 <b>Marathon Petroleum Company LP</b>		<b>REFINERY-WIDE</b>		<b>R-83-002</b>
<b>ANACORTES REFINERY</b>		<b>Contractor Safety Program</b>		<b>Page 1 of 36</b>
<b>RESPONSIBLE DEPT.</b>	<b>CONTENT CUSTODIAN</b>	<b>APPROVED BY</b>	<b>LEGACY NUMBER:</b>	
Supply Chain	Trent Kies	William Shaw	SR-11	
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## Contents

<b>1.0 INTRODUCTION .....</b>	<b>3</b>	<b>6.0 ON-SITE CONTRACTOR PERSONNEL BADGING REQUIREMENTS .....</b>	<b>14</b>
1.1 General Requirements .....	3	6.1 Badging Requirements .....	14
1.2 Scope .....	4	6.2 Contractor Process Safety Management Orientation .....	15
<b>2.0 REFERENCES.....</b>	<b>4</b>	6.3 Field Safety Manual .....	15
2.1 Marathon Standards, Policies & Procedures .....	4	<b>7.0 DRUG AND ALCOHOL TESTING.....</b>	<b>15</b>
2.2 Government Regulations .....	4	7.1 ASAP Drug Solutions .....	15
<b>3.0 DEFINITIONS .....</b>	<b>4</b>	7.2 Post Incident (for Cause Drug & Alcohol Testing) .....	16
<b>4.0 ROLES AND RESPONSIBILITIES.....</b>	<b>7</b>	<b>8.0 MAJOR PROJECTS (INCLUDING CAPITAL) AND SITE-SPECIFIC SAFETY PLANTS (INCLUDING TAR) .....</b>	<b>16</b>
4.1 Marathon Responsible Persons (Coordinates Contractors) .....	7	8.1 Contractor Selection Process.....	16
4.2 Contractor Sponsor .....	8	8.2 Safety Leadership .....	16
4.3 Marathon Contractor Safety Coordinator .....	8	8.3 Site Specific Safety Plan .....	16
4.4 Contractor Safety Representatives .....	9	8.4 Green Field Requirements.....	17
4.5 Marathon Employees .....	9	<b>9.0 CONTRACTOR REQUIREMENTS FOR SITE PARTICIPATION/FIT FOR DUTY .....</b>	<b>17</b>
<b>5.0 CONTRACT ADMINISTRATION AND APPROVAL PROCESS .....</b>	<b>10</b>	<b>10.0 JOB SITE SAFETY AUDITS AND COMMUNICATIONS .....</b>	<b>17</b>
5.1 Contractor Safety Review Process.....	10	10.1 Purpose of Job Site Audits .....	17
5.2 ISNetworld Qualification & Review Process .....	10	10.2 Performing Job Site Safety Audits.....	17
5.3 Contractor Written Safety Program Exemption Requirements .....	12	10.3 Communicating Findings.....	18
5.4 Contractor Variance (Temporary Approval) Process.....	12	<b>11.0 CONTRACTOR SAFETY PERFORMANCE REVIEWS</b>	
5.5 Managing Grade Changes .....	14		

**ATTENTION:** Printed copies should be used with caution.

The user of this document must ensure the current approved version of the document is being used.



<b>AND CONTINUOUS IMPROVEMENT .....</b>	<b>18</b>	<b>19.0 APPENDIX D – CONTRACTOR TEMPORARY APPROVAL FORM (SAF- 4004 APPENDIX D) SAMPLE .....</b>	<b>26</b>
11.1 Annual Reviews.....	18		
11.2 Major & Capital Projects .....	19		
11.3 Periodic Reviews .....	19		
11.4 Continuous Improvement .....	19		
<b>12.0 REPORTING/MANAGING INCIDENTS .....</b>	<b>19</b>	<b>20.0 APPENDIX E – CONTRACTOR DECISION FLOWCHART (SAF-4004 APPENDIX E) SAMPLE .....</b>	<b>30</b>
<b>13.0 CONTRACTOR SAFETY COUNCIL .....</b>	<b>20</b>	<b>21.0 APPENDIX F – SAFETY SENSITIVE DECISION FLOWCHART (SAF-4004 APPENDIX F) SAMPLE .....</b>	<b>31</b>
<b>14.0 TRAINING .....</b>	<b>20</b>	<b>22.0 APPENDIX G – FATALITY REVIEW QUESTIONS (SAF- 4004 APPENDIX H) SAMPLE .....</b>	<b>32</b>
14.1 Marathon Employees .....	20		
14.2 Contractors Performing Marathon Employee Duties .....	20		
14.3 Contract Employees .....	20		
<b>15.0 REVIEW AND REVISION HISTORY .....</b>	<b>21</b>	<b>23.0 APPENDIX H – CONTRACTOR FIELD VERIFICATION AUDIT CHECKLIST (RSP-1306 CKLST) .....</b>	<b>33</b>
<b>16.0 APPENDIX A – ROLES &amp; RESPONSIBILITIES PROCESS MAP (SAF-4004 APPENDIX A) SAMPLE .....</b>	<b>22</b>	<b>24.0 APPENDIX I – BADGING AND IDENTIFICATION .....</b>	<b>34</b>
<b>17.0 APPENDIX B – CONTRACTOR SAFETY COMMON EVALUATION CRITERIA (SAF-4004 APPENDIX B) SAMPLE .....</b>	<b>23</b>	24.1 Safety Sensitive Service Badge .....	34
<b>18.0 APPENDIX C – WRITTEN SAFETY PROGRAM EXEMPTION REVIEW FORM (SAF-4004 APPENDIX C) SAMPLE .....</b>	<b>25</b>	<b>25.0 APPENDIX J – ANACORTES WORKCODE MATRIX SAMPLE .....</b>	<b>35</b>
		<b>26.0 APPENDIX K – MARATHON HIGH HAZARD FACILITY TRAINING (HHFT) EXCEPTION FORM SAMPLE .....</b>	<b>36</b>

## List of Tables

Table 1	Definitions .....	4
Table 2	Contractor Training Requirements .....	21

**ATTENTION:** Printed copies should be used with caution.

The user of this document must ensure the current approved version of the document is being used.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 3 of 36</b>

## 1.0 INTRODUCTION

### 1.1 General Requirements

In order to perform Safety Sensitive Services on-site at MPC owned, leased, operated or controlled locations, Contractors shall successfully complete the requirements of:

- An evaluation conducted by the authorized third-party contractor auditing firm, or
- An alternative evaluation process can be used if an Exemption to this portion of the Standard has been approved per GEN-1001.

MPC uses a suite of risk-based Model Form Contracts for procurement of onsite services. When onboarding new Contractors that have not historically provided services to MPC, Global Procurement shall determine the appropriate Model Form Contract based on the services the Contractor is eligible to perform.

Contractors executing the following MPC Model Form Contracts, or an approved Non-Standard Contract of comparable terms and conditions, shall be required to complete the requirements of an evaluation conducted by the authorized third-party contractor auditing firm, regardless of services the Contractor will initially provide to MPC:

- Major Services Contract;
- Emergency Response Services Contract;
- Environmental Services Contract;
- Engineering, Procurement, Construction and Construction Management Contract; or
- Master Environmental Services Contract.

Contractors executing the following MPC Model Form Contracts, or without a governing contract (i.e., services performed by traditional vendors or consultants,) shall be required to complete the requirements of an evaluation conducted by the authorized third-party contractor auditing firm if the services they perform meet the definition of Safety Sensitive Services:

- Engineering and Procurement Contract;
- Engineering, Drafting & Consulting Contract; Standard Service Contract;
- Basic Service Contract; or
- Engineering, Procurement & Construction (Project Specific).

MPC will employ Common Evaluation Criteria across the Organizations to assist in evaluating Contractors (see Appendix B). Contractors shall only be hired for services they have been pre-qualified to perform.

If a contractor utilizes temporary workers, the temporary staffing agency is not required to be approved by the third-party contractor auditing firm.

MPC Global Procurement is responsible for administering a common database of Contractor information (Contractor Database) about contracts, Contractors with the Safety Status Met designation and the work for which they are approved.

- Global Procurement shall update the Contractor Database as needed with approved Safety Program Restriction Request Form information.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 4 of 36</b>

- Global Procurement shall update the Contractor Database as needed with Temporary Approval information.

Contractors that meet all requirements of the Common Evaluation Criteria shall be identified as Safety Status Met in the Contractor Database.

## 1.2 Scope

This procedure applies to affected Marathon Anacortes Refinery employees and contractors. All personnel working on Marathon Anacortes Refinery property must comply with this procedure.

## 2.0 REFERENCES

### 2.1 Marathon Standards, Policies & Procedures

- SAF-4004, Contractor Management
- RSP-1306, PSM/RMP Contractors
- REF-1054, Refining Safety Policy
- 25-009, Service Contract Administration
- 25-050, Contractor Performance Evaluation

### 2.2 Government Regulations

- OSHA 29 CFR 1910-119(h), Contractors
- WAC 296-67-029, Contractors
- WAC 296-67-335, Contractors
- EPA RMP 40 CFR 68 Subpart G, Risk Management Plan

## 3.0 DEFINITIONS

The following definitions are applicable to this procedure.

**Table 1 Definitions**

Term	Description
Agreement (MSA)	The type of contractual arrangement Marathon Anacortes Refinery and a Contract Group enter regarding a course of action. Marathon's Procurement Contract Administration Department employs a variety of documents. These include the Master Service or Supplemental Agreements (MSA/SA), Small Project Agreements, and Service Orders.
Common Evaluation Criteria	Safety Performance criteria used to determine if Contractors qualify to perform services at the MPC, outlined in Appendix B.
Contract Administrator	Performs contract activities, including soliciting the services of independent contractors, ensuring clear and concise contract language, evaluating proposals, negotiating terms and conditions, and monitoring contractor performance.

