MWH TREATMENT

System Management Toolbox Talk
SYTT01-03

Quality Principles - Records

Why Keep Records?

The most common reasons for keeping records are:

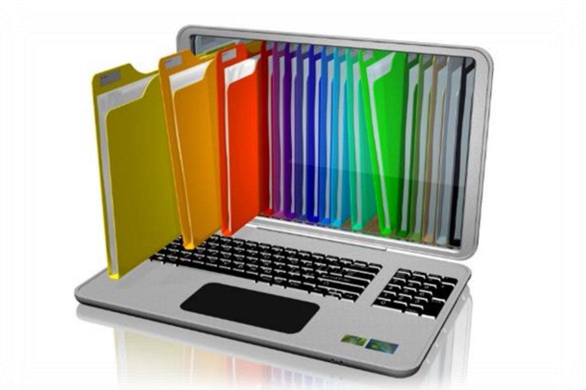
- Accurately capture and store information / **evidence**
- To assist with any **litigation processes**
- To be able to **retrieve key information** as and when required
- To trace back to the source of NCO's / Issues
- To monitor **continual improvement**
- To **analyze trends** and support reports

Types of Records

Management Records:	Project Records:
▪ Audit / Inspection Report	▪ Briefing Records
▪ Induction & Training Records	▪ Calibration Records
▪ Occupational Health Records	▪ Product Non-Conformances
	▪ Inspection and Test Certificates
	▪ Management Plans

How Should Records be Kept?

- Records should be named **logically** and **uniquely**, so that they are **easy to retrieve** for all personnel.
- Keep records in a **secure location** that the relevant personnel have access to, for example:
  - ❖ Project Folder on a Network Drive
  - ❖ IFS
  - ❖ Sharepoint
  - ❖ Project email box (**NOTE:** Do not use personal email inboxes as these cannot be accessed by others)



- Paper records should be kept in a secure area (e.g. filing cabinet – fire / flood proof and locked).

  *Note: Where possible, create an **electronic back-up** of any paper records.*

- Archive, store and dispose of records as per FSPR01 Archiving of project Information and follow the standard paper / electronic folder structures. (For details on how long records should be kept for, see SYPR01 SHEQ System Documentation and Records).

Meeting Minutes

<u>Meeting minutes should be taken during a meeting to:</u>

- ▪ Accurately **record all actions** raised
- ▪ To identify **responsibilities** and close out **timescales** for actions
- ▪ To remind attendees of the contents of the meeting and inform those **unable to attend**

At the beginning of a meeting, designate one person to take the minutes using the template form BPFR04-01 Meeting Minutes Template or BPFR04-02 Action Tracker. Throughout the meeting ensure that any key discussions and actions are captured with a responsible person and target date assigned to each action. Store the recorded minutes on a storage platform that all required parties can access.

<u>Closing out meeting actions:</u>

During meetings, address any actions raised from previous meeting minutes and update the minutes to record the progress and close-out of actions.

"Log Everything"

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REGISTER OF ATTENDEES

Delivered By: **(name / job title)**	
Project No.:	
Project Name:	

Name (print)	**Sign**	**Date**