## **Training and Evaluation Outline Report**

Status: Approved 22 Dec 2015 Effective Date: 29 Sep 2020

Task Number: 10-CO-0236

Task Title: Manage Bulk Petroleum Accountability

**Distribution Restriction:** Approved for public release; distribution is unlimited.

**Destruction Notice: None** 

**Foreign Disclosure: FD1 -** This training product has been reviewed by the training developers in coordination with the CASCOM, Fort Lee, Virginia foreign disclosure officer. This training product can be used to instruct international military students from all approved countries without restrictions.

#### Supporting Reference(s):

Step Number	Reference ID	eference ID Reference Name		Primary	Source Information
	AR 200-1	ENVIRONMENTAL PROTECTION AND ENHANCEMENT	Yes	No	
	AR 70-12	FUELS AND LUBRICANTS STANDARDIZATION POLICY FOR EQUIPMENT DESIGN, OPERATION, AND LOGISTICS SUPPORT	Yes	No	
	ATP 3-04.94	Army Techniques Publication For Forward Arming and Refueling Points	Yes	No	
	ATP 4-43	Petroleum Supply Operations	Yes	No	
	ATP 5-19	RISK MANAGEMENT, with change 1 dated 8 Sep 2014	Yes	No	
	FM 3-04.104	TACTICS, TECHNIQUES, AND PROCEDURES FOR FORWARD ARMING AND REFUELING POINT	Yes	No	
	PAM 710-7	HAZARDOUS MATERIAL MANAGEMENT PROGRAM	Yes	No	

Conditions: The petroleum element receives an operations order (OPORD) from higher headquarters (HQ) to conduct petroleum distribution operations to support units in the area of operations and are required to maintain bulk petroleum accountability. The petroleum element is established in support of a higher HQ operational mission and in support of unified land operations. The petroleum element has primary access to main supply routes, external logistical support, and it is accessible to all supported and supporting customers/units. Continuous digital and analog communications is established with higher headquarters. All applicable regulations, internal and external tactical standard operating procedures (TSOP), technical manuals (TMs), and field manuals (FMs) are on-hand as reference material. The petroleum element leaders are provided guidance on rules of engagement for this mission. Threat capabilities include opposing forces which have the ability to gather information, interact with hostile force sympathizers, coordinate suicide bombings, set up improvised explosive devices, coordinate air support, and execute reinforced platoon/squad operations in a chemical, biological, radiological, and nuclear (CBRN) environment. Mission, enemy, terrain and weather, troops and support available-time available and civil considerations (METT-TC) identified constraints must be considered. The unit is not likely to be attacked with hostile enemy fire or chemical agents. This task is performed under all environmental conditions. All authorized equipment is on hand and operational. All unit personnel are available to provide support during all day and night operations. External dependent units have been contacted and coordinations have been made to support petroleum element operational mission. Specified time constraints are identified in the operations order. The section has adequate time to prepare. Unit leaders are present in the area of operations. Some iterations of this task should be performed in MOPP 4.

**Standards:** The petroleum element maintains bulk petroleum accountability with the use of all available equipment and personnel within the specified time constraints in the mission OPORD and in accordance with (IAW) the approved Army standards identified in the Task Evaluation Criteria Matrix which is included in this task below, commanders guidance, applicable internal and external TSOPs, and approved Army regulations.

LEADER STATEMENT: An Army leader is anyone who by virtue of assumed role or assigned responsibility inspires and influences people to accomplish organizational goals. Leadership is not limited to or synonymous with an assigned duty, position, or given rank as it also manifests itself in both informal and collective forms. Informal leadership provides knowledge, experience, and technical expertise while collective leadership results through the combined effects and synergies of leaders at different levels and experience collaborating to achieve a common purpose. Informal and collective leadership can include positions with an expanded scope of responsibility, significance and operational / mission implications. Therefore, for the purpose of training this task, Leaders are not only defined as officers, warrant officers, noncommissioned officers, and Army civilians but also include individuals who are Subject Matter Experts (SME) which possess the requisite knowledge and skill set to perform a particular task (i.e., conduct an operation, provide logistics, or operate specific equipment, etc.) at the tactical through strategic level as the situation and/or mission dictates.

