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BUYER'S GUIDE

Choosing an OQ Vendor

Introduction

A third-party provider can support your OQ program with covered tasks, evaluation criteria, Evaluators, training, and qualification records. But the pipeline Operator remains responsible for ensuring the program meets its requirements and for demonstrating that to a regulator . This guide helps you ask the right questions and understand what to listen for in the answers.

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Using this guide in a vendor review?

Get the questions spreadsheet

01 Start With Your Own Program

Industry standards such as ASME B31Q and API RP 1161 set the baseline for OQ programs. A strong program also depends on a clear understanding of your own operation.

Many pipeline Operators draw on a shared framework of covered tasks and evaluation criteria. The best frameworks reflect years of collective Operator experience and keep qualifications consistent from one Operator to the next. But your program still has to account for every regulated asset you operate, the covered tasks that apply, and the procedures, equipment, and people behind them.

The result is a program built around your operation and the people doing the work.

Four questions to ask

Answer these before you open a vendor conversation. Each one tells you which parts of a vendor's product and services to examine most closely.

01

Do the people doing the work understand the program?

A strong OQ program goes beyond qualification records. Workers should understand what is expected of them, the procedures that apply, and how to recognize and react when something goes wrong. Ultimately, OQ is about the person doing the work.

02

Can you show how each qualification was granted, and by whom?

A qualification should be more than a status in a system. You should be able to trace it back to the evaluation, the criteria used, and the Evaluator who determined the individual was qualified.

03

Are you measuring whether the program works?

An effective OQ program should be evaluated, not assumed. Look beyond completion and qualification numbers to understand whether the program is producing competent people and supporting safe, consistent work.

04

Where do your qualification records live, and how fast do they update?

Qualification records should be current, reliable, and easy to access when you need them. You should know where the record comes from, when it was updated, and be able to produce the supporting documentation when needed.

02 What To Ask Every Vendor

The product matters, but so does the partnership behind it. Your OQ provider should bring the people, expertise, and support to help you manage your program, not just the technology to track it.

Questions to ask

01 Who will support my program, and what OQ and regulatory experience do they bring?

02 Beyond the technology, what regulatory, training, audit, and consulting support do you provide?

03 How will you support us before, during, and after a regulatory inspection?

04 How do you independently validate your own program and processes, and what will you share with us?

05 How is your team involved in developing the industry standards and practices that shape OQ?

06 How do you bring Operators together to share experiences, challenges, and leading practices?

07 Before we become a client, will you help us understand where our current program is strong and where opportunities may exist?

What to listen for
Look for specifics: experienced people, clearly defined support, and examples of how the vendor partners with Operators. Strong providers are transparent about their role, demonstrate how their own processes are validated, and support you through regulatory scrutiny while recognizing that ownership of the OQ program remains with the Operator.

03 Where a Program Gets Tested

Across audits, state program reviews and incident investigations, the same six subjects come up. Evaluation and records come first, because an inspection starts there and most findings land there.

- Evaluation
- Records
- Covered Tasks
- Requalification
- Span of Control
- Management of Change

Where a program gets tested

Evaluation

What you need to show:

You need defined requirements for who can become an authorized Evaluator and a documented process for how evaluations are conducted. Just as importantly, you need a way to verify that Evaluators are following that process, applying the required evaluation criteria, and consistently maintaining the integrity of your OQ program.

Questions to ask

01 What training and preparation do Evaluators receive before they are authorized?

02 How do you select and authorize Evaluators, and how do you verify they meet your requirements?

03 Does anyone review the evaluation record before a qualification is granted?

04 For performance-based tasks, how do you evaluate both knowledge and skills, including recognizing and reacting to abnormal operating conditions?

05 How do you audit Evaluators after authorization, and what happens when requirements are not met?

06 Do you audit qualified individuals in the field to verify continued knowledge and skill?

What to listen for

Look for evidence that oversight leads to action. A strong provider should be able to explain how issues are identified, investigated, corrected, and communicated, including how affected qualifications are addressed when an Evaluator does not follow the required process.

