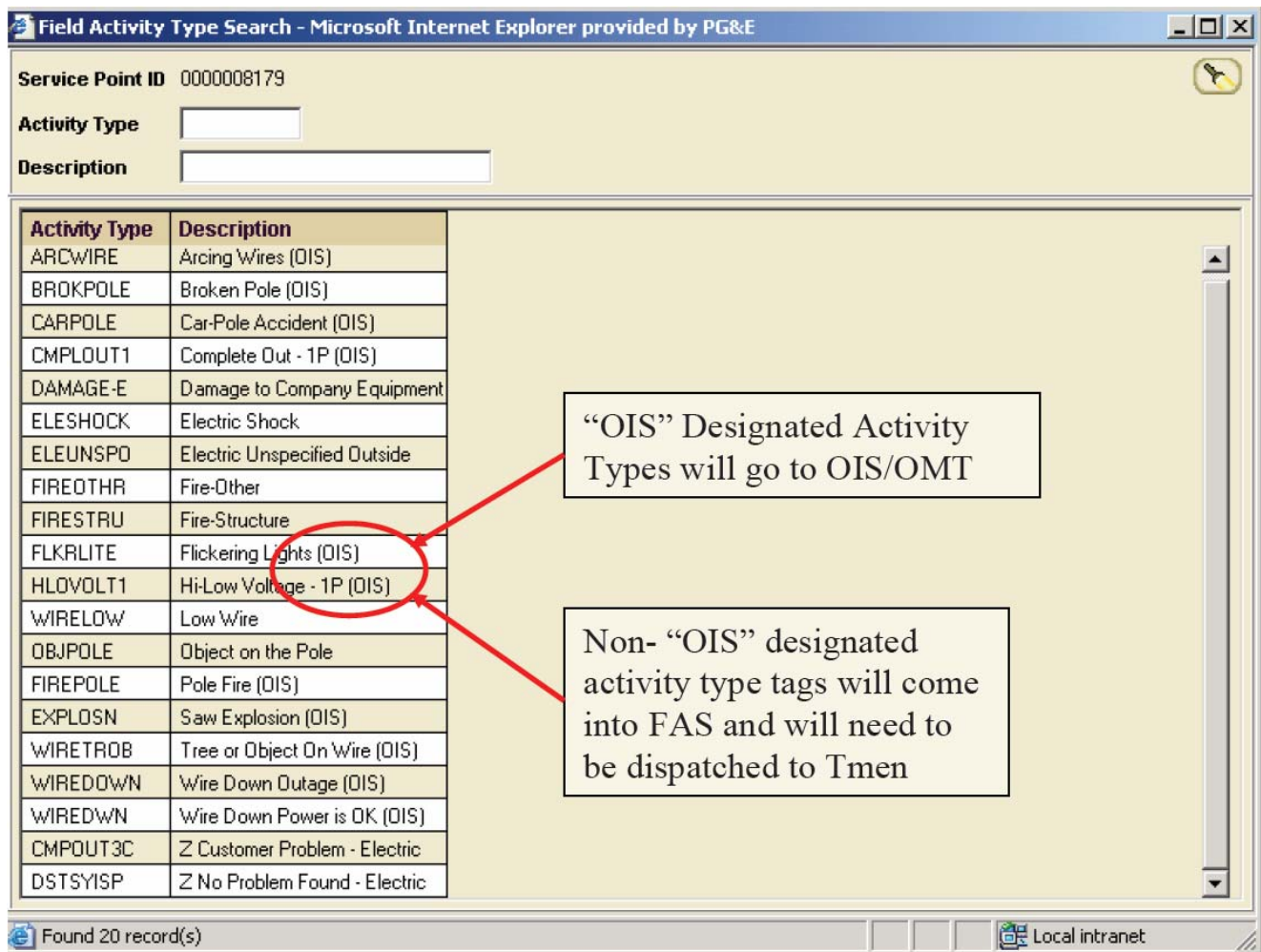
2.2 Create the trouble report in CC&B. If there is an agency standing by, note this on the trouble report so that the distribution operators (DOs) or storm rooms may prioritize these orders.

Handling 911 Calls – Emergency Response

3 Creating New Trouble Reports in CC&B

3.1 This section describes how to create “Trouble Reports” in CC&B.

1. Use the **Field Activity Type Search** to select a field activity type as shown in Figure 5, “CC&B Field Activity Type Search Page.”
 - If possible, select an Outage Information System (OIS)-designated activity type during normal conditions (Level 1) and major emergencies (Level 2–3).
 - Service request for OIS-designated activity types go to the OIS system for action.
 - Service request for non–OIS designated activity types go to FAS before being sent to the field technician through FAS. If FAS is not being used during an emergency or storm, send the field order on paper.



Service Point ID 0000008179

Activity Type

Description

Activity Type	Description
ARCWIRE	Arcing Wires (OIS)
BROKPOLE	Broken Pole (OIS)
CARPOLE	Car-Pole Accident (OIS)
CMPLOUT1	Complete Out - 1P (OIS)
DAMAGE-E	Damage to Company Equipment
ELESHOCK	Electric Shock
ELEUNSPD	Electric Unspecified Outside
FIREOTHR	Fire-Other
FIRESTRU	Fire-Structure
FLKRLITE	Flickering Lights (OIS)
HLOVOLT1	Hi-Low Voltage - 1P (OIS)
WIRELOW	Low Wire
OBJPOLE	Object on the Pole
FIREPOLE	Pole Fire (OIS)
EXPLOSN	Saw Explosion (OIS)
WIRETROB	Tree or Object On Wire (OIS)
WIREDOWN	Wire Down Outage (OIS)
WIREDWN	Wire Down Power is OK (OIS)
CMPOUT3C	Z Customer Problem - Electric
DSTSYISP	Z No Problem Found - Electric

Found 20 record(s)

Local intranet

Figure 5. CC&B Field Activity Type Search Page

Handling 911 Calls – Emergency Response

- 3.2 On CC&B Control Central – Main page, type in the address of a known premise in the **Address** field.

If the address is unknown, type “unknown” in the **Address** field and type the name of the city in the **City** field.

- 3.3 For known or unknown premises, the system opens the CC&B Control Central – Main page as shown on Figure 6, “CC&B Control Central – Example Main Page with Unknown Premise.”

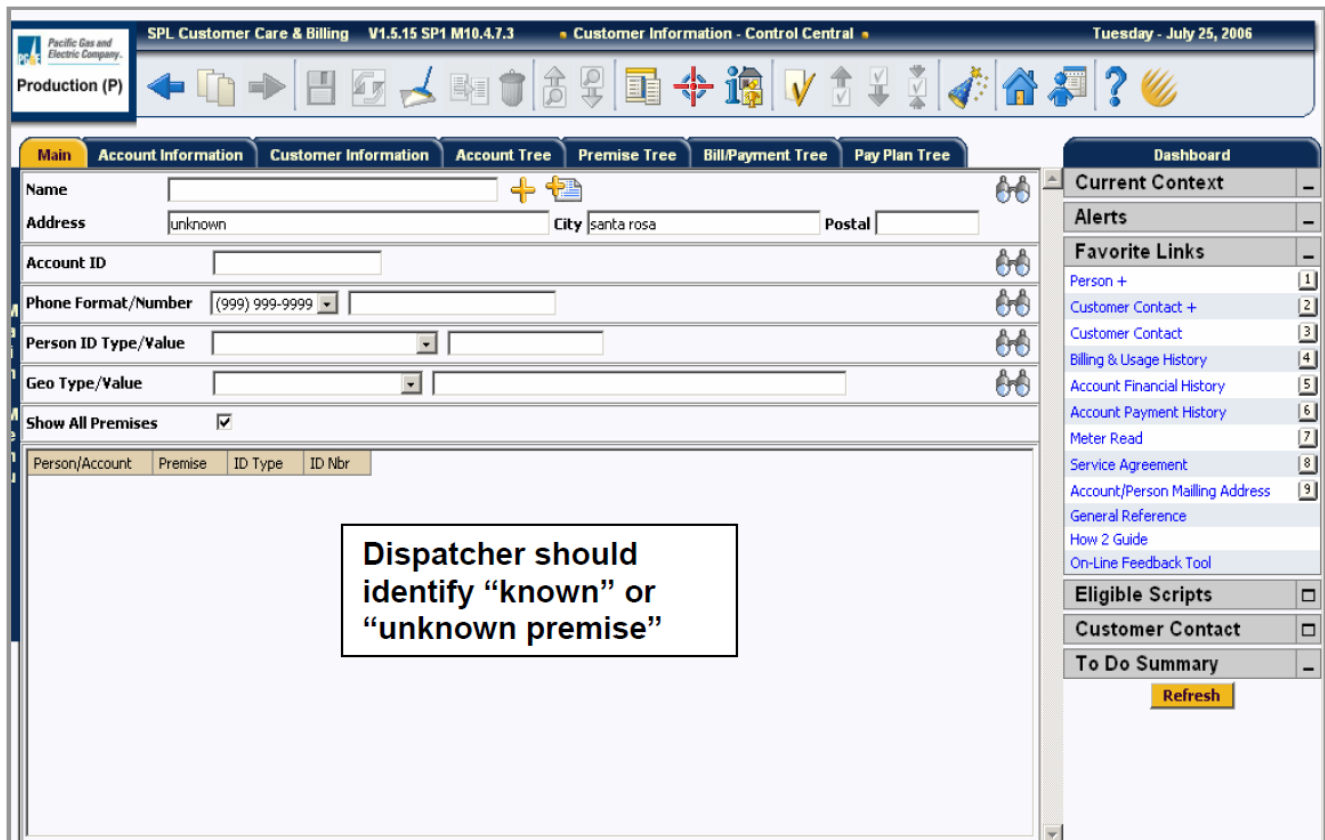


Figure 6. CC&B Control Central – Example Main Page with Unknown Premise

- 3.4 Click the **Premise Tree** tab as shown in [Figure 7, “CC&B Control Central – Example Account Information Page, Unknown Premise.”](#)
- 3.5 On the **Premise Tree** page, click the **Electric Service Point** context menu button as shown in [Figure 8, “CC&B Control Central – Premise Tree Page.”](#)

Handling 911 Calls – Emergency Response

The screenshot shows the 'SPL Customer Care & Billing' interface. The 'Premise Tree' tab is selected and highlighted. A red arrow points to this tab with the text 'Click the Premise Tree tab'. The main content area displays 'Field Activity Information' for the premise 'UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177'. The table below shows a list of field activities with their schedule dates and statuses.

Schedule Date/Time Start	Field Activity Information	Field Order Status
07-16-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, Backg	Completed
07-11-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, On-line	Completed
07-10-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Gas-Unknown-Service Point, On-line User, Digin Investigation - Gas, Completed, Scheduled 07-10-2006 08:00AM	Completed
07-08-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, On-line User, Low Wire, Completed, Scheduled 07-08-2006 08:00AM	Completed
07-05-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Gas-Unknown-Service Point, On-line User, Gas Leak Outside Unspecified, Completed, Scheduled 07-05-2006 08:00AM	Completed
07-03-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Gas-Unknown-Service Point, On-line User, Gas Leak Outside Unspecified, Completed, Scheduled 07-03-2006 08:00AM	Completed
06-29-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, On-line User, Digin Investigation - Electric, Completed, Scheduled 06-29-2006 08:00AM	Completed
06-24-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, Background, Car-Pole Accident (OIS), Completed, Scheduled 06-24-2006 08:00AM	Completed
06-16-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Ele-Unknown-Service Point, On-line User, Digin Investigation - Electric, Completed, Scheduled 06-16-2006 08:00AM	Completed
06-13-2006 08:00AM	UNKNOWN PREMISES, SANTA ROSA, CA, 95401, USA, System Use Only, 000008177, Gas-Unknown-Service Point, On-line User, Digin Investigation - Gas, Completed, Scheduled 06-13-2006 08:00AM	Completed

Figure 7. CC&B Control Central – Example Account Information Page, Unknown Premise

- 3.6 Select **Go to Outages** from the context menu (Figure 8). The system opens the **Outage Information System – Main** page as shown in Figure 9, “[Outage Information System – Main Page.](#)”

Handling 911 Calls – Emergency Response

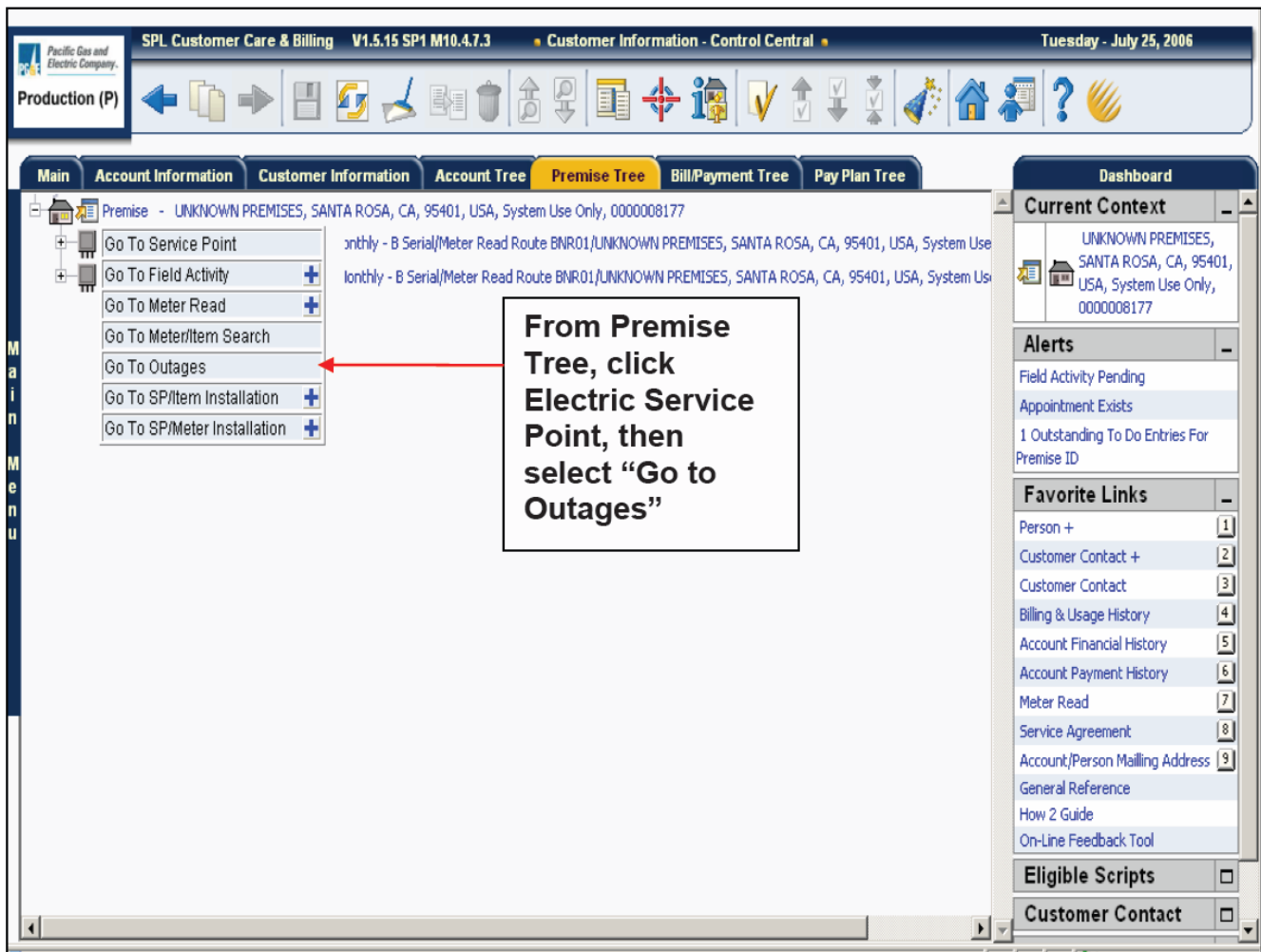


Figure 8. CC&B Control Central – Premise Tree Page

4 Adding a Trouble Report for an Unknown Premise

- 4.1 To add outage information for an unknown premise, click the **UPTR** button as shown in [Figure 9, “Outage Information System – Main Page.”](#)

