CASE STUDY

Configurability and ease-of-use cited as determining factors for company-wide success.

Solution
EHS Platform

Industry
Utility

Size
120 Employees

Location
Arizona, U.S.

Utility co-op improves workflows, streamlines equipment maintenance, and improves safety with the HSI EHS Platform.

Pinal County Electrical District No. 3 (ED3), a utility in Maricopa, Arizona, includes two organizations – an electrical provider and the Maricopa Stanfield Irrigation and Drainage District for agricultural irrigation. When Joshua Reilly joined ED3 as its Safety Specialist and Field Asset Inspector, he noticed the utility co-op didn't have any consistency in the way it captured safety-related data, leaving them vulnerable to mistakes.

Challenge

At ED3, each department had their own way of reporting inspections, incidents, near misses, and observations in the field. Some departments were using paper forms, while others took freehand notes. No matter how the information was documented, it had to be transcribed into spreadsheets at the end of the day, a time-consuming process that introduced another opportunity for data entry errors. In addition, transcribing all those notes caused delays in reporting safety incidents and requesting equipment maintenance.

Because each department had unique needs, ED3 needed a robust, completely customizable system.

To get buy-in, the system needed to be easy-to-use for everyone, from field technicians and inspectors to upper-level managers. Reilly knew streamlining safety and maintenance processes would provide the added benefit of increasing efficiency. After an exhaustive search, ED3 chose HSI's EHS Platform due to its configurability and ease-of-use for even the least tech savvy of their employees.

Solution

After reviewing available Platforms, ED3 was impressed with the range and scalability of the HSI EHS Platform. It records safety incidents and observations for employees, while tracking inspections, maintenance requests, work orders, and job completion for equipment ranging from vehicles and lifts to substations and power poles. According to Reilly, "The scalability and robustness of the system convinced us the HSI EHS Platform was the best to meet our unique needs."

Why It Matters

Comprehensive data analysis and real-time tracking improves safety

Centralized data tracking improves repair time and customer satisfaction

Checklists and workflows reduce employee hours and maintenance downtime

Two features were key in ED3's final decision: the ability to customize the system internally and accessibility for different users.

The ED3 team has complete control over how they use the system to maximize efficiency. When they discover a new need, they can easily create a new checklist or workflow tool. If they hit a stumbling block, they can reach out to their HSI implementation manager who is more than willing to help solve problems and offer recommendations based on best practices.

"My implementation manager told me **with the HSI EHS Platform the only thing that limits us is our imagination** and that's held true."

— Joshua Reilly,
Safety Specialist and Field Asset Inspector

Safety and OSHA Compliance

The HSI EHS Platform is integral to maintaining a safe workforce. If an employee sees a coworker using equipment in an unsafe manner, they can anonymously submit an observation within the HSI EHS Platform. When a safety-related incident occurs, that information is also uploaded to the system, and notifications are sent to the appropriate managers. Any follow-up by employees or managers is automated, allowing ED3 to complete a root cause analysis to create better safety policies and arrange for safety training to prevent future injuries.

These processes are all important for workplace safety, but the ability of the HSI EHS Platform to automatically generate data for OSHA reports at a moment's notice was another strong selling point for ED3. When it's time to submit regulatory reports, they're created from data that's collected in the format required by the agency, reducing a several days process down to a simple click of a mouse.

> "We're to the point now where we have enough data in the HSI EHS Platform to do analysis on incidents and track trends to see what we're doing well and where we can improve."
>
> — Joshua Reilly
> Safety Specialist and
> Field Asset Inspector

Keeping Equipment Up To Date

The fleet shop uses the HSI EHS Platform to track all vehicle and equipment maintenance. Employees perform daily inspections before equipment leaves the shop. If the employee notices something small, like a cracked taillight, the fleet manager receives a repair request with the vehicle's VIN, make, and model. The correct part is ordered, and the vehicle repaired once the part arrives to minimize down time.

When a vehicle or piece of equipment needs a larger repair, the fleet manager gets an automated notification. The shop then has 24 hours to diagnose the problem or repair it. ED3 found reducing equipment downtime leads to a more effective and efficient workflow for employees.

Checklists within the EHS Platform also track the life history of the utility's 12 substations. These checklists show the organization all completed inspections and track work orders, with that information viewable in the asset folder. In addition, ED3 can track inspections for the more than 14,000 power poles within their service area to ensure they are well maintained, reducing pole failure and potential power outages.

Improving Response Time

Efficiency and reliability are keys to customer satisfaction and the HSI EHS Platform helps ED3 improve both. Prior to implementation, if an inspector conducting a "meter read" found a problem, the inspector would write a paper report and take pictures that would have to be uploaded to a spreadsheet at the end of the day. Inspectors usually dedicated the last two hours of their day transposing their notes and uploading photos into the spreadsheet. Not only was this wasting valuable employee time, it also created another opportunity for data entry errors.

The next day, a coordinator would go through all reports, prioritize work orders, and submit them to the proper department. Then, that department would start the planning process, which may include another site visit. Finally, after any parts were ordered and received, the team would complete the work order. ED3 was spending a minimum of two days and often up to a week before starting a work order.

Now, using the HSI EHS Platform, the inspector uploads the report from the field, including any photos, and the coordinator is notified immediately. "Because the information from inspections goes directly into the HSI EHS Platform, our inspectors spend less time on data entry and more time on field inspections or other important tasks," according to Reilly.

The technician can speak to the coordinator while still on-site and plan any needed repairs or updates – reducing response times from two or more days to almost immediately.

Results

After less than a year, ED3 has found incredible efficiency from implementing the HSI EHS Platform. Hundreds of person hours are saved per month, vehicles and equipment are back in the field quicker, and work order times have been cut in half. In addition, ED3 benefits from the following:

- Real-time tracking of safety incidents
- Less time on data entry, resulting in fewer errors
- Comprehensive data analysis to improve safety
- Faster and more efficient equipment maintenance
- Increased customer satisfaction with faster repair response times
- Streamlined OSHA reporting

ED3 uses the HSI EHS Platform to track safety incidents and observations to improve training and submit OSHA regulatory reports. Checklists in the plant and equipment modules help improve workflows while tracking equipment maintenance needs, reducing downtime for repairs. As ED3 continues to learn how to implement automations, they expect the organization to become safer and more efficient, ultimately leading to an improved work environment where they can better serve their community.