## **Objective Task Evaluation Criteria Matrix:**

Plan and Prepare		d Prepare	Execute					Assess		
Operation Environme CO & BN	nal ent	Training Environment (L/V/C)	Leaders Present at Training/Required	Present at Training/Required	External Eval	Performance Measures	Critical Performance Measures	Leader Performance Measures	Evaluator's Observed Task Proficiency Rating	Commander's Assessment
									Δ.	
Dynamic and Complex			>=85%		<b>-</b>	>=91%		>=90%	т	Т
and Complex (4+ OE Variables and Hybrid Threat)	Night	IAV	75-84%	>=80%	Yes	80- 90%	All	80- 89%	T-	T-
Dynamic		IAW unit CATS statement.	65-74%	75-79%		65- 79%			89%	Р
Dynamic (Single Threat)	D	ent.	60-64%	60-74%	No	51- 64%			P-	P-
Static (Single Threat)	Day		<=59%	<=59%		<=50%	<all< td=""><td>&lt;=79%</td><td>U</td><td>U</td></all<>	<=79%	U	U

**Remarks:** Task steps and performance measures are arranged in a logical order and are not intended to be interpreted as a "required order" for performance. These task steps and/or performance measures of collective task may not always be applicable to every unit. Prior to evaluation, coordination should be made between the evaluator, the unit itself, and the evaluated units' higher headquarters (if required) to determine the task step(s) and/or performance measure(s) that may be omitted and/or must be performed. Training begins with the execution of pre-combat checks and inspections. Training ends when designated training objectives for the particular training events or exercises are performed to Army standard. Unit leadership should conduct an after action report (AAR) to determine future training requirements for the unit.

Task Evaluation Criteria Matrix Definitions:

Static: Aspects of operational variables (PMESII-PT) needed to stimulate mission variables (METT-TC) are fixed throughout the unit's execution of the task.

Dynamic: Operational variables and Threat TTPs for assigned counter- tasks change in response to the execution of BLUFOR's task.

Complex: Requires a minimum of four (Terrain, Time, Military [Threat], and Social [Population]) or more operational variables; brigade and higher units require all eight operational variables (PMESII-PT) to be replicated in varying degrees based on the task being trained.

Single Threat: Regular, irregular, criminal, or terrorist.

Hybrid Threat: The diverse and dynamic combination of regular forces, irregular forces, terrorist forces, and/or criminal elements unified to achieve mutually benefitting effects.

To obtain a T or T- this task must be conducted in a dynamic and complex environment with 4 plus OE variables and a hybrid threat at night with 75% or more leaders present, greater than 80% of Soldiers present, receive a "GO" on 80% or more of the performance measures, ALL of the critical performance measures and at least 80% "GO" on the leader performance measures. Must be conducted during an external evaluation.

Task steps and measures were developed using the Plan, Prepare, Execute and Assess (PPEA) construct to reinforce the operations process and is implied throughout the T&EO as applicable.

**Notes:** REPORTING ERRORS AND RECOMMENDING IMPROVEMENTS: You can help improve this collective task. If you find any errors, or if you would like to recommend any improvements to the procedures in this collective task, please let us know. The preferred method is to submit a DA Form 2028 (Recommended Changes to Publications and Blank Forms) with your recommended changes via email to usarmy.lee.tradoc.mbx.cascom-g3-collective@mail.mil. Your recommended changes will be reviewed, validated to ensure approved Army or joint doctrine supports your recommendation(s), implemented as applicable, and a reply will be furnished to you.

Safety Risk: Low

#### **Task Statements**

**Cue:** The petroleum element receives an operations order (OPORD) from higher headquarters (HQ) to conduct petroleum distribution operations to support units in the area of operations and are required to maintain bulk petroleum accountability.

# **DANGER**

Soldiers must constantly be alert for and avoid situations that may result in injury or death. At the training site, leaders must establish training safety overview procedures.

# WARNING

Soldiers must be alert to human error and know the capabilities and limitations of the equipment and vehicles they use. Following the proper safety procedures preserves troop strength by preventing personnel losses through accidents.