Handling 911 Calls – Emergency Response

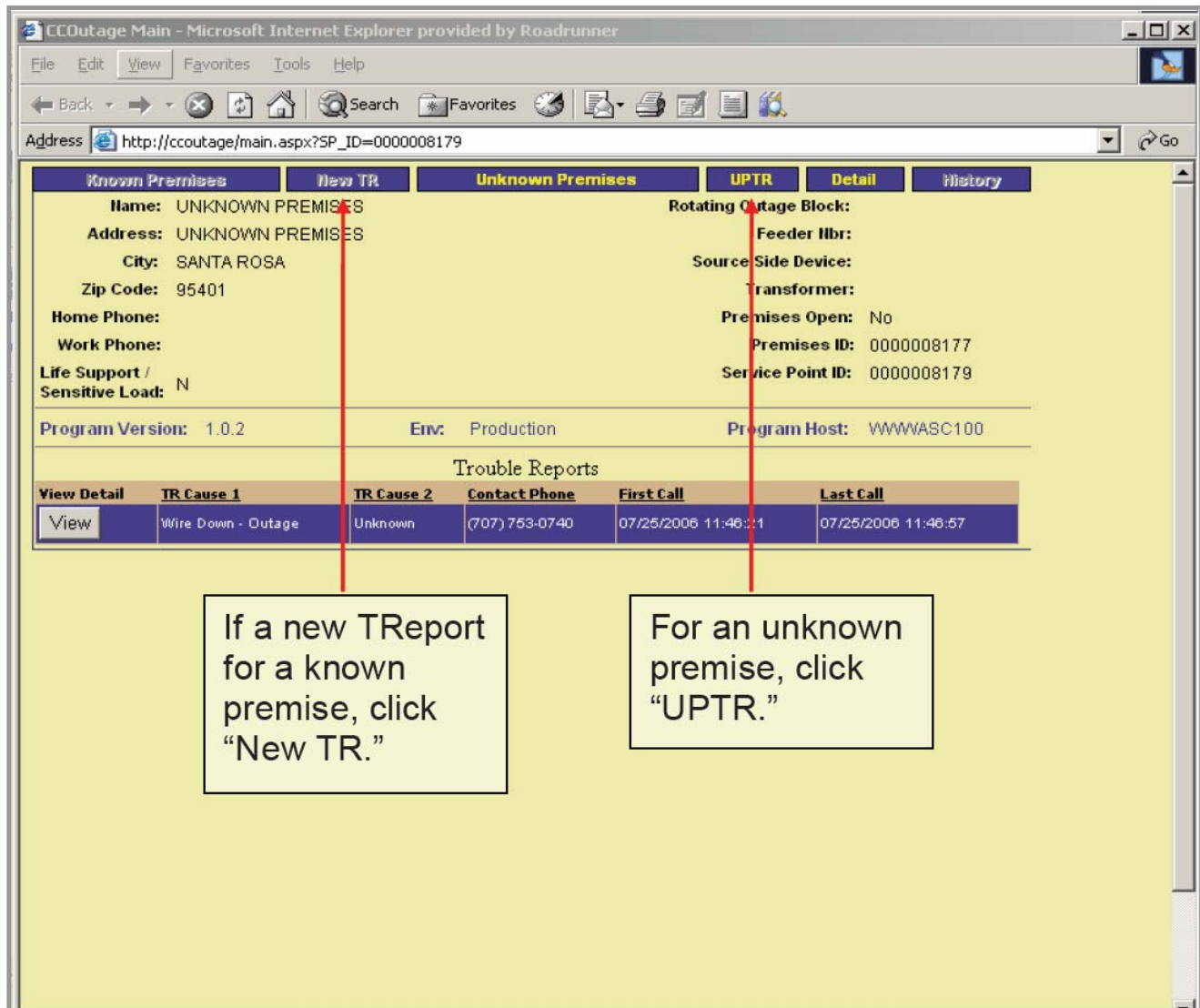
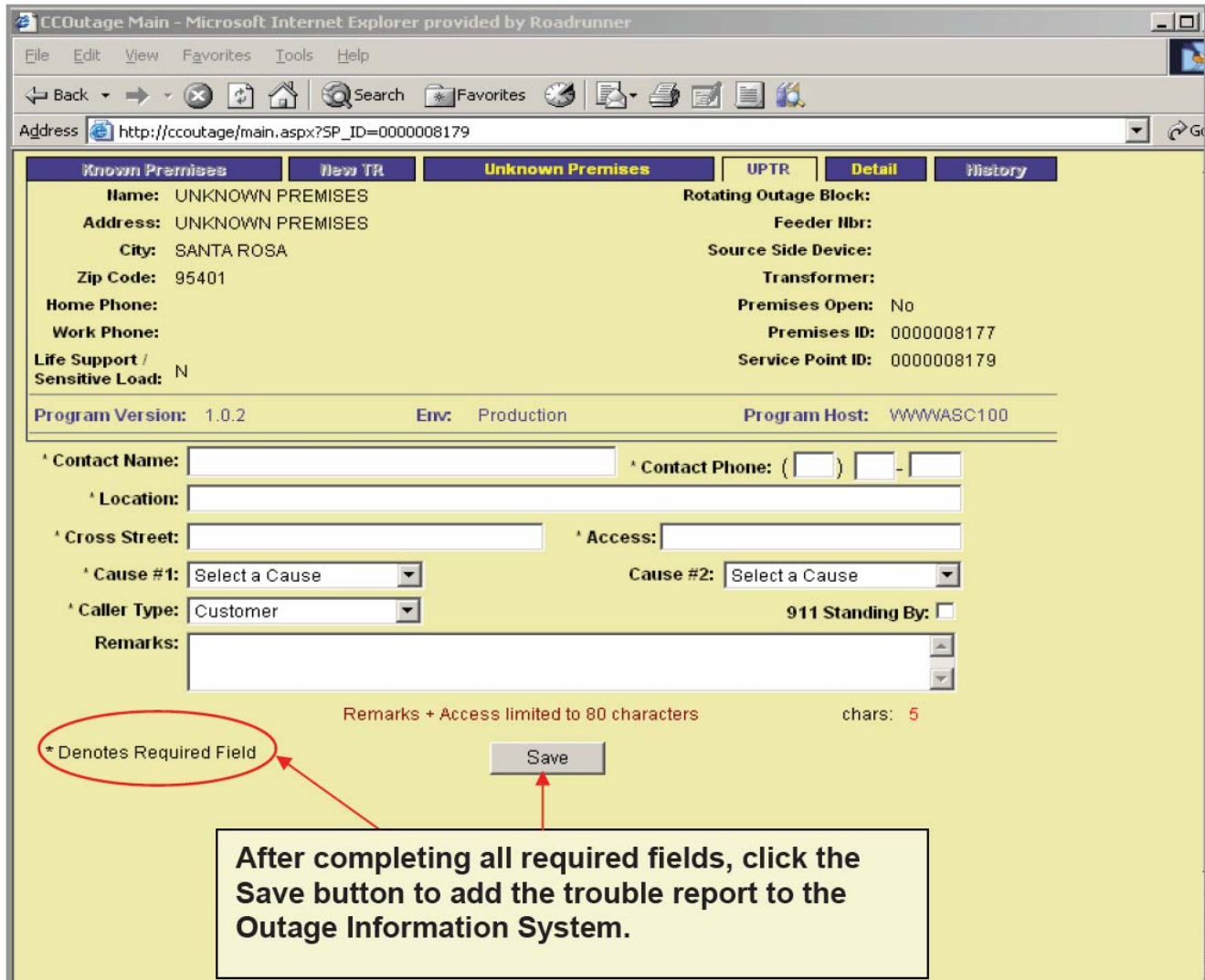


Figure 9. Outage Information System – Main Page

- 4.2 Complete all required fields (marked by an asterisk) as shown in [Figure 10. "Outage Information System – Unknown Premise Trouble Report Page."](#)
- 4.3 Add a note in the **Remarks** field.
- 4.4 Click the **Save** button to add the trouble report to OIS.

Handling 911 Calls – Emergency Response



CCOutage Main - Microsoft Internet Explorer provided by Roadrunner

Address: http://ccoutage/main.aspx?SP_ID=0000008179

Unknown Premises | New TR | **Unknown Premises** | UPTR | Detail | History

Name: UNKNOWN PREMISES **Rotating Outage Block:**
Address: UNKNOWN PREMISES **Feeder Ilbr:**
City: SANTA ROSA **Source Side Device:**
Zip Code: 95401 **Transformer:**
Home Phone: **Premises Open:** No
Work Phone: **Premises ID:** 0000008177
Life Support / Sensitive Load: N **Service Point ID:** 0000008179

Program Version: 1.0.2 **Env:** Production **Program Host:** WWWASC100

* **Contact Name:** [] * **Contact Phone:** ([]) [] - []
 * **Location:** []
 * **Cross Street:** [] * **Access:** []
 * **Cause #1:** Select a Cause [] **Cause #2:** Select a Cause []
 * **Caller Type:** Customer [] **911 Standing By:**
Remarks: []

Remarks + Access limited to 80 characters chars: 5

* Denotes Required Field **Save**

After completing all required fields, click the Save button to add the trouble report to the Outage Information System.

Figure 10. Outage Information System – Unknown Premise Trouble Report Page

5 Adding a Trouble Report for a Known Premise

5.1 To complete a trouble report for a known premise, perform the following steps:

1. Check for existing, planned, or inferred outages before proceeding as shown in [Figure 11, "Outage Information System Page – No Trouble Reports on Premise."](#)

If an outage for this premise has already been reported, no further action is required by the dispatcher unless a hazard exists that was not previously reported.

Handling 911 Calls – Emergency Response

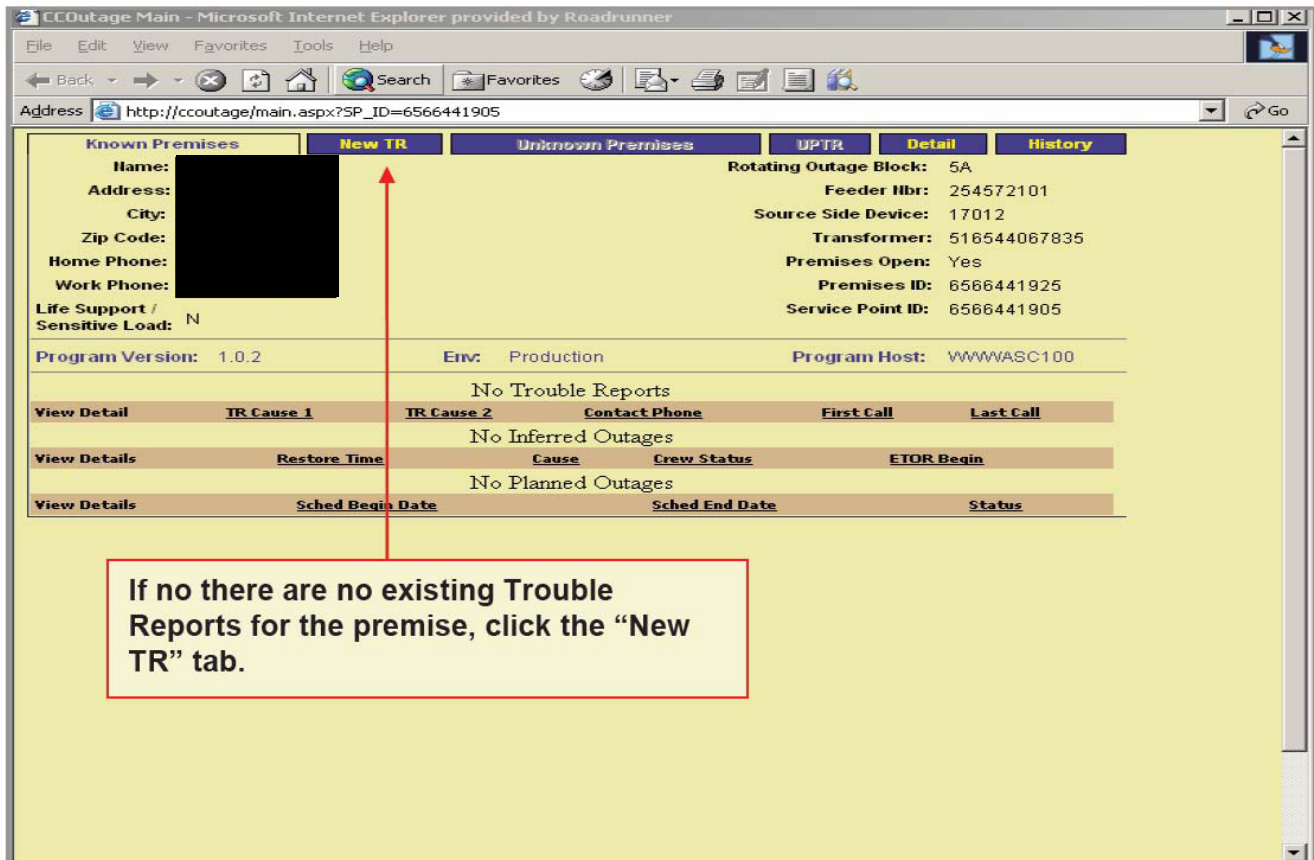
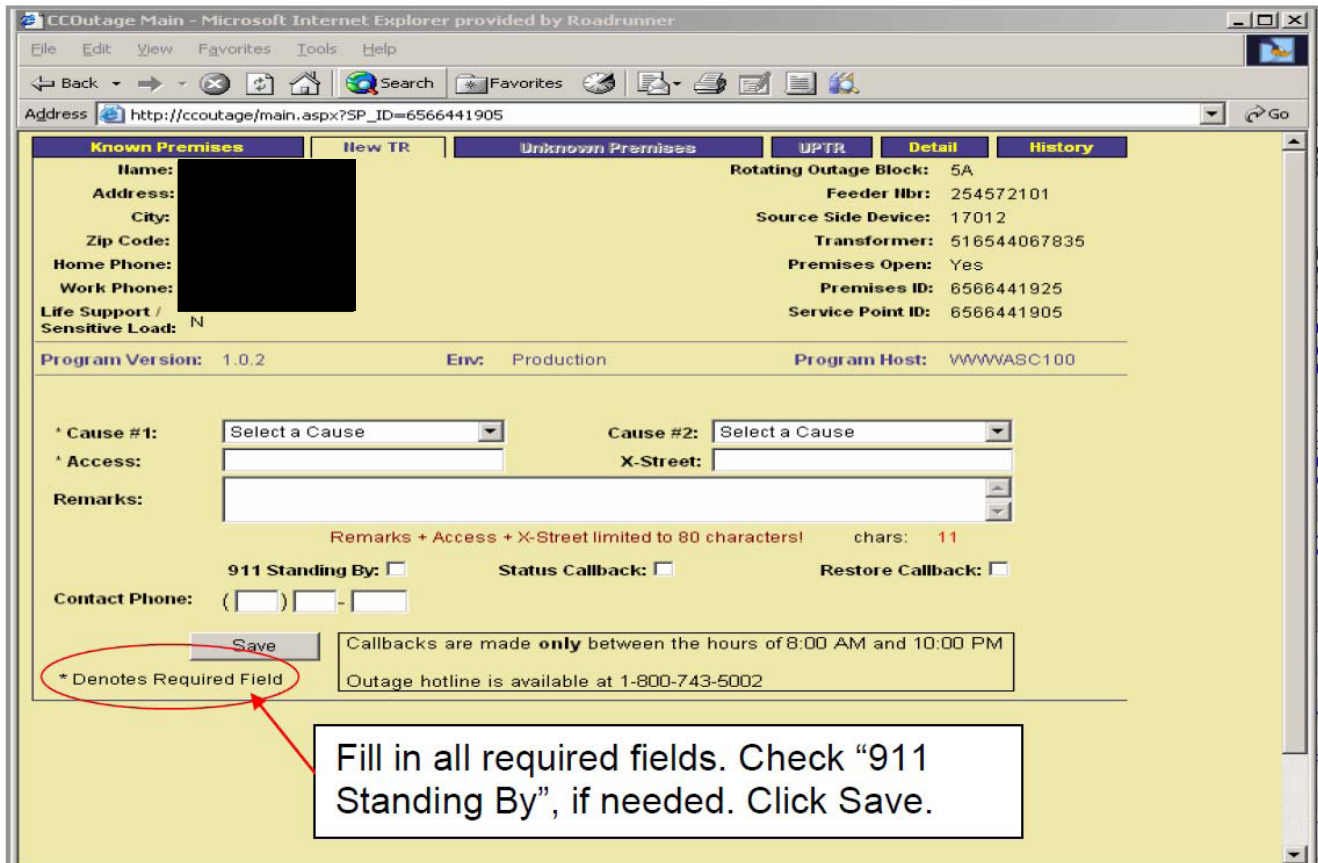


Figure 11. Outage Information System Page – No Trouble Reports on Premise

- 5.2 If there are no existing trouble reports for a known premise, click the **New TR** button (Figure 11).
- 5.3 Complete all required fields (marked by an asterisk) as shown in [Figure 12, "Example of Outage Information System Page – Known Premise Trouble Report Page."](#)
- 5.4 Add a note in the **Remarks** field.
 Select the **911 Standing By** option if a 911 emergency agency is standing by.
- 5.5 Click the **Save** button to add the trouble report to OIS.

