

UNCLASSIFIED

# DEFENSE LOGISTICS AGENCY

*Established 1961*



## Worldwide Energy Conference

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THE NATION'S LOGISTICS COMBAT SUPPORT AGENCY

UNCLASSIFIED

# Policy Compliance Assessments (PCAs)



## Purpose:

- Provide information to Defense Fuel Support Point (DFSP) leadership on inventory accountability and compliance with DLA Energy Policies.
- Target audience is Responsible Officers (RO), Terminal Managers (TM), and alternates.

## Agenda:

- Purpose and Authority
- Policy Compliance Assessment Focus Areas
- Trending Deficiencies
- Highly Missed Items



Information



Guidance



Decision



Other

The overall classification of this presentation is:  
Unclassified Controlled Information (CUI)



# PCA: Purpose, Authority, and Value to the DFSP

## Purpose: Why We Conduct PCAs

To provide a comprehensive assessment of compliance with established directives and procedures.

To identify and share best practices across the enterprise, fostering a culture of continuous improvement.

To ensure the proper stewardship of government resources and enhance mission readiness.

## Authority: The Foundation for Compliance

PCAs are conducted in accordance with DLA Energy Policy.

Ensures standardization and accountability across all Defense Fuel Support Points (DFSPs).

Serves as a key component of the DLA's broader quality assurance and risk management framework.

## Value: How a PCA Helps Your DFSP

Provides an independent, third-party evaluation of your site's operational health and compliance posture.

Delivers a detailed "snapshot" that leadership can use to identify strengths and prioritize areas for improvement.

Offers clear, actionable recommendations to mitigate risks, enhance safety, and improve efficiency.



## Inventory Accountability

- RO/TM/PA Responsibilities
- Inventory Accounting / Forms
- Files and Disposition
- Segregation of Duties (SOD)

## Environmental and Safety

- Spill Prevention Plan
- Safety Program / Equipment / PPE

## Quality

- Quality Surveillance Program
- Laboratory Operations, Equipment and Documentation
- GOCO/COCO Service Provider (PWS) Evaluations



## Facilities and Equipment

- Service Vehicle Inspection & Maintenance
- Equipment Calibration and Certification
- General Facility Inspection & Maintenance

## Operations

- DoW / DLA Energy Policy Familiarization / Training Programs
- Local Publication Review
  - (SOPs and Checklists)
- EPOS Program
- Aircraft/Org Tank Servicing

## Training

- Primary & Backup Formal Training & Computer Based Training (CBT)

# Overall Compliance Trends (FY26)



Focus Area	Compliance Rate	Visual
Training	95%	
Environmental & Safety	92%	
Quality	88%	
Inventory Accountability	85%	
Operations	81%	
Facilities & Equipment	78%	



## 8 Highly Missed Checklist Items

- Properly completing DLA Form 2061
- VPMM Sign on AFSS Pedestal – Requires name, email, and phone #
- ALT RO appointment (not appointed on DLA 2059-1 or not appointed at all)
- 2921 “Eyes on” review
- Secondary containment non-existent or breached due to cracks/vegetation
- F/S not marked properly IAW UFC 3-460-03, 3-6.1.1d
- Storage tanks and pipelines properly marked with the grade of product stored per UFC3-460-01, para 2-17, UFC 3-460-03, para 2-7.1, or MIL-STD-161H, 1.1.2?
- Certified pipeline/manifold letters. All locations require them, but retail stations don’t require the letter to be certified by an engineer. Some locations have the letter, but report a different quantity on the DD 2921.



## Properly completing DLA Form 2061 (RO/TM/RP DAILY DOCUMENT REVIEW CHECKLIST)

- Must be completed each day inventory transactions are processed
- If the RO/TM assigns a 2<sup>nd</sup> level reviewer, the name must be spelled out
- The RO/TM must initial all applicable areas and use N/A when the item is not applicable.
- The form is required on the end of month as well with the EOM 2056
- Days outside established daily tolerance limits, notes must be annotated on the 2061.
- Anytime EPoS transactions are modified, notes must be added to the 2061.



