Fossil and Renewables Stations ADM - Work Management

SUMMARY

This procedure details the work management process at all Fossil Generating Stations and Renewable facilities. See separate SAP help guides to perform various SAP actions. When Work Management interpretation issues arise between this procedure and other documents this procedure is the overriding document.

This procedure applies to all plant structures, systems, and components, both active and passive.

Level of Use: Reference Use

TARGET AUDIENCE

All Fossil Generation and Renewable plant personnel

SAFETY

Performing this procedure will not raise the risk of a specific hazard to personnel, the public, or equipment.

BEFORE YOU START

1.1 Plant Manager OR appropriate supervisor CONFIRM only trained AND qualified personnel implement this procedure.

1. ENSURE Fossil and Renewable employees trained in work management process.

1.2 REQUIRE each employee maintain their SAP log in.

1. ENSURE each employee logs into SAP once per month to stay active.

1.3 Before use, READ and VERIFY you understand AND will comply with this entire procedure.

1.4 REVIEW the following:

1. All Fossil and Renewable generation facilities use work management process (WMP) using computerized maintenance management system (CMMS).

2. All work (except tool pouch) is identified AND documented in SAP.

1.5 REFER TO Figure 1, WMP Flow, for visual of high level overview of WMP.

Figure 1, WMP Flow

Identify Work →	Plan/Evaluate Work →	Execute Work →	Close Out Work →

1.6 REFER TO Appendix A, Roles and Responsibilities, as necessary.

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PROCEDURE STEPS

1 Work Management Process

1.1 UNDERSTAND WMP is broken down into five steps:

1. Identification
2. Planning
3. Evaluating
4. Execution
5. Close out

1.2 Work Identification

NOTE
Identifying work in SAP is normally performed by person identifying work to be done; however, it can be delegated to another.

1. REQUIRE all work be identified in SAP by Fossil OR Renewable employee (Initiator).

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1.2 (continued)

2. Initiator, CREATE work notification in SAP using the following minimum required information:

   - Short description of work/problem
   - Equipment by asset number
   - Outage Relevance Code (Operating/Outage/Reserve Shutdown)
   - Object Part Code
   - Damage (what is damage/problem/symptom)
   - Priority estimation (See Definitions Section)
   - Reported By (person that identified need for work)

3. IF known,

   THEN PROVIDE the following optional information:

   - Long text description of work/problem
   - Cause (Reason for Work)
   - Photo
   - Main Work Center
   - Required End Date AND Reason

4. IF work considered Emergency work,

   THEN CONTACT Management for direction/decision.

1.2 (continued)

NOTE

The completion times below are intended to serve as a general guide to complete the associated SAP tag. Supervisors are permitted to adjust required end dates which reflect a more appropriate time for completion (such as Outage work or Reserved Shutdown work).

5. Time-based Priority: Corrective Maintenance

NOTE

Priority 1 work usually requires a conversation with the Operations Supervisor or On Call Supervisor.

a. Priority 1

(1) ADDRESS this work immediately.

(2) ENSURE mitigating measures in place within 24 hours.

b. Priority 2

(1) Operations and Maintenance Supervisors DETERMINE work execution window.

(2) ADDRESS this work before all other lower priority work.

(3) ATTEMPT to complete this work within 2 – 7 days.

c. Priority 3

(1) SCHEDULE with a 2 - 6 week completion window.

d. Priority 4

(1) SCHEDULE with a 6 - 52 week completion window.

e. Priority 5

(1) ENTER required end of 52 weeks to ensure the notification is reviewed on a regular basis.

1.2.5 (continued)

f. REFER TO Figure 2. Fossil Notification Types and End Dates.