# **CAUTION**

The possibility of personal injury or damage to equipment that may result from long-term failure to follow correct procedures. Take extra precautions in your steps when mounting petroleum storage equipment to conduct inventories, receive, or issue petroleum.

# **Performance Steps and Measures**

**NOTE:** Assess task proficiency using the task evaluation criteria matrix.

NOTE: Asterisks (\*) indicate leader steps; plus signs (+) indicate critical steps.

NOTE: Asterisks (*) indicate leader steps; plus signs (+) indicate critical steps.			
STEP/MEASURE	GO	NO-GO	N/A
+ 1. Commander supervises bulk petroleum accountability.			
a. Appoint in writing an accountable officer (responsible individual) to maintain control of all petroleum accountability records and provide an audit trail.			
<ul> <li>b. Maintain statements summarizing daily issues during field operations when auditable records are not feasible to account for consumed fuel.</li> </ul>			
c. Ensure petroleum is handled IAW applicable regulations to prevent theft, fraud, waste, and abuse.			
d. Instill upon unit personnel to exercise reasonable and prudent actions to properly use, care for, and safeguard all petroleum products in their possession.			
e. Ensure unit maintains storage levels to meet daily demand or unit specified mission.			
f. Approve internal and external petroleum operations TSOP as necessary to support current operational missions.			
g. Review monthly bulk petroleum accountability reports and document register to ensure petroleum accountability audit trail is supported.			
h. Ensure that required financial liability investigation of property loss (FLIPL), AR 15-6 nvestigation(s), and/or causative research is completed as required.			
i. Provide mission command, concise objectives, and mission end state to the petroleum personnel.			
j. Maintain continuous communications with higher HQ and supported units.			
+ 2. Accountable Officer, Petroleum Officer, Petroleum Systems Technician, or Petroleum Non- Commissioned Officer maintain control of all bulk petroleum.			
a. Prepare statements summarizing daily issues during field operations when auditable records are not feasible to account for consumed fuel.			
b. Audit petroleum accountability records routinely.		+ -	
c. Identify accountability gaps during inspections.		+	
d. Inspect bulk petroleum operations to validate proper accountability procedures are being bllowed.			
e. Ensure petroleum personnel maintain required records of inventory and documents that identify jains, losses, issues, receipts, and on-hand balance(s).			
f. Maintain audit records and supporting documentation IAW Army regulations.			
g. Ensure petroleum stewardship to maintain fuel accountability is effective and less subject to raudulent activities.			
h. Ensure accurate accountability of fuel at all levels to provide accurate data for consumption estimation and its resources.			
i. Ensure vehicle identification link (VIL) keys, fleet credit cards, and air cards are on the unit property book.			
j. Document losses of fuel due to spillage and/or contamination for quantities over 25 gallons and attach documentation to the monthly bulk petroleum accounting summary (MBPAS) record as a supporting document to adjust records.			
k. Forward MBPAS report to approving authority at the next higher command within three (3) working days for action.			
I. Ensure appropriate inventory adjustment actions are conducted each month as outlined in current actions are conducted each month as outlined in current actions.			
(1) Initiate a FLIPL if the fuel loss exceeds the maximum allowable loss and the value of the fuel ost is equal to or more than \$1000 or if the Approving Official disapproves any loss on the MBPAS IAW current Army petroleum and property accountability regulations.			
(2) Initiate causative research if fuel lost exceeds the maximum allowable loss and the value of the fuel lost is less than \$500 or if fuel gain exceeds the maximum allowable gain IAW current Army betroleum and property accountability regulations.			
(3) Initiate an AR-15-6 investigation if approving official disapproves any fuel gain on the MBPAS.			
m. Adjust petroleum accountability records after approving authority approves the MBPAS and etain documents for audit procedures.			
+ 3. Petroleum Officer, Petroleum Systems Technician, Petroleum Platoon Leader, Platoon Sergeant, Section leaders manage platoon accountability records.			
a. Ensure petroleum inventories are conducted and documented.			
b. Enforce approved internal and external TSOP and modify it as necessary to support current operations.			
c. Accurately account for receipt, issue, and stocks on hand for both bulk and packaged products.			
d. Maintain audit trails on all fuel issued and received for the current fiscal year of issue, plus three prior years.			
e. Manage fuel dispensing systems as required and IAW current regulations.			
f. Consolidate the MBPAS to maintain auditable records of monthly receipts, issues, and inventory of petroleum products and to adjust inventory as necessary.			
a Maintain a current document register for poeting and controlling documents		1	

g. Maintain a current document register for posting and controlling documents.