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**Table 1 Definitions**

Term	Description
Contract Initiator	The Marathon Anacortes Refinery individual who requests the contractor services. Typically, this is the person whose name appears in the "requested by" section of the requisition.
Contractors	Any entity (other than Marathon or a Marathon affiliate) or individual (other than a Marathon employee) contracted and/or under purchase order to provide services on behalf of Marathon. <ul style="list-style-type: none"> <li>• This includes entities/individuals contracted or under purchase order to provide maintenance services, construction services, or to support process activities.</li> <li>• This includes entities/individuals under the direct supervision of Marathon personnel and/or entities/individuals providing services for Marathon under contracted supervision.</li> </ul>
Contractor Safety Coordinator	The Marathon Anacortes Refinery employee responsible for evaluating contractor safety qualifications and programs and for overall coordination of the Marathon Contractor Safety Program.
Contractor Specific	Temporary Approval granted for a specific Contractor to perform work specified in the Temporary Approval form (welding, security services, and scaffolding.)
Contractor Temporary Approval	A process used to evaluate Contractors that do not currently meet the Marathon required level of safety performance. This is referred to as the variance at the Anacortes Refinery.
Days Away from Work (DAFW) Rate	A mathematical calculation that describes the number of recordable injuries/illnesses per 100 employees that resulted in days away from work.
Experience Modification Rate (EMR)	The EMR is a computation comparing a company's annual losses in insurance claims against its Workers Compensation policy premiums over a three-year period, excluding the most current year.
Emergency Response	A Temporary Approval granted to a contractor named as a responder on one or more government-mandated list of emergency-response Contractors. This Temporary Approval applies only to emergency response services during an active response. This contractor cannot perform services outside of the response.
Facility	An MPC owned, leased operated or controlled place where work is performed.
Highly Hazardous Chemicals (HHC)	Substances possessing toxic, reactive, flammable, or explosive properties, and found at or above its threshold quantity listed in Appendix A of 29 CFR 1910.119 and Table 1 of 40 CFR 68.130.
ISNetworld (ISN)	A web-based third-party administered database that assists with satisfying governmental and Marathon-specific recordkeeping and management requirements relating to Contractor evaluation and selection.
JHA Job Hazard Analysis	A process to identify, analyze and record the steps involved in performing a specific task. The analysis identifies the existing or potential safety and health hazards associated with each step and the recommended action that will eliminate or reduce these hazards. It focuses on the relationship between the worker, the task, the tools, and the work environment.
Life Critical Activities	Activities defined by the organization, that have significant potential for serious injury, illness or death resulting from failure to comply.

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**Table 1 Definitions**

Term	Description
Management System	A formal, documented set of activities designed to produce consistent results on a sustainable basis.
MPC Representative	Any Employee (MPC or Contractor) with the primary responsibility for overseeing the completion of work being conducted by a contractor and or interfacing with Contractor Supervision or Contractor Employees. (Project Lead, MPC Supervisor, Directly Supervised Contractor working on Behalf of MPC, MPC Safety Rep, Operations.)
NCMS	National Compliance Management Service - verifies DOT and non-DOT drug & Alcohol programs.
No History	Temporary Approval granted to a Contractor because the criteria is not available yet and the Contractor has not yet begun or is in the process of submitting the Contractor Evaluation Criteria (IS Net World). New Contractor Companies that do not have 3 years of data will be evaluated on the data that is available.
Pre-Qualification Form	A screening process used to evaluate Contractor history and experience to determine if the Contractor can accomplish the desired job tasks without compromising the safety and health of the Contractor employees, Marathon employees, the public, or the environment.
Process (i.e., Covered)	A PSM/RMP covered process. Any activity involving a highly hazardous chemical including any use, storage, manufacturing, handling, or the on-site movement of such chemicals, or combination of these activities. For purposes of this definition, any group of vessels which are interconnected and separate vessels which are located such that a highly hazardous chemical could be involved in a potential release shall be considered a single process.
Process Safety Information (PSI)	A compilation of written information concerning process chemicals, process technology, and process equipment which is essential to an effective Process Safety Management Program and to process hazards analysis. The compiled information, designated as PSI, enables employers and employees involved in operating a process to identify and understand the hazards posed by processes containing highly hazardous chemicals.
Process Safety Management (PSM)	Process safety management (PSM) of highly hazardous chemicals is to prevent unwanted releases of hazardous chemicals especially into locations that could expose employees and others to serious hazards. Refer to OSHA 1910.119 for further information.
Project Specific	Temporary Approval granted for a Contractor to perform a predetermined project specifically identified in the Temporary Approval form. Work outside of the project scope would require a separate Temporary Approval.
RAVS	Review and Verify Service - ISN verifies all information submitted through Health & Safety Professionals.
Recordable Incident Rate	A mathematical calculation illustrating the number of recordable incidents a Contract Group experiences per 100 full-time employees.
RMP	EPA Risk Management Plan; also known as 40 CFR Part 68, Subpart G

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 7 of 36</b>

**Table 1 Definitions**

Term	Description
Safety Sensitive Services	On Site Maintenance/Repair On Site Heavy Equipment Repair Asbestos/Lead Abatement Hot Tap/Stopple Crane Operations/Rigging Services Electrical and Instrumentation Construction/Repair
Severity Rate	A mathematical calculation performed by adding the number of days away from work plus the number of days of job transfer or restriction X 200,000 and dividing by the total number of hours worked.
Shall/Must	Order, requirement, or obligation of the standard or procedure. Example: a strict regulatory requirement.
Total Recordable Incident Rate (TRIR)	Recordable rate expressed as the number of recordable injuries and illnesses per 200,000 hours worked. A measure of the rate of recordable workplace injuries, normalized per 100 workers per year.
Supplier	A person or entity that is the source for goods or services. A supplier could provide goods or services to MPC or to a vendor. Once a supplier performs Safety Sensitive Services, as defined by this standard, they will be considered a contractor and required to comply with this procedure.
Vendor	Is used to describe the person or entity that is paid for the goods provided, rather than the manufacturer of the goods. A vendor would provide their goods to MPC or a Contractor. Once a Vendor performs Safety Sensitive Services, as defined by this standard, they will be considered a contractor and required to comply with this procedure.
Work Practices	Training in any procedure or skill required to safely perform required job tasks. If the contract employees will be performing maintenance on the on-going integrity of process equipment, the plant or work zone, this will include overview of the process, plant or work zone, its hazards, and operational or maintenance procedures applicable to the job task.
Work Restriction	A restriction that prohibits a Contractor from performing work activities (i.e. confined space entry, elevated work, lifting with cranes) that require specific safety programs. Specific programs are needed for all activities otherwise restrictions will be required.

## 4.0 ROLES AND RESPONSIBILITIES

### 4.1 Marathon Responsible Persons (Coordinates Contractors)

The Marathon Responsible Person (MRP) is responsible for ensuring the information within this document and other applicable Marathon Anacortes Refinery requirements are communicated to the contractors they coordinate. This person is typically, but not limited to, the Contract Initiator.



 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 8 of 36</b>

## 4.2 Contractor Sponsor

The Contractor Responsible Person (CRP) is responsible for ensuring all individuals within their supervision (i.e., including third party) comply with Marathon Anacortes Refinery Safety Regulations and other applicable Safety Management Systems, including Marathon contractual obligations.

- Identifies the types of work activities to be performed by a Contractor, to include whether the work meets the definition of DOT OQ covered work (e.g., Operator Qualified Tasks (OQ)).
- Verifies the Contractor has an acceptable grade within ISN prior to using them.
- Conducts an initial project review on the minimum safety expectations of Marathon.
- Maintains current knowledge of Contractors' ongoing work activities and notifies safety if contractor scope/work classification changes.
- Initiates the Variance process. Monitors the mitigation or improvement plan required under a Contractor's Variance, when necessary.
- Leads/verifies meetings with Contractors at an appropriate frequency based on the level of risk associated with the work being performed are being conducted. The meetings shall include a review of completed tasks, upcoming or in progress hazardous tasks, and the control measures to be used.
- Ensures all contractor employees have all required documentation prior to badging.
- Ensure all Contractors are provided with relevant Process Hazard Overview per PSM-1070.

**NOTE:** An Onboarding Requirements document is available on the Contract Management SharePoint page. The link is provided below:

[Onboarding Requirements](#)

## 4.3 Marathon Contractor Safety Coordinator

The Contractor Safety Coordinator is a designated member of the Health & Safety Department that manages the Contractor Safety Management Program. The Contractor Safety Coordinator (CSC) shall ensure that applicable process safety information is accessible to all contractors. This person must be knowledgeable in the following areas:

- Process safety management program (PSM), where it applies.
- General worker safety principles (re: compliance with location, state, and federal requirements).
- Facility process hazards, safe work practices, safety systems and emergency response plans.
- For all Safety Sensitive Services, ensure that the Contractor has a JSA process that is consistent with expectations of this standard.
- Verify that the contractor has the appropriate Anacortes Refinery-specific training prior to commencement of work.
- Maintain current knowledge of contractor's work activities.
- Monitor grades for the contractors currently being used.

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 9 of 36</b>

- Upload completed Contractor Variance forms into ISN to document the approval of the Variance request.
- Provides a copy of the Variance (Contractor Temporary Approval) Form to the Supply Chain Management should the Contractor not participate in ISN or it is for an Emergency Response.
- Perform manual grading of contractors.
- Maintain completed Variances, Emergency Work Exception, and Manual grading documentation.
- Monitor Key Performance Indicators (e.g., JSA's, Inspections, Incidents, ISN Dashboard grades) of Contractors. This data shall be used to evaluate Contractor performance to identify negative trends so that any necessary corrective actions can be taken to improve performance. Verify that safety meetings with Contractors occur at an appropriate frequency, based on the level of risk associated with the work performed are being conducted.

#### 4.4 Contractor Safety Representatives

All companies that have personnel working within a covered process, adjacent to a covered process or on a significant project will provide a Contractor Safety Representative that is responsible for ensuring compliance with the Marathon Anacortes Contractor Management Program. This individual's credentials will be reviewed by the Marathon Health & Safety Department.

The Contractor Safety Representative provides safety leadership for the group/organization for which they are employed. The Contractor Safety Representative actively participates in the Marathon Job Site Audit Program, Incident Investigation, and other participation-based programs (Ex: Not in My House/Bring Your "A" Game). The Contractor Safety Representative frequently meets with the Contractor Safety Council, and the Marathon Health & Safety Department to improve safety leadership and decrease incidents and injuries.

The Contractor Safety Representative is responsible for participating and attending quarterly Contractor Safety Council Meetings and weekly Marathon Contractor Safety Representative Meetings. The Contractor Safety Representative is also responsible for ensuring all employees within their company are current with all applicable health and safety training. All contractor employee training records should be readily available, should Marathon request to see a copy related to pertinent site requirements.

The Marathon Contract Administrator is responsible for qualifying companies and subcontractors through regular procurement practices and regulations and verifying the Contractor Management Database criteria and industry knowledge.