Print Form

Email Form

Clear

RESPONSIBLE OFFICER (RO) / TERMINAL MANAGER (TM) / RESPONSIBLE PERSON (RP) DAILY DOCUMENT REVIEW CHECKLIST		Prescribed by: DoDM 4140.25 and Energy P-7 Sponsor: DLA Energy
<b>SECTION I - HEADING</b>		
1. DODAAC:	2. JULIAN DATE (YYDDD)	3. PAPERWORK CLOSEOUT DATE (MM/DD/YYYY)
<b>SECTION II - INSPECTION ITEMS</b>		RO/TM MUST WRITE IN 2ND LEVEL REVIEWER'S NAME, THEN INITIAL TO CONFIRM COMPLETION OF THE REVIEW. (Enter N/A for tasks not applicable at the DFSP.)
<p><b>4</b></p> <p>A. Reviewed all applicable accounting documents for completeness and accuracy, and compared each to what was processed in the Accountable Property System of Record (APSR).</p> <p>B. Where EPoS devices are used, compare all automated transactions in the EPoS Transaction Summary for completeness and accuracy, and compare each to the transactions processed in APSR.</p> <p>C. Where EPoS devices are used to manually record transactions, compare all supporting manually prepared documents to the EPoS Transactions Summary for completeness and accuracy, and compare the EPoS transactions to each transaction processed in the APSR.</p> <p>D. Ensure suspended or rejected transactions are identified and being actively worked.</p>		
<p><b>5</b></p> <p>Compared and verified DD Form 2921 and/or Automatic Tank Gauge (ATG) Summary Report quantities against APSR product ledgers; signed and dated DD Form 2921 and/or ATG Summary Report.</p>		
<p><b>6</b></p> <p>Recorded daily inventory includes total physical quantities in all active storage tanks, pipelines, manifolds, breakout tanks, and refueling vehicles per product.</p>		
<b>DAILY GAINS/LOSSES EXCEEDED TOLERANCE FACTORS: (CHECK ALL THAT APPLY)</b>		
A. Investigated to determine cause		<input type="checkbox"/>
B. Determined and applied remedy		<input type="checkbox"/>
<p><b>7</b></p> <p>C. Findings filed in daily document folder</p>		<input type="checkbox"/>
D. Notified appointing authority		<input type="checkbox"/>
E. NOTES:		
<p><b>8</b></p> <p><b>IN-TRANSIT GAIN(S) OR LOSS(ES) EXCEEDED ALLOWABLE VARIANCE: (CHECK ALL THAT APPLY)</b></p> <p>A. DD Form 361, Transportation Discrepancy Report completed <input type="checkbox"/></p> <p>B. Shipper and DLA Energy Region notified <input type="checkbox"/></p>		
<b>MANUAL GAUGING CONDUCTED AND DOCUMENTED: (CHECK ALL THAT APPLY)</b>		
A. ATG faulty and/or quantities suspected of inaccuracy		<input type="checkbox"/>
B. ATG Summary Report reflects I/O failure		<input type="checkbox"/>
<p><b>9</b></p> <p>C. Help Desk ticket generated for faulty or inoperable ATG(s)</p>		<input type="checkbox"/>
D. Help Desk Ticket Number:		
E. Help Desk Ticket Status:		<input type="checkbox"/>

DLA FORM 2061, MAY 2023

PDF (DLA)

DLA Form 2061  
Page 1



Print Form

Email Form

Clear

**RESPONSIBLE OFFICER (RO) / TERMINAL MANAGER (TM) / RESPONSIBLE PERSON (RP) DAILY DOCUMENT REVIEW CHECKLIST**

Prescribed by: DoDM 4140.25 and Energy P-7  
Sponsor: DLA Energy

10. NOTES

Large empty text area for notes.

**SECTION III - SIGNATURE**

11. SIGNATURE

12. PRINTED NAME

13. DATE (MM/DD/YYYY)

Signature and name/date input fields.

