

# NEW YEAR COMPLIANCE CHECKLIST

A practical guide for engineering teams who want a clean start to the year.

## CALIBRATION STATUS AND TRACEABILITY

Are all critical process instruments calibrated within defined intervals, with records traceable to recognised standards (UKAS-accredited laboratories or national standards)?

## INSTRUMENT INSTALLATION COMPLIANCE

Have all field instruments been installed in accordance with manufacturer requirements, applicable codes of practice, and site engineering standards (orientation, impulse lines, mounting)?

## DOCUMENTATION ACCURACY & CURRENCY

Do loop diagrams, data sheets, hook-up drawings, and instrument indexes accurately reflect the current as-installed condition?

## PROOF TESTING AND FUNCTIONAL VERIFICATION

Are safety, control, and monitoring instruments periodically proof-tested and functionally verified under representative operating conditions, with results formally documented?

## ENVIRONMENTAL AND HAZARDOUS AREA SUITABILITY

Are instruments correctly specified, certified, and labelled for the installed environment (temperature, vibration, corrosion, ingress protection, hazardous area classification)?

## SIGNAL INTEGRITY AND LOOP HEALTH

Have instrument loops been recently checked for grounding issues, electrical noise, drift, impulse line blockage, or response delay that could affect measurement reliability?

## ALARM AND TRIP PERFORMANCE VALIDATION

Are alarms, interlocks, and trips configured, tested, and recorded to meet site safety, operational, and regulatory requirements?

## MAINTENANCE ACCESSIBILITY AND PHYSICAL CONDITION

Are instruments safely accessible, clearly tagged, and in a serviceable condition, free from temporary repairs, corrosion, or mechanical damage?

## MANAGEMENT OF CHANGE AND COMPLIANCE DRIFT

Have recent process changes, shutdowns, or modifications been reviewed to confirm that instrumentation remains compliant and fit for purpose?

## AUDIT AND REGULATORY READINESS

Could your site demonstrate full instrumentation compliance at short notice in the event of a regulatory inspection, safety audit, or insurer review?