#### 4.5 Marathon Employees

Shall be familiar with this procedure, and how it applies to the management of contractors. Any Marathon employee who assists with on-boarding contractor personnel must be authorized and trained on how to do so (i.e., CBT Contractor On-Boarding, Contractor Safety Management).

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 10 of 36</b>

## 5.0 CONTRACT ADMINISTRATION AND APPROVAL PROCESS

ISNetwork provides contractor safety management and auditing services to Marathon Anacortes Refinery as the Contractor Management Database. Contractors who work in and around the Process areas must be evaluated through ISNETWORLD before a contract can be issued through Purchasing.

**Important:** The Procurement Department cannot issue a contract to any contractor without verifying that the contractor is either:

- Meeting the criteria set forth in this standard; or:
- Has a variance/exception from Refinery Management; or:
- Is not required to be enrolled in the Contractor Management Database.

### 5.1 Contractor Safety Review Process

The Contractor Decision Flowchart in Appendix E can be used to determine if someone is a contractor. All Contractors performing work at Marathon Anacortes must be reviewed and approved per the standards set forth in this document. Contractor Sponsors and or Contract Initiators are responsible for verifying the Contract Company they are requesting services from is enrolled in the Contractor Management Database prior to requesting a Service Order from the Contract Administrator. If the contractor is not in the Contractor Management Database, the Contractor Sponsor must work with the Contract Administrator to enroll the desired company into the Contractor Management Database.

**Notes:**

- This process applies to all Contract Companies working on Marathon Anacortes Refinery Property, including Turnarounds & Capital Projects.
- The Contract Administrator (CA) is responsible for ensuring all Contract Groups are in ISNetwork.

### 5.2 ISNetwork Qualification & Review Process

All Contractors that will provide Safety Sensitive Services are required to be enrolled in ISNetwork. Before a Contractor performs Safety Sensitive Services at the Anacortes Refinery, the Safety Department shall use ISN to collect and review prior safety performance. The ISN website provides the following information for each Contractor that has enrolled with ISN:

- Safety Statistics:
  - EMR
  - TRIR
- Fatalities
- ISNetwork MSQ Score
- RAVS Written Program Score
- Life Critical Programs
- 3-year Company History
- MPC Status Override

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 11 of 36</b>

- Restricted Status
- Safety Questionnaire
- Severe Violator List
- Willful Citations
- Written Program Restrictions (Completed by MPC if an Exception/Variance has been granted)

ISNetworld will conduct a Desk Top Audit of a contractor's qualification. This Desk Top Audit consists of reviewing all the information the Contract Group provided in the prequalification package, including but not limited to a copy of Contractor's Safety Manuals, OSHA 300 Logs, documentation relating to safety related incidents (i.e., within the past three years) and the contractor's ongoing safety programs. ISNetworld may also visit the contractor's facility and verify the information that was received.

Once ISNetworld has completed the Desk Top Audit and the Office Audit, if performed, ISNETWORLD will ensure the proper approval grade is posted.

- **Safety Status Met** designation is for Contractors who meets or exceeds all the requirements of the common evaluation criteria.
- **Safety Status Met with Restrictions** is a designation assigned to contractors who meets or exceeds the requirements of the Common Evaluation Criteria and is subject to Work Restrictions.
- **Safety Status Not Met:** Designation assigned to a Contractor who does not meet all the requirements of the Common Evaluation Criteria.
- **Supplier:** A person or entity that is the source for goods or services. A supplier could provide goods or services to MPC or to a Vendor. Once a Supplier performs Safety Sensitive Services, as defined by this Standard, they will be considered a Contractor and required to comply with this Standard.

A Status Met or Met with Restrictions grade for a contractor's status acts as the authorization for Procurement to begin the process of establishing a contractual relationship with the contractor. This may include, but not be limited to, adding the contractor to Marathon's Approved Vendor List (AVL), submit request for pricing for either a specific project or the establishment of a Master Services Agreement, issuance of a Purchase Order for specific type of work or establish the contractor as a strategic supplier.

A copy of the contractual document will be routed to the Requestor, Security (i.e., badging services) and the Health & Safety Department. Upon receipt, the requestor is then obligated to contact the contractor sponsor to set up the Orientation Program for the contractor and ensure all site-specific requirements needed from the contractor are completed.

The Health & Safety Department, along with the Contract Administrator, will have the authority to monitor, review and work with ISNetworld in the retention of all approved contractors. Marathon Corporation strives to use contractors with outstanding safety performance. However, where the evaluation indicates gaps in the Contract Company's safety performance, Marathon Anacortes Refinery shall work with the contractor to address areas of concern to provide support and oversight as necessary to ensure a safe and successful execution of their on-site service. This increased oversight may also require development and implementation of more stringent safe work practices. The

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 12 of 36</b>

increased measures initiated by the location shall be proportional to the potential risk implied by the contracted work. All contractors must have a Marathon Master Service Agreement (MSA) prior to working at Marathon Anacortes Refinery. The Contract Administrator is responsible for ensuring this agreement is established.

### 5.3 Contractor Written Safety Program Exemption Requirements

The Anacortes Refinery may submit a Safety Program Restriction(s) Request Form (Appendix C) to the Contractor Safety Management Team for waiver of individual safety programs in cases where the Contractor will never perform services that require those safety programs for any MPC Organization. These waivers will be granted globally across all MPC Organizations. Most likely these requests will be made through IS Net World.

All completed Safety Program Restriction Request Forms shall be forwarded from the Contractor Safety Management Team to the Corporate Safety Supervisor for final approval or rejection.

Waiver of individual safety program(s) will not be granted for project specific tasks. A project specific Variance (Temporary Approval) could be utilized instead, since a waiver removes the requirement for that Contractor across all MPC Components from that point forward.

Contractors that meet all remaining requirements of the Common Evaluation Criteria and have an approved Safety Program Restriction(s) Request Form will be identified as Safety Status Met-With Restrictions in the Contractor Database.

- Contractors identified as Safety Status Met-With Restrictions may perform the services indicated with the exception of activities related to the safety program(s) waived.

If Anacortes is utilizing a Contractor and the Contractor is identified as Safety Status Met-With Restrictions, then Anacortes shall refer to the Safety Programs Waived section in the Contractor Database and ensure work being completed will not require the program that was waived (i.e., the restriction).

### 5.4 Contractor Variance (Temporary Approval) Process

When a contractor does not achieve or maintain Safety Status Met, and the Anacortes Refinery has identified the need to use that Contractor's services, the Contractor Sponsor shall initiate the Variance (Contractor Temporary Approval) process. Use Appendix E Contractor Decision flowchart for guidance. If it is not clear if a Temporary Approval is required, the Contractor Safety Management Team shall be consulted. The Contractor Safety Management Team will evaluate if the Contractor meets the CEC's and provide a final determination. If the Contractor Safety Management Team is reviewing whether a fatality is, applicable and related to the type of service requested by MPC, they shall utilize Appendix G – Fatality Review Questions. The Organization shall start and approve the Temporary Approval if it is a refining wide Temporary Approval. An Organization wide Temporary Approval needs to be approved by Anacortes for acknowledgement. The Anacortes Refinery will approve the Variance (Temporary Approval) when being used at their location/project. This requires written approval of the Requesting Department Manager, ES&S Manager and General Manager (or equivalent). The Refinery Plant Manager has the authority to delegate (continuous delegation, not just when out of the office) Contractor Variance (Temporary Approval) authority to one or more Managers within the Refinery or Organizational structure, other than the ES&S Manager as that

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 13 of 36</b>

person is already required to sign all Contractor Temporary Approval Forms. Delegation of authority must be in writing to a named Managers. The written authorization shall be retained by the approved Managers.

A completed Contractor Temporary Approval Form or electronic process shall include the following information.

- A thorough explanation of the Contractor's scope of work and/or work types allowed.
- The reasons for requesting a Temporary Approval.
- Details about the risk mitigation measures the Refinery will perform/require to ensure adequate safety.

It is the Refinery's responsibility to ensure the risk-mitigation measures are sufficient and complied with once the Contractor is on-site to perform services. The Refinery shall communicate the Variance (Temporary Approval) and risk mitigation measures to the Contractor with documented acknowledgement by the Contractor.

In the event a Contractor is providing services on site (ongoing services) at the time they become non-compliant with the Common Evaluation Criteria, a Variance (Temporary Approval) shall be implemented within thirty (30) calendar days from the date of notification if wish to continue utilizing that Contractor's services for the ongoing services.

Variances (Temporary Approvals) must meet one of four authorized approval types listed in the Contractor Temporary Approval Form:

- Project Specific – for a defined scope of work.
- Contractor Specific – for a specific company performing work.
- Emergency Response – to authorize use of an emergency responder listing.
- No History – if the Contractor's safety criteria are not yet available (No History).

The length of term for a Contractor Temporary Approval is dependent upon the Qualification Criteria not met, as indicated on the Contractor Temporary Approval Form.

If the Common Evaluation Criteria are still not met upon expiration, the Organization must complete a new Temporary Approval to cover the remainder of the three (3) years or twelve (12) quarters for which the Temporary Approval is required with revised risk mitigation measures (if applicable)

- The Health & Safety Department will track expiration dates across all active Temporary Approvals and may send out reminders. The MPC Representative is responsible for ensuring that Temporary Approvals are active and do not expire. If a Temporary Approval expires employee badges for the contract company may be shut off until the Temporary Approval is renewed.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 14 of 36</b>

Criteria Not Met	New Request	1 <sup>st</sup> Renewal	2 <sup>nd</sup> Renewal	Additional Renewals
OSHA Willful Citation, Fatality related to services provided and PEC Health & Safety Audit Score	6 months	12 months	18 months	18 months
OSHA Incident Rate and Experience Modification Rate	12 months	12 months	12 months	12 months

Use Appendix D, Contractor Temporary Approval for the process.

## 5.5 Managing Grade Changes

When a Contractor's grade changes during the year, the Anacortes Refinery shall have a thirty (30) day period from the date of the posted grade change in ISN to make a determination on a course of action (e.g., variance, discontinue service, or find another resource, etc.).

It is imperative that Contractor Sponsors and other users maintain awareness of the status of Contractors.