Handling 911 Calls – Emergency Response



The screenshot shows a web browser window titled "CCOutage Main - Microsoft Internet Explorer provided by Roadrunner". The address bar shows "http://ccoutage/main.aspx?SP_ID=6566441905". The page has several tabs: "Known Premises", "New TR", "Unknown Premises", "UPTR", "Detail", and "History". The "Known Premises" tab is active, displaying a form with the following fields and values:

- Name: [Redacted]
- Address: [Redacted]
- City: [Redacted]
- Zip Code: [Redacted]
- Home Phone: [Redacted]
- Work Phone: [Redacted]
- Life Support / Sensitive Load: N
- Rotating Outage Block: 5A
- Feeder Ildr: 254572101
- Source Side Device: 17012
- Transformer: 516544067835
- Premises Open: Yes
- Premises ID: 6566441925
- Service Point ID: 6566441905

Below these fields, there are dropdown menus for "Cause #1" and "Cause #2", both set to "Select a Cause". There are also input fields for "Access" and "X-Street". A "Remarks" field is present with a character count of 11. There are checkboxes for "911 Standing By", "Status Callback", and "Restore Callback". A "Contact Phone" field is also visible. A "Save" button is highlighted with a red circle. A red arrow points from the "Save" button to a text box containing the following instructions:

Fill in all required fields. Check "911 Standing By", if needed. Click Save.

Figure 12. Example of Outage Information System Page – Known Premise Trouble Report Page

NOTE

The **Status Callback** and **Restore Callback** options are used by the Call Center to indicate that customers need to receive callbacks. *Do not* use these boxes when 911 agencies are calling to report trouble at a known premise.

6 Handling Non-Agency Calls

6.1 Follow these steps when receiving a non-emergency call that is not an emergency call or that is made by an unauthorized caller:

1. Be polite.
2. If the subject of the call involves an imminent hazard to life or property, respond as if the call were from an emergency agency. Create a trouble report.



Handling 911 Calls – Emergency Response

3. If the subject of the call is not an imminent emergency, explain to the caller that the phone line is used only for emergencies reported by 911 agencies, such as the police and fire departments, or the California Highway Patrol.



Handling 911 Calls – Emergency Response

6.1 (continued)

4. Provide the **1-800-PGE-5000 (1-800-743-5000)** number to the caller.

7 Handling Level 1 Emergencies – Normal Day-to-Day Operations

7.1 When a “PG&E Emergency” 911 call is received, perform the following steps (see [Figure 13, “911 Call Handling Process – Level 1”](#)):

1. In CC&B, create a trouble report or edit an existing trouble report by adding specific detail and location/address information.
2. Ask if the agency is standing by and select the **911 Standing By** option, if needed.
3. Ask if an ETA or additional information is needed.
4. Obtain the necessary information from the Outage Information System Outage Management Tool (OIS-OMT) or from the local DO.
5. Provide the information to the emergency agency.

NOTE

Placing “needs ETA” in the **Remarks** field of the trouble report does not exempt the dispatcher from following up with the calling agency. The Company must close out “Level 1 Emergency” calls.

Handling 911 Calls – Emergency Response

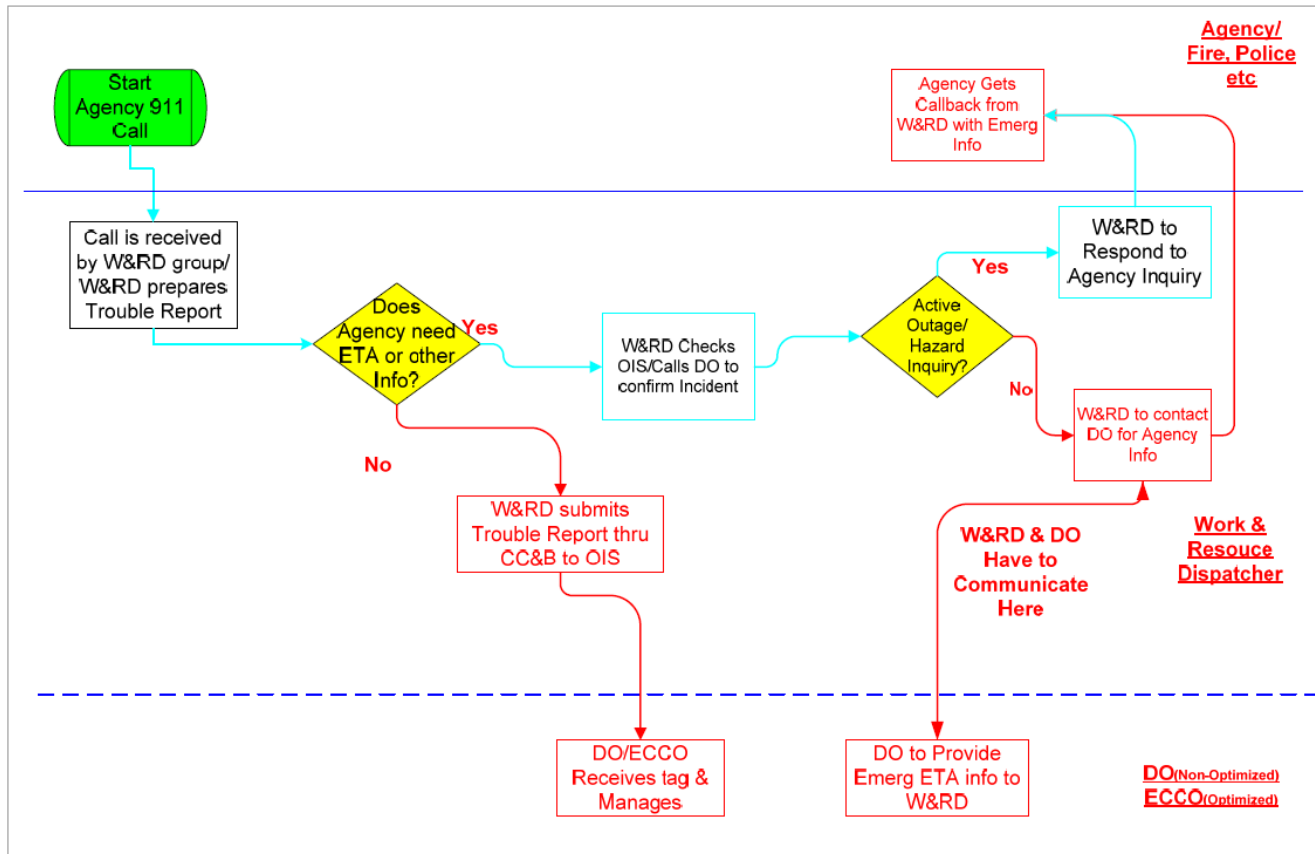


Figure 13. 911 Call Handling Process – Level 1

6. If needed, use OIS to determine if there are incidents or hazard reports related to the present emergency.
7. Use this information to help answer the agency's questions as shown in [Figure 14, "OIS Districts Summary."](#)
8. Exercise caution when providing information directly from OIS.
9. Check with the DO to verify the accuracy of ETAs, etc.

Handling 911 Calls – Emergency Response

7.1 (continued)

Outage#	Dist. Name	Substation/Source Name	Circuit	Verify?/Device	Level	Start Time/ Span (hh:mm)	Haz.	Crew	Crew Type	Crew Status	FAS Crew Status	Assigned DO	Stdby 911	ETA
760938	Coast	CAMP EVERS-BK 2	083622106	(L1511)	CUST.	1 07/13/2004 17:40		STORMENT/2846	T-MAN	Awaiting T-Man	Acknowledged			
761124	Kern	MAGUNDEN-BK 1	252771104	(2929152)	CUST.	1 07/14/2004 06:53		JENNINGS 3354	T-MAN	T-Man Enroute	Enroute			
761167	Santa Rosa	SONOMA-BK 2	042721105	(MM3513)	CUST.	1 07/14/2004 07:07		PARROTT/4267	T-MAN	T-Man On Site	Onsite			
761178	Silverado	NAPA-BK 1	042021101	5123	DEVICE	97 07/14/2004 07:09		MBOCK	REPAIR	Crew On Site	On Site			
761191	Yosemite	MENDOTA-BK 1	252311103	Line Cut-765	DEVICE	10 07/14/2004 07:30		GC/C/BARRY	REPAIR	Crew On Site	On Site			07/14/2007
761194	Mission	LAS POSITAS-BK 2	014402107	40458	DEVICE	73 07/14/2004 07:32		(1L) LIV-BLKTM	T.BLKETA	Awaiting T-Man		corky		07/14/2008
761201	Red Bluff	CORNING-BK3	103331103	(DD3410)	CUST.	1 07/14/2004 07:39	15			Awaiting T-Man				
761204	Skyline	DALY CITY-BK 1	022641104	(D0311)	CUST.	1 07/14/2004 07:48		COTTONHAM/834	T-MAN	T-Man On Site	Onsite			07/14/2010

Double click the number in the “Haz” column to produce the “Hazardous Report.” Use the information to determine consistency with what the caller is reporting.

Note “911 Stand By” column.

Figure 14. OIS Districts Summary

- To get more information about the incident, double-click the hazard number in the **Haz** column to view the Hazardous Report as shown in Figure 15, “Sample Hazardous Report.”

Hazardous Report								
Total number of Customers Affected = 4								
1 Hazardous Report for outage 761326 (max. 100 reports are returned)								
							Print	Close
Outage#	Curr. Cust	Crew ID	Crew Name	Address	City	Haz. Desc.	Stdby 911	Comments
761326	4	V8TCMCG	CLEVENGER/1320	8277 AMBERWOODS PL	SHINGLETOWN	Heard Explosion		AXS OK. HEARD EXPLOSION. POWER OUT.

Figure 15. Sample Hazardous Report

8 Handling Levels 2–3 Emergencies

- Dispatcher Responsibilities During Level 2–3 Emergencies:** The dispatcher has the following primary responsibilities during Level 2–3 Emergencies (see [Figure 16, “911 Call Handling Process – Levels 2–3”](#)):

- Create a trouble report in CC&B with specific details and location/address information.

Handling 911 Calls – Emergency Response

8.1 (continued)

2. Send the “911 Emergency Agency Referral/Callback Form” to the Operations Emergency Center (OEC) and/or Electric Control Center Operations (ECCO), if necessary.
3. Inform the agency that the local OEC will respond within 20 minutes by stating: “Thank you for calling. Our local Operations Emergency Center will respond to your inquiry within 20 minutes.”

8.2 OEC Responsibilities During Level 2–3 Emergencies: The OEC has the following primary responsibilities during Level 2–3 emergencies:

1. Establish a 911 station (standby handling desk) to receive agency referral forms and other communications from the dispatcher.
2. Respond to agency questions within 20 minutes.

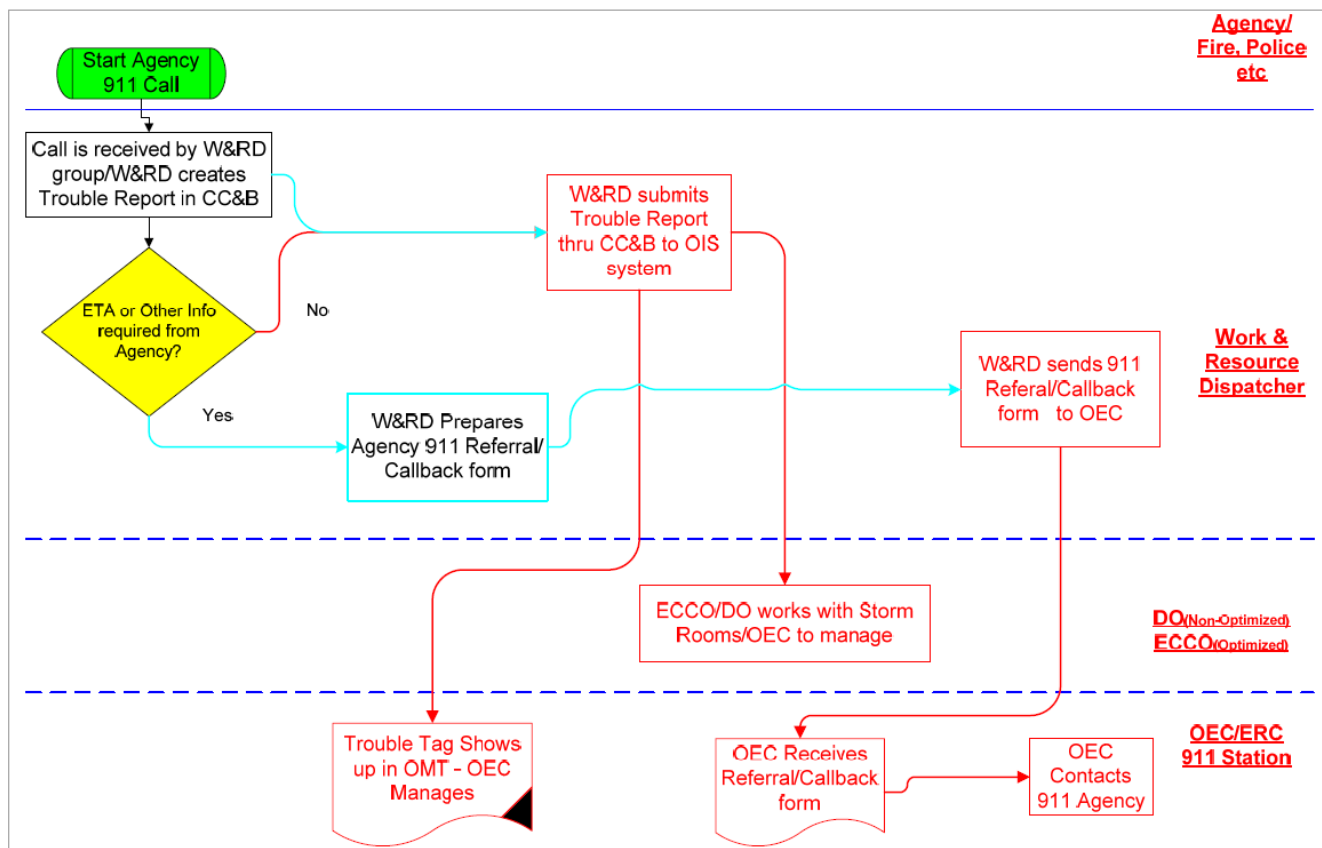


Figure 16. 911 Call Handling Process – Levels 2–3



Handling 911 Calls – Emergency Response

9 Completing the Agency Referral/Callback Form

- 9.1 Use the “911 Agency Referral/Callback Form” as shown in [Figure 17, “911 Emergency Agency Referral / Callback Form.”](#) for referrals when a question or information cannot be answered or provided.
- 9.2 The Agency/Referral Callback form is also used during the following circumstances:
- Level 2-4 emergencies when OECs are open.
 - When the 911 agency requests a call back with an ETA or a standby crew.
 - When the 911 agency asks to speak to someone involved with the emergency.
 - When the 911 agency asks to speak directly with local OEC personnel.

NOTE

Also, use the form as a quick reference for finding DO/OEC/TCC phone numbers when dispatchers receive 911 agency calls for any areas they do not handle regularly.