Figure 2. Fossil Notification Types and End Dates

Notification type	Description	Priority system	End Dates
FA	Preventative/ recurring/ from maintenance plan	1. Urgent 2. Regulatory required 3. Internal policy 4. Reminder 5. Tracking only	
FB	Corrective/ User written	1.-Immediate action 2. Interruption of the current week's work schedule 3. High priority corrective maintenance 4. Medium priority corrective maintenance 5. Low priority corrective maintenance	24 hrs/ 1 day 7 days 6 weeks 52 weeks 52 weeks
FC	Compliance related	1. Urgent 2. Regulatory required 3. Internal policy 4. Reminder 5. Tracking only	
FS	Safety notifications	1.-Immediate action 2. Interruption of the current week's work schedule 3. High priority corrective maintenance 4. Medium priority corrective maintenance 5. Low priority corrective maintenance	24 hrs/ 1 day 7 days 6 weeks 52 weeks 52 weeks

6. Operations Supervisor REVIEW all notifications created for corrective OR project work.

a. After thorough review, APPROVE, REJECT, or REQUEST additional information for each notification.

b. For notifications to be approved, Supervisor:

(1) REVIEW and UPDATE all data entered by notification creator.

(2) ASSIGN appropriate user statuses for:

- Engineering work
- Change management work
- Safety issue/work
- Environmental issue/work

1.2.6.b (continued)

(3) ADD comments into long text, as necessary.

(4) ASSIGN user status “app”.

(5) ASSIGN user responsibility to Maintenance Supervisor

(6) IF applicable,

THEN ENTER or UPDATE the following:

- Equipment ID
- Cause (reason for work)
- Main Work Center
- Required End Date
- Work priority

c. For notifications to be rejected, Supervisor:

(1) ENTER comment into long text explaining why notification is being rejected.

NOTE

When user status is updated to “rej,” creator of notification will receive a system generated email telling them it was rejected.

(2) UPDATE user status to “rej”.

(3) SET notification Deletion Flag.

1.2.6 (continued)

d. For notifications requiring additional information:

(1) Supervisor:

- ENTER comment into long text explaining what additional data is necessary.

NOTE

When user status is updated to “info,” creator of notification will receive a system generated email telling them it needs additional information.

- UPDATE user status to “info”.

(2) Maintenance Planner REVIEW user notifications for “info request” status at bi-weekly back log meetings.

7. In addition to review above, Operations Supervisor DESIGNATE notifications for engineering work.

a. IF only purpose of notification is for engineering work OR work must be completed before work proceeding,

THEN Operations Supervisor:

(1) SET user status “eng”.

(2) UPDATE Main Work Center to “ENGINEER”.

b. IF engineering work can be completed in parallel with other work required for this notification,

THEN Operations Supervisor:

(1) CREATE, via copy, and APPROVE new notification for engineering work.

(2) SET original notification user status to “eng”.

(3) ENTER new notification number into comments on original notification.

1.2 (continued)

8. Engineer REVIEW notification and PROCEED as follows:

- ACT on notification for minor work and CLOSE notification.
- CREATE new notification for work referencing original notification number as needed.
- CREATE new notification for projects OR other major work as needed.

1.3 Work Planning

1. Emergent work

a. Maintenance Supervisor REVIEW all approved SAP notifications NOT assigned to an order.

NOTE

- Unbudgeted work may need to be funded through Job Estimate process or Power Generation Budget Tradeoff Process.
- Work that is not funded may be placed in the 5-year plan depending upon priority assigned by Plant Manager.

b. DETERMINE whether work scope is within existing budget.

c. ASSIGN User Responsibility to individual technician.

2. For recurring work, UNDERSTAND the following:

a. Work will automatically be created in SAPWM as an order.

b. Work is pre-planned.

1.3 (continued)

NOTE

Only the Plant Manager can allow deviation from routine work criteria.

3. ENSURE routine work meets all criteria listed in Definitions Section.

4. UNDERSTAND a Job Plan is the process or document where elements, such as the following, of upcoming work are identified:

   - Type of Labor and Work Center
   - Duration
   - Procedures
   - Tools
   - Equipment
   - Tasks Lists
   - Scope
   - PPE

NOTE

Job Packages are designed to detail the work scope, labor, tools and materials required to complete a planned job.

5. Power Plant Technicians (PPTs)/Solar Techs (STs) or Maintenance Planner PREPARE Job Package.

   a. ENSURE elements of Job Package contain enough detail to execute the work.

   b. INCLUDE the following elements in Job Package as applicable:

      (1) Material

      - IDENTIFY material location.
      - INCLUDE Purchase Order number.