## 6.0 ON-SITE CONTRACTOR PERSONNEL BADGING REQUIREMENTS

### 6.1 Badging Requirements

For badging, all Contract personnel shall be active in OSCA, including:

- background check
- current ASAP/NASAP third party (TPA) drug & alcohol screening,
- completed site PSM/Marathon Essentials Orientation annually,
- 20-hour High Hazard Facility Training (HHFT) (Appendix K) will be required for all employees of a contract company if the work type meets the criteria in the Anacortes Workcode Matrix (Appendix J).
  - Employees that will not perform work requiring HHFT can file for an exemption using the Marathon High Hazard Facility Training (HHFT) Exemption Request form (Appendix L).
  - If a company does not have any employees required to comply with the HHFT requirements, no exemption is required.
- have active TWIC Cards on their person while inside the facility.

**NOTE:** OSCA ASAP/NASAP TPA, and Basic Safety requirements may be waived by the Marathon Health & Safety Department, dependent upon Drug & Alcohol screenings conducted (Ex: DOT), work being performed, etc.

Vendors, Suppliers, and visitors will not be required to be active in OSCA, have a third-party background check. TWIC cards are still required unless they are escorted.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 15 of 36</b>

## 6.2 Contractor Process Safety Management Orientation

The Contractor PSM Orientation is required for all contractors who will be given unescorted access to the Marathon Anacortes Refinery. Prior to going to work and on an annual basis (i.e., for requalification), all contractors are required to complete the orientation and successfully pass the exam.

The Contractor Safety Orientation is designed to provide the contractor with a basic knowledge of the following:

- Process safety hazards and process overview
- Basic safety management systems for hazard review (i.e., work permitting, lockout/tagout, confined space, and personnel protective equipment)
- Basic refinery and safety requirements
- Environmental precautions and requirements

The Contractor Safety Orientation shall be reviewed and updated annually by the Marathon Contractor Safety Coordinator. Any changes/modifications must be communicated to all contractors in accordance with R-63-001.

Escorted visitors regardless of activity must watch the Visitor Emergency Action Plan video prior to being granted access to the facility. The video will allow escorted access for up to three months, after which escorted access will be restricted until the visitor watches the presentation again.

## 6.3 Field Safety Manual

The Field Safety Manual is intended to be used as a tool to inform contractors and visitors of basic EHS procedures and hazard recognition. The Field Safety Manual does not address every EHS, operational or maintenance procedure. Contractor Safety Representatives are encouraged to use this manual for weekly/monthly training materials to ensure contractors maintain awareness of the Marathon Anacortes Refinery safety requirements. The Contractor Safety Coordinator shall review and update the field safety manual as changes to EHS procedures take place, and annually to ensure it is updated.

## 7.0 DRUG AND ALCOHOL TESTING

### 7.1 ASAP Drug Solutions

All Contract Companies that provide Safety Sensitive Services are required to go through NASAP Drug Testing Protocol and chooses the Third-Party Administrator (TPA) of their Drug & Alcohol Program. Vendors and visitors are the only parties exempt from the drug screen and background check requirements. All other contractors onsite that do not perform Safety Sensitive Services but perform continuous work at the Anacortes Refinery are required to be drug program compliant.

**NOTE:** For Contract Employees providing Safety Sensitive Services, OSCA ASAP/NASAP TPA, and the Basic Safety Course (RSO, OSHA 10, etc.) requirements may be waived by the Marathon Health & Safety Department, dependent upon the company's experience and Drug & Alcohol program they are currently using (DOT, etc.).

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 16 of 36</b>

## 7.2 Post Incident (for Cause Drug & Alcohol Testing)

Marathon Anacortes Refinery reserves the right to request post incident, and for cause testing for any contract personnel at any time.

## 8.0 MAJOR PROJECTS (INCLUDING CAPITAL) AND SITE-SPECIFIC SAFETY PLANTS (INCLUDING TAR)

### 8.1 Contractor Selection Process

Prior to the selection of Contract Companies for major projects, the Contract Administrator, Contractor Safety Coordinator and Capital Projects or Maintenance Manager shall formally meet to discuss the criteria used in selecting contractors for major projects. All contractors providing Safety Sensitive Services working on Marathon Anacortes Refinery Property must be evaluated by ISNetworld, unless a Contractor Temporary Approval has been provided.

### 8.2 Safety Leadership

Safety leadership is critical and begins with company leadership. For major projects, a Safety Professional assigned to the project shall have their credentials and experience provided to the Contractor Safety Coordinator. The qualifications of these roles will be evaluated, and feedback given to the Marathon responsible person and contract company. Deficiencies that are identified will be corrected. Marathon Anacortes Refinery currently requires 1 Safety Representative for every 25 employees working on the project.

The performance of the assigned Safety Professional will be evaluated by the Contractor Safety Coordinator and Capital or Maintenance Manager to ensure expectations are met. If expectations are not met, a documented plan will be established to improve performance.

It is also critical that positive behaviors are observed, and individuals are encouraged to participate in behavioral based safety programs. The assigned Safety Professional shall support programs such as Not in My House / Bring Your "A" Game and job site audits to further promote employee participation.

Hazing, bullying or other forms of disrespectful behaviors toward other contract companies will not be allowed. There is zero tolerance for this type of behavior. The Marathon Safety Coordinator will contact the Capital Projects Manager or Maintenance Manager immediately if these behaviors are observed.

### 8.3 Site Specific Safety Plan

A Site-Specific Safety Plan describes the project, identifies a clear scope, recognizes hazards specific to the project and lists specific mitigations. The Site-Specific Safety Plan is not simply a conglomeration of Marathon Anacortes Refinery and Contract Group Policies. The Site-Specific Safety Plan shall be approved and documented by all involved parties prior to the commencement of work. The plan shall also be kept on-site and communicated to all contractors, subcontractors, and Marathon Anacortes Refinery employees involved with the project. Training on the Site-Specific Safety Plan will be documented in the Safety Filing System. The Marathon Contract Safety Coordinator has an approved template that must be used for all Site Safety Plans.

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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 17 of 36</b>

## 8.4 Green Field Requirements

Often with large projects it is critical to establish a "green field" that separates the project from all other activities in the Marathon Anacortes Refinery.

The Contractor Safety Coordinator and Project Manager will determine if a Green Field is necessary. If a green field is established in or adjacent to a live process unit, adequate facility siting evaluations must take place and be documented, such as the following:

- All electrical equipment must be GFCI and portable buildings cited per Marathon Anacortes Refinery requirements.
- The Green Field shall be separated by enough barriers (i.e., fence) to ensure all individuals outside the green field understand that specific policies and programs exist within the boundaries.
- Required PPE and other signs communicating specific hazards must be posted.
- In congested areas with heavy equipment or vehicle traffic, spotters must be available.

## 9.0 CONTRACTOR REQUIREMENTS FOR SITE PARTICIPATION/FIT FOR DUTY

All contract companies performing work at the Anacortes refinery shall participate in:

- Permit to Work Process - to include JHA, and Joint Job Site Visit Process.
- Job Site Audit Process for continuous improvement.
- Contractor Safety Council

Contract Companies that work at the Anacortes MPC Refinery shall have a Fit for Duty Policy that all of their employees are active in. The Contract Companies Fit for Duty Policy needs to have oversight from a Health Care Provider.

## 10.0 JOB SITE SAFETY AUDITS AND COMMUNICATIONS

### 10.1 Purpose of Job Site Audits

The purpose of Job Site Safety Audits is to prevent incidents and injuries by identifying leading indicators through the evaluation process.

### 10.2 Performing Job Site Safety Audits

All Contractor Safety Representatives and Marathon Safety Specialists are trained to conduct Job Site Audits. All contractors and employees are encouraged to participate with the audit process. Training on the audit process is available by contacting a Contractor Safety Representative or Marathon Safety Specialist. The **FAST** Audit Form can be obtained **on** the Health & Safety Department **Sharepoint page**.

Participation with Job Site Safety Audits is reflected in the annual safety performance reviews. Audits are used to help determine a company's overall safety performance.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 18 of 36</b>

### 10.3 Communicating Findings

Leading indicators are identified and communicated during the weekly Contractor Safety Representative meetings. Contractor Safety Representatives shall attend this meeting to receive critical information that is communicated plant wide.

## 11.0 CONTRACTOR SAFETY PERFORMANCE REVIEWS AND CONTINUOUS IMPROVEMENT

Performance of contract employers in fulfilling their obligations are per the requirements set forth under this procedure and MSA Safety Requirements Exhibit (see Attachment 4). Performance reviews shall be documented in the Safety Filing System. The Contractor Safety Coordinator will schedule contractor performance reviews and work with Capital Projects, Maintenance, and other departments as needed to conduct this evaluation. If contractor safety performance is determined to be substandard, the Marathon Anacortes Refinery will take appropriate remedial actions to improve performance. Contractor deficiencies and their resolutions shall be documented. Deficiencies noted in contractor performance or programs shall be brought to the attention of the Contract Group and a documented Action Plan implemented to resolve the deficiencies. The types of performance reviews are listed below.

### 11.1 Annual Reviews

Anacortes Refinery will periodically perform (at least annually) an evaluation ("Full Program Audit") of a representative number of Contractors and Subcontractors performing work on or adjacent to Covered Processes. Contractors and Subcontractor eligible for this Full Program Audit must include those performing on-going maintenance services, turnaround services, major renovation, installation, and/or specialty services on-site at PSM covered facilities. Anacortes Refinery will perform a Full Program Audit of each nested (resident) Contractor at least once every three (3) years. The Full Program Audit may, at the discretion of MPC, be conducted at the PSM covered facility and/or at Contractor offices. The Full Program Audit may, at the discretion of MPC, be conducted by MPC personnel, or by a third-party auditor. The periodic Full Program Audit will include an assessment that the Contractor/Subcontractor is fulfilling their responsibilities required by the PSM regulation. Specifically, this assessment is to confirm that:

- Contract employees are being trained on applicable work practices necessary to safely perform their job (e.g., safe work practices, safety procedures, task procedures)
- Contract employees are instructed on known potential fire, explosion, and toxic hazards (if not included in training provided by the site PSM covered facility)
- Proper training documentation has been developed and is available, and
- The Contractor has implemented a program to assure that their employees follow safety rules and conducts periodic audits/evaluations to confirm that employees are following safety rules.
- The Contractor has advised the Refinery of any unique hazards associated with their work or of hazards found by the contract employer's work.
- The Contract Company participates in our sites Job Site Audit Program.
- The Contract company has a way of downloading data from their H2S meters.
- All Incident Investigations on the Contract Company will be reviewed.