Handling 911 Calls – Emergency Response

911 - EMERGENCY AGENCY Referral / Callback Form	
To: OEC/DO/TCC Select Recipient ▶ <input type="text"/> Select Location ▶ <input type="text"/> Contact Number: Internal <input type="text"/> External <input type="text"/> Fax Number: Internal <input type="text"/> External <input type="text"/>	Navigation Main Menu Back to Level 2-4 Procedure Clear Form SEND OEC AGENCY REQUEST
From: Dispatch Operations Select Location ▶ <input type="text"/> Contact Number: Internal <input type="text"/> External <input type="text"/> Fax Number: Internal <input type="text"/> External <input type="text"/> <div style="text-align: center; color: red;">Prepared by (LAN ID): <input style="border: 1px solid red;" type="text"/></div>	
Agency Information: Agency Name <input type="text"/> Contact Name <input type="text"/> Agency Contact Number <input type="text"/> Contact # Type <input type="text"/> Secondary Contact Number <input type="text"/> Contact # Type <input type="text"/> <small>Press for Current Date/Time</small> Time of Call <input type="text"/> Date of Call <input type="text"/>	PRINT FORM PAGE DOWN↓
Nature of Emergency: <input style="width: 100%; height: 40px;" type="text"/>	
Location of Emergency: Physical/Descriptive Address <input type="text"/> City <input type="text"/> Nearest X-Street <input type="text"/> Is 911 Agency Standing By ? <input type="text"/>	
Agency Request: Agency Requests Callback w/ETA <input type="text"/> Agency Requests Standby Crew <input type="checkbox"/> Agency Requests Callback from Emergency Response Coordinator <input type="checkbox"/> Special Instructions <input style="width: 100%; height: 40px;" type="text"/>	BACK TO TOP ↑ PRINT FORM SEND OEC AGENCY REQUEST
OEC Response	
Resolution: <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	
Call Back Date & Time: <input style="width: 100%;" type="text"/> Incident / Log Number: <input style="width: 100%;" type="text"/> OIS Number: <input style="width: 100%;" type="text"/> Completed by (LAN ID): <input style="width: 100%;" type="text"/>	

Figure 17. 911 Emergency Agency Referral / Callback Form

9.3 Fill out all applicable sections of the form. As selections are made from the drop-down boxes, the top section of the form automatically populates with phone numbers for the DOs and OECs.

Ensure that the red sections (required) have as much information as possible so the OEC does not need to call back.



Handling 911 Calls – Emergency Response

9.4 After completing the form, click the **Send OEC Agency Request** button to email it directly to the standby handling desk in the OEC.

10 Determining Which Areas are in a Level 2–3 Emergency

10.1 When a call is received from an agency in another area, this may indicate that the other area is having an emergency.

The main page in OIS-OMT shows if a division OEC is open. The OEC may establish a 911 standby handling desk.

1. To check if an area is in a Level 2 or greater event, open the main page of the OMT to see if the division's OEC is open (indicated by a dot on the map in that particular division) as shown in [Figure 18, "Outage Management Tool Main Page – System Summary by Area."](#) If the OEC is open, follow the steps described above in [Section 8, Handling Levels 2–3 Emergencies](#).
2. To determine which areas are in a Level 2–3 emergency when receiving an out-of-area call, and when the present area is experiencing no problems or emergencies, perform the following steps:
 - a. Determine the area or headquarters that the 911 caller is calling from.
 - b. Go to the main page of the OMT.
 - c. From the **Business Support Tools** menu, select **OEC Activation Status**. The system displays the OEC Activation Status page, which shows open OEC and if a standby handling desk has been activated as shown in [Figure 19, "Viewing Open OECs."](#)

Handling 911 Calls – Emergency Response

10.1 (continued)

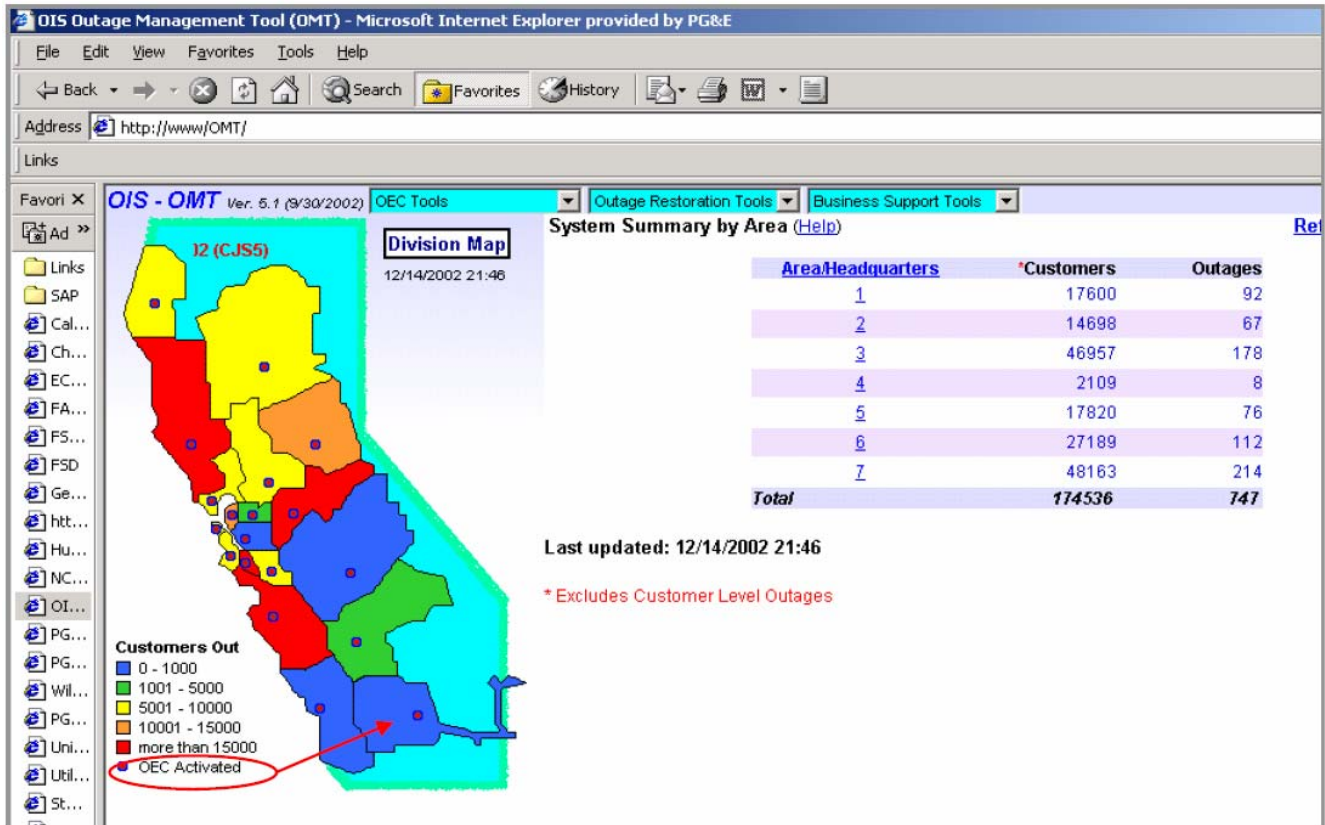


Figure 18. Outage Management Tool Main Page – System Summary by Area

Handling 911 Calls – Emergency Response

10.1 (continued)

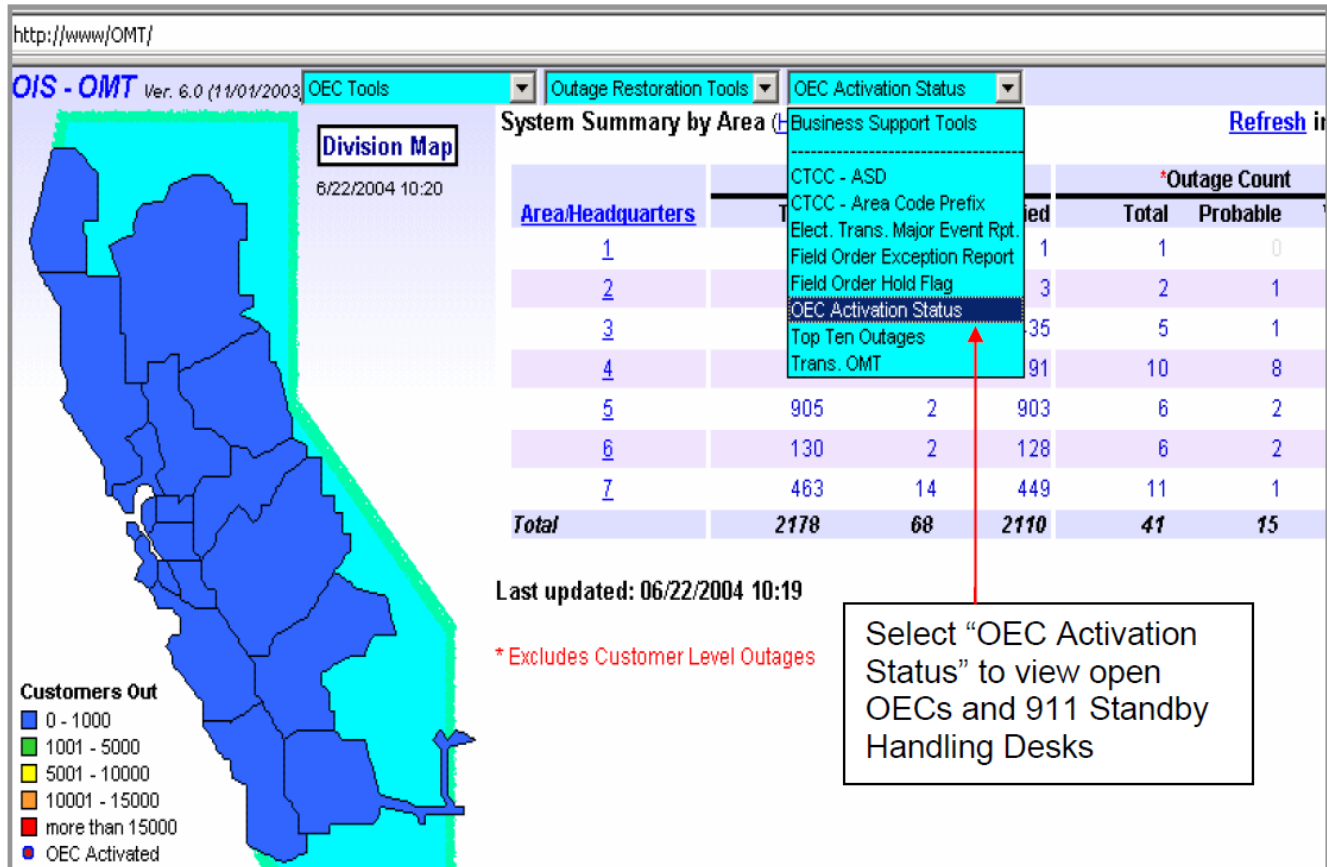


Figure 19. Viewing Open OECs

3. In [Figure 20. "Sample OEC Activation Status Screen."](#) the example shows that the Diablo and East Bay OECs and 911 Standby Handling Desks are open. San Francisco OEC is open, but the 911 standby handling desk is not operational. This means the San Francisco OEC is not monitoring email for the 911 referral/callback form.

Handling 911 Calls – Emergency Response

10.1 (continued)

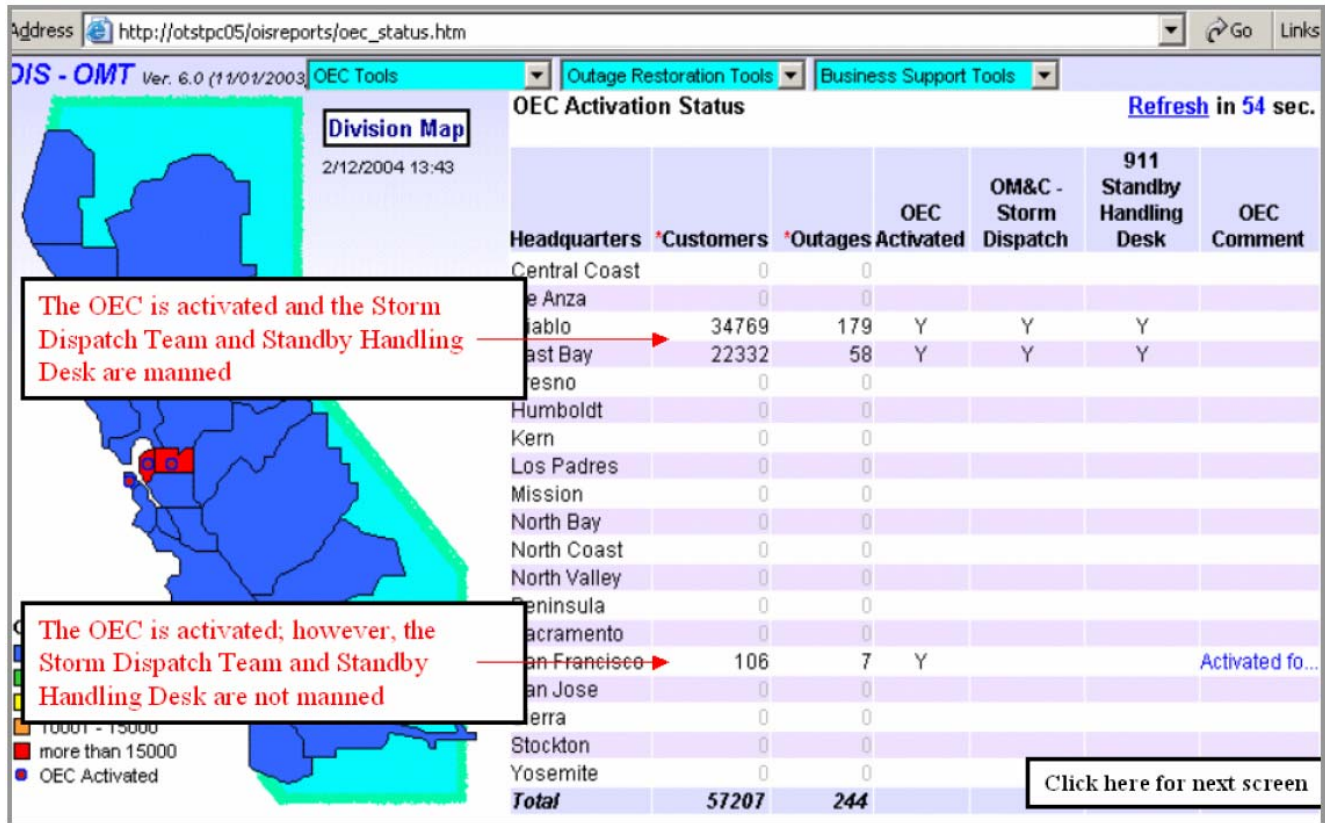


Figure 20. Sample OEC Activation Status Screen

11 Creating Trouble Reports During On-Line Tech Down (Levels 1–3)

11.1 Use the following process when CC&B is in a tech down mode and dispatchers are not able to create trouble reports. If OIS is down, all levels use the same on-line tech down (OLTD3) process.

1. Use the OLTD3 application to create a trouble report.
2. The system automatically sends the tag to the appropriate electric tag alert mailbox

11.2 Creating OLTD3 Tags

1. Use the following link to access the OLTD3 application: <http://old3>.

NOTE

Fields with red headings indicate that the information is required.

Handling 911 Calls – Emergency Response

11.2 (continued)

2. To fill out the form, enter the following information ([Figure 21, "Sample On-Line Tech Down Page"](#)):
 - a. To designate the proper priority code, enter the **Activity Type**.
 - b. In the **Access** field, describe issues and conditions that inhibit access, such as dogs or locked gates.
 - c. Update the home phone and contact phone number.
 - d. Type any other pertinent information in the **Comments** field.

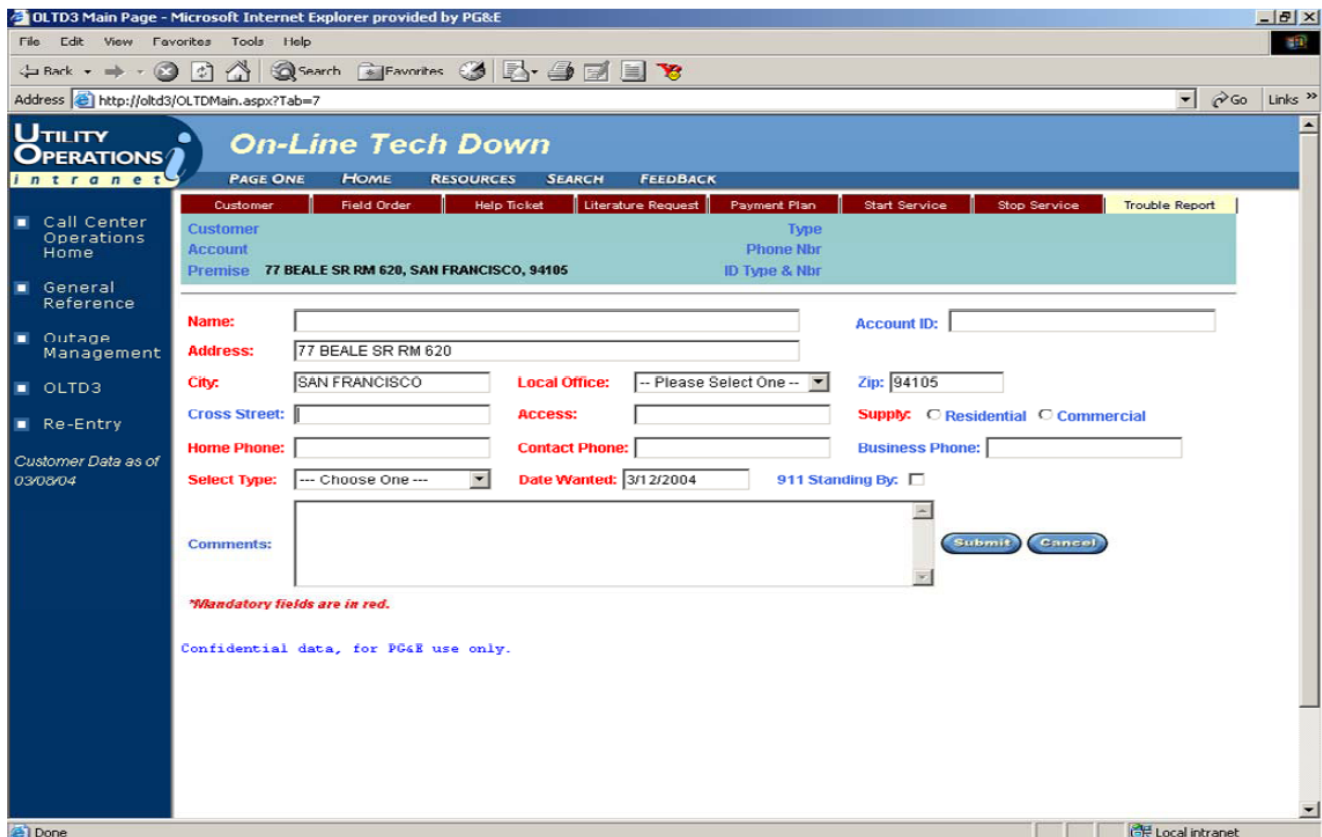


Figure 21. Sample On-Line Tech Down Page

11.3 Creating an OLTD3 Trouble Report

1. If the address is known, type it into the address line as shown in [Figure 22, "On-Line Tech Down – Search Page."](#)
2. Enter the City.

Handling 911 Calls – Emergency Response

11.3 (continued)

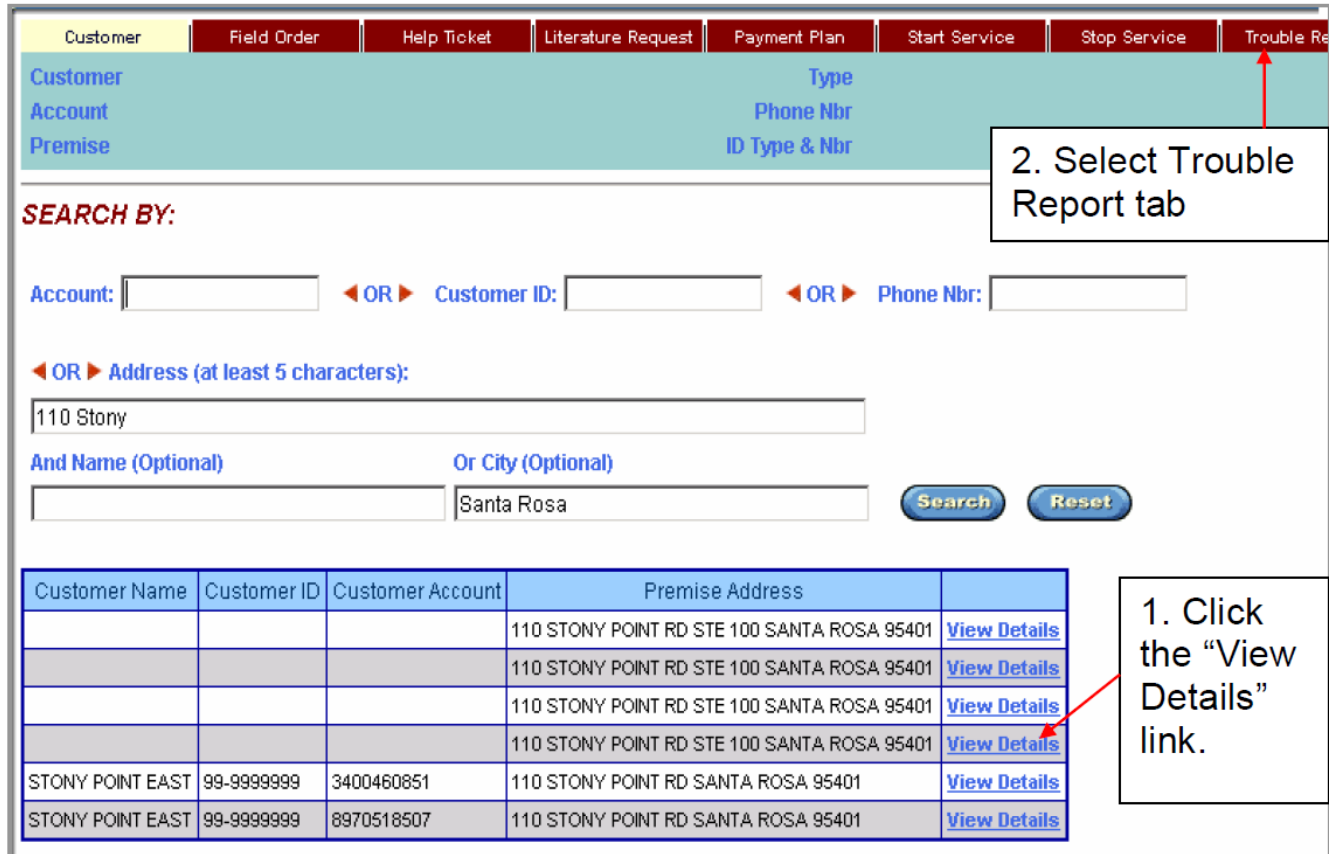
3. Click the **Search** button. The application returns a list of search results.

Figure 22. On-Line Tech Down – Search Page

4. On the OLTD3 Search Results page, select the **View Details** link for the appropriate customer account as shown in [Figure 23, “OLTD3 Search Results Page.”](#)

Handling 911 Calls – Emergency Response

11.3 (continued)



2. Select Trouble Report tab

SEARCH BY:

Account: ◀ OR ▶ Customer ID: ◀ OR ▶ Phone Nbr:

◀ OR ▶ Address (at least 5 characters):

And Name (Optional) Or City (Optional)

Customer Name	Customer ID	Customer Account	Premise Address	
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
STONY POINT EAST	99-9999999	3400460851	110 STONY POINT RD SANTA ROSA 95401	View Details
STONY POINT EAST	99-9999999	8970518507	110 STONY POINT RD SANTA ROSA 95401	View Details

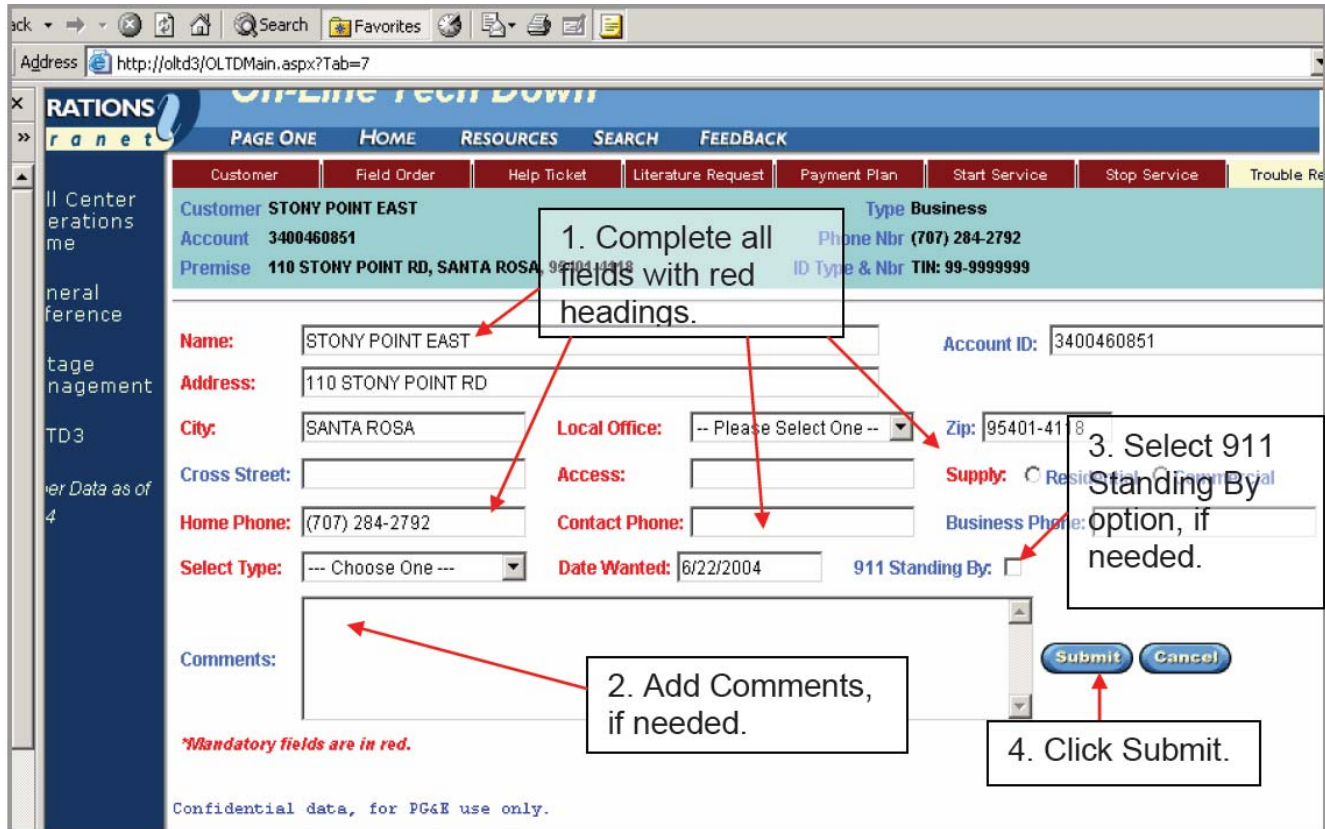
1. Click the "View Details" link.

Figure 23. OLTD3 Search Results Page

5. Select the **Trouble Report** tab.
6. On the **Trouble Report** page, complete all fields that have red headings as shown in [Figure 24, "OLTD3 Trouble Report Page."](#)
7. Select the **911 Standing By** option, if necessary.
8. Click the **Submit** button. The tag goes automatically to the appropriate DO tag alert mailbox.

Handling 911 Calls – Emergency Response

11.3 (continued)



The screenshot shows the OLTD3 Trouble Report Page with the following fields and callouts:

- 1. Complete all fields with red headings.** (Points to: Name, Address, City, Home Phone, Select Type, Local Office, Access, Contact Phone, Date Wanted, 911 Standing By)
- 2. Add Comments, if needed.** (Points to: Comments text area)
- 3. Select 911 Standing By option, if needed.** (Points to: 911 Standing By checkbox)
- 4. Click Submit.** (Points to: Submit button)

Customer: STONY POINT EAST
 Account: 3400460851
 Premise: 110 STONY POINT RD, SANTA ROSA, CA 95401-4118
 Phone Nbr: (707) 284-2792
 TIN: 99-999999

Name: STONY POINT EAST
 Address: 110 STONY POINT RD
 City: SANTA ROSA
 Home Phone: (707) 284-2792
 Select Type: --- Choose One ---
 Local Office: -- Please Select One --
 Access:
 Contact Phone:
 Date Wanted: 6/22/2004
 Zip: 95401-4118
 911 Standing By:

Comments:
 *Mandatory fields are in red.

Submit Cancel

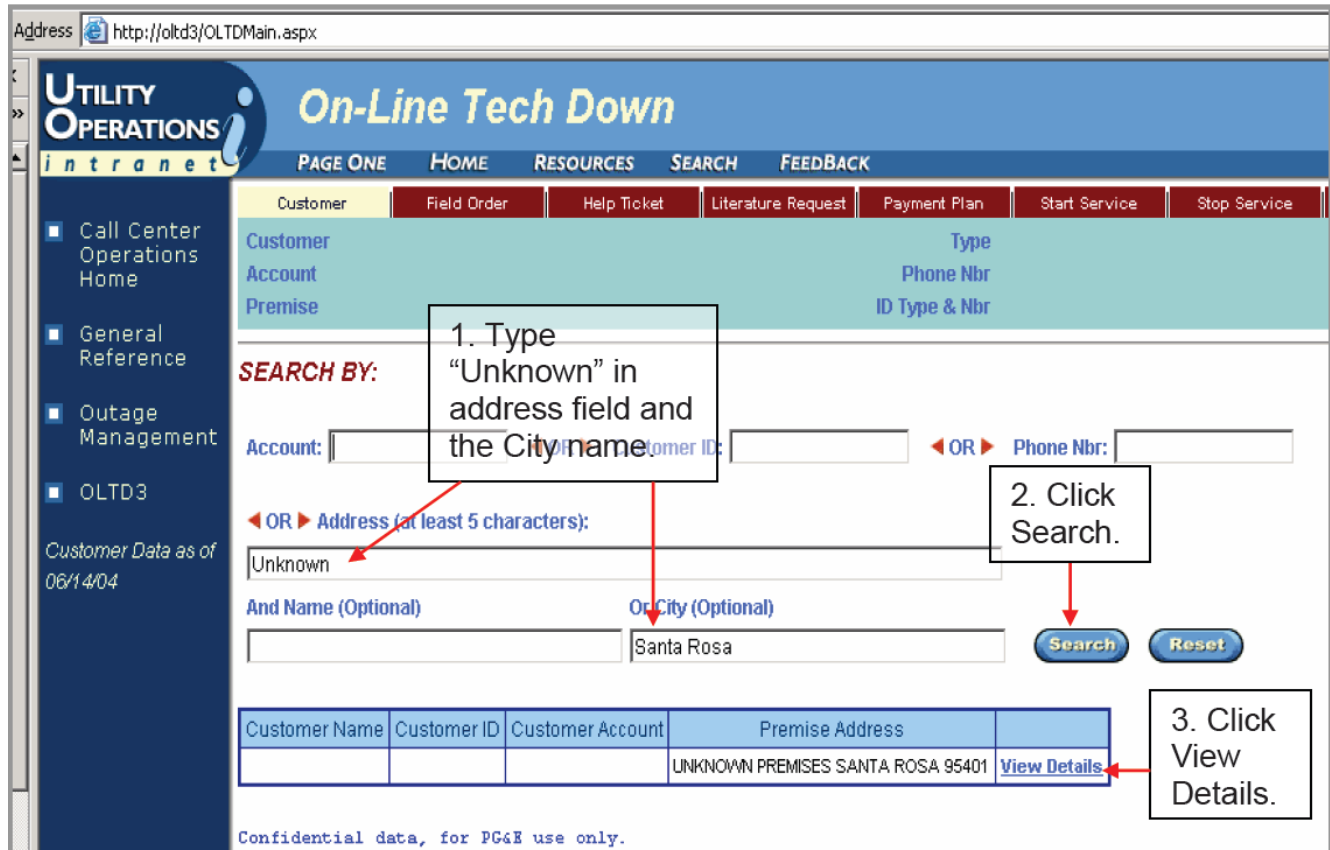
Figure 24. OLTD3 Trouble Report Page

11.4 Creating an OLTD3 Trouble Report for an Unknown Premise

1. To create a trouble report for an unknown premise, perform the following steps ([Figure 25, "On-Line Tech Down – Search Page"](#)):
 - a. Type "unknown" on the address line
 - b. Type the name of the city.
 - c. Click the **Search** button.
 - d. In the **Search Results**, click the **View Details** link.
 - e. Click the **Trouble Report** tab.

