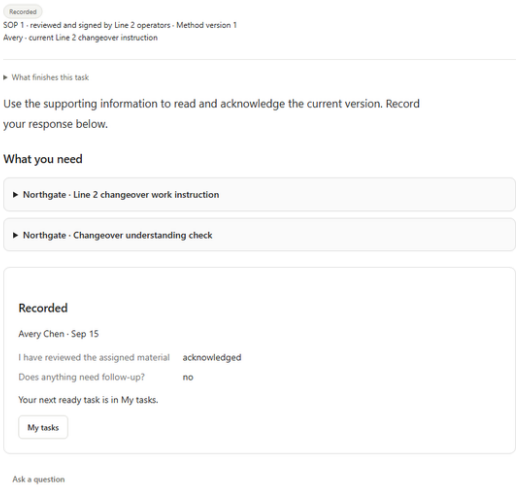
MEET A RECURRING COMPLIANCE OBLIGATION

Keep filing proof where the team can find it

For an obligation that requires filing or posting, record where it went and attach the receipt, photo or confirmation. The team can review the submission and its supporting proof in the same place.

Prepare the record or filing > Approve and sign > File or post it and attach proof (when triggered)

SkillSmith · Keep the acknowledgement with the assigned instruction



SkillSmith · Choose prepared work and its recipient — incident-response example



SkillSmith · Request a trace export from the permitted scope



Keep the acknowledgement with the assigned instruction

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Designated specialist	Prepare the record or filing; File or post it and attach proof	Respond with proof (photo, receipt, confirmation), supporting evidence, the completed record and where filed or posted.
Accountable owner	Approve and sign	Respond with signed / returned and signer.

Attach the outstanding filing confirmation

In a worked example, the record is signed but the required external filing has no receipt; keep filing outstanding rather than equating signature with submission.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Obligation and Completion form	Open the selected material for this occurrence.
Recorded response	where filed or posted and proof (photo, receipt, confirmation)	Save the response with its work context.
Review point	the obligation requires posting or external filing	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Meet a recurring compliance obligation

Bring obligation and completion form into the prepared work. Designated specialist and Accountable owner each receive the context needed for their part.

01 Prepare the record or filing

Record the completed record and supporting evidence.

02 Approve and sign

Record signed / returned and signer.

03 File or post it and attach proof

When the obligation requires posting or external filing, record where filed or posted and proof (photo, receipt, confirmation).

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Meet a recurring compliance obligation

Every recurring record, filing, posting or certification the site owes is prepared ahead of its deadline, signed by the accountable person and filed with proof.

OSHA 300A annual summary · Plant A (EHS, site manager)

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Obligation The task uses this material	The obligations register entry: what, authority, cadence, owner, deadline, lead time.
Completion form The task uses this material	The record to prepare (300A, DOT file check, permit renewal, waste manifest reconciliation).
Source The task uses this material	The regulation or policy text the obligation comes from.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose obligation and completion form from the resources your team uses.

02 Agree the responsibilities

Confirm designated specialist and accountable owner for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Walk through these conditional steps: “File or post it and attach proof”.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains where filed or posted and proof (photo, receipt, confirmation). It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring obligation and completion form. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do the conditional steps become part of the method?

The conditional route is used when the obligation requires posting or external filing. Select the variant or respond to the recorded condition before treating that step as required.

What is the outcome for the wider workflow?

Signed record on or before the deadline; filed or posted with proof where the obligation requires it; an internal-only obligation closes on signature.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The person has to leave the work to find its instructions or help.	Open the selected resources with the task, and keep a question attached when help is needed.
The current status hides which response or version came before it.	Keep where filed or posted and proof (photo, receipt, confirmation) with the work, with recorded history available for later review.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- What proof is needed when the selected obligation requires filing or posting?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact