

ADDENDUM 1  
DECEMBER 2013

# **Bulk Engine Oil Chain of Custody and Quality Documentation**

API 1525A  
FIRST EDITION, JANUARY 2012



AMERICAN PETROLEUM INSTITUTE



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**Downstream Segment**

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## Foreword

API 1525A *Bulk Engine Oil Chain of Custody and Quality Documentation* provides procedures for managing bulk engine oil chain of custody to ensure oil quality from the point of manufacture to installation in the end user's engine. All parties involved with supplying finished bulk engine oil to consumers have a role in protecting the quality of the oil throughout the supply chain. Responsibility for quality starts with the marketer/blender and ends with the installer. The blender, the transporter/distributor and the installer that originally ordered the product have a role in ensuring the quality of the engine oil received matches the quality ordered.

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# Bulk Engine Oil Chain of Custody and Quality Documentation

## 1 Scope

This document provides procedures for managing bulk engine oil chain of custody to ensure oil quality from the point of manufacture to installation in the end user's engine. The procedures specifically address the following key topics: marketer/blender practices; the ordering of oils meeting API 1509; chain-of-custody documentation that identifies bulk engine oil throughout the supply system; and requirements for informing consumers about the types of engine oil available for installation and requirements for notification (written and/or electronic) of the oil installed in engines.

All parties involved with supplying bulk engine oil to consumers (end users) have a role in protecting the quality of the oil throughout the supply chain. Responsibility for quality starts with the marketer/blender and ends with the installer. The marketer/blender, the distributor and the installer that originally ordered the product have a role in ensuring the quality of the engine oil received matches the quality ordered.

This document builds on procedures published in API Recommended Practice 1525, *Bulk Oil Testing, Handling, and Storage Guidelines*. API 1525 addresses storage and handling of bulk oil, facility and equipment standards, loading and unloading, comingling in distributor storage, multiple transporters between marketer/blender and oil-change facilities, personal safety equipment, training, and governmental requirements and reviews.

## 2 Normative References

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

API 1509<sup>1</sup>, *Engine Oil Licensing and Certification System*

API 1525, *Bulk Oil Testing, Handling, and Storage Guidelines*

API Engine Oil Licensing and Certification System (EOLCS) Application for Licensure

ASTM D445<sup>2</sup>, *Standard Test Method for Kinematic Viscosity of Transparent and Opaque Liquids (and Calculation of Dynamic Viscosity)*

ASTM D1500, *Standard Test Method for ASTM Color of Petroleum Products (ASTM Color Scale)*

ASTM D4052, *Standard Test Method for Kinematic Viscosity of Transparent and Opaque Liquids (and Calculation of Dynamic Viscosity)*

ASTM D4927, *Standard Test Methods for Elemental Analysis of Lubricant and Additive Components—Barium, Calcium, Phosphorus, Sulfur, and Zinc by Wavelength Dispersive X Ray Fluorescence Spectroscopy*

ASTM D4951, *Standard Test Method for Determination of Additive Elements in Lubricating Oils by Inductively Coupled Plasma Atomic Emission Spectrometry*

ASTM D5293, *Standard Test Method for Apparent Viscosity of Engine Oils Between 5 and 35°C Using the Cold Cranking Simulator*

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<sup>1</sup> API, 1220 L Street, NW, Washington, DC 20005 USA

<sup>2</sup> ASTM, 100 Barr Harbor Drive, West Conshohocken, PA 19428 USA

ASTM D5762, *Standard Test Method for Nitrogen in Petroleum and Petroleum Products by Boat Inlet Chemiluminescence*

ASTM D5949, *Standard Test Method for Pour Point of Petroleum Products (Automatic Pressure Pulsing Method)*

ASTM D5950, *Standard Test Method for Pour Point of Petroleum Products (Automatic Tilt Method)*

ASTM D5985, *Standard Test Method for Pour Point of Petroleum Products (Rotational Method)*

ASTM D6362, *Standard Practice for Certificates of Reference Materials for Water Analysis*

ASTM D6481, *Standard Test Method for Determination of Phosphorus, Sulfur, Calcium, and Zinc in Lubrication Oils by Energy Dispersive X Ray Fluorescence Spectroscopy*

ASTM D7279, *Standard Test Method for Kinematic Viscosity of Transparent and Opaque Liquids by Automated Houillon Viscometer*

ISO 17050-1<sup>3</sup>, *Conformity Assessment — Supplier's Declaration of Conformity — Part 1: General Requirements*

SAE J300<sup>4</sup>, *Engine Oil Viscosity Classification*

### **3 Terms and Definitions**

For the purposes of this document, the following definitions apply:

#### **3.1 Terms**

- a) May—indicates provisions that are optional and, consequently, are at the discretion of the designer or operator.
- b) Must—indicates important legal or safety considerations.
- c) Shall—indicates provisions that are mandatory to meet this API standard.
- d) Should—indicates provisions that are recommended but not mandatory. Implementation of these provisions will be made based on consideration of the following, as appropriate: (a) risk/benefit analysis, (b) company standards, (c) company experience, and (d) company philosophy.