Handling 911 Calls – Emergency Response

11.4 (continued)



Address http://oltd3/OLTDMain.aspx

UTILITY OPERATIONS *On-Line Tech Down*
 intranet PAGE ONE HOME RESOURCES SEARCH FEEDBACK

Customer Field Order Help Ticket Literature Request Payment Plan Start Service Stop Service

Customer Account Premise Type Phone Nbr ID Type & Nbr

SEARCH BY:

Account: Customer ID: OR Phone Nbr:

OR Address (at least 5 characters):

And Name (Optional) Or City (Optional)

Customer Name	Customer ID	Customer Account	Premise Address	
			UNKNOWN PREMISES SANTA ROSA 95401	View Details

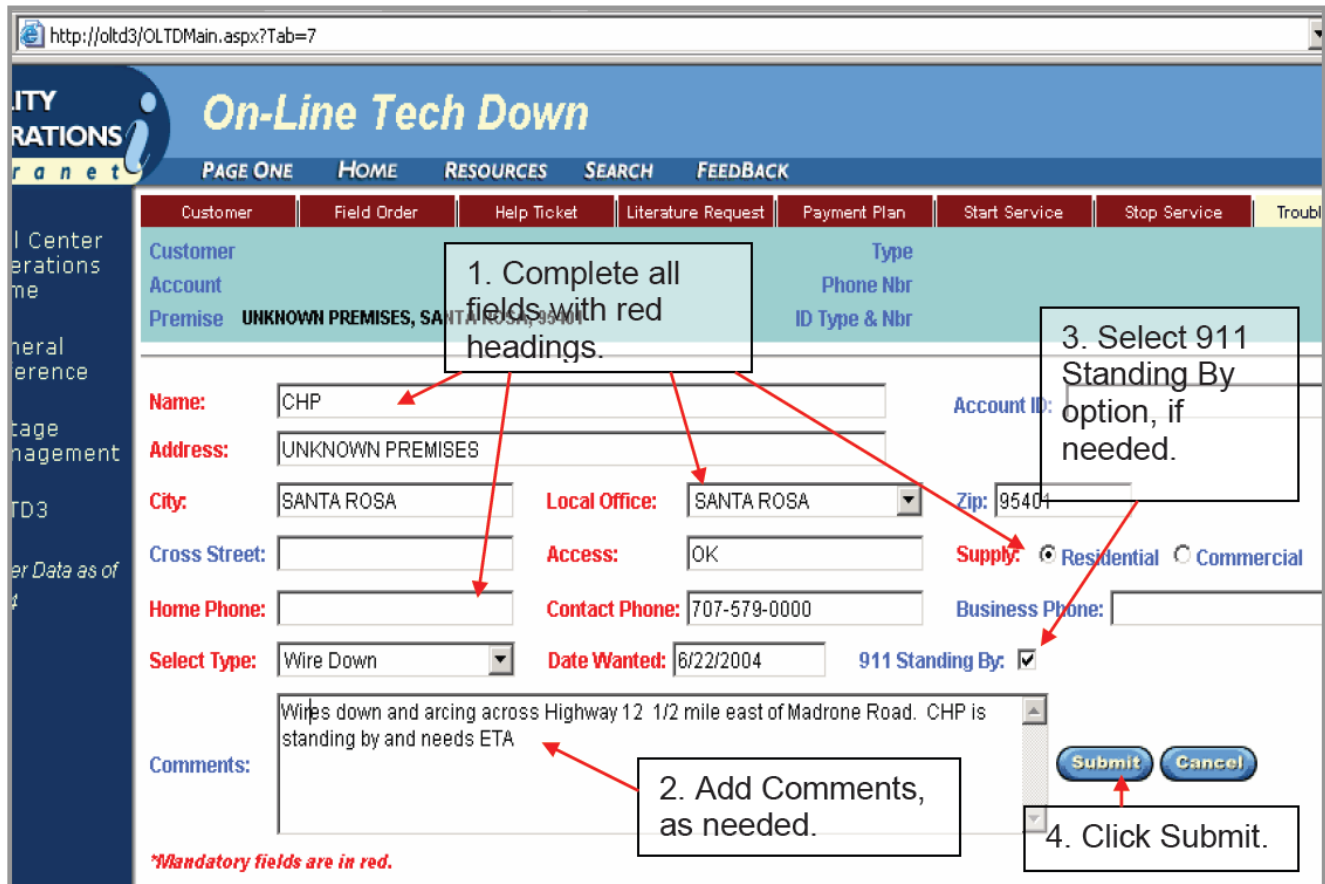
Confidential data, for PG&E use only.

Annotations:
 1. Type "Unknown" in address field and the City name
 2. Click Search.
 3. Click View Details.

Figure 25. On-Line Tech Down – Search Page

- f. On the **Unknown Trouble Report** page, complete all fields that have red headings as shown in [Figure 26. "OLTD3 Trouble Report Page – Unknown Premise."](#)
- g. Click the **Submit** button. The tag goes directly to the DO tag alert mailbox.

Handling 911 Calls – Emergency Response



The screenshot shows the 'On-Line Tech Down' form in the OLTD3 system. The form is titled 'On-Line Tech Down' and has a navigation bar with 'PAGE ONE', 'HOME', 'RESOURCES', 'SEARCH', and 'FEEDBACK'. Below the navigation bar are tabs for 'Customer', 'Field Order', 'Help Ticket', 'Literature Request', 'Payment Plan', 'Start Service', 'Stop Service', and 'Troubl'. The form is for an 'Unknown Premise' and includes the following fields:

- Name:** CHP
- Address:** UNKNOWN PREMISES
- City:** SANTA ROSA
- Local Office:** SANTA ROSA
- Zip:** 95404
- Access:** OK
- Contact Phone:** 707-579-0000
- Date Wanted:** 6/22/2004
- 911 Standing By:**
- Supply:** Residential Commercial
- Select Type:** Wire Down
- Comments:** Wires down and arcing across Highway 12 1/2 mile east of Madrone Road. CHP is standing by and needs ETA

Four numbered callouts with red arrows point to specific parts of the form:

1. Complete all fields with red headings.
2. Add Comments, as needed.
3. Select 911 Standing By option, if needed.
4. Click Submit.

Figure 26. OLTD3 Trouble Report Page – Unknown Premise

12 Handling Gas Emergencies

12.1 When an area is in a Level 2 or greater event, dispatchers may get an out-of-area 911 or a CO call concerning a gas emergency. When this occurs, perform the following steps:

1. Create the tag in CC&B with Priority "0."
2. Contact the area dispatcher if the agency needs an ETA or other information.
3. Complete or close the 911 call.

12.2 Some situations require handing off the emergency incident to the area dispatcher because the area dispatcher controls local resources. When handing off the order, perform the following steps:

1. Ensure that the receiving dispatcher has the emergency agency contact information and is willing to handle the call back.



Handling 911 Calls – Emergency Response

12.2 (continued)

2. If there is an out-of-area OLTD3, create an FAS “order entry” gas emergency service request for dispatching.

13 Emergency Notification Requirements

13.1 Depending on the type of incident, dispatchers may be asked to make emergency notifications to organizations, such as Safety Health and Claims (SH&C) as shown in Figure 27, “Work and Resource Dispatcher Notification Tailboard.” Dispatch operations may receive calls for the following types of incidents:

- Personnel injury/fatality
- Third party injury/fatality
- Third party contacts/exposures
- Security issues
- Hazardous conditions/incidents
- Major media events

NOTE

Dispatchers must adhere to and follow all emergency notification requirements.

WORK & RESOURCE DISPATCHER NOTIFICATION TAILBOARD
(Taken from CS&R Procedure 3- Attachment 3)

The following table identifies incident notification requirements for many types of incidents. Review Customer Service & Revenue emergency response plans and other procedures to determine whether other notifications, may be required. **Instances where a supervisor or on-call supervisor is notified and is not the correct person to be notified, Dispatchers will make notification to the correct supervisor or on-call supervisor, regardless if the wrong person contacted takes responsibility for notifications.**

To contact the Safety, Health and Claims Department, dial Company number [REDACTED], or external [REDACTED]. For:

Safety Engineering (SE) Fatality, Serious Injury or Illness Notifications	Option 1
Workers' Compensation (WC) Notifications	Option 2
Third Party Claims (TPC) Notifications	Option 4

Figure 27. Work and Resource Dispatcher Notification Tailboard



Handling 911 Calls – Emergency Response

13.2 For emergency conditions reported by outside agencies (fire, police, Office of Emergency Services [OES], etc.) and Company personnel, refer to [Utility Procedure TD-6436P-12, "Handling Emergency Conditions Reported by Outside Agencies and Company Personnel,"](#) for instructions to manage those situations.

END of Instructions

Definitions	NA
Implementation Responsibilities	NA
Governing Document	Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices," governs this document.
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>Code of Safe Practices.</p> <p>USP 22, "Safety and Health Program."</p> <p>Supplemental References:</p> <p>Utility Procedure TD-6436P-12, "Handling Emergency Conditions Reported by Outside Agencies and Company Personnel."</p> <p>Utility Procedure TD-6436P-20, "Customer Care and Billing On-Line Tech Down."</p>
Appendices	NA



Handling 911 Calls – Emergency Response

Attachments [Attachment 1, "Emergency Notification Requirements by Incidents."](#)

Document Recision This document supersedes Work Procedure WP6436-14, "Handling 911 Calls - Emergency Response," issued 10/2006.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document placed in new template.



Handling Overtime Call-out for Emergency Calls and Regular Work Assignments

Summary

This procedure outlines specific call-out processes for dispatch operators when contacting field personnel during emergency, normal, and after-hours situations. This process applies to situations when additional field personnel may be needed to respond to emergencies, or to assist with normal workloads.

The purpose of this procedure is to minimize delays and improve overall customer service by placing an emphasis on the urgency of emergency call-out situations.

Level of Use: Information Use

Target Audience

Managers, supervisors and dispatch personnel who perform call-outs during emergencies and regular work assignments.

Safety

Personnel working in an office environment must adhere to proper office ergonomic practices to minimize the risk of workplace injury.

Before You Start

Personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by qualified personnel to do such work.

Procedure Steps

1 Call-Out Procedure – Emergency Work Conditions

1.1 Detailed procedures

1. For call-outs during emergency work conditions, dispatchers perform the following tasks:
 - a. Find available field personnel for dispatch using the local call-out list with personnel names and numbers, which is located in the technical resource and calendar (TRAC) application.
 - b. Make only two attempts when contacting field personnel to respond to an emergency. If no response, proceed to next personnel available on TRAC.



Handling Overtime Call-out for Emergency Calls and Regular Work Assignments

1.1 (continued)

- c. If the contact with field personnel is successful, request an estimated time of arrival (ETA) and notify local 911 agencies if requested.
 - d. Record the name of responding field personnel in TRAC.
2. For emergency gas call-outs, dispatch contacts the gas service representative (GSR) supervisor, transmission and regulations (T&R) personnel, or maintenance and construction (M&C) personnel, if it is deemed necessary by the GSR on-site.
- a. If field personnel cannot be contacted after two calls and the call-out list has been exhausted, or if no personnel signed up on the local weekly call-out lists, immediately contact the supervisor for the appropriate local work group to request assistance with the call-out. When this situation occurs, perform the following steps:
 - (1) Ask the local supervisor to take over the call-out.
 - (2) Request a call back from the local supervisor when a responder has been assigned.
 - (3) Make a note of the call to the local supervisor in TRAC.
 - (4) After the local supervisor calls back, make the appropriate notifications to the agencies requesting an ETA, etc.
 - b. If the local supervisor cannot be reached for assistance, immediately notify the on-call field supervisor.
 - c. If the on-call field supervisor cannot be contacted, seek direction from the dispatch supervisor.

2 Call-Out Procedure – Normal Working Hours

- 2.1 For call-outs during normal workload conditions that require additional field personnel to fill a resource gap, dispatchers perform the following tasks:
- 1. Notify the dispatch supervisor and scheduler that additional resources are needed.
 - 2. Notify local supervisor.
 - 3. If requested, assist with the call-out. To avoid any possible bypass, clarify which personnel to call out. These calls do not need to be noted in TRAC or in the dispatch log.
- 2.2 For non-emergency work after regular hours (generally after 4 p.m.), call the on-call field supervisors to obtain approval for additional help before calling out any field personnel.



Handling Overtime Call-out for Emergency Calls and Regular Work Assignments

2.3 If the on-call field supervisor cannot be reached, contact the appropriate dispatch supervisor.

END of Instructions

Definitions	NA
Implementation Responsibilities	<p>The senior director in charge of customer field services reviews, authorizes, and issues this procedure.</p> <p>The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.</p> <p>Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.</p>
Governing Document	Utility Standard TD-6436S, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices," governs this document.
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>NA</p> <p>Supplemental References:</p> <p>NA</p>
Appendices	NA



Handling Overtime Call-out for Emergency Calls and Regular Work Assignments

Attachments NA

Document Recision This procedure supersedes Utility Procedure WP6436P-16, "Handling Overtime Callout for Emergency Calls and Regular Work Assignments," issued 10-06.

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Procedure placed in new template.

Fleet Loading Instructions

Summary This procedure outlines the process for dispatching a full day's work to gas service representatives. The goal is to ensure that gas service representatives are productive throughout the work day.

Level of Use: Informational Use

Target Audience The primary audiences for this procedure are managers, supervisors, and dispatch employees who perform fleet loading work.

Safety To ensure safety, employees must follow all applicable precautions and requirements when handling or responding to any gas or electric field order, as described in the following documents:

- [Utility Standard Practice \(USP\) 22, "Safety and Health Program"](#)
 - [Code of Safe Practices](#)
-

Before You Start NA

Procedure Steps

1. General Information

Dispatchers and gas service representatives have the following fleet loading responsibilities:

- 1.1 Before the beginning of the work shift, dispatchers assign gas service representatives a full day of work, unless one of the special conditions described in this procedure exists.

NOTE

A full day of work is a minimum of 15 to 20 field orders, including AM and PM orders.

- 1.2 Gas service representatives notify the dispatcher if the work level drops off during the day.

Fleet Loading Instructions

2. Standard Fleet Loading and Special Conditions

- 2.1 Standard fleet loading for gas service representatives is a minimum of 15 to 20 field orders sorted and routed by sub-areas.
- 2.2 The following list describes dispatcher responsibilities for the fleet loading process under seven special conditions:
1. Gas service representative working the night shift:
 - a. Before the start of the employee's shift, dispatch all NM (5–8 p.m. appointment) field orders.
 - b. Assign work, such as PM field orders, to relieve over-loaded sub-areas.
 - c. Assign enough work to keep gas service representatives productive throughout the night shift.
 2. Gas service representative performing compliance work:
 - a. Assign gas scheduled meter changes (SMCs) based on time factors, usually 11 to 13 field orders.
 - b. Assign electric time of use (TOU) meter changes based on time factors, usually 15 to 20 field orders.

NOTE

Standard work time per SMC or TOU field order equals 20 minutes each, plus travel time.

3. Gas service representative performing gas meter sets:
 - a. Assign gas meter sets based on time factors, usually nine to 11 field orders.
 - b. Consider the travel time involved.

NOTE

Standard work time per gas meter set field order equals 32 minutes each, plus travel time.

4. Gas service representative performing propane to natural gas conversions:
 - a. For full conversions, allow 75 minutes per field order.
 - b. Consider the travel time involved.

Fleet Loading Instructions

2.2, Continued

5. New gas service representative:
 - a. Assign work at 50%, about eight to 10 field orders.
 - b. Route new gas service representatives to areas where they can find assistance quickly.

NOTE

Standard work time is not applicable.

6. Service Mechanics:
 - a. Dispatch field orders that require a service mechanic.
 - b. Dispatch commercial field orders as the work load permits.
 - c. Supplement the work load with standard field orders, as needed.
7. Gas service representative working a partial day or on special assignment:
 - a. Reduce the work load as follows, based on the number of hours off:
 - 2 hours off—reduce to 12 to 15 field orders
 - 4 hours off—reduce to seven to 10 field orders
 - 6 hours off—reduce to three to five field orders
 - b. Adjust AM or PM work according to when time off is taken.

END of Instructions

Fleet Loading Instructions

DefinitionsNA

**Implementation
Responsibilities**

The senior director in charge of customer field services is responsible for reviewing, authorizing, and issuing this procedure. The director in charge of field services is responsible for ensuring that this procedure is communicated and properly implemented in all service areas. Field services managers and supervisors are responsible for ensuring that field services employees are trained and knowledgeable about this procedure.

**Governing
Authority**

[Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices"](#)

**Compliance
Requirement/
Regulatory
Commitment**NA

**Reference
Documents**

[Code of Safe Practices](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program"](#)

AppendicesNA

AttachmentsNA

**Document
Revision**

This utility procedure cancels and supersedes Work Procedure WP6436-17, "Fleetloading Instructions," issued 10-06.

Fleet Loading Instructions

Approved By Jimmy Morales
Manager

Document Owner Barry Knapp
Compliance Supervisor

Document Contact John Freeman [REDACTED]
[REDACTED]

Revision Notes

Where?	What Changed?
WP6436-17	Changed document number to TD-6436P-17 and updated to new template.



Order Completion for Field Services Alteration Crews

Summary

This procedure provides field service and dispatch personnel with a consistent process for creating, dispatching, and completing field orders (FOs) when work assignments are given to field services alteration crews.

