




Lubricants: Customer Site Standards

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Reviewed By	Daryl Yeates	Approver	Richard Garnett

Certas Energy Lubricants – Site Standards at Commercial delivery customers

Certas Energy Lubricants (CEL) and all third parties working on behalf of Certas Energy and CEL will always look to carry out customer deliveries with the expectation that minimum site standards are in place at the customer site in order to;

- Minimise the risk of health, safety and environmental incidents occurring as a result of Certas Energy Lubricants delivery operations
- Protect the customer and their employees, visitors and contractors
- Protect the customers property
- Protect our drivers

The safety of the customer, the environment and our drivers is our main priority. When a new customer goes through the onboarding process with CEL Customer Services they will be asked a series of question to establish the current site standards in order to identify how they may impact a safe delivery. Working with the customer, CEL customer services will ensure that:

- The customer site meets our expected safe delivery standards
- Any areas of concern are reviewed before they will complete the delivery order
- The customer is advised of any improvement to their facilities to ensure safe delivery
- The site information is relayed to our driver before going to site

When our driver arrives at a new customer site and before setting up to start a delivery, he will assess the site and review the information provided by the customer to CEL customer services in order to;

- Confirm that the customer site meets those safe delivery standards
- Confirm that the site is safe before they will start the delivery
- Inform the customer of any further improvements required to ensure safe delivery
- Inform their CEL line manager of any improvement to the customer facilities required to ensure safe delivery

For existing customers, we will continually review their site to ensure it continues to meet CEL safe delivery standards both through our customer services advisors online/by phone and our drivers at the customer site prior to starting a scheduled delivery.

We may also ask permission for our senior managers and/or HSE BP`s to visit a customer site to ensure that the site delivery standards and the CEL delivery process are both aligned to ensure both a safe and compliant delivery.

This will also ensure that both the customer and CEL are compliant in our shared duty and responsibility for the Health & Safety of all persons as per the Health & Safety at Work Act 1974.

CEL Customer Services Check List

Customers have a legal duty to provide safe access and egress both for vehicles and people to enable our employees to carry out their tasks safely.

Certas Energy customer services will endeavour to obtain general information with regard to the customer's arrangements for safe delivery by asking about;

- Any vehicle restrictions
- The driver reporting procedure
- The site rules
- The competent site person
- Pedestrian safety
- The vehicle reversing arrangements
- The access/egress to the tank/delivery point
- The delivery point & Tank
- The exit from site

CEL Drivers will stop and review the site upon arrival with regard to confirming the customer's arrangements for safe delivery by assessing and confirming;

- A safe and clear approach to site
- The site reporting procedure
- An understanding of the site rules
- The vehicle reversing arrangements
- Any vehicle restrictions
- Pedestrian safety
- A safe and secure parking position
- The sites designated competent person
- The access/egress to the tank/delivery point
- The customer instructions at the delivery point.
- The customer labelling at the delivery point.
- A safe and compliant delivery point
- A safe and compliant tank
- A safe and compliant delivery procedure
- The exit from site

CEL General Site Safety Standards – Commercial Delivery

For the purposes of oil delivery a “commercial customer” is any business or concern including commercial, industrial, agricultural, construction sites and military establishments.

The commercial customer has a legal duty to provide and maintain their site, site infrastructure, tanks, pipes and delivery systems in a safe and legally compliant condition.

CEL General Site Safety Standards – Site Competent Person & Responsibility

For commercial deliveries the customer may authorise a designated “competent person” who has sufficient knowledge, training and experience of the delivery procedures at their premises.

The customer “competent person” is one who has sufficient knowledge, training and experience to know the set-up, condition, capacity and ullage of their oil storage tank(s).

For example a site manager would be deemed competent. A secretary or office employee that do not know about the tank set-up or ullage etc. would not be judged as competent. If the driver is in any doubt about the customer’s competence to sign the ullage box, they need to seek advice from their Line Manager and not make the delivery until this has been confirmed.

The CEL driver needs to use their professional judgement to assess if the customer is a “competent person”.

The competent person must sign the delivery checklist with the driver to confirm they are delivering the correct product and volume to the correct customer, location and tank. They will also confirm that they are delivering from the correct pot/IBC to the correct tank/fill point and that the receiving tank is vented and structurally sound with sufficient ullage to receive the approved delivery volume on the order.