h. Ensure petroleum gains and losses are within tolerance levels.		
i. Provide mission command for all assigned or attached personnel.		
j. Control platoon operations to support higher HQ mission.		
k. Manage petroleum distribution operations.		
I. Coordinate internal and external petroleum operations.		
m. Plan petroleum distribution operations.		
n. Provide petroleum operations technical advice to the commander, platoon, and supported units		
as needed.		
+ 4. Petroleum Section personnel conduct bulk petroleum accounting functions.		
a. Ensure a valid signature card is provided to the SSA and in the section files.		
b. Account for bulk petroleum products received.		
c. Manage accounting for stored bulk petroleum.		
d. Account for bulk petroleum issued to supported or supporting units during distribution operations.		
e. Monitor bulk petroleum requests from operating platoons.		
f. Consolidate and forward appropriate bulk petroleum reports to higher headquarters.		
g. Conduct reconciliation inventories using the Petroleum Product Control Sheet or local approved form to compare physical inventory data against daily issues as reflected on proper issue documents and the pump totalizer meter readings.		
+ 5. Petroleum handlers maintain accountability of received daily bulk petroleum.		
a. Record receipts and issues on appropriate DA Form IAW current Army regulations and DA Pamphlets (PAM).		
b. Record vehicle, equipment, and/or tail number the amount fuel obtained during defueling operations and/or fuel received from end item equipment in maintenance.		
c. Assign document numbers for all bulk petroleum issues and receipts.		
d. Post petroleum received directly from a consuming end item on daily issue form.		
e. Ensure packaged petroleum products are properly rotated and issued on a first in first out basis.		
f. Properly account for expired packaged petroleum products based on product shelf life information.		
+ 6. Petroleum handlers maintain accountability of issued bulk petroleum.		
a. Assign document number for petroleum issued to supported units outside of organization.		
b. Ensure to use the equipment or vehicle number for petroleum issued directly into or specifically identifiable to a consuming end item.		
c. Ensure convoy or refuel on the move (ROM) petroleum is issued to an Individual of the supported unit.		
d. Properly document transferred fuel that is transferred from a transporting vehicle to a storage container to another as an issue.		
e. Document monthly abstract of issues of petroleum products and operating supplies.		
+ 7. Petroleum handlers conduct bulk petroleum inventories.		
<ul> <li>a. Physically inventory facilities, rigid-wall tanks/containers, and collapsible wall tanks/containers IAW to procedures in equipment TM or applicable regulations.</li> </ul>		
b. Inventory collapsible wall tanks/containers by reconciling the beginning inventory, issues, receipts, and by physically checking the tank, couplings, fittings, and area around the tank to ensure no leaking has occurred.		
c. Account for losses that occur during leaks and ruptures.		
d. Gage and reconcile bulk fuel storage tanks that have issues or receipts daily.		
e. Gage and reconcile bulk fuel storage tanks that do not have issues or receipts at least once a week.		
f. Conduct monthly physical inventory for each type or grade of bulk petroleum product on hand within the unit.		
g. Ensure to conduct volume correction of storage container for required monthly inventories.		
h. Utilize the correct volume correction factors referenced in most current ASTM International tables.		
i. Document volume correction to quantities of $3,500$ gallons or greater when issued, received, and at the end of the month inventories.		
j. Conduct reconciliation inventories using the Petroleum Product Control Sheet or local approved form to compare physical inventory data against daily issues as reflected on proper issue documents and the pump totalizer meter readings.		
k. Ensure petroleum products are measured with an approve petroleum sampling and gauging kit or petroleum measuring device.		
I. Ensure petroleum is tested.		
m. Ensure all petroleum handlers wear approved personal protective equipment IAW Occupational Safety and Health Administration (OSHA), Army safety regulations, and equipment TM's.		
+ 8. Petroleum handlers account for allowable petroleum losses and gains.		
a. Document gains (overages) for each type of bulk petroleum that exceed authorized allowances.		
b. Track petroleum losses for each type of product to ensure that allowance loss percentages are properly documented.		
c. Conduct monthly detailed analyses of actual and allowable losses		

