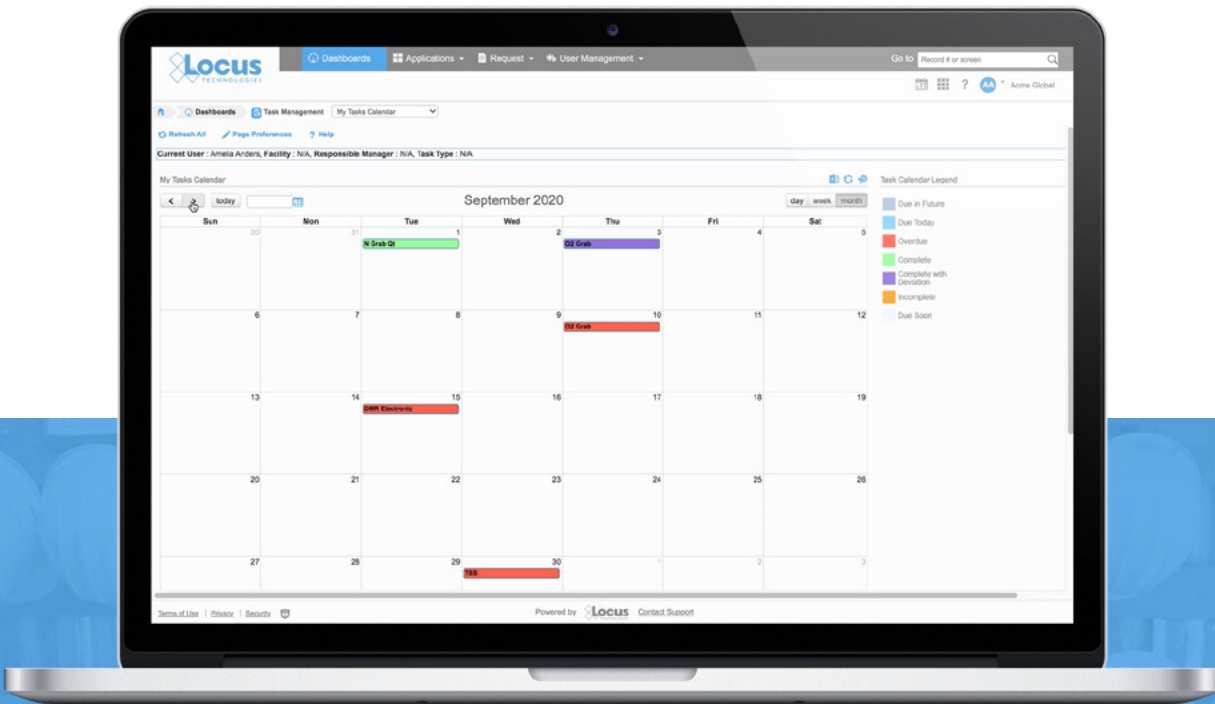# EHS Compliance Calendar Best Practices

EHS compliance is a continuous challenge. Often, there are thousands of obligations spanning many years with varying frequencies. Many customers come to Locus to replace Excel spreadsheets, which are difficult to manage, and are equally difficult to track in email calendars.

Locus has both "off the shelf" and configurable solutions to handle the complexities of tracking compliance obligations. In working with customers, we have put together a working list of best practices and features to request when moving from email calendars/Excel to a more robust compliance solution.

Pick a solution that can handle "non-standard" recurrence frequencies

With so many variations in frequency of tasks, and the reality that obligations can get delayed and rescheduled, it's important to have a flexible tasking engine to accommodate unusual repeat cycles and easily handle changes that occur. For example, some obligations are once a year (easy) and some are 364 days from the completion of a prior task regardless of date (more difficult). Locus' off-the-shelf flexible solution includes over a dozen recurrence types, and furthermore the ability to sequence tasks (I.e., completion of one task triggers a second, which can trigger subsequent tasks). Locus' new Workflow and Group task types enable users to schedule and reassign previously configured tasks to users with a new overall due date.

Be selective about what goes into the system

For every task in a Compliance Calendar, someone must enter it, document the responsible parties and recurring frequencies and complete each instance of the task. The completion of the task is the permanent record of compliance. Consider the number of obligations and locations/divisions/departments/facilities etc. before creating daily and weekly tasks, especially if they are routine, have little consequence if late, and are well handled. Alternatively, create Groups or WorkOrders of frequently-scheduled tasks so they can be tracked on a granular level and be completed easily with minimal fuss.

Set up tasks knowing there will be changes in responsible parties over time

Change is inevitable, but your Compliance Calendar, which is more than happy to keep tasks assigned to people that retired five years ago, cannot read your mind. When setting up responsible parties you can approach changes in two standard ways:

1. Assign tasks to a user group (e.g., Plant Supervisor) or Job Function instead of a named individual

2. Assign tasks to a named individual and use a bulk update program in the software to change the responsible party, as needed. Batch updates do not update previously completed tasks, therefore preserving your compliance history.

Notifications are great, until they aren't

Reminders are great in moderation. With too many reminders, people tend ignore them until it's too late. Use notifications judiciously and at appropriate intervals for maximum effectiveness. For example, most people don't need reminders for routine weekly or monthly tasks, but do appreciate reminders for annual reports or submittals sent a number of days (or weeks) before the due date to ensure the work is scheduled and completed. Look for tools that replace notifications, such as well-designed summary dashboards and compliance calendars. Also look for tools to easily manage notifications so you don't have to search for every notification in order to make adjustments. The same best practice noted above applies to notifications -send reminders to groups or individuals, but know change will happen and ensure there are easy tools to make changes to notifications.

If you build it, they will come…but not when you planned

Most customers have clear visions of how fast the Compliance Calendar will be up and running and adopted by all the users. Sometimes those visions are accurate but many times they are not, especially for larger teams. You can expect that when you get up and running with your data fully loaded, you will find yourself with many overdue tasks that were completed outside the system, before your Go Live occurred. By ensuring your system has the bulk update tools to quickly close out old completed tasks with appropriate documentation, such as "completed prior to system go live", you will be able to quickly get your system up to date.

Track as much or as little as you need

Typically, compliance systems have a lot of features in order to provide a comprehensive tracking system from obligation document > requirements > tasks. Some companies want this level of detail and documentation on each key compliance obligation. Other companies want tasks and only tasks with obligations/permits management in other tools. There is no single correct approach: just ensure your Compliance Calendar has the flexibility to manage your obligations how you want to manage them.

Ready to get started?

Take control of your permits, requirements, and compliance calendar in one streamlined solution. With Locus Compliance Management, everything is easily tracked, monitored, and managed. Contact us if you'd like to see a demo of Locus' EHS compliance management solution.

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