



# Safety documentation

## Four critical components to help marketers manage field-gathered data

Everybody knows safety is a critical component of every propane marketer's business plan.

However, a majority of marketers rely on outdated methods for documentation, storage and retrieval of important information, such as safety and cathodic protection inspections. Documentation, storage and retrieval of any safety or compliance-related information is important to safeguard the company from a legal perspective, but that is only half of what is needed.

The other critical components relate to how that field-gathered data is used and managed. And, an often-missing process for most marketers relates to the inspection of the quality of that field-generated data. With a paper-driven inspection and nonelectronic filing, it is virtually impossible to cost-effectively use that data to produce management reports or to implement a quality-control process.

Therefore, the four critical components of a best-practice safety documentation program are:

1. A cost-effective review process to assure the inspections are being accurately documented
2. An electronic filing system that produces important management reports relating to gas checks, timing of cathodic protection, duty to warn, tank asset tracking, corrugated stainless steel tubing (CSST) piping corrective action, regulator date codes and leak checks
3. An electronic system that identifies incorrectly documented inspections from the bulk of all inspections
4. Incorporating these functions around a management process that ties



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directly back to targeted training for personnel gathering the field data

Most marketers have heard the phrase, "If it's not documented, it didn't happen." This, of course, is true, but inspections that are simply documented fall into the same category. This is why a best-practice safety documentation program actually begins with the ability to accurately identify incorrect data, fix the documentation and provide a feedback loop to retrain the individuals making the mistakes.

To implement a program that incorporates these four components may seem like a long road, potholed with complexity. However, there are turnkey programs that you can implement to move your documentation process to state of the art. The right program can be inexpensive and surprisingly not time consuming for management.

### Easy step toward improvement

Consider a review and audit of your current business processes as they relate to safety documentation. This can be done in a couple of hours by following these simple steps.

First, review your ability to actually

retrieve important information. Can you, for example, identify all of your delivery accounts that require cathodic protection inspections and when those inspections need to occur? Similarly, can you identify your customers in need of regulator replacements (past due) or the ones that need replacement in the next 12 months, or CSST corrective action?

Next, have a knowledgeable staff member review 25 recent leak checks and gas checks. Review the documentation as if you needed it for a court case. Is the writing legible, are hold times correct and are the right inspections being conducted based on the reason for the inspection, such as a run-out?

Now imagine comparing your findings to a system that can provide you with all of the data, information and re-

**"If you don't know where you are going, you might not get there." – Yogi Berra**

ports required to have a state-of-the-art documentation and corrective-action program. Imagine further that you can view a dashboard that outlines every inspection documented incorrectly by the tech that did the inspection.

These are the critical components of a safety documentation program that works for you, your underwriter and, most importantly, your customers. **LPG**

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