Where the driver cannot check the receiving tank and equipment, the “competent person” must be available to confirm the suitability of the tank and equipment and that there is sufficient ullage in their tank to accept the delivery quantity.

The customer “competent person” can also sign if there is no overfill alarm and/or gauge at the remote fill point for an offset or blind fill but it is always preferable that a tank is fitted with a means of determining ullage. However providing the customer “competent person” signs the ullage box prior to the delivery, the delivery can be made.

If the customer “competent person” signs the delivery checklist to confirm ullage and tank condition, and providing it was shown that delivery driver had followed the correct delivery procedure, any leak, overfill or spillage would be deemed to be the customer’s responsibility.

The customer must provide instructions and labelling for the driver at the delivery point.

A copy of the Lubricants Pre-delivery site checklist is on the next page

LUBRICANTS PRE-DELIVERY CHECKLIST

This document MUST be completed and signed by the driver and the authorised site representative before delivery can commence.

<u>Customer Name</u>	
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Ticket Number	Product Description	Product Code	Qty (Ltrs)	Tank Identification	Comments

TO BE COMPLETED BY BOTH DRIVER AND AUTHORISED SITE REPRESENTATIVE

<u>PRE-DELIVERY CHECK</u>	<u>DRIVER</u>	<u>SITE REP.</u>
THE SITE REPRESENTATIVE HAS THE AUTHORITY TO SIGN FOR THE DELIVERY ON BEHALF OF THE SITE		
SITE REPRESENTATIVE CONFIRMS THIS IS THE CORRECT LOCATION AND DELIVERY DETAILS ABOVE ARE CORRECT		
SITE REPRESENTATIVE HAS CONFIRMED THE POSITION OF THE TANK(S) FOR DELIVERY		
VEHICLE IS PARKED IN A SAFE & SECURE PLACE THAT IS ACCESSIBLE TO THE DELIVERY POINT		
THERE IS A SAFE ROUTE FOR THE DELIVERY HOSE FROM THE VEHICLE TO THE DELIVERY POINT		
SITE REPRESENTATIVE CONFIRMS THERE IS ENOUGH ULLAGE IN RECEIVING TANK(S) TO SAFELY DELIVERY PRODUCTS/LTRS ABOVE		
SITE REPRESENTATIVE CONFIRMS TANK(S) ARE STRUCTURALLY SOUND AND VENTED		
SITE REPRESENTATIVE HAS CONFIRMED HOSE IS CONNECTED TO THE CORRECT TANK/OFF-SET FILL POINT BEFORE DELIVERY OF PRODUCT		
SITE REPRESENTATIVE HAS CONFIRMED THE CORRECT POT/IBC/IBC's HAVE BEEN SELECTED FOR DELIVERY		
THE CUSTOMER HAS EXPLAINED ON SITE PROCEDURES AND REQUIREMENTS IN THE EVENT OF AN EMERGENCY.		

DRIVER NAME: _____ **SIGNED:** _____
DATE: / / .

SITE REPRESENTATIVE: _____ **SIGNED:** _____
DATE: / / .

DRIVER SIG./
SITE REP SIG.

DRIVER & SITE REPRESENTATIVE CONFIRM POST DELIVERY CHECKS CARRIED OUT, SITE FREE FROM OIL SPILLS AND VEHICLE EQUIPMENT. TANK/OFFSET FILL POINT CAPS AND LIDS REPLACED CORRECTLY.		
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CEL General Site Safety Standards – Access and Egress

The CEL vehicle should have safe and unobstructed access to the site entrance, the site delivery point and a safe and designated pedestrian free parking space.

The customer should have the capability to ensure the delivery vehicle and all ancillary equipment can be safely cordoned off and isolated from other site activity, vehicles and pedestrians during the delivery process.

The CEL vehicle should have safe and unobstructed egress back to the site entrance/exit.

CEL General Site Safety Standards – The Tank

CEL Drivers must be able to check, the receiving tank and equipment is suitable for the delivery to be made. Our drivers will check key areas surrounding the customer tank to ensure that we have safe access to the tank and delivery point and that they are in good working condition.