Using these guidelines promotes accurate recording of dispatched and completed field work in the Field Automation System (FAS).

Level of Use: Informational Use

Target Audience

Field service and dispatch personnel.

Safety

All personnel, whether working in an office or field environment, must adhere to proper ergonomic practices to minimize the risk of workplace injury.

Before You Start

Field personnel who perform tasks in accordance with this procedure must work under the direction of trained personnel or receive training from the Gas Service School to do such work.

Dispatch personnel who perform tasks in accordance with this procedure must work under the direction of trained personnel or first complete the *Dispatcher in Training* program.



Order Completion for Field Services Alteration Crews

Procedure Steps

1 Dispatching Work to Field Service (FS) Alteration Crews

- 1.1 When dispatching FOs to field service alteration crews, the dispatcher performs the following steps:
1. Create a duplicate FO for each original FO assigned to the field service alteration crew.
 2. Dispatch the original FO to one person on the field service alteration crew.

NOTE

One person is dispatched on the original FO(s)
and other personnel are dispatched on a duplicate
FO(s) so they can enter completion data
individually.

3. Dispatch the corresponding duplicate FO to other personnel on the crew.

2 FS Alteration Crew – Receiving Field Orders

- 2.1 Each field service alteration crew member uses the respectively assigned Pacific Gas and Electric Company (Company) vehicle.
- 2.2 Throughout the day, crew members use the FAS mobile application (MA) to view and complete dispatched FO(s) or duplicate FO(s).
1. Personnel dispatched with the original FO uses the FAS MA by remote access.
 2. Field personnel dispatched with the duplicate FO use the local mode of the FAS MA. When working in the local mode, inform the dispatcher that the local/remote function of the FAS MA is being used. The local mode places FAS MA “off-line.”

3 FS Alteration Crew – Using FAS to Download Duplicate Field Orders

- 3.1 To download FOs, field personnel who have been assigned the duplicate FOs use one of the following methods:
1. Method 1:
 - a. From the assigned Company vehicle, log on to FAS.
 - b. Download the dispatched duplicate FO(s).
 - c. Follow the “Use of Local/Remote Functionality Instruction.”



Order Completion for Field Services Alteration Crews

3.1 (continued)

2. Method 2:
 - a. In the Company vehicle of personnel with originally assigned FO(s), remove the MA from the FAS cradle.
 - b. Place the MA of personnel with duplicate assigned FO(s) in the FAS cradle.
 - c. Log on to FAS and download the dispatched duplicate FO(s).
 - d. Follow the "Use of Local/Remote Functionality Instruction."
 - e. After downloading duplicate FOs, remove the MA from the FAS cradle.
 - f. Field personnel with original FOs reinserts the vehicle's assigned MA into the FAS cradle.

3.2 After downloading the duplicate FO(s) and returning to the assigned Company vehicle, complete the assigned FO(s) as if connected to FAS in the remote mode.

3.3 Note any FO completion exceptions, as described below in Section 5, "FS Crew – Order Completion Exception."

4 Uploading Completed Field Orders

4.1 At the end of the day, field alternation crew personnel upload completed FOs by placing the MA back into the FAS cradle that was used to download the FO.

NOTE

Failure to use the same FAS cradle to download and upload information may result in loss of the completion data.

5 FS Alteration Crew – Order Completion Exception

5.1 For original FOs, personnel dispatched on original FOs upload completion data for all meter work, gas regulator work, etc.

5.2 For meter changes, personnel dispatched on duplicate FOs upload completion data using the following Completion Codes in the primary completion code field (Field 1):

- 5240
- 5242
- 5243



Order Completion for Field Services Alteration Crews

5.3 For duplicate FOs pertaining to gas regulator work, use the appropriate FAS job completion code, as shown in the following table:

Table 1. FAS Job Completion Codes and Definitions

Code	Description	Comments
6160	Gas Change Reg - Other	Other reason to replace the regulator.
6170	Gas Change – KREG Out	Changing out of a K-regulator (Reliance K, H and Modern regulators) for an IRV regulator.
6180	Gas Change – BREG Out	Changing out of a non-IRV breakaway gas regulator for an IRV regulator.
6190	Gas Change – IRV Out	Changing out of an IRV regulator for another IRV regulator.

END of Instructions



Order Completion for Field Services Alteration Crews

Definitions

NA

**Implementation
Responsibilities**

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services and the director in charge of dispatch ensure that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors and the dispatch manager and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.

**Governing
Document**

[Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices."](#)

**Compliance
Requirement/
Regulatory
Commitment**

NA

**Reference
Documents**

Developmental References:

NA

Supplemental References:

[Code of Safe Practices.](#)

[Utility Standard Practice \(USP\) 22, "Safety and Health Program."](#)

[Utility Procedure TD-6436P-03, "Managing Field Automation System \(FAS\) Duplicate Field Orders."](#)

Appendices

NA



Order Completion for Field Services Alteration Crews

Attachments

NA

**Document
Revision**

This document supersedes Work Procedure WP6436-18, "Order Completion for Field Services Alteration Crews," issued 10/2006.

Approved By

Jimmy Morales
Manager

Document Owners

Barry Knapp
Supervisor

**Document
Contact**

John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Document placed in new template.



Customer Care and Billing On-Line Tech Down

Summary This procedure describes the Customer Care and Billing (CC&B) system in Tech Down mode. All outage information system (OIS) levels (1 through 4) use the same on-line tech down (OLTD3) process.

When CC&B is down, and dispatchers are not able to create trouble reports, use OLTD3 for creating trouble reports and for other reporting. OLTD3 automatically sends the tag alert to the appropriate email address.

Level of Use: Information Use

Target Audience Managers, supervisors, and field and dispatch personnel who dispatch field orders.

Safety Personnel working in an office environment must adhere to proper ergonomic practices to minimize the risk of workplace injury.

Before You Start Personnel who perform tasks in accordance with this procedure must work under the direction of qualified personnel or receive training by qualified personnel to do such work.

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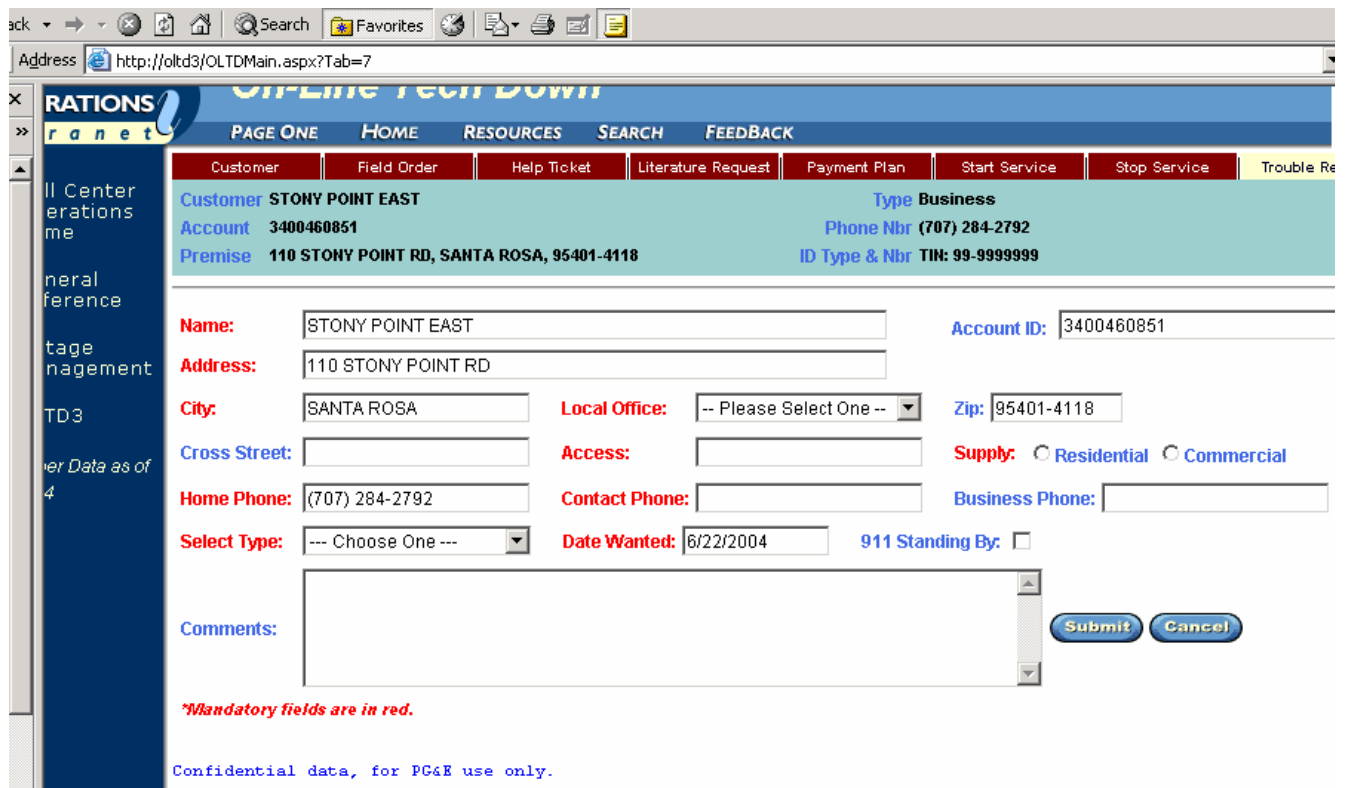
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Customer Care and Billing On-Line Tech Down

Procedure Steps

1 Accessing the OLTD3 Application

- 1.1 To open the OLTD3 application, use the following URL to access the website: <http://OLTD3>.
- 1.2 Fields with red headings indicate required information as shown in Figure 1, "Sample OLTD3 Page." Perform the follow steps to enter all required information:



The screenshot shows a web browser window with the address <http://oltd3/OLTDMain.aspx?Tab=7>. The page title is "CUSTOMER CARE AND BILLING ON-LINE TECH DOWN". The navigation menu includes "PAGE ONE", "HOME", "RESOURCES", "SEARCH", and "FEEDBACK". The main content area displays customer information for "STONY POINT EAST" and includes a form with the following fields:

- Name:** STONY POINT EAST
- Account ID:** 3400460851
- Address:** 110 STONY POINT RD
- City:** SANTA ROSA
- Local Office:** -- Please Select One --
- Zip:** 95401-4118
- Cross Street:** (empty)
- Access:** (empty)
- Supply:** Residential Commercial
- Home Phone:** (707) 284-2792
- Contact Phone:** (empty)
- Business Phone:** (empty)
- Select Type:** --- Choose One ---
- Date Wanted:** 6/22/2004
- 911 Standing By:**
- Comments:** (empty text area)

Buttons for "Submit" and "Cancel" are located at the bottom right of the form. A note at the bottom states: "Confidential data, for PG&E use only."

Figure 1. Sample OLTD3 Page

1. To designate the proper priority code, select an **Activity Type** from the **Select Type** drop-down list.
2. In the **Access** field, describe any issues that inhibit access, such as unrestrained animals or locked gates.
3. Update the **Home Phone** and **Contact Phone** number fields.
4. Type any other pertinent information in the **Comments** field.

Customer Care and Billing On-Line Tech Down

2 Creating a Trouble Report for a Known Address

2.1 Perform the following steps to create a trouble report when the service address is known:

1. Type the address into the **Address** field as shown in Figure 2, "OLTD3 – Search Page."
2. Type the name of the city in the **City** field.

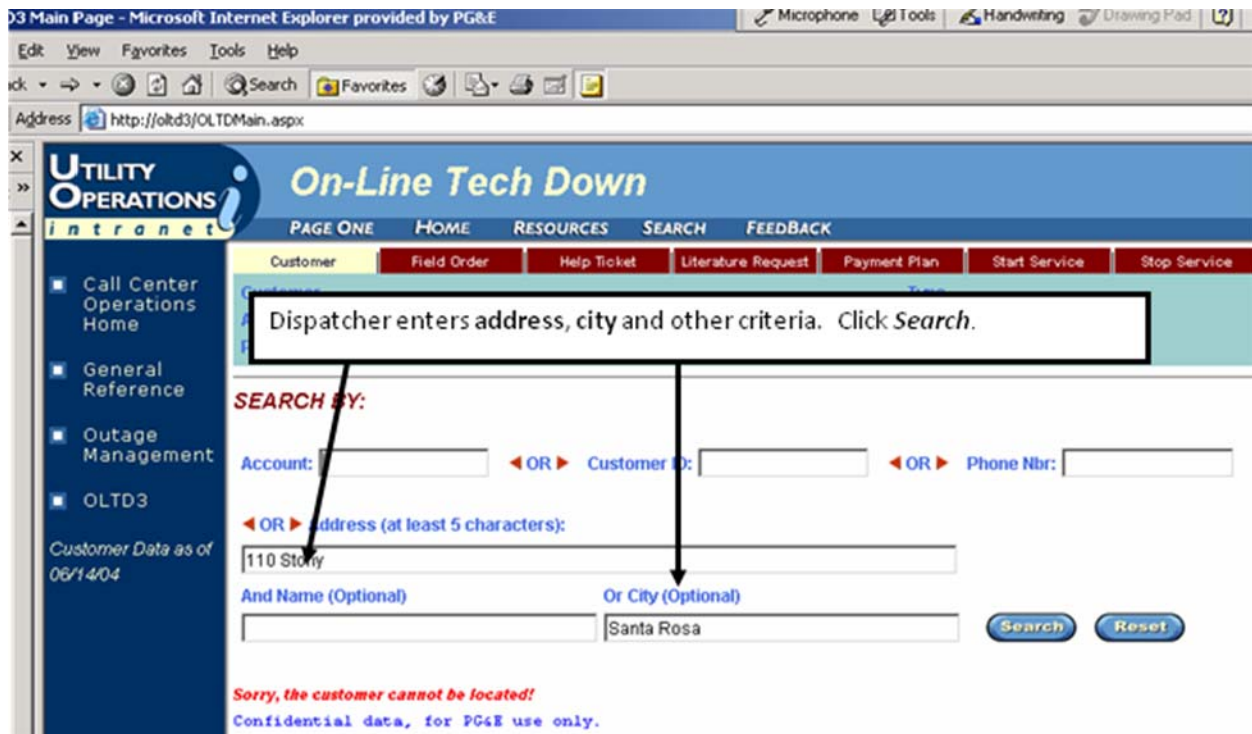
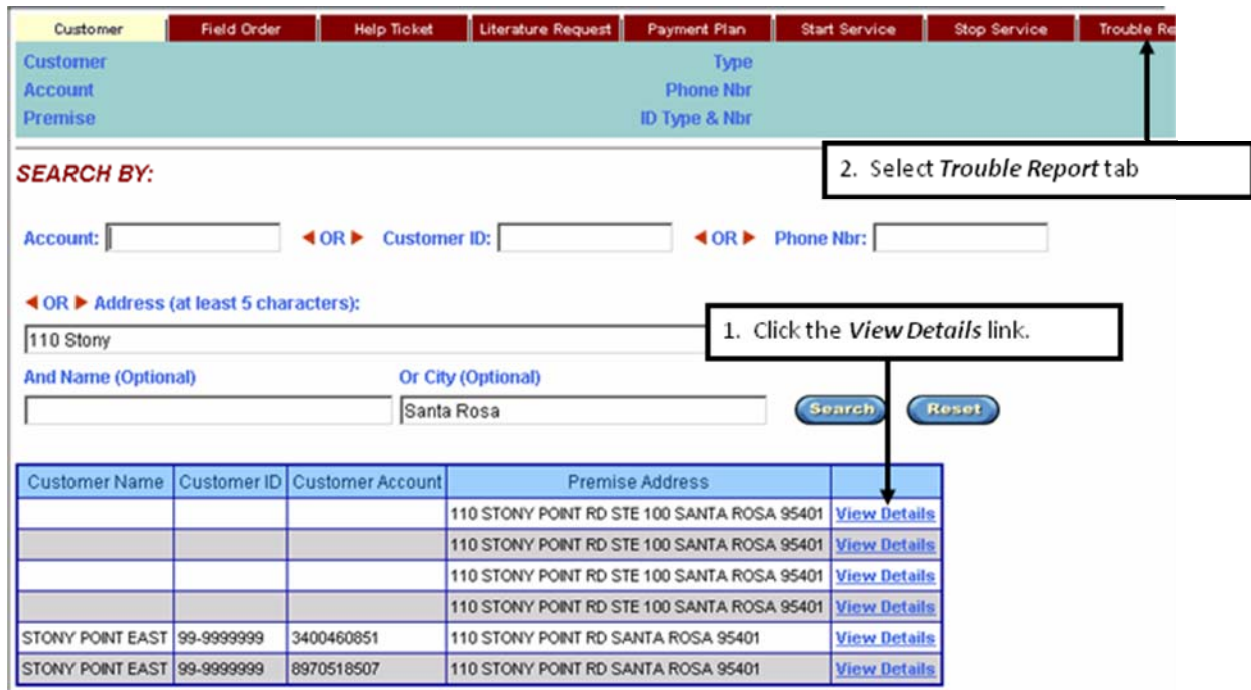


Figure 2. OLTD3 – Search Page

3. Click the **Search** button. The application displays a list of search results as shown in [Figure 3, "OLTD3 Search Results Page,"](#) on Page 4.
4. In the search results, click the **View Details** link for the appropriate customer account ([Figure 3](#)).
5. Click the **Trouble Report** tab.

