



MEa OQ PROGRAM GUIDELINES

**Information describing guidelines for
using MEa Operator Qualification
Materials**

June 2018

1. Introduction

MEA Energy Association (MEA) provides this document to ensure that you are successful in your use of the MEA OQ (Operator Qualification) Connect materials. Your successful participation means that MEA can verify the integrity of your OQ processes. This is especially valuable if there is a need to confirm the credibility of your OQ program and if you wish MEA to be a “verifying agent” for your records.

This document is to be used with MEA OQ Connect materials and is intended for:

- Gas distribution companies
- Gas transmission companies
- Liquids companies
- Pipeline/distribution contractors
- Regulators
- Third party providers

1.1. Operator Qualification (OQ)

The Final Rule on the Qualification of Pipeline Personnel (the OQ Rule) was issued by the DOT in 1999 and was enacted into law in 2002. It is addressed in Title 49 of the Code of Federal Regulations (CFR), subpart 192 and 195. The OQ rule requires individuals who perform covered tasks on a pipeline to be trained and qualified to perform those tasks. The intent of the OQ rule is to ensure a qualified workforce and to reduce the likelihood of pipeline incidents caused by human error.

MEA, in support of its members, was an early pioneer in the development of OQ training, testing and evaluation materials. MEA continues to work closely with their users to improve the overall OQ program.

1.2. OQ Program

An OQ Program must ensure that qualified individuals possess the necessary knowledge, skills and abilities (KSA) to perform the tasks that they perform on the pipeline. The development and ongoing maintenance of the written qualification program is the responsibility of the operator. MEA supports this process by providing online training (TNG) and testing (KNT), and with performance evaluation forms (PEF). MEA provides guidelines for companies using MEA OQ materials, which fall into the following four categories:

1. Online Training and Testing
2. Performance Evaluations
3. Recordkeeping and Record Transfers
4. Program Review

Other requirements needed for a written qualification program can be found in the Code of Federal Regulations (CFR) 192 Subpart N- Qualification of Pipeline Personnel. §192.805.

2. The Process, Roles, and Responsibilities

2.1. The Process

Only those records that are contained in EnergyU are considered “verifiable” by MEA. That means that all training (TNG) and knowledge tests (KNT) must be done in EnergyU, using the standard MEA courses and tests according to MEA guidelines. Companies must correctly complete the appropriate paperwork for performance evaluations prior to granting PEF certificates in EnergyU. All performance evaluations must be completed using the standard MEA PEFs and follow MEA OQ Connect procedures and format.

2.2. Roles

The following outlines the roles of your company:

- Company (EnergyU) Administrator – Each company is required to have a designated primary administrator. It is important that all administrators understand their [role and responsibilities](#).
- Company Proctors – Although not currently required by OQ regulation, it is beneficial to use a proctor when using MEA online assessments for knowledge testing. This will help ensure the testing procedures and results are in no way compromised.
- Company Evaluators – Must submit required credentials, complete the MEA evaluator training, complete the training and testing for the tasks that they will be evaluating, and follow MEA guidelines during the evaluation process.

Further definition of the roles is provided in the remainder of this document.

2.3. Responsibilities

The following outlines the process steps and responsibilities for TNGs and KNTs:

1. Company Administrator enrolls company personnel in certificates for required TNG and KNT courses.
2. Personnel take TNG and KNT courses according to the guidelines.
3. Certificates for passed TNGs and KNTs are automatically granted by the system.

The following outlines the process steps and responsibilities for PEFs:

1. Company Evaluator conducts the evaluations and completes the associated MEA PEF forms according to MEA guidelines.
2. Company Administrator grants the PEF certificates in EnergyU.

MEA approved performance evaluation forms must be used when conducting field evaluations. Approved forms are available in the following formats: PDF (fillable electronic or print paper copies), EZval electronic, and CERCMobile electronic.

MEA, under the guidelines of the OQ Connect Program, will periodically audit TNG, KNT and PEF records for compliance. Any non-conforming data will require immediate remediation; MEA reserves the right to revoke any data determined unverifiable. In addition, evaluators will be randomly evaluated to confirm their performance.

Further definition of the responsibilities is provided in the remainder of this document.

MEAenergy.org/energyu

3. Online Training and Testing

The MEA online training and assessments, accessed via EnergyU.org, help companies determine if an individual is able to perform a covered task and recognize Abnormal Operating Conditions (AOC). A covered task is defined as a pipeline operations or maintenance activity that affects the operation or integrity of the pipeline. MEA trained evaluators use specific evaluation criteria and forms to document an individual's ability to perform a task.

MEA online training materials track directly with Title 49, Code of Federal Regulations, Part 192/195 covered tasks, and tasks published by the ASME B31Q Pipeline Personnel Qualification Standard. Course titles identify the library and task using TNG and KNT to designate the course as either training or knowledge test. Example: *192-1402 KNT Backfilling* is a knowledge test on Backfilling from the 192 course library.

3.1. MEA Certificates

MEA certificate numbers are assigned for each TNG, KNT, and PEF certificate within EnergyU. Certificates are automatically granted for online training and testing. Certificates must be manually granted by the EnergyU Administrator for Performance Evaluations.

Each individual requires a unique login and license for EnergyU. Specific operator requirements for qualification of individuals do vary; operators may require achievement of one or more MEA certificates in order to be considered "qualified" for a covered task. MEA certifications may be issued for:

- **Online training (TNG certificate)**
 - Interactive training course for each covered task
 - Includes an optional pre-test that may be taken once
 - Course passing based on learning pages visited (80% required)
 - Training available even after course is passed – no reset required

- **Online knowledge test (KNT certificate)**
 - Assessment for each covered task
 - Course passing based on percentage of questions answered correctly (80% required)
 - One attempt allowed
 - Administrator must reset if individual failed

- **Performance Evaluation Form completed by approved MEA Evaluator (PEF certificate)**

Evaluator training and certification requirements:

 - Successful completion of evaluator classroom training workshop
 - Evaluator application submitted and approved by MEA
 - Completion of online courses associated with evaluator credentials
 - Completion of Evaluator refresher every three years

MEA is accredited as an Authorized Provider by the International Association for Continuing Education and Training (IACET). This endorsement is evidence that the course materials meet industry standard training and testing requirements. IACET accreditation allows MEA to offer Continuing Education Units (CEUs) for courses taken online. Users may [request CEU transcripts](#).

3.2. Training Courses (TNG)

Standard training courses include a pre-test that may be taken once. Although the pre-test is scored, the score is not tracked or included in course passing criteria. Courses are passed when 80% of the learning content has been viewed (80% of the pages visited). For each course passed, an MEA certificate number is automatically granted by the system. The allowed attempts for viewing the online training content is unlimited.

When an online course is used as part of a classroom training session, EnergyU Administrators may manually grant certification of the online training course under the following conditions:

- Classroom training reflects the content and scope of the online training.
- Attendance of classroom session is validated by a signed and dated roster. (Approved Evaluator or EnergyU Administrator signature required.)

3.3. Knowledge Tests (KNT)

An individual is allowed one attempt to pass the KNT. Knowledge tests are passed if 80% of the questions are answered correctly. For each test passed, an MEA certificate number is automatically granted by the system. If the individual does not pass, the EnergyU Administrator must reset the KNT in order for the individual to retake the test. It is up to each company to determine remediation action and follow procedures as outlined in the company OQ plan in the event of test failure. Administrators may not grant certificates for assessments; all KNTs must be taken online and certificates granted by the LMS.

The use of a proctor during testing is not currently required by OQ regulation, but it is recommended to help ensure the testing procedures and results are in no way compromised. The MEA Technical Training Committee provides the following recommendations to meet those requirements:

- Check photo ID of the candidate before the test start time to verify the candidate's identification.
- Ensure that the candidate does not use any unapproved written or electronic resources or communication devices in the test room.
- Maintain the integrity of the testing material.
- Remain in the room during the test period.
- Ensure testing process is understood and followed.
- Notify MEA of any test questions that are in dispute.

4. Performance Evaluations

Field evaluations are done external to EnergyU and performed by MEA Qualified Evaluators. Certificates for performance may be granted by EnergyU Administrators when the appropriate Performance Evaluations Form (PEF) has been completed by an approved MEA Evaluator.

4.1. Performance Evaluation Forms

A zip file containing PEF forms in pdf format is available as a resource from EnergyU Administrator. Electronic PEFs are included in EZval and CERCMobile. The form must be signed by both the Evaluator and the Evaluatee. EnergyU Administrators will need to manually grant certificates in EnergyU for all completed PEFs.

4.2. Becoming a Qualified MEA Evaluator

Only *qualified* MEA Evaluators may evaluate the performance of individuals to obtain MEA certificates. Evaluators must use approved forms designed by MEA.

The requirements to become a MEA Qualified Evaluator are as follows:

- Candidates must have a minimum of three years industry experience or formal training.
- Candidates must submit a résumé with their historical industry background, and must provide a minimum of three references who can substantiate industry experience.
- Candidates must participate in an MEA Train the Evaluator one-day classroom session. (Certificate MEA11994 valid for three years)
- Candidates must complete EnergyU TNG and KNT courses for all tasks they wish to evaluate.
- Approved Evaluators will be required to take an MEA Evaluator Refresher Course every three years in order to maintain their approved status.

Note: There are two options for refresher training. Evaluators can select between classroom training (certificate MEA11994) or online refresher course (certificate MEA11995).

5. Recordkeeping & Record Transfer

The EnergyU Learning Management System (LMS) maintains user records associated with online training and testing, including achieved MEA certificates and expirations. The EnergyU LMS provides reporting capabilities for the user data tracked by the system. Reports may be exported, saved and printed. MEA reserves the right to audit online records and will report any findings back to the user for corrective action.

Companies requiring transfer of employee qualification records out of EnergyU must follow MEA guidelines.

5.1. Participating Companies

Training (TNG) and testing (KNT) records are automatically maintained in EnergyU. Performance (PEF) certificates must be manually granted by the EnergyU Administrator. Companies must be sure to maintain their own PEF records.

5.2. ISNetworld Participating Companies

Training (TNG) and testing (KNT) records for transfer must be maintained in EnergyU. Companies may request a transfer of these records via the online Pay Center link, or by calling or emailing EnergyU support. Upon request and payment of transfer fee, MEA will generate a report of “verifiable” OQ records from the member company’s EnergyU account and forward the records as required.

5.3. Accessing Online Training

It is the responsibility of the EnergyU Administrator to assign appropriate courses to Evaluators. It is possible for an Evaluator to also be an EnergyU Administrator.

6. Program Review

6.1. Program Review

On a random annual basis, MEA will contact companies using MEA OQ Connect Program materials to conduct a review of their training and testing records. This records review will include viewing a percentage of the training (TNG), knowledge testing (KNT) and performance evaluations (PEF). The purpose of these periodic reviews is to work with the company to correct any errors found, and to ensure that the process is working correctly.

In addition to the records review, MEA will also conduct random "Evaluate the Evaluators" reviews to assess the evaluator's adherence to the evaluation process, including completeness of the required forms.

7. Contact Us

For additional information on the OQ Rule or on how to become a qualified MEA Evaluator:

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For additional information on EnergyU Administration and licensing or on how to become your company's EnergyU administrator:

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