- The tank must meet the UK Storage Regulations for Oil
- The area around the tank and fill point should be clean and easily accessible
- The area around the tank and fill point should be clear of slip, trip and fall hazards
- The tank should be located on good solid and even ground
- The tank and fill point must be in a good undamaged condition
- The fill point should be easily accessible and any covers/doors safe to open and secure
- The base of any plastic tank should be fully supported
- We must know if the tanks are interconnected or at different levels
- We must be able to deliver safely if the tank is at height
- The tank and/or fill point should be clearly labelled with product grade and tank number
- The tank should have a working gauge or means to confirm tank ullage safely
- The tank should have a working overfill alarm to warn of tank high level
- If no overfill alarm is fitted, we must know if there is a high risk of overfill
- We must know what type of fill point the tank has – open, camlock, thread
- There must be suitable spill medium readily available to capture any spills
- There must be a safe route for the delivery hose to be laid where it will not be damaged

It is always preferable that tank is fitted with a means of determining ullage. However providing the delivery driver can clearly see the tank and customer competent person signs the ullage box prior to the delivery, the delivery can be made. The CEL Driver and customer must ensure there is sufficient ullage in the tank prior to commencing delivery. Ullage checks can be made by;

- tank gauge
- physical dipping of tank
- remote sensor or similar device

The CEL Driver may consider delivery of initial test quantities to determine tank gauge operation, and if in any doubt, delivery may be aborted.

Tanks are not to be filled beyond their marked Safe Working Capacity (SWP) or 95% of the tank capacity if SWP is not marked.

The tank's base should fully support the weight of the tank and should not be placed on an uneven surface as this could cause the tank to weaken.

The Oil Tank Storage Regulations guidance indicates that above ground plastic tanks should be replaced at 20 years old. Where observation of the site indicates that tanks are nearing the end of their lifetime, customers should be aware and consider replacing their tank. Plastic Tanks must;

- Be fully supported
- Be securely mounted
- Show no evidence of tank supports "biting" into the tank
- Show no evidence of distortion, bowing
- Show no evidence of cracking
- Show no evidence of any repairs
- Not overhang from a ledge or base

CEL drivers must have safe and easy access to the tank and delivery point. If our drivers are unable to work safely then they may have to report this to their line manager and abort the delivery.

If the driver has any concerns about delivering your order, they will recommend improvements.

CEL General Site Safety Standards – Offset Fill

An “Offset Fill” is defined as a pipe/valve arrangement which is connected to the tank to enable filling from a remote point and/or if the tank is at height to enable filling from ground level.

The customer must provide instructions and labelling for the driver at the offset delivery point.

- Offset fill point must be permanently connected to the receiving tank
- Customer should provide instructions and labelling for the driver at the delivery point
- There must be a suitable means of determining ullage before & during delivery (tank gauge or similar)
- Overfill alarms* should be fitted and working
- Drivers must confirm by means of testing that any alarms are live and working prior to commencing delivery

*Where an overfill alarm is not fitted at a commercial site the “competent person” must confirm there is sufficient ullage for the delivery by signing the “ullage box” on the delivery ticket and the pre-delivery check-list to allow the delivery to be made.

CEL General Site Safety Standards – Blind Fill

A “Blind Fill” is defined as a delivery where the tank cannot be seen from the delivery point.

A “Blind fill” is only permitted where driver has a means for determining ullage, monitoring tank filling (i.e. tank gauge, physical dipping of tank, remote sensor or similar device) and an overspill alarm* is fitted.

The customer must provide instructions and labelling for the driver at the delivery point;

- Blind fill point must be permanently connected to the receiving tank
- Customer should provide instructions and labelling for the driver at the delivery point
- There must be a suitable means of determining ullage before & during delivery (tank gauge or similar)
- Overfill alarms* should be fitted and working
- Drivers must confirm by means of testing that any alarms are live and working prior to commencing delivery

*Where an overfill alarm is not fitted at a commercial site the “competent person” must confirm there is sufficient ullage for the delivery by signing the “ullage box” on the delivery ticket and the pre-delivery check-list to allow the delivery to be made.

CEL General Site Safety Standards – Working at Height

Under the Working at Height Regulations there is a 'hierarchy of control' which must be applied to all working at height which determines the safest available method of making a delivery. We must assess the risk and the safest method of delivery before considering the use of ladders.

Ladder use is not the first option considered if the tank is at height.