d. Properly compute losses and gains for jet fuels and all other petroleum products. e. Ensure volume calculations are IAW current doctrine, capability tables, and calibration charts. + 9. Petroleum handlers conduct Preventive Maintenance Checks and Services (PMCS) on organic equipment during accountability procedures. a. Inspect organic equipment to ensure that petroleum is not evaporating or leaking from damaged equipment. b. Conduct routine inspections on all fuel equipment for serviceability IAW with applicable TM. c. Conduct inspections for equipment in storage and facilities to ensure they remain operational and do not jeopardize petroleum accountability. d. Maintain maintenance records and publications. e. Perform technical inspections and document on current maintenance form. f. Report all deficiencies to supervisor immediately upon discovery of problem. +\* 10. All leaders manage administrative functions as appropriate, directed, or required. a. Ensure proper petroleum quality surveillance procedures are in compliance with U.S. military standards, current military standard (MIL-STD), and host nation regulations. b. Conduct troop leading procedures. c. Manage composite risk management assessments. d. Provide status reports to higher HQ IAW TSOP. e. Maintain continuous communications with higher HQ IAW TSOP. f. Manage Command Supply Discipline Program (CSDP).

g. Enforce Safety and Operation Security (OPSEC) procedures.

i. Comply with environmental stewardship procedures IAW applicable internal and external TSOP,

j. Direct destruction of unit equipment to prevent enemy use as situations dictate.

h. Enforce safety regulations and established TSOP's.

Army, joint, and host nation regulations.

Task Performance Summary Block									
Training				ITER/	ATION				
		1		2		3			4
Date of Training	per Iteration:								
Day or Night	Training:	Day /	Night						
		#	%	#	%	#	%	#	%
Total Leaders Authorized	% Leaders Present								
Total Soldiers Authorized	% Soldiers Present								
Total Number of Performance Measures	% Performance Measures 'GO'								
Total Number of Critical Performance Measures	% Critical Performance Measures 'GO'								
Live Fire, Total Number of Critical Performance Measures	% Critical Performance Measures 'GO'								
Total Number of Leader Performance Measures	% Leader Performance Measures 'GO'								
MOPP LEVEL									
Evaluated Rating per Iteration T, T-, P, P-, U									

### Mission(s) supported: None

**MOPP 4:** Sometimes

MOPP 4 Statement: Chemical protective clothing ensemble and field protective mask restrict movement and activities. Wear MOPP gear only when threat forces have used CBRN weapons or are likely to do so. MOPP gear should be worn during CBRN training exercises. During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines in accordance with CBRN regulations.

**NVG:** Never

**NVG Statement:** Night vision goggles are not required to conduct this task. However, they may be required when conducting sustainment unit operations, during movement, or Soldier duties as assigned.

## Prerequisite Collective Task(s):

Step Number	Task Number	Title	Proponent	Status
	10-CO-0012	Establish Petroleum Pipeline and Terminal Operating Operations	10 - Quartermaster (Collective)	Approved
	10-CO-1011	Establish Petroleum Support Company Operations	10 - Quartermaster (Collective)	Approved
	10-SEC-0205	Establish Petroleum Tank Farm Tactical Petroleum Terminal	10 - Quartermaster (Collective)	Approved