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1.3.5.b (continued)

(2) Labor and Work Center

- Type of labor
- Quantity of labor

(3) Hours

- Duration-Clock Hours NOT including time to remove OR place in service
- Total Work Hours-Includes all hours allocated to job
- Example 1-1 person total of 8 hours (Duration =8, Total =8)
- Example 2-4 persons total of 8 hours (Duration=2, Total=8)

(4) Contracts

- Type of Contract
- Contract Work Authorization Number
- Contract Sponsor
- Contractor Name and Point of Contact
- Contractor Scope

(5) Procedures

(6) Permits (JSA required for all notifications)

- JSA
- Hot Work Permit
- Permit Required Confined Space
- LOTO Request

(7) Tools

- Special tools required for job
- See also Task Lists (Step 1.3.4.b(10))

1.3.5.b (continued)

(8) Equipment

(9) Special Equipment required for job such as:

- Rigging
- Cranes
- Scaffolding

(10) Tasks Lists

- List of steps from SAPWM for the purpose of performing this or like work

(11) Scope

- Brief scoping document outlining prescribed work

(12) Drawings

(13) Manufacturer's Instructions

(14) PPE

6. Maintenance Supervisors REVIEW and APPROVE Job Package.

7. Facility maintenance personnel OR other directed AND informed site staff PROCURE the following:

- All required special tools/equipment
- All required materials
- All required contract services

1.4 Work Evaluation:

1. Maintenance Team, led by Maintenance Planner, HOLD bi-monthly meeting to review AND revise notifications included in backlog report.

a. DISCUSS new work priority AND concerns AND new outage work.

b. REVIEW backlog report to determine work classification (Operating, outage, OR reserve work).

1.4.1 (continued)

c. REVIEW past due AND aged notifications to analyze AND document reasons for delays in completion (i.e., awaiting materials, tools, equipment, etc.)

d. REVIEW and ADJUST priority levels, as necessary, to ensure correct on all active notifications.

e. For aged notifications, REVIEW all notifications to determine IF work necessary, prioritized correctly AND scheduled for execution.

(1) ENSURE all low priority work older than 364 days will have review with documented plan created to close each work order during next outage OR opportunity.

1.5 Work Execution

1. REFER TO PG-1404P-01, “Power Generation Clearance and Tagging - Lockout Tagout,” for specifics regarding equipment isolation.

2. Planned Work

a. Facility Supervisor CONDUCT tailboard discussing day’s activities.

b. PPT/ST PREPARE Job Safety Analysis (JSA) for:

- Planned work.
- Emergency Work.

c. PPT/ST REVIEW JSA with Facility Supervisor AND Control Room PPT (CRPPT) at Fossil plants.

d. Facility maintenance personnel SUBMIT Lockout Requests to Control Room operator (HBGS APPT) (CRPPT).

e. CRPPT DIRECT authorized employee to execute lockout.

3. CRPPT PERFORM the following:

a. VERIFY work can still be performed.

(1) IF work can NOT be performed,

THEN SEND work back to Maintenance Planner.

1.5.3 (continued)

b. VERIFY Lockout in effect or DIRECT Authorized Employee to perform Lockout.

(1) REFER TO PG-1404P-01, “Power Generation Clearance and Tagging - Lockout Tagout,” for specifics.

c. VERIFY work approved to proceed.

4. PPT/ST EXECUTE and FINALIZE work.

a. Equipment Breakdown - Critical Equipment Breakdown

(1) For all plant critical equipment (equipment that leads to plant outage OR de-rate) that experiences a failure, ENSURE root cause of failure is included in corrective action closeout in SAP.

(2) Tech who performed repair PROVIDE cause of failure.

(3) Maintenance supervisor REVIEW and APPROVE before closeout.

b. Management of Change (MOC)

(1) WHEN new equipment introduced to facility,

THEN plant manager CREATE a training plan for all affected employees.

- ENSURE training plan includes an effectiveness review to understand IF the training was adequate.

5. WHEN work complete,

THEN with CRPPT consent, PPT PERFORM functional testing as required PER LOTO guidelines.

a. IF test acceptable,

THEN:

(1) CLEAN area.

(2) CERTIFY Complete.

b. IF test NOT acceptable,

THEN TROUBLESHOOT and RESOLVE issue.