1. CEL follow the Hierarchy of working at height, can the delivery be made from ground level?

- Can the tank be repositioned at ground level - a tank situated at ground level can often be safely filled via the top inlet point with the driver standing at ground level.
- Could tank be fitted with an offset fill and gauge - a tank fitted with a low level filling point (offset fill) enables delivery from ground level.
- A tank fitted with a sight glass or gauge which can be read from ground level avoids the driver having to climb up to check how much product is left in the tank.

2. If this is not possible, can the delivery be made safely at height by a fixed ladder/platform?

- Is a safe means of access provided to the tank – stairs, fixed ladder with working platform and guardrails to prevent our driver falling from height
- Drivers can use a suitable permanently fixed ladder installed at the delivery point (does not mean tied off) providing it has the necessary safety precautions
- 3 metres is the maximum height the driver is permitted to climb on a suitable fixed ladder and it must have safety hoops fitted if higher than 2m.
- If access to top of the tank is required, a suitable working platform with twin guard rails and/or fall protection must be fitted.

3. If this is not possible, can the delivery be made safely at height by a portable ladder?

- Drivers must first assess the delivery site conditions to ensure it is suitable and safe for ladder use
- Drivers can use their approved vehicle ladder only if trained and competent to do so and no other safer delivery method is available
- Under no circumstances can drivers use a customer's ladder
- This ladder must be used use is in accordance with our existing Working at Height risk assessment and standard operating procedure.
- Drivers cannot climb any ladder in excess of 3m height from ground level.
- The ladder must only be used for short durations of no longer than 30 minutes
- Driver must keep their waist within the confines of the ladder and are not permitted to climb off the ladder to go over walls, onto platforms or top of tanks etc.

Assisted Deliveries

Drivers are not permitted to allow the customer to physically assist with the delivery or where the customer may be placing themselves at risk (e.g. unsafe working at height). *The only exception to this rule is marine deliveries.*

Customers can assist a driver delivery under instruction by visually monitoring the delivery.

Where a suitable alternative is not available, it is permissible for a fully trained and approved customer at a specific site to assist with a delivery following a site risk assessment. (e.g. tank is situated in restricted area). Such deliveries will be notified to driver via the delivery instructions.

Delivery Instructions

Any special delivery requirements/instructions will be notified to drivers via the delivery ticket.

The driver will be instructed to follow any specific delivery instructions issued.

Underground Storage Tanks

The Environment Agency has identified that underground oil storage tanks may cause a large percentage of groundwater pollution incidents. This may be caused by spillage/leakage due to insufficient ullage or tank failure due to condition and/or pressurisation of underground systems.

Drivers must check ullage, check tank is suitably vented and fill on slow speed.

Barrel Filling / Intermediate Bulk Containers (IBCs)

Filling barrels at customer sites is not permitted.

It is permissible to fill IBCs providing they have the outlet valve closed and locked and are;

- In a good condition
- Properly supported
- At ground level or suitably secured
- In a sufficiently vented area
- Contained in suitable bund/building

Marine Deliveries

Due to the risks of injury to driver gaining safe access and the environmental impact of spillages into water, all Marine deliveries must be undertaken with our existing Marine Delivery risk assessment and standard operating procedure.

Drivers are permitted to allow the customer to physically assist with a marine delivery.

Customer Site Improvement (CSI) Reporting

Where delivery is made to a site that fails to meet these standards or has other safety concerns, defects or environmental issues, the driver will complete a Customer Site Improvement Report.

The depot manager will complete a CSI report on Well Worker and follow any remedial actions through to completion.

This report is followed up with the customer to recommend that suitable modifications are made to improve the delivery site within a stipulated timescale.

During this time every effort is made to deliver to the customer in a safe manner.

Where a site is deemed as unsafe to make a delivery, the customer is notified and CEL will provide recommendations given on what action is required to allow delivery to be safely made. In this situation, CEL will not contract a third party to carry out a delivery on their behalf.

CEL drivers will be fully supported by CEL senior management in their assessment of a customer's site regards safe delivery.

Under no circumstances will we allow drivers to be pressurised, threatened or coerced into making a delivery to an unsafe location.

Where a site is deemed unsafe to make a delivery, the customer has been notified and the recommended remedial actions have not been undertaken in the agreed timescale, CEL will not deliver to that customer until the site is made safe.

Any such actions will be reported to the directors & senior managers of the customer.

Version Control

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1	D. Yeates	September 2022	Document creation	September 2025