Large empty area for document review checklist items.

## DLA Form 2061 Page 2



# DLA Form 2061 Page 3

Print Form

Email Form

Clear

## RESPONSIBLE OFFICER (RO) / TERMINAL MANAGER (TM) / RESPONSIBLE PERSON (RP) DAILY DOCUMENT REVIEW CHECKLIST

Prescribed by: DoDM 4140.25 and Energy P-7  
Sponsor: DLA Energy

### INSTRUCTIONS

#### Section I - Heading

1. Enter Department of Defense Activity Address Code
2. Enter 5 digit Julian date for documents being reviewed
3. Enter calendar date for documents being reviewed

#### Section II - Inspection Items

4. Items 4 through 6 require a 2nd level review. Reviews cannot be done by the same person that input the transactions into the APSR. The RO/TM must write in the second level reviewer's name then initial to confirm of completion the reviews. Review all applicable accountability documents such as DD Forms 250, 2921, & 1898; DLA Form 2046; local forms such as consolidation log; etc. for accuracy, completeness, and legibility. Enter N/A if not applicable.
5. Compared and verified DD Form 2921 and/or Automatic Tank Gauge (ATG) Summary Report quantities against Accountable Property System of Record (APSR) product ledgers; signed and dated DD Form 2921 and/or ATG Summary Report, when necessary.
6. Ensure recorded daily inventory includes total physical quantities in all active storage tanks, pipelines, manifolds, breakout tanks, and refueling vehicles per product.
7. Determine if daily gains and/or losses exceeded the local daily limit per product established by Paragraph 7.1 of DoDM 4140.25, Volume 9. If so, follow guidance of DoDM 4140.25, Volume 11.
  - A. Has the root cause(s) been determined?
  - B. Has a remedy been determined and applied to prevent further gain/loss?
  - C. Were the findings filed in the applicable daily folder?
  - D. Was the RO appointing official notified? (for sites with less than 5 FTEs or segregation of duty waivers)
  - E. Use the notes section to briefly explain investigation details, status, findings, etc.
8. Did in-transit gains/losses exceed the standard allowable tolerance factors listed in Table 1 of DoDM 4140.25, Volume 11?
  - A. Was a DD Form 361, Transportation Discrepancy Report filled out for in-transit gains/losses?
  - B. Were the shipper and DLA Energy Region Office notified?
9. Did DFSP conduct manual gauging? If yes, were recordings documented in feet, inches, and 1/8" or 3/16" on DD Form 2921 and/or ATG Summary Report?
  - A. Was manual gauging a result of a faulty ATG or suspected quantity inaccuracy?
  - B. Was manual gauging a result of an ATG Summary Report reflecting I/O failure?
  - C. If an ATG is suspected of inaccuracy or an ATG Summary Report reflected I/O failure, was a helpdesk ticket created?
  - D. Provide helpdesk ticket number (i.e., REF00000123456 or INC0000012345).
  - E. Provide helpdesk ticket status. OPEN if ATG is still inoperable / CLOSED if ATG operation has been restored
10. Use this MEMO section to record additional notes.

#### Section III - Signature

11. RO/TM signature stating completion of checklist items.
12. Printed RO/TM name.
13. Date RO/TM completed review of documents.

DLA FORM 2061, MAY 2023

PDF (DLA)



## **VPMM Sign on AFSS Pedestal – Requires name, email, and phone #**

Per DLA Energy P-30 –

(3) Customer Service Notice. Post a notice at each Fixed device displaying the names, phone numbers and email address of appointed Vehicle Purchase Media Managers (VPMMs) to resolve purchase media issues.



## ALT RO appointment (not appointed on DLA 2059-1 or not appointed at all)

Per DLA Energy P-7:

### **“3.8. DELEGATION OF RO AUTHORITY.**

The RO must nominate an alternate RO on the DLA Form 2059-1, “Alternate Responsible Officer Appointment”.

The alternate RO must serve during occasions when the RO is temporarily absent from the duty location for more than 5 consecutive workdays (vacation, temporary duty, etc.), but less than 60 days.