1.5 (continued)

6. CRPPT Authorized Employee, VERIFY work area clean AND ready for service.

   a. IF area NOT ready,

      THEN DIRECT PPT to clean area.

   b. IF area ready,

      THEN PERFORM operational test.

      (1) IF test satisfactory,

          THEN REPORT off Lockout.

      (2) IF test NOT satisfactory,

          THEN REFER issue to PPT.

1.6 Work Close Out

1. PPT/ST:

   a. CLOSE OUT all permits.

   b. MARK UP As-Builts.

   c. UPDATE History in SAP.

   d. MARK notification as status Final Review (FREV).

   e. ADD text of corrective action taken AND root cause of failure.

2. Maintenance Planner AND Maintenance Supervisor:

   a. REVIEW completed job package.

   b. CREATE engineering notification as required.

   c. SUBMIT As-Builts to Engineer.

   d. VERIFY notification complete (NOCO).

   e. REVIEW details of corrective action taken and VERIFY root cause/failure mode identified in sufficient detail.

1.7 SAP Tag Elimination

1. REQUIRE any request for the elimination of an SAP tag to be raised by Fossil OR Renewable employee (Initiator) to the Facility Maintenance or O&M Supervisor.

2. PPT/APPT/Solar Tech SUBMIT written request with Justification for the requested SAP tag elimination.

3. Facility Maintenance or O&M Supervisor REVIEW the request and MAKE their recommendation to the Facility Manager.

4. Upon review and agreement by the Facility Manager, DIRECT the Maintenance Planner to eliminate the SAP Tag.

5. Maintenance Planners, upon receipt of written approval from the Facility Managers, DELETE SAP Tag.

2 Records

NOTE

Notifications are the electronic tool where equipment history is kept.

2.1 DOCUMENT all work generated from notification.

1. PPTs/STs AND others CREATE notifications and ADD detailed repair comments including failure mode.

NOTE

Orders are the electronic tool where cost to maintain equipment and work schedule are kept.

2.2 Maintenance Planner MAINTAIN all facets of orders.

2.3 LOG DCS OR other electronic history in change log.

1. Engineer closely COORDINATE with PPTs/STs to maintain accurate DCS history.

END of Instructions

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DEFINITIONS

Outage Work: Outage work includes all work requiring an outage on any major power island components.

Outages are classified as follows:

- Forced Outage (U-1)-Unit trips or is taken out of service without adequate CAISO notice.
- Planned Outage (PO)-Unit taken out of service with adequate CAISO notice. This outage is planned well in advance (1 year). This outage is communicated to the CAISO in the department long term outage plan. Examples include overhauls and some inspections.
- Maintenance Outage (MO)-Work requiring an outage on any of the units with adequate CAISO notice.

Routine Work: This work is minimal risk done on a routine basis and meets the criteria below.

- No Permits required to perform task
- No work history needed
- ODMS entry is required
- No isolation required to perform work
- No Tool Pouch work is allowed for any contractor work
- No Risk to Safety, The Environment, or Facility Output

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Time-based Priority: Corrective Maintenance

- Priority 1-this is work requiring immediate action. This work includes unit derate, outage, environmental or safety incident. This work usually requires a conversation with the Operations Supervisor or On Call Supervisor. This work is addressed immediately and mitigating measures are in place within 24 hours.
- Priority 2-this is work requiring interruption of the current week's work schedule. The Operations and Maintenance Supervisors determine work execution window. This work is addressed before all other lower priority work. This work should be completed within 7 days.
- Priority 3-this is high priority corrective maintenance. Priority 3 Corrective Maintenance is scheduled with a 6 week completion window.
- Priority 4-this is medium priority corrective maintenance. Corrective Maintenance is scheduled with a 52 week completion window.
- Priority 5-this is low importance priority corrective maintenance. Corrective Maintenance has no defined repair period; however, a required end of 52 weeks is entered to ensure the notification is reviewed on a regular basis.

Risk/Consequence-Based Priority Preventive/Predictive Maintenance/Inspection and Compliance: The primary intention of the Risk-Based Priority system is to bring visibility to leaders of the obligations/requirements associated with Preventive/Predictive Maintenance/Inspections and Compliance requirements.

- Priority 1- this is an urgent priority maintenance, inspection, or compliance requirement. Failure to complete this scope of inspection or work on time may lead to an injury, fatality, or catastrophic failure of equipment (E.g. Electrical Rubber Glove Inspection, Eyewash/Shower Inspection)

- Priority 2- this is a regulatory required or external obligation required maintenance, inspection, or compliance requirement. Failure to complete this scope of inspection or work on time may lead to a compliance violation (E.g., annual CEMS report, GO 167 filings)

- Priority 3- this is an internal policy maintenance, inspection, or compliance requirement. Failure to complete this scope of inspection or work on time would result in a failure to satisfy our written standards and procedures. (E.g. Monthly Housekeeping Inspection)

- Priority 4- this is a reminder maintenance, inspection, or compliance requirement. Failure to complete this scope of inspection or work on time would result in missing an opportunity to perform a best practice in a timely manner. (E.g. Weekly Chemical inventory, replacing iron trap filters, replacing sample panel resin)

- Priority 5- this is a tracking only maintenance, inspection, or compliance requirement. Failure to complete this scope of inspection or work on time would result in missing an opportunity to track completion of a maintenance, inspection, or compliance requirement.

IMPLEMENTATION RESPONSIBILITIES

Plant Manager is responsible for approving, issuing, and revising this document.

Plant Supervisor is responsible for communicating this procedure to affected employees and conducting a tailboard or department meeting.

GOVERNING DOCUMENT

NA

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COMPLIANCE REQUIREMENT / REGULATORY COMMITMENT

Records and Information Management:
Document Owner, or designee, ENSURE any records generated by this procedure are maintained in accordance with the Enterprise Records and Information (ERIM) program Policy, Standards and Enterprise Records Retention Schedule (ERRS). REFER to GOV-7101S, "Enterprise Records and Information Management" and related standards.
Management of records includes, but is not limited to:

- Integrity
- Storage
- Retention and Disposition
- Classification and Protection

REFERENCE DOCUMENTS

Developmental References:

- NA

Supplemental References:

- PG-1404P-01, "Power Generation Clearance and Tagging - Lockout Tagout"

APPENDICES

NA

ATTACHMENTS

NA

DOCUMENT RECISION

This document supersedes PG-4000P-04, "Fossil Generating Stations ADM - Work Management," Revision 3, dated 09/18/2023.

DOCUMENT APPROVER

[redacted], Senior Plant Manager – Gateway Generating Station and Renewables

[redacted], Senior Plant Manager – Colusa Generating Station

[redacted], Plant Manager- Humboldt Bay Generating Station

Fossil and Renewables Stations ADM - Work Management

DOCUMENT OWNER

[redacted], Maintenance Supervisor - Colusa Generating Station

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DOCUMENT CONTACT

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[redacted], Humboldt Bay Maintenance Planner - PGEN

Current Power Generation Guidance Documents Approver, Owner, and Contact List

Fossil and Renewables Stations ADM - Work Management

REVISION NOTES

Where?	What Changed?
This Revision, Rev 4 (04/23/2024)	
Entire Document	Reviewed and edited for clarity and consistency, including minor editorial updates.
Section 1.2.5	Moved time-based corrective maintenance priority requirements and actions to new Section 1.2.5. Added new Figure 2. Fossil Notification Types and End Dates.
Section 1.7	New Section 1.7 content required to address a SAP Tag elimination request. This was raised in CAP# 126607990.
Definitions	Updated definitions.
Revision 3 (09/18/2023)	
Sections 1.2.2,1.2.3	Updated
Section 1.2.5.b.5	Added Assign user responsibility to Maintenance Supervisor
Section 1.3.1.c	Added Assign user responsibility to individual technician
Definitions	Updated and added new definitions for work priority
Revision 2 (02/28/2023)	
Title	Updated to add “Renewables”
Throughout	Converted to the new Guidance Document Management (GDM) template, including minor editorial updates. Added “Renewables” references. Moved Roles and Responsibilities to Appendix A.
Definitions	Moved “Job Package” and “Job Plan” to body of procedure.
References	Updated Supplemental References.
Document Ownership	Updated Contact, Owner and Approver names.
Revision 1, (06/29/2020)	
Throughout	Internal Audit updates.
Revision 0, (04/27/2020)	
Throughout	New Document. This document was converted to the Guidance Document Management (GDM) format and writing style. Although this is revision 0, for PG Doc Mgr tracking purposes, Colusa’s tracking lists this as revision 2. This document supersedes PG-5103P-07, “Fossil and Renewables Stations ADM - Work Management,” Revision 0, dated 03/12/2019 for CGS and plant specific Administrative Work Management procedures at GGS and HBGS.