# **Supporting Collective Task(s):**

Step Number	Task Number	Title	Proponent	Status
	10-BN-0202	Conduct Petroleum Support Battalion Operations	10 - Quartermaster (Collective)	Approved
	10-CO-0209	Direct Petroleum Pipeline and Terminal Operating Operations	10 - Quartermaster (Collective)	Approved
	10-CO-1015	Conduct Petroleum Support Company Operations	10 - Quartermaster (Collective)	Approved
	10-CO-4000	Conduct Force Provider Company Operations	10 - Quartermaster (Collective)	Approved
	10-CO-4731	Conduct Composite Supply Company Operations	10 - Quartermaster (Collective)	Approved
	10-GRP-0212	Conduct Expeditionary and Sustainment Petroleum Group Operations	10 - Quartermaster (Collective)	Approved
	10-PLT-0201	Conduct Petroleum Terminal Operating Platoon Operations	10 - Quartermaster (Collective)	Approved
	10-PLT-0202	Conduct Petroleum Pipeline Operating Platoon Operations	10 - Quartermaster (Collective)	Approved
	10-PLT-0236	Conduct Composite Supply Company Petroleum Platoon Headquarters Operations	10 - Quartermaster (Collective)	Approved
	10-PLT-1013	Conduct Petroleum Support Platoon Operations	10 - Quartermaster (Collective)	Approved
	10-SEC-0206	Control Petroleum Storage and Issue Operations	10 - Quartermaster (Collective)	Approved
	10-SEC-0220	Conduct Bulk Petroleum Storage Operations	10 - Quartermaster (Collective)	Approved
	10-SEC-0229	Conduct Petroleum Tank Farm Operations	10 - Quartermaster (Collective)	Approved
	10-SEC-0237	Conduct Bulk Petroleum Distribution Section Operations	10 - Quartermaster (Collective)	Approved

#### OPFOR Task(s): None

### Supporting Individual Task(s):

Step Number	Task Number	Title	Proponent	Status
	101-23A-6006	Enforce Accountability of Bulk Petroleum Products (Brigade and Below)	101 - Quartermaster (Individual)	Approved
	101-23A-7007	Enforce Accountability of Bulk Petroleum Products	101 - Quartermaster (Individual)	Approved
	101-92F-3125	Direct Accountability of Petroleum Products	101 - Quartermaster (Individual)	Approved
	101-FR8-9001	Plan Bulk Petroleum Operations	101 - Quartermaster (Individual)	Approved
	101-FR8-9004	Monitor Gaging of Bulk Petroleum Products	101 - Quartermaster (Individual)	Approved
	101-FR8-9014	Manage the Maintenance of Petroleum Equipment	101 - Quartermaster (Individual)	Approved
	101-FR8-9017	Plan ROM Operations	101 - Quartermaster (Individual)	Approved

#### Supporting Drill(s): None

### Supported AUTL/UJTL Task(s):

Task ID	Title
ART 4.1.3.3	Provide Petroleum, Oils, and Lubricants (Class III)
ART 4.1.3.3.2	Provide Packaged Petroleum, Oils, and Lubricants Products

#### **TADSS**

TADSS ID	Title	Product Type	Quantity
No TADSS specified			

#### **Equipment (LIN)**

LIN	Nomenclature	Qty
No equipment specified		

#### Materiel Items (NSN)

NSN	LIN	Title	Qty
No materiel items specified			

**Environment:** Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to the current Environmental Considerations manual and the current GTA Environmental-related Risk Assessment card. It is the responsibility of all Soldiers and Department of the Army civilians to protect the environment from damage.

Safety: In a training environment, leaders must perform a risk assessment in accordance with current Risk Management Doctrine. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW current CBRN doctrine. Leaders must verify the structural soundness of all training and evaluation plans from a safety viewpoint. Leaders must conduct training at levels consistent with the abilities of the Soldiers being trained. They must instill an awareness of individual safety in all subordinate leaders and Soldiers. Soldiers must constantly be alert for and avoid situations that may result in injury or death. At the training site, leaders must establish training safety overview procedures. Safety procedures should emphasize the adherence to standards, consideration of environmental factors (for example wet bulb), risk assessment, and factors contributing to and aiding in the prevention of accidents. Responsible individuals must know how to balance the risks against the training requirements and monitor conditions for safety and health hazards (to eliminate or control them). Leaders must ensure the welfare of their soldiers in all situations. Leaders must establish a buddy system for safety. Soldiers should maintain a safety watch on each other, with emphasis on individual safety training, and first aid responsibilities. All unsafe conditions and unsafe acts must be recognized and reported. Soldiers must be alert to human error and know the capabilities and limitations of the equipment an