Records

What you need to show:

Your records should provide a clear, traceable history of each qualification: who was qualified, for what task, when, how the qualification was determined, and by whom. You should also be able to demonstrate that your OQ program is reviewed annually for effectiveness.

Questions to ask

01 Where does the qualification record live, and how quickly is it updated after an evaluation?

02 Where do I access the source record — directly from you or through another platform?

03 Can I verify that a worker meets applicable qualification, training, and procedure requirements before work begins?

04 Can I see who qualified the worker and how that qualification was determined?

05 What reporting do you provide to help me review and demonstrate the effectiveness of my OQ program?

What to listen for

Look for a controlled process that protects the integrity of the qualification record. A strong provider should be able to explain how records are reviewed, validated, maintained, and protected — and how supporting information is provided when needed.

Where a program gets tested

Covered Tasks

What you need to show:

Your covered tasks should accurately reflect the work performed on your assets. A common task framework provides a strong starting point, but strong programs continuously evolve. They incorporate Operator-specific procedures, equipment, training, and lessons from the people doing the work.

Questions to ask

01 Where did your task framework come from, who maintains it, and what role do Operators have in that process?

02 Can I use common tasks, develop Operator-specific tasks, or combine both?

03 Can I incorporate my own procedures, training, and assessments into the program?

04 How do you help me align tasks with my assets, procedures, equipment, and workforce?

05 Can training, procedures, evaluations, and completion records be managed and connected in one place?

06 How does your solution help my program evolve as our operations and requirements change?

What to listen for

Look for more than a task list. Strong providers will have a proven process for maintaining their common framework, and the expertise and partnership to help you build on it as your assets, procedures, and workforce evolve.

Requalification

What you need to show:

Requalification should be a defined process, not simply an extension of an expiration date. You should understand when qualifications expire, what an individual must demonstrate to become requalified, and how those requirements are consistently applied. Industry standards can help inform intervals, but your program should determine what is appropriate for your work and workforce.

Questions to ask

01 How are your requalification intervals established, and how do they compare with recognized industry standards?

02 What must an individual do to become requalified?

03 Is requalification based on demonstrating current knowledge and skill, rather than simply completing an administrative renewal?

04 How are upcoming expirations communicated and managed so qualifications do not lapse unexpectedly?

05 Can an Operator establish more stringent intervals or requalification requirements when appropriate?

06 What happens when an individual does not successfully complete requalification?

What to listen for

Look beyond the expiration date. A strong provider should be able to explain why intervals are established, what happens when they expire, and what a worker must demonstrate to become qualified again.

Span of Control

What you need to show:

Your program should clearly define when a non-qualified individual may perform covered work under the direction and observation of a qualified individual. Expectations should be clear, including applicable limits and what effective oversight looks like in the field.

Questions to ask

01 How are span-of-control limits established and communicated?

02 What does “direct and observe” mean within your program?

03 How do you ensure the qualified individual can effectively oversee the work and take corrective action when needed?

04 Can Operators establish more stringent span-of-control requirements for specific tasks or conditions?

05 How can I verify who was qualified and responsible for directing and observing the work?

What to listen for

Look beyond the ratio. The provider should be able to explain how span of control works in practice and how requirements can be tailored to the task, conditions, and the Operator’s program.

Management of Change

What you need to show:

Your OQ program should have a defined process for responding to changes that affect covered work. When procedures, equipment, tasks, or requirements change, you should be able to identify who is affected, determine what action is needed, and verify that action is completed.

Questions to ask

01 How does your system help identify and communicate changes that affect covered tasks?

02 Can I determine what action is required based on the significance of the change?

03 Can required training, procedure review, or reevaluation be assigned and tracked?

04 Can I verify that affected individuals completed the required action before performing the work?

05 How are those changes and completed actions documented over time?

What to listen for
Look beyond the notification. A strong process connects the change to the people and tasks it affects, determines what action is needed, and verifies completion before the work continues.

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Ask us these questions

Everything in this guide applies to any vendor, including us. Put the same questions to our team and see how the answers compare.

Let's talk

Get the questions spreadsheet

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250+
pipeline Operators

1,000,000+
active qualifications

6000+
authorized Evaluators

25+ years
of operational excellence