Appendix A, Roles and Responsibilities
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NOTE
All are responsible for WMP use, although several user groups have specific responsibilities and authority. Certain actions are the responsibility of the various positions. For work management purposes these responsibilities may be delegated when someone is temporarily assigned to one of these positions. Site specific “Staff Organization and Qualifications” Utility procedures contain additional roles and responsibilities information.

A. Plant Manager is responsible for:

- All facets of managing work.
- Delegating certain work management functions to positions below.

B. Operations Supervisor/O&M Supervisor/Renewables Supervisor is responsible for:

- Filling production coordinator role for assets under his/her authority.
- Reviewing, validating, AND prioritizing corrective work entered in WMP.
- Delegating corrective work to appropriate support groups for execution AND documentation of actual work performed.

C. Maintenance Supervisor is responsible for:

1. Fulfilling role of Plant owner of WMP.
2. Receiving corrective maintenance notifications from Operations Supervisor/O&M Supervisor via CMMS.
3. Outage AND non-outage work.
4. Planning AND allocating resources to perform work AND documenting all work completed at sufficient level of detail for retrievable history.
5. Managing Preventative Maintenance master database (SAP), the sub-program of WMP which issues maintenance work notifications WHEN time OR equipment condition triggers reached.
    - Revising PM priorities as conditions warrant (HBGS O&M Supervisor).
6. Monitoring facility backlog.
7. Directing daily activities of maintenance staff.

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C. (continued)

8. Arranging resources for safe planned work execution.

9. Managing contractor safety through ISNetworld database.

10. Notifying Operations/Renewable Supervisor anytime work requires unit derate OR outage with sufficient time to get authorizations from California Independent System Operator (CAISO).

D. Maintenance Planner is responsible for:

- Working alongside Maintenance Supervisor to manage AND document facility backlog.
- Revising AND adding PM tasks WHEN equipment modified OR replaced.

NOTE

For recurring (preventative maintenance [PM]) work, both equipment condition status and elapsed time between servicing must remain primary determinants of when PM work will be performed; however, Operation/Renewable Supervisor performs PM work prioritizing against corrective work for all outage work with appropriate input from Maintenance Supervisor and Maintenance Planner.

- Providing input to Operation/Renewable Supervisor for PM work prioritization against corrective work for all outage work.
- Fulfilling role of primary resource for SAP modifications.
- Maintaining an outage list for planned outages called revisions inside of CMMS.
- Maintaining an outage list for forced or maintenance outages that can be used in short notice to make opportunity repairs.

E. Power Plant Technician (PPT) or Solar Tech (ST) is responsible for:

- Performing work under direction of Maintenance Supervisor AND Operations Supervisor.
- Using Safe Work Permit AND this procedure to conduct all work.

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F. Plant Engineer is responsible for:

- Evaluating AND recommending solutions for assigned notifications.
- Fulfilling primary role with management of change AND drawing control.

G. SAP Superuser is responsible for:

NOTE

SAP Superuser is the individual(s) designated to represent plant in department wide SAP WM issues.

- Performing all high level SAP WM responsibilities such as creating OR deleting tasks, equipment, AND functional locations, etc.

H. Work Management Team is responsible for:

1. Performing work under Plant Manager OR designee.
2. Overseeing execution of work management program to include facility backlog.
3. Meeting bi-monthly to discuss AND revise notifications included in backlog report.
   - Discussing new work priority AND concerns AND new outage work.
   - Reviewing backlog report to determine work classification (Operating, outage, OR reserve work).

NOTE

Operations and maintenance hold daily tailboard meeting to discuss operational and maintenance activities.

4. Meeting ad hoc to discuss any upcoming outages OR work management issues.
5. Determining the following:
   - Whether equipment OR parts need material code
   - Whether equipment OR parts will be stored on site
   - Min/max levels