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 19 of 36</b>

The periodic Full Program Audit will include confirmation that applicable criteria used in the Contractor Safety Pre-Qualification Process are utilized by Contractor during performance of services. The Full Program Audit will include Contractor/Subcontractor safety program conformance while conducting work at the Anacortes MPC Refinery. If the written safety programs of the Contractor are evaluated during screening process, then the evaluation Full Program Audit may include confirmation that Contractor employees are trained on the written safety programs.

The results of each periodic Full Program Audit must be reviewed with the Contractor or Subcontractor, tracked to closure if there are significant recommendations, and documented and retained per the applicable MPC records retention guidelines.

The Anacortes Refinery will conduct and document at least one (1) audit of routine, ongoing safety requirements (Field Verification Audit) of every Contractor performing work on or adjacent to Covered Processes on at least an annual basis. The Field Verification Audit will ensure that the Contractor/Subcontractor is conducting their work safely and in compliance with applicable PSM and other OSHA regulations as well as Refinery safety procedures and rules. The Field Verification Audits shall be conducted by a qualified MPC employee or contract employee including, but not limited to Operators, Maintenance Coordinators, Safety Professionals, PSM Coordinators, and/or Contract third-party auditor. Field Verification Audits shall be documented in writing by the person conducting the audit. It is recommended that the audit is conducted using a "checklist format" substantially in the form of Appendix H: Contractor Field Verification Audit Checklist.

## 11.2 Major & Capital Projects

The Contractor Safety Performance Review will be utilized after the completion of major or capital projects. The Contractor Safety Coordinator will determine when this is necessary.

## 11.3 Periodic Reviews

Periodic reviews take place when significant incidents, unsafe behaviors or repeat incidents occur (i.e., based on safety performance). Periodic reviews may be requested by the Contract Safety Coordinator, Maintenance Manager or Capital Projects Group.

## 11.4 Continuous Improvement

Tools, such as incident investigation trending, Job Site Audit Database, Permit Audit Database and the Not in my House / Bring Your "A" Game process may be used to determine leading indicators and opportunities for improvement.

## 12.0 REPORTING/MANAGING INCIDENTS

Incident Investigation: All incidents must be reported in accordance with R-12-007.

Injury Management: All contractors are required to contact a Marathon Safety Specialist if an injury occurs and are encouraged to utilize the Marathon Anacortes Refinery Medical Clinic, regardless of severity (see R-11-006).

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 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 20 of 36</b>

## 13.0 CONTRACTOR SAFETY COUNCIL

Marathon Anacortes Refinery has a Contractor Safety Council that meets with Marathon Safety Specialists weekly, and with additional contractor representatives quarterly. On-site Contractor Safety Representatives are expected to participate and attend these meetings. The Safety Council's mission is to keep everyone safe every day with no accidents or injuries.

## 14.0 TRAINING

### 14.1 Marathon Employees

- Refining ES&S Manager and Refining Senior Vice President must train on the Requirements of the Variance (Temporary Approval) program and their role and responsibilities when signing and authorizing Contractor and Subcontractor temporary approvals.
- Marathon Contact (Contractor Coordinator) must have general awareness training on the requirements of this standard.
- Supply Chain Personnel must know their roles and responsibilities of implementing the Contractors and Subcontractors Safety Pre-Qualification Process.
- Safety Personnel must be trained on the roles and responsibilities of the Contractors and Subcontractors Pre-qualification and Safety Audit Process.

Refresher training on this standard is required annually. Marathon Anacortes Refinery employees that coordinate contractors are also responsible for ensuring that contractors have reviewed and understand all applicable EHS procedures for the work they are performing. Marathon Anacortes Refinery employee training records will be retained within LMS through the Training Department.

### 14.2 Contractors Performing Marathon Employee Duties

Contract employees that routinely perform the same duties that a Marathon Anacortes Refinery employee would perform without Marathon Supervision shall receive the same level of training as a Marathon Anacortes Refinery employee.

### 14.3 Contract Employees

All contract employees are expected to understand EHS procedures applicable to the work they are performing. A summary of these procedures can be found in the Safety Field Manual, which is provided during Contractor Safety Orientation. Initial training is provided during the Contractor Safety Orientation.

The table below sets forth certain Contractor training requirements, by Contractor category.

 <b>Marathon Petroleum Company LP</b>	<b>REFINERY-WIDE</b>	<b>R-83-002</b>
<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 21 of 36</b>

**Table 2 Contractor Training Requirements**

Contractor Category	Site Specific Contractor Safety Orientation	Process Overview	Covered Operator Training Program	MOC (if applicable to job roles)	ESS Training Matrix Requirements
Involved in short work visits (1 day or less) to a process area and report to contract company supervision.	X	X			
Involved in longer work visit (1 day or greater to a process area and report to contract company supervision.	X	X			
Resident or longer term professionals that report to MPC Supervision	X	X		X	X
Resident or longer term administrative or clerical support staff that report to MPC Supervision	X				X
Contract Operators that report directly to MPC Supervision	X	X	X	X	X
Contract Craftsmen that report directly to MPC Supervision	X	X		X	X

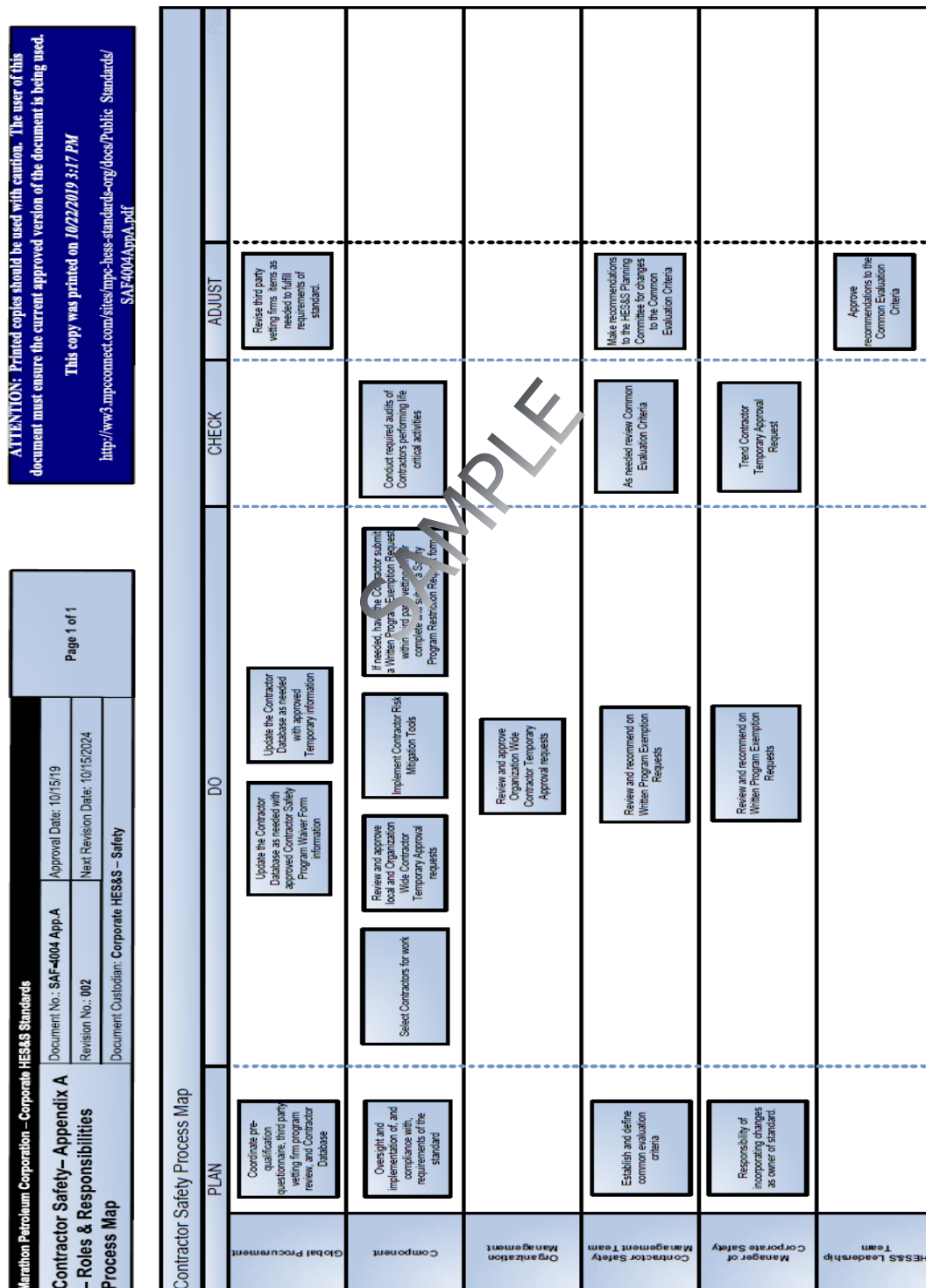
## 15.0 REVIEW AND REVISION HISTORY

Revision #	Preparer	Date	Description
0	Trent Kies	2/12/2024	Original document number (superseded R-11-009); updated Responsible Dept and Approved By in header; Added Temporary Approval expiration tracking and consequences to Sec. 5.4; changed audit information to FAST in Sec. 10.2; deleted PNW RSO from Sec. 14.3; deleted PICS Contractor Acceptance Form; and updated TOC. Updated badging.