Customer Care and Billing On-Line Tech Down



SEARCH BY:

Account: <OR> Customer ID: <OR> Phone Nbr:

<OR> Address (at least 5 characters):

And Name (Optional) Or City (Optional)

Customer Name	Customer ID	Customer Account	Premise Address	
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
			110 STONY POINT RD STE 100 SANTA ROSA 95401	View Details
STONY POINT EAST	99-9999999	3400460851	110 STONY POINT RD SANTA ROSA 95401	View Details
STONY POINT EAST	99-9999999	8970518507	110 STONY POINT RD SANTA ROSA 95401	View Details

Figure 3. OLTD3 Search Results Page

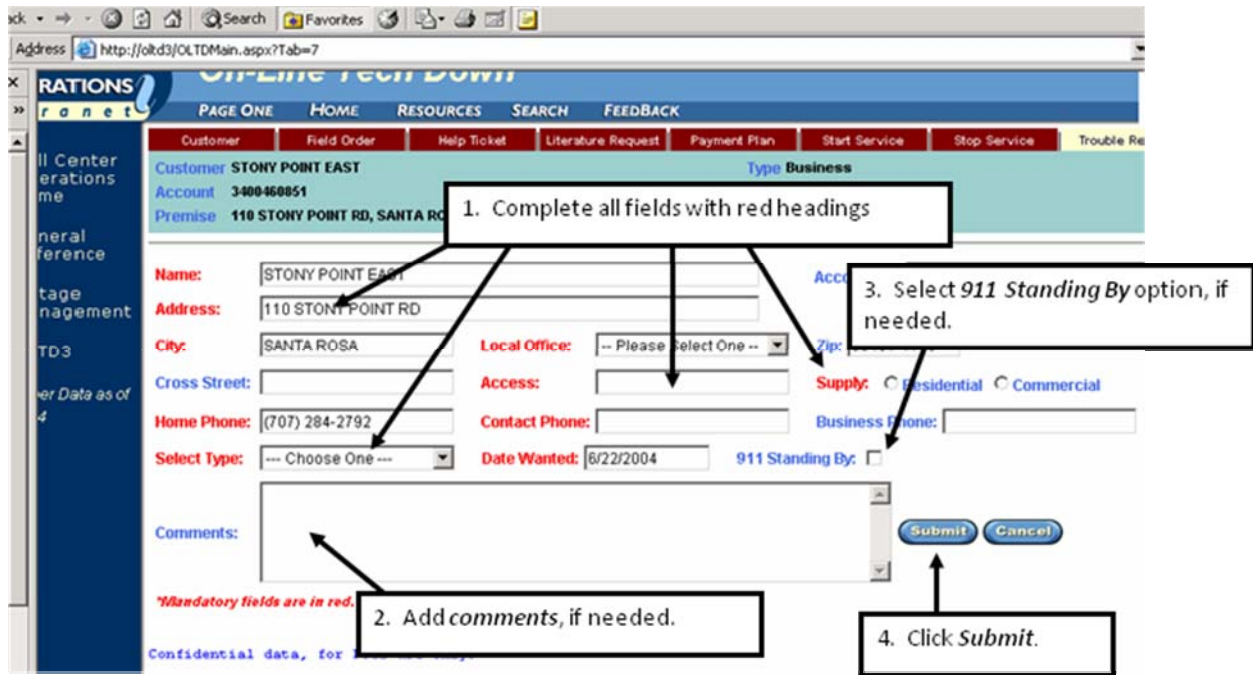
- On the **Trouble Report** page, complete fields that have red headings as shown in [Figure 4, "OLTD3 – Trouble Report Page,"](#) on Page 5.

NOTE

Select the 911 **Standing By** option, if necessary.

- Click the **Submit** button. The tag automatically goes to the appropriate division operator (DO) tag-alert mailbox.

Customer Care and Billing On-Line Tech Down



The screenshot shows the OLTD3 Trouble Report Page. The page title is "OLTD3 - VILINE TECH DOWN". The customer information is: Customer: STONY POINT EAST, Account: 3400460851, Premise: 110 STONY POINT RD, SANTA ROSA. The form fields include: Name (STONY POINT EAST), Address (110 STONY POINT RD), City (SANTA ROSA), Cross Street, Home Phone ((707) 284-2792), Select Type (--- Choose One ---), Date Wanted (6/22/2004), Local Office (--- Please select One ---), Access, Contact Phone, Business Phone, and 911 Standing By (checkbox). The form also has a Comments field and Submit/Cancel buttons. Red text indicates mandatory fields. Callouts 1-4 provide instructions: 1. Complete all fields with red headings; 2. Add comments, if needed; 3. Select 911 Standing By option, if needed; 4. Click Submit.

Figure 4. OLTD3 – Trouble Report Page

3 Creating Trouble Report for an Unknown Address

3.1 Perform the following steps to create a trouble report when the service address is unknown:

1. Type "Unknown" on the address line as shown in [Figure 5, "OLTD3 – Search Page,"](#) on Page 6.
2. Type the name of the city in the **City** field.
3. Click the **Search** button.
4. On the **Search Results** page, click the **View Details** link.
5. Click the **Trouble Report** tab.



Customer Care and Billing On-Line Tech Down

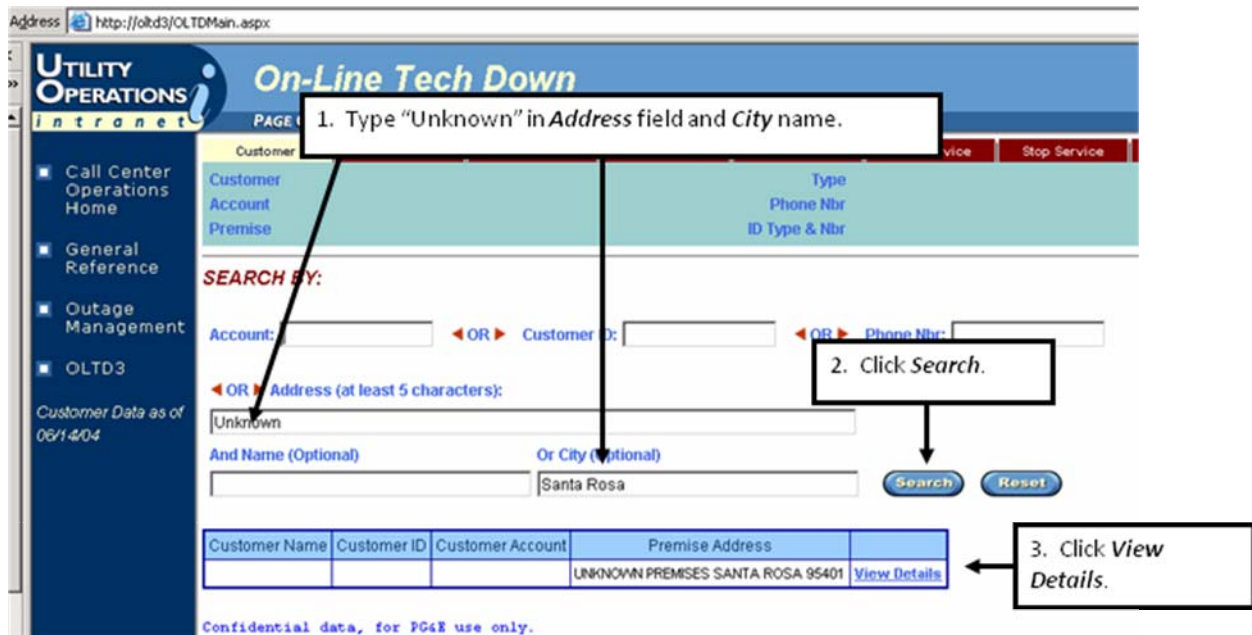


Figure 5. OLTD3 – Search Page

- On the **Trouble Report** page, complete fields that have red headings as shown in [Figure 6, "OLTD3 Trouble Report Page – Unknown Premise,"](#) on Page 7.

NOTE

Select the 911 **Standing By** option, if necessary.

- Click the **Submit** button. The tag automatically goes to the appropriate DO tag-alert mailbox.

Customer Care and Billing On-Line Tech Down

The screenshot shows the OLTD3 Trouble Report Page for an 'Unknown Premise'. The page title is 'On-Line Tech Down'. The navigation bar includes 'PAGE ONE', 'HOME', 'RESOURCES', 'SEARCH', and 'FEEDBACK'. Below the navigation bar are tabs for 'Customer', 'Field Order', 'Help Ticket', 'Literature Request', 'Payment Plan', 'Start Service', and 'Stop Service'. The form fields are as follows:

- Customer:** UNKNOWN PREMISES
- Name:** CHP
- Address:** UNKNOWN PREMISES
- City:** SANTA ROSA
- Local Office:** SANTA ROSA
- Zip:** 95401
- Cross Street:**
- Access:** OK
- Supply:** Residential (selected), Commercial
- Home Phone:**
- Contact Phone:** 707-579-0000
- Business Phone:**
- Select Type:** Wire Down
- Date Wanted:** 6/22/2004
- 911 Standing By:**
- Comments:** Wires down and arcing across Highway 12 1/2 mile east of Madrone Road. CHP is standing by and needs ETA.

Numbered callouts indicate the following steps:

1. Complete all fields with red headings
2. Add comments, if needed.
3. Select 911 Standing By option, if needed.
4. Click Submit.

Figure 6. OLTD3 Trouble Report Page – Unknown Premise

The screenshot shows the OLTD3 Trouble Report Page for 'Stony Point East'. The page title is 'On-Line Tech Down'. The navigation bar includes 'PAGE ONE', 'HOME', 'RESOURCES', 'SEARCH', and 'FEEDBACK'. Below the navigation bar are tabs for 'Customer', 'Field Order', 'Help Ticket', 'Literature Request', 'Payment Plan', 'Start Service', and 'Stop Service'. The form fields are as follows:

- Customer:** STONY POINT EAST
- Account:** 3400460851
- Phone Nbr:** (707) 284-2792
- Premise:** 110 STONY POINT RD
- Name:** STONY POINT
- Address:** 110 STONY POINT RD
- City:** SANTA ROSA
- Local Office:** -- Please Select One --
- Zip:**
- Cross Street:**
- Access:**
- Supply:** Residential, Commercial
- Home Phone:** (707) 284-2792
- Contact Phone:**
- Business Phone:**
- Select Type:** --- Choose One ---
- Date Wanted:** 6/22/2004
- 911 Standing By:**
- Comments:**

Numbered callouts indicate the following steps:

1. Complete all fields with red headings
2. Add comments, if needed.
3. Select 911 Standing By option, if needed.
4. Click Submit.

Figure 7. OLTD3 Trouble Report Page



Customer Care and Billing On-Line Tech Down

4 Handling Gas Emergencies

4.1 Dispatchers may get an out-of-area 911 call concerning a gas emergency, a dig in, or carbon monoxide (CO) call, when an area is in a level 2 or greater event. When this occurs, perform the following steps:

- Create the tag in CC&B with Priority "0".
- Contact the area dispatcher if the agency needs an estimated time of arrival (ETA) or other information.
- Complete or close the 911 call.

4.2 Some situations require personnel to hand the emergency incident off to another dispatcher. When handing the order off, perform the following steps:

- Make sure the receiving dispatcher has the contact information for the emergency agency and is willing to handle the callback.
- For out of area on-line tech down, the dispatcher would create an "order entry tag" in FAS for dispatching.

END of Instructions



Customer Care and Billing On-Line Tech Down

Definitions

NA

**Implementation
Responsibilities**

The senior director in charge of customer field services reviews, authorizes, and issues this procedure.

The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.

Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.

**Governing
Document**

[Utility Standard S6436, "Gas and Electric Field Services and Dispatch and Scheduling Operating Practices,"](#) governs this document.

**Compliance
Requirement/
Regulatory
Commitment**

NA

**Reference
Documents**

Developmental References:

NA

Supplemental References:

[Utility Procedure WP6436-14, "Handling 911 Calls – Emergency Response."](#)

Appendices

NA

Attachments

NA

**Document
Revision**

This procedure cancels and supersedes Utility Procedure WP6436P-20, "Customer Care and Billing On-Line Tech Down," issued 10/06.



Customer Care and Billing On-Line Tech Down

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Procedure placed in new template.



Glossary of Terms

Summary This document contains definitions for terms that appear in the text of all dispatch utility procedures.

Level of Use: Information Use

Target Audience Managers, field services supervisors, and field service representatives who dispatch work to field personnel.

Safety NA

Before You Start NA

Terms

1 **Dispatcher**

Any personnel in dispatch and scheduling, maintenance and construction (M&C), or electric control center operations (ECCO) responsible for dispatching field orders to field personnel through the field automation system (FAS).

2 **Duplicate Field Order (Formerly Assist)**

A field order created in the FAS Dispatch Application replicating an existing field order and that can be dispatched to field personnel. The first character of a duplicate field order identification number (FO ID) is an alpha character (excluding the letter 'T'). The first character changes on December 1 of each year to eliminate redundant FO IDs. It corresponds to the time period in which the duplicate field order was created. The following example shows how the alpha character for duplicate field orders change on December 1 for the years 2007 through 2010:

- "F" = 12/01/07 – 11/30/08
- "G" = 12/01/08 – 11/30/09
- "H" = 12/01/09 – 11/30/10

Continued on following page.



Glossary of Terms

2 (continued)

Based on this example, the letter "I" would be the next alpha character assigned for the year beginning December 1, 2010 through November 30, 2011.

NOTE

Duplicate field orders are not uploaded to the Customer Care and Billing (CC&B) system.

3 FAS Field Order

An order created in the FAS Dispatch Application through the Order Entry Viewport. The first character of an FAS FO ID is an alpha character (excluding the letter 'T'). The character changes on December 1 of each year to eliminate redundant FO IDs. It corresponds to the time period in which the FAS field order was created. The following example shows how the alpha character for duplicate field orders change on December 1 for the years 2007 through 2010:

- "F" = 12/06/07 – 11/30/08
- "G" = 12/01/08 – 11/30/09
- "H" = 12/01/09 – 11/30/10

Based on this example, the letter "I" would be the next alpha character assigned for the year beginning December 1, 2010 through November 30, 2011.

NOTE

Field Orders created in FAS are not uploaded to CC&B. Dispatchers should never create billing and/or metering-related field orders in FAS.

4 Field Personnel

Any field services (FS), M&C, meter reading and office services (MR&OS), or field metering services (FMS) personnel who receive field orders via the FAS mobile application (MA) and complete them in the field.

5 Field Order

An order created in CC&B and downloaded to FAS.

6 Route

References the FAS sub areas or divisions within the seven areas that comprises the Company's service territory.

END of Terms



Glossary of Terms

Definitions	NA
Implementation Responsibilities	<p>The senior director in charge of customer field services reviews, authorizes, and issues this procedure.</p> <p>The director in charge of field services ensures that this procedure is communicated and properly implemented in all service areas.</p> <p>Field services managers and supervisors ensure that field services personnel are trained and knowledgeable about this procedure.</p>
Governing Document	<p>Utility Standard TD-6436S, "Gas and Electric Field Service and Dispatch and Scheduling Operating Practices," governs this document.</p>
Compliance Requirement/Regulatory Commitment	NA
Reference Documents	<p>Developmental References:</p> <p>NA</p> <p>Supplemental References:</p> <p>NA</p>
Appendices	NA
Attachments	NA
Document Recision	<p>This document supersedes WP6436-21, "Glossary of Terms (Definitions)," dated 10/06.</p>



Glossary of Terms

Approved By Jimmy Morales
Manager

Document Owners Barry Knapp
Supervisor

Document Contact John Freeman
Reviewer

Revision Notes

Where?	What Changed?
NA	Procedure moved to new format.