Follow section 3.10, Account Transfer to formally transfer primary RO duties when the expected absence is 60 days or more.

The alternate RO must be a qualified Government employee or local national who meets the requirement in section 3.3 and training requirements outlined in DLA Energy P-32.

File new, approved DLA Form 2059 according to DoDM 4140.25, Volume 2 and DLA energy P-3, and continuity documents before any RO absence of 60 days or more.”



## “Eyes on” review not recorded on the DD 2921

DoDM 4140.25 Volume 6, Section 9, Segregation of Duties:

“When issued a waiver DFSPs will ensure the DWCF Inventory Operator/Handler and the RO and TM jointly (at least once per quarter at end of the month,) witness physical inventories being taken and both annotate “eyes on” review on the DD Form 2921.”

When exempted from needing a waiver “The RO or TM witnesses the physical inventories being taken during the end of month close out and annotate the “eyes on” review on the DD Form 2921.”



## Secondary containment non-existent or breached due to cracks/vegetation

Loading and unloading areas must be designed to have secondary containment to hold at least the maximum capacity of any single compartment of a tank car or truck loaded or unloaded at the facility per 40 CFR 112.7, 40 CFR 279.22.

Cracks and vegetation growing through the containment represent compromised containment and must be fixed to meet the requirements in the CFR.

# Frequently Missed Items





## **F/S not marked properly IAW UFC 3-460-03, 3-6.1.1**

Stencil pre-filters in accordance with Section 3-6.1.3 Stenciling of Pre-Filters when filter cartridges are changed. Pre-filters require the following inspection and maintenance:

3-6.1.3 - Use stencils or embossing tape (0.75 to 1-inch (19 to 25 mm) letters) to permanently mark pre-filters when filter cartridges are changed with date changed, due date for next change, and maximum differential pressure.



## Frequently Missed Items

**Storage tanks and pipelines must be properly marked with the grade of product stored per UFC 3-460-01, para 2-17, UFC 3-460-03, para 2-7.1, or MIL-STD-161H, 1.1.2**

UFC 3-460-03 and UFC 3-460-01 refer to MIL-STD-161 for product marking and flow arrows.

MIL STD 161:1.1.2. Color assignments. MIL-STD-101, Color Code for Pipelines and Compressed Gas Cylinders, has assigned a color to each of six classes of materials. Color codes are intended to reduce the chances of accidental mixing of products during operation of permanently installed military bulk storage and dispensing systems. MIL-STD-101 permits only “yellow” as the identifying color for petroleum products and hydrocarbon missile fuels. All other colors will be removed or obliterated.

5.1.6 Use of arrows. An arrow painted in yellow may be used to indicate the direction of flow of the product in the line. It will appear adjacent to the title and band(s)



## Certified pipeline/manifold letters

All locations require them, but retail stations don't require the letter to be certified by an engineer. Some locations have a letter yet report a different quantity on the DD 2921.

DLA Energy P-1, Enclosure 2: "Pipelines and Manifolds. DFSPs shall include the total gross pipeline, manifold, and system component inventory capacity for each product in the total daily physical inventory. Pipeline, manifold, and system component inventory is not required to be volume corrected to 60°F, or 15/20°C if measured in liters. With the exception of retail points (military or contractor operated gas stations) a qualified Civil Engineer/Public Works or equivalent individual shall certify and record the capacities on Office Memorandum. NATO/Foreign Government DFSPs, TOAs, and COCO DFSPs are exempt from requirement to report gross inventory capacity when the system components do not contain DWWCF petroleum product."



- **Partnerships**: FENA partners with the Region and Service Control Point (SCP) to provide a broader picture of what to review and/or incorporate into Region SAV program
- **Region SAV Program**: Each Region should continue to provide in-depth reviews during SAVs to ensure compliance with DLA Energy Policy
- **Follow-up**: Coordinate with SCP and the DFSP after each site visit to ensure observations are addressed and corrected