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## 16.0 APPENDIX A – ROLES & RESPONSIBILITIES PROCESS MAP (SAF-4004 APPENDIX A) SAMPLE







## 17.0 APPENDIX B – CONTRACTOR SAFETY COMMON EVALUATION CRITERIA (SAF-4004 APPENDIX B) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards		
<b>Contractor Safety Management Standard – Appendix B – Contractor Safety Common Evaluation Criteria</b>	Document No.: SAF-4004 App B	Approval Date: 4/27/2020
	Revision No.: 003	Next Revision Date: 10/15/24
	Document Custodian: Corporate HES&S	
		Page 1 of 2
<b>Requirements:</b>	<p>Contractors, including sub-contractors, must meet the following minimum criteria in order to be eligible to perform safety-sensitive services on-site at MPC owned or controlled locations. Newly established companies without three years of data will be evaluated on the data that is available.</p> <p>Note: The Gathering and Processing organization may continue to use the third party vetting firm's Common Evaluation Criteria (CEC) currently existing within their account until it is merged with MPC's account</p> <ol style="list-style-type: none"> <li>1. OSHA Total Recordable Incident Rate (TRIR)               <ol style="list-style-type: none"> <li>a. Contractor's and/or sub-contractor's three-year <sup>(1)</sup> OSHA TRIR must be less than or equal to 2.00.                   <ol style="list-style-type: none"> <li>i. If a Contractor cannot provide data for the previous three years, (e.g. The company has not been in business that long) and the three year TRIR is unable to be calculated, MPC will evaluate the reason and apply an "override" in MPC's third party vetting system until three years of data is available.</li> </ol> </li> </ol> </li> <li>2. Experience Modification Rate (EMR)               <ol style="list-style-type: none"> <li>a. Contractor's most recent year <sup>(1)</sup> must be less than or equal to 1.15</li> </ol> </li> <li>3. OSHA Citations <sup>(1)</sup> <ol style="list-style-type: none"> <li>a. Contractor is disqualified if they have a citation for a willful violation related to the type of service requested by MPC during the past three years.</li> </ol> </li> <li>4. Health &amp; Safety Written Program Score               <ol style="list-style-type: none"> <li>a. Contractors must receive a 85% average score of their written safety programs when audited by the third-party Contractor vetting firm. The following programs require a 100% individual score when required by the services Contractors perform:                   <ul style="list-style-type: none"> <li>• Cranes &amp; Rigging;</li> <li>• Confined Space Entry;</li> <li>• Confined Space Rescue;</li> <li>• Fall Protection;</li> <li>• Hot Work; and</li> <li>• Lock-out Tag-out.</li> </ul> </li> <li>b. Only sub-contractors that perform safety sensitive services at PSM/RMP sites are required to submit programs to MPC's third party contractor vetting firm.</li> </ol> </li> <li>5. Questionnaire               <ol style="list-style-type: none"> <li>a. Contractor is disqualified if they score below 70.</li> </ol> </li> <li>6. Fatalities <sup>(1) (2)</sup> <ol style="list-style-type: none"> <li>a. Contractor is disqualified if they have experienced an incident that resulted in a</li> </ol> </li> </ol>	
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**Contractor Safety Management Standard –  
Appendix B – Contractor Safety Common  
Evaluation Criteria**

Doc. No.: SAF-4004 Appendix B

Rev. No.: 003

Page 2 of 2

fatality within the past three years while performing work related to the type of service requested by MPC and deemed applicable. Utilize Appendix H – Fatality Review Questions to assist with determination.

- i. If a company has not been in business for three years. MPC will apply an "override" to allow the contractor to get the points they deserve as long as there has not been a fatality during that time period.

**7. OSHA Severe Violators List**

- a. Contractor is disqualified if they are on OSHA's Severe Violators List.

**8. DOT Drug & Alcohol Testing Program (where required)**

- (1) Updated statistical information must be provided by the contractor on or before March 31 of the succeeding year (e.g., 2019 information is due March 31, 2020). Companies with 10 or fewer employees that are not required by regulations to keep OSHA injury and illness records must still submit all required safety information as outlined in the Common Evaluation Criteria.
- (2) The decision to continue or terminate safety-sensitive services ongoing at an MPC location as of the date of a Contractor fatality requires coordination among the affected MPC Supply Chain, HES, Law and Operating Organizations in order to ensure mitigation of all associated risks.

**Revision History:** The revision history of the standard is included below:

Revision Number	Description of Change	Written By	Approved By	Approval Date
000	Replacing HES 304	Dennis Mendenhall	Downstream HES&S Leadership Committee	04-04-11
001	Requirements section added new company data statement, removed ORIR rate of 5.0 for existing contractors and added ORIR of 4.0 for everyone, added OSHA Severe Violators List review requirement, added third party program audit score to include 80% minimum score for 6 programs – with 18 month grace period. Added requirement in footnote (1) of small co. <10 are still required to submit required information.	Todd Flippin	HES&S Leadership Committee	05-12-2016
002	Detailed when an override can be administered for TRIR and / or fatality scenarios. Updated PEC/ISN title to generic title. Removed specificity of "RAVs" for written programs.	Adam Waltz	HES&S Planning Committee	10/15/2019
003	Updated Common Evaluation Criteria to reflect new combined account scorecard.	Adam Waltz	HES&S Planning Committee	4/27/2020


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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 25 of 36</b>

## 18.0 APPENDIX C – WRITTEN SAFETY PROGRAM EXEMPTION REVIEW FORM (SAF-4004 APPENDIX C) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards			 Page 1 of 1
Contractor Safety Standard – Appendix C – Written Program Exemption Review Form	Document No.: SAF-4004 App C	Approval Date: 10/15/2019	
	Revision No.: 002	Next Revision Date: 10/15/2024	
	Document Custodian: Corporate HES&S		

### Written Program Exemption Review Form

Completion of this form indicates that the Contractor Safety Team has conducted a review of a Contractor's request to be exempt from a written safety program that is required by the Work Type Matrix in MPC's third party vetting firm. Approval of an exemption request dictates that the Contractor will never perform services that require the Safety Programs listed below for any MPC Organization. This Safety Program Waiver is not a job or project specific waiver, but if approved, waives the safety programs below until the contract expires. MPC's third party vetting system will identify the Contractor as "Safety Status Met - With Restrictions" to prevent this Contractor from performing the services that are associated with the waived safety programs below.

Contractor Name/ ID Number:

Written Program(s) Requested to be Waived:

Work Types/Services:

\*indicates which work type is triggering the written program requirement Review:

Spend/Location:

#### Approval

The Contractor Safety Team (identified below) hereby approves the above Written Program(s) Exemption request. The Contractor is restricted from performing the services associated with the exempted Written Program(s).

- |   |                                       |  |
|---|---------------------------------------|--|
| <input type="checkbox"/> Admin Services           | <input type="checkbox"/> Legal        | <input type="checkbox"/> Logistics & Storage |
| <input type="checkbox"/> Corporate Safety         | <input type="checkbox"/> Supply Chain |  |
| <input type="checkbox"/> Gathering and Processing | <input type="checkbox"/> Refining     |  |

Date Approved by Team:

If not approved, reason for rejecting the exemption request:

Note: If this waiver is not approved, the Contractor cannot be utilized until either the Safety Programs indicated above are in place and satisfactory within third party vetting firm system, or a Temporary Approval is approved.


Note: Submit completed forms to the Corporate Safety Supervisor for consideration of approval.

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ANACORTES REFINERY	Contractor Safety Program	Page 26 of 36

## 19.0 APPENDIX D – CONTRACTOR TEMPORARY APPROVAL FORM (SAF-4004 APPENDIX D) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards		 Page 1 of 4	
Contractor Safety Standard – Appendix D – Contractor Temporary Approval Form	Document No.: SAF-4004 App D		Approval Date: 4/27/2020
	Revision No.: 005		Next Revision Date: 10/15/2024
	Document Custodian: Corporate HES&S		

☐ New Request   
 ☐ 1<sup>st</sup> Renewal   
 ☐ 2<sup>nd</sup> Renewal   
 ☐ Additional Renewal (if needed)

This form is required because:

- 1) Contractor has failed to meet one or more of the Marathon Petroleum Company LP ("MPC") Common Evaluation Criteria that establish minimum safety requirements for performing safety sensitive services on site at MPC locations; or
- 2) Contractor is not in MPC's third party contractor vetting firm's system or has initiated the Contractor Safety Pre-Qualification process but has not yet provided all of the safety information required to allow evaluation.

Requestor asks that Contractor be granted temporary approval to perform either a specific job or specified work types for a specified period of time for the Organization(s) indicated below and based on the reason(s) shown below.

**Contractor Name:** \_\_\_\_\_

**Vendor #(s):** \_\_\_\_\_

**3<sup>rd</sup> Party Account Number(s) Account Number(s):** \_\_\_\_\_

**Contractor Contact Person(s):** \_\_\_\_\_

**MPC Requestor:** \_\_\_\_\_

**MPC Organization(s) making request:**

☐ Refining Wide
 

☐ Anacortes

☐ Detroit

☐ Galveston Bay

☐ Mandan

☐ Salt Lake City

☐ Canton

☐ Dickinson

☐ Garyville

☐ Martinez

☐ S.Houston GP

☐ Catlettsburg

☐ El Paso

☐ Kenai

☐ Robinson

☐ Cincinnati Biofuels

☐ Gallup

☐ Los Angeles

☐ St. Paul Park

☐ L&S
 

☐ MPL

☐ Marine

☐ L&SE

☐ Terminals

☐ Trucking & Rail

☐ Southwest Gathering

☐ Marketing  
☐ Administrative Services  
☐ G&P

**TA Type:**   
 ☐ Project Specific   
 ☐ Contractor Specific   
 ☐ Emergency Response   
 ☐ No History

**Scope of Work:** \_\_\_\_\_

**Work Types:** \_\_\_\_\_

**Qualification Criteria Not Met:**

☐ OSHA Incident Rate   
 ☐ Experience Modification Rate   
 ☐ Fatality [date: \_\_\_\_\_]  
☐ OSHA Willful Citation   
 ☐ Health & Safety Score   
 ☐ Not Evaluated by Contractor Evaluation Process

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Contractor Safety Standard Appendix D

SAF-4004 App D

Rev. No.: 005

Page 2 of 4

**Description of disqualifying criteria:**

Criteria Not Met	New Request	1 <sup>st</sup> Renewal	2 <sup>nd</sup> Renewal	Additional Renewals
OSHA Willful Citation, Fatality related to services provided and Health & Safety Vettered Score	6 months	12 months	18 months	18 months
OSHA Incident Rate and Experience Modification Rate	12 months	12 months	12 months	12 months

**Begin Date:**  **End Date:**  (Review Table 1 in Section 3.6 of the Standard for TA Terms)

**Risk Mitigation Measures (the measures selected must apply to each project or job):**

- ☐ JSA ☐ OSHA 10 or 30 Hour ☐ BBS Inclusion  
☐ Safety On-Site ☐ Marathon Leadership Training ☐ Auditing Program  
☐ Other Measures (describe below):

**MPC Approval**

I hereby approve the use of the above-referenced Contractor for execution of the work identified above at MPC locations within my area of responsibility.

Organization:

Requesting Department Manager (signature):  Date:

Requesting Department Manager (please print name):

HES&S Manager (signature):  Date:

HES&S Manager (please print name):

General Manager (signature):  Date:

General Manager (please print name):

☐ Not Approved  Date:

General Manager (signature)

General Manager (please print name):

Reason:

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**Contractor Acceptance of Risk Mitigation Measures**

I hereby accept the Risk Mitigation Measures referenced above to be implemented at the assigned MPC locations referenced above.

Contractor Company: \_\_\_\_\_

Contractor Corporate Manager (signature): \_\_\_\_\_ Date: \_\_\_\_\_

Contractor Corporate Manager (please print name): \_\_\_\_\_

Contractor Site Representative (signature): \_\_\_\_\_ Date: \_\_\_\_\_

Contractor Site Representative (please print name): \_\_\_\_\_

**MPC Approval – Organization #2**

I hereby approve the use of the above-referenced Contractor for execution of the work identified above at MPC locations within my area of responsibility.

Organization: \_\_\_\_\_

Requesting Department Manager (signature): \_\_\_\_\_ Date: \_\_\_\_\_

Requesting Department Manager (please print name): \_\_\_\_\_

HES&S Manager (signature): \_\_\_\_\_ Date: \_\_\_\_\_

HES&S Manager (please print name): \_\_\_\_\_

General Manager (signature): \_\_\_\_\_ Date: \_\_\_\_\_

General Manager (please print name): \_\_\_\_\_

**Notes:**

- 1) Contractor, except for sub-contractors, must have executed the appropriate service contract and provided proof of required insurance coverage prior to commencement of on-site work.
- 2) Must be executed by General Manager (or equivalent) (or designated Direct Report Manager) of Component granting approval, or a Manager who has been delegated temporary responsibility for the Organization during their absence.
- 3) Use additional pages for more signatures if necessary.
- 4) Forward completed form to your Supply Chain (SC) contact and send a copy to the Corporate Safety – Contractor Lead. The Contractor Database is to be updated by SC to reflect this exemption.

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Contractor Safety Standard Appendix D		SAF-4004 App D		Rev. No.: 005	Page 4 of 4
Revision Number	Description of Change	Written By	Approved By	Approval Date	
000	Replaces HES 304	Dennis Mendenhall	HES&S Leadership Committee	04/04/11	
001	Administrative Changes: Added in Header and Footer information along with Revision History	Stephanie Huff	Greg Herold	7/11/12	
002	Added Galveston Bay	Mark Bailey	Tim Haley	05/22/13	
003	Added Cincinnati Biofuels	Stephanie Huff	Nicole Birchall	5/28/14	
004	Changed Work Type to Contractor Specific, changes TA lengths, Added Contractor Signature block & added South Houston Green Power	Todd Flippin	HES&S Leadership Committee	05-12-16	
005	Updated Component locations. Updated PEC/ISN to generic title. Added in App D, MPC Approval a signature line for the Requesting Department Manager	Todd Flippin / Adam Waitz	HES&S Leadership Committee	10/15/2019	
006	Updated Organization Manager to General Manager to align Component Manager titles	Adam Waitz	HES&S Leadership Committee	4/27/2020	

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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 30 of 36</b>

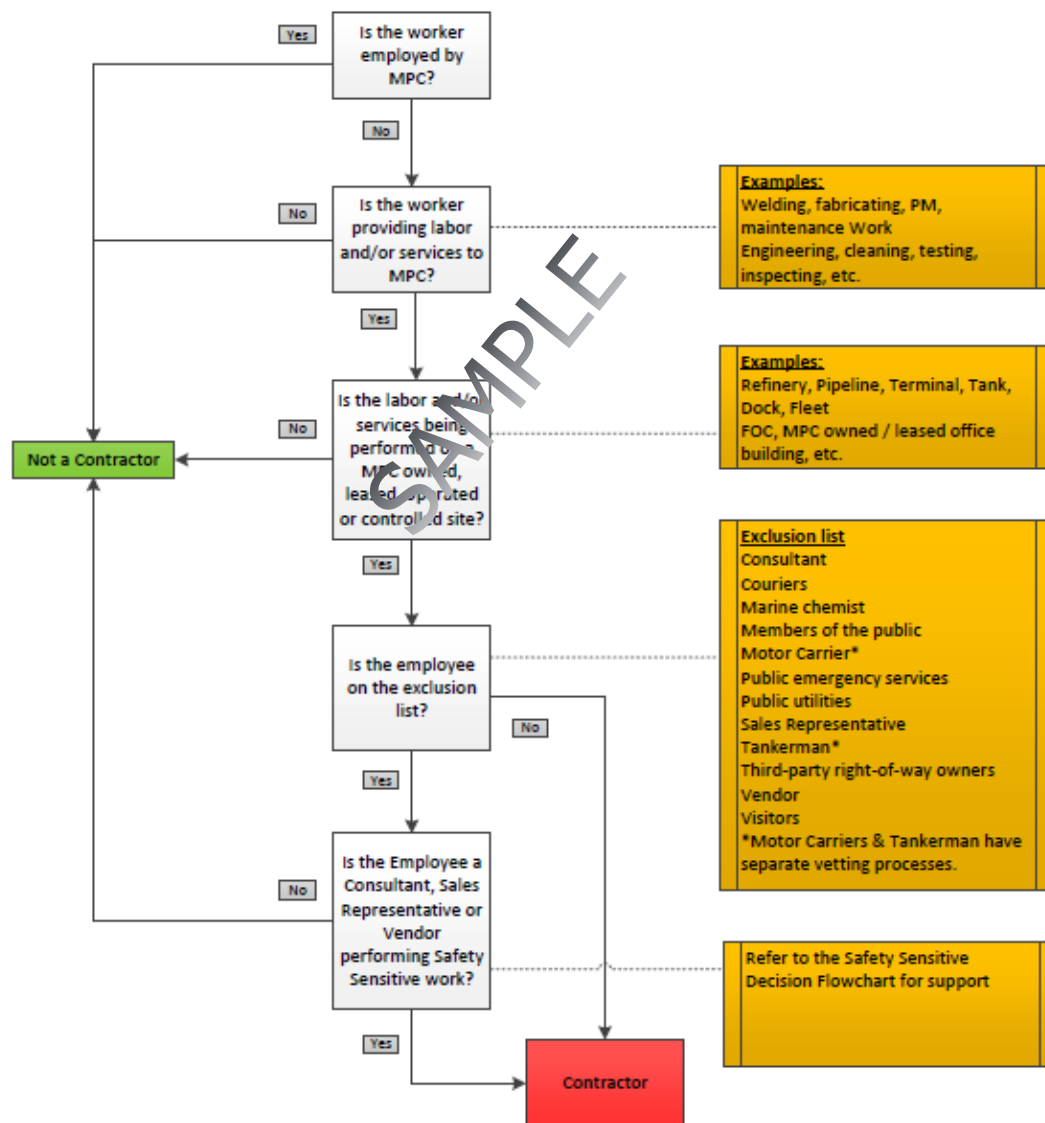
## 20.0 APPENDIX E – CONTRACTOR DECISION FLOWCHART (SAF-4004 APPENDIX E) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards		
Contractor Safety Standard – Appendix E Contractor Decision Flowchart	Document No.: SAF-4004 App E	Approval Date: 10/15/19
	Revision No.: 001	Next Revision Date: 10/24/19
	Document Custodian: Corporate HES&S	



Page 1 of 1

### Contractor Decision Flowchart




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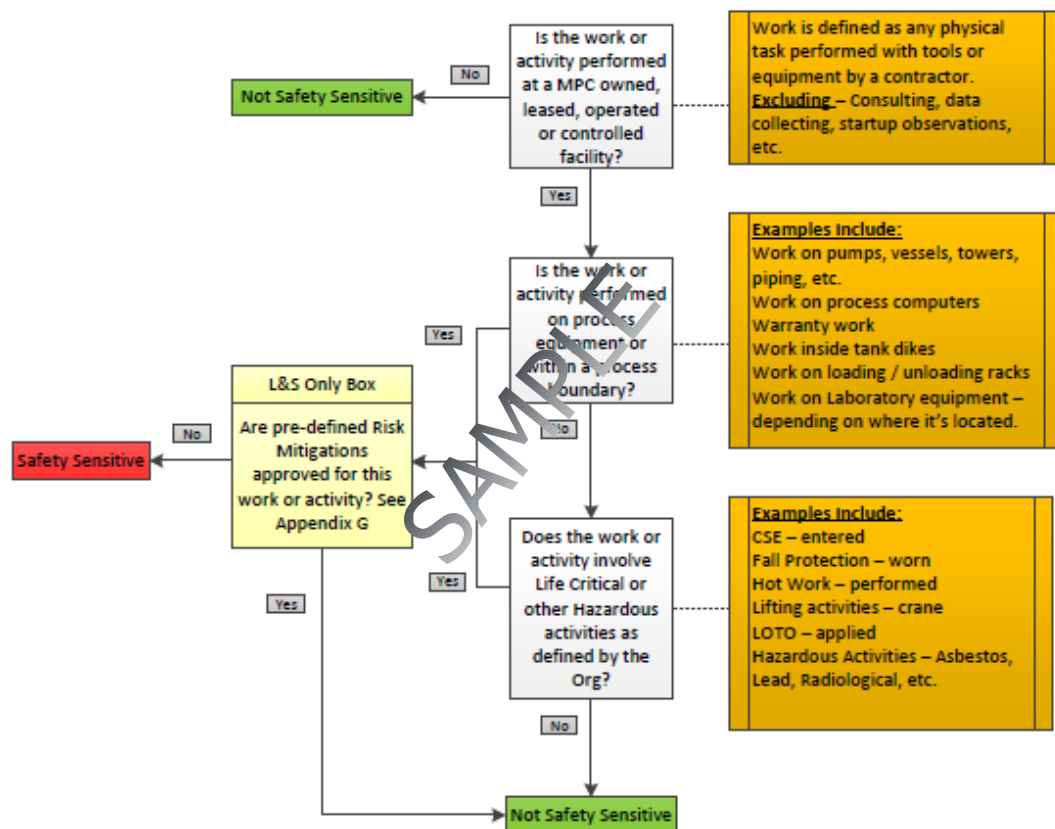
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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 31 of 36</b>

## 21.0 APPENDIX F – SAFETY SENSITIVE DECISION FLOWCHART (SAF-4004 APPENDIX F) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards		
<b>Contractor Safety Standard – Appendix F Safety Sensitive Decision Flowchart</b>	Document No.: SAF-4004 App F	Approval Date: 10/15/19
	Revision No.: 001	Next Revision Date: 10/15/24
	Document Custodian: Corporate HES&S	
		 Page 1 of 1

### Safety Sensitive Decision Flowchart




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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 32 of 36</b>

## 22.0 APPENDIX G – FATALITY REVIEW QUESTIONS (SAF-4004 APPENDIX H) SAMPLE

Marathon Petroleum Corporation – Corporate HES&S Standards			 Page 1 of 1
Contractor Safety Standard – Appendix H Fatality Review Questions	Document No.: SAF-4004 App H	Approval Date: 10/15/2019	
	Revision No.: 001	Next Revision Date: 10/15/2024	
	Document Custodian: Corporate HES&S		

### For Contractor Safety Management Team Use Only

#### Purpose

When the Contractor Safety Management Team is reviewing if a fatality should require a Temporary Approval or not the following questions and scenarios should be reviewed.



If the fatality occurred...	Then...
While driving to a job site.	If the Contractors business (work provided to MPC) is driving for MPC then, Yes TA required.  If the Contractors business (work provided to MPC) isn't driving for MPC then, No TA required.
To an employee not involved in the work which causes the accident (e.g., explosion at a plant and fatally injures an employee in a nearby unit performing non-associated work).  Unless Hazard Recognition would have protected the employee (e.g., not following proper evacuation process and continued to gather tools before leaving).	No TA required.  Then, Yes TA required
To an employee walking through a facility (e.g., employee walking on a catwalk, it collapses, the employee falls and is fatally injured).  Unless Hazard Recognition would have protected the employee (e.g., walking under barricade tape into work area and something drops onto the employee).	No TA required.  Then, Yes TA required
To an employee involved in the work which causes the accident (e.g., setting up or assisting with the setup of a crane).	Yes, TA required.
Because of a personal medical condition.	No TA required as long as the work didn't in any way contribute to the fatality.
To a Contract company having different Divisions/Sub Companies with different tax ID numbers.	No TA required to the entire Contract company. The TA is only required to the Contractors associated tax ID number that shows the fatality.
To a company that doesn't meet the criteria of being a contractor (e.g., Airgas).	No TA required, Airgas is a Supplier not a Contractor.

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ANACORTES REFINERY	Contractor Safety Program	Page 33 of 36

## 23.0 APPENDIX H – CONTRACTOR FIELD VERIFICATION AUDIT CHECKLIST (RSP-1306 CKLST)

The current form can be found at link below:

[http://cbqrs401.mgroupnet.com/Red/Copyout.aspx?lib\\_no=32&doc\\_no=2443&rev\\_no=0](http://cbqrs401.mgroupnet.com/Red/Copyout.aspx?lib_no=32&doc_no=2443&rev_no=0)

Yes - Contractor is in compliance No - Contractor is out of compliance NA - Not Mandated for the job			<b>Marathon Petroleum Corporation</b> Contractor Field Verification Audit Checklist (RSP-1306-CKLST)					
Date:			Permit #:			Permit Type:		
Time:			Supervisor:					
Contractor:			MPC Coordinator:					
Location:			Work Description:					
Auditor:								
<b>Personal Protective Equipment</b>			<b>Hot Work</b>			<b>General</b>		
Yes	No	NA	Yes	No	NA	Yes	No	NA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HARDHAT			FIRE WATCH IN ATTENDANCE			LADDERS INSPECTED & IN GOOD CONDITION		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
EYE PROTECTION			FIRE EXTINGUISHERS			SCAFFOLDS TAGGED AND UPDATED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
FALL PROTECTION (if required)			AIR HORN & VEST			EXT. CORDS & POWER TOOLS IN GOOD CONDITION		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
FACE SHIELD (if required)			NAME I.D. BACK OF PERMIT			PROPERLY BANNED & COLORED HOSES USED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
HEARING PROTECTION			COMMUNICATION PROCEDURE			GFCIs BEING USED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
RESPIRATOR (if required)			UPDATED GAS TESTING			LOCKBOX IN PLACE		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
GLOVES (if required)			<b>Confined Space</b>			OWNING DEPARTMENT LOCK IN PLACE		
<input type="checkbox"/>			Yes No NA			<input type="checkbox"/>		
FIRE RETARDANT CLOTHING			<input type="checkbox"/>			PERSONAL LOCKS WITH NAMES IN USE		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
SAFETY SHOES			ATTENDANT PRESENT			BLINDS IN PLACE		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
H2S MONITOR			COMMUNICATION PROCEDURE			PROPER LIGHTING IS BEING USED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
WELDING PPE (if required)			RADIO CHECK			BARRICADES ARE TAGGED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
GOGGLES (if required)			RESCUE PERSONNEL			PROPER HAZARD SIGNS ARE POSTED		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
CHEMICAL CLOTHING			UPDATE GAS TESTING			GENERAL HOUSEKEEPING		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
OTHER:			AIRMOWER IN PLACE			HAZCOM - CONTAINERS PROPERLY ID		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
			EXCAVATION SHIFT			MOTORIZED EQUIPMENT IN GOOD CONDITION		
<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>		
<b>Work Permits</b>			<b>Based on Interviews with Contractors and Supervisors:</b>					
Yes	No	NA	Yes	No	NA			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ARE CONTRACTORS UP TO DATE ON THEIR TRAINING?		
<input type="checkbox"/>			<input type="checkbox"/>			ARE CONTRACTORS KNOWLEDGEABLE ON POTENTIAL HAZARDS IN THEIR WORK AREA?		
WORK PERMIT FOLLOWED			<input type="checkbox"/>			ARE CONTRACTORS KNOWLEDGEABLE ON THE EMERGENCY RESPONSE PLAN?		
<input type="checkbox"/>			<input type="checkbox"/>			ARE CONTRACTORS KNOWLEDGEABLE ON THE NEED TO FOLLOW REFINERY WORK PRACTICES?		
JOINING JOBSITE VISIT PERFORMED			<input type="checkbox"/>			ARE CONTRACTORS KNOWLEDGEABLE ON NEED TO IMMEDIATELY REPORT ANY WORK PLACE INJURY?		
<input type="checkbox"/>			<input type="checkbox"/>			ARE CONTRACTORS KNOWLEDGEABLE ON NEED TO INFORM THE REFINERY OF UNIQUE HAZARDS THAT THEIR WORK MAY		
PROCESS HAZARD OVERVIEW			<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>					
ENERGY ISOLATION			<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>					
PROPER PERMIT EXTENSION			<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>					
PROPER SIGNATURES			<input type="checkbox"/>					
<input type="checkbox"/>			<input type="checkbox"/>					
<b>Compliance</b>								
Yes	No	NA						
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IS CONTRACTOR WORKING UNDER A TEMPORARY APPROVAL RESULTING FROM FAILURE TO MEET COMMON VALUATION CRITERIA?					
<input type="checkbox"/>			IS CONTRACTOR MITIGATION PLAN BEING FOLLOWED, WHERE APPLICABLE?					
<input type="checkbox"/>								
<b>Comments</b>								

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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 34 of 36</b>

## 24.0 APPENDIX I – BADGING AND IDENTIFICATION

### 24.1 Safety Sensitive Service Badge



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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 35 of 36</b>

## 25.0 APPENDIX J – ANACORTES WORKCODE MATRIX SAMPLE

Anacortes Workcode Matrix can be located by following the link below:

[2023 Anacortes Workcode Matrix.xlsx \(marathonrefinerycontractor.com\)](https://marathonrefinerycontractor.com/2023%20Anacortes%20Workcode%20Matrix.xlsx)

<p>All Risk Levels are based on the Marathon Corporate Contractor Work Code Matrix and includes the Anacortes Site Requirements. Guests or contractors that do not fall into the state or local requirements may be considered exempt and/or require escorting.</p> <p>**Use discretion reviewing this matrix as project or site specific measures and conditions may change the risk level and any variance (corporate or site) may be required to mitigate risk.</p>		<b>Corporate Requirement: ISN</b>		<b>Washington State Requirement: Advanced High Hazard Training</b>			<b>Marathon Anacortes: Contractor Site Requirements</b>	
		ISN Prequalification NOT-Required	ISN Prequalification Required	Refinery Safety Overview	Craft Training Required	Petroleum History Required	Security Administered Drive in Orientation	Site Specific Orientation/Marathon Safety Essentials Required
		Non-Safety Sensitive	Safety Sensitive	8 hour class	8 hour class	4 hour class	15 Min. CBT	2 hour CBT/Onsite Speech & Badging
<b>#</b>	<b>Work Type</b>							
<b>1 Misc. Service Providers</b>	Administrative Personnel (No field activities) Visitors only	X					X	
	Administrative Personnel (Field activities e.g. process areas, refinery units) - Required to get an annual badge		X					X
	Business recovery services i.e. mobile workspace	X					X	
	Catering / Food Services (outside the restricted area)	X					X	
	Janitorial Services (outside the restricted area)	X					X	
	Janitorial Services (inside the restricted area)		X					X
	Municipal Waste	X					X	
	Pest Control	X					X	
	Postal (e.g. FedEx, UPS, DHL, USPS, etc. <150 lbs.)	X					X	
	Software developers	X					X	
	Training content development and delivery.	X					X	
	Vendors (i.e. water, vending machine, etc.)	X					X	
<b>2</b>	<b>Aerial Services – Drone/Helicopter</b>		X	X	X	X		X
<b>3</b>	<b>Boiler Systems - Installation / Maintenance / Repair</b>		X	X	X	X		X
<b>4</b>	<b>Canopies/Awnings - Installation / Maintenance / Repair</b>		X					X
<b>5</b>	<b>Cathodic Protection - Installation / Maintenance / Repair</b>		X	X	X	X		X
<b>6</b>	<b>Civil Work</b>							
<b>6.1</b>	<b>Asphalt Removal/Paving/Patching</b>		X	X	X	X		X
	<b>Ground Penetration Tester/Boiler Ops</b>							

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<b>ANACORTES REFINERY</b>	<b>Contractor Safety Program</b>	<b>Page 36 of 36</b>

## 26.0 APPENDIX K – MARATHON HIGH HAZARD FACILITY TRAINING (HHFT) EXCEPTION FORM SAMPLE

The current electronic exemption form can be found at the link below.

[Marathon High Hazard Facility Training \(HHFT\) Exemption Request Form](#)



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