#### **3.2 Definitions**

- a) API service category—is an engine oil designation (for example, API SM, SN, CH-4, CI-4, and CJ-4) that defines a specific level of performance as measured in engine and bench tests.
- b) Batch—is a delivery of finished engine oil from a marketer/blender to a distributor from a maximum of one vehicle, rail car or portable container. A delivery of the same product from multiple compartments from a single vehicle at the same time may be considered a single batch if loaded from a single storage tank.
- c) Bulk engine oil—is engine oil dispensed and delivered in metered quantities.
- d) Distributor—is the entity that stores and delivers to multiple users (other distributors or installers) finished engine oils obtained from another source or from a qualified in-house blending operation.
- e) Formulation—is a specific mixture of lubricant base stocks and performance additives (additive package), including treat levels of all components, that results in an engine oil.
- f) Installer—is the entity that puts engine oil into the engine of a consumer (end user).

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<sup>3</sup> ISO, 1, ch. de la Voie-Creuse, CP 56, 1211 Genève 20, Switzerland

<sup>4</sup> SAE, 400 Commonwealth Drive, Warrendale, PA 15096-0001 USA

- g) Licensable category—is an API service category listed in API 1509 as eligible for use in the API Service Symbol.
- h) Licensed formulation—is a formulation that meets the requirements of API 1509 for the service category claimed and is licensed by API.
- i) License status—is a statement that the formulation used to blend an engine oil is licensed or not licensed by API.
- j) Candidate Data Package – is a record of each test program conducted under the American Chemistry Council Code of Practice (see [www.americanchemistry.com](http://www.americanchemistry.com) for details).
- k) Marketer/blender—is the entity that mixes engine oil base stocks and performance additives (additive package) to produce an engine oil.
- l) Ownership—is the top management position in the legal entity (private or corporate) responsible for all actions carried out by all distributors and/or installers owned or controlled by the entity.
- m) Product—is a marketer/blender’s finished engine oil sold in bulk with a unique brand name, viscosity grade, and API service category.
- n) Product delivery—is the offloading of product to a distributor or installer’s tanks or the transfer of product in a portable container to the distributor or installer’s custody.
- o) Product identification information—is the unique marketer/blender’s name, brand name, viscosity grade, API service category, and API licensure status that is specific to an engine oil or engine oils.
- p) Product quality—is defined as an engine oil’s ability to meet API, OEM, industry, national or international specifications.
- q) Qualified formulations—are specific engine oil formulations identified by unique codes for which acceptable performance against API performance standards has been demonstrated. Proof of performance against API standards requires the successful completion of engine and bench tests.
- r) Quality assurance—is a program for the systematic monitoring and evaluation of the various aspects of a project, service, or facility to ensure that standards of quality are being met.
- s) Quality control—is the aggregate of activities (as design analysis and inspection for defects) designed to ensure adequate quality especially in manufactured products.
- t) Quality statement—is a document that confirms that an engine oil delivered meets the characteristics and performance level expected from the marketer/blender. The quality statement can be a Certificate of Analysis (C of A), Certificate of Conformance (C of C) or other document as agreed between the parties prior to product delivery.
  - 1) Certificate of Analysis (C of A)—is a certification report of the analysis performed to develop the certified values reported on the Certificate of Analysis. It shall list the test method(s) used for analysis and industry specification limits for tests listed, when available, for the engine oil(s) supplied (see latest edition ASTM D6362).
  - 2) Certificate of Conformance (C of C)—is a document that contains a Certificate of Conformity of a manufactured product. The certificate documents that the product conforms to manufactured specifications (see latest edition ISO/IEC 17050-1).

## 4 General Principles

### 4.1 Equipment for Handling, Sampling and Testing Engine Oils

Engine oils should be handled, sampled and tested in accordance with the latest edition of API 1525. At minimum, clean, dry, and clear glass or plastic bottles shall be used when making visual comparisons to reference samples for color, water, and contamination.

### 4.2 Procedures

Engine oil marketer/blenders, distributors and installers should have written procedures consistent with those described in the latest edition of API 1525.

### 4.3 Abbreviation

If the format for any documentation referenced by this standard limits the number of characters that can be used, an abbreviation may be used as long as the information required by the standard is discernible within the abbreviation. For example, if brand name, SAE viscosity grade, and API service category are required within the documentation, "Brand X SAE 5W-30 ILSAC GF-5/API SN" could be abbreviated as "BrdXSAE5W-30SN."

## 5 Requirements for Marketer/Blenders Supplying Engine Oil to API-Certified Distributors

### 5.1 Basic Requirements for Marketer/Blenders

**5.1.1** A marketer/blender shall have available for supply to distributors or installers engine oils that are in compliance with the latest edition of API 1509.

**5.1.2** The marketer/blender shall clearly identify to all recipients for each engine oil to be supplied the API license status, API service category, SAE viscosity grade, and brand name. Notification may be made by paper or electronic record.

**5.1.3** The marketer/blender shall verify an engine oil's license status by providing a valid copy of its Schedule A License Agreement or citing API's on-line Directory of Licensees ([www.api.org/eolcs](http://www.api.org/eolcs)). Notification may be made by paper or electronic record.

**5.1.4** The marketer/blender must maintain pertinent sections of the Candidate Data Package provided by the technology supplier sufficient to document the API service category of each formulation supplied.

**5.1.5** Records required by this section shall be maintained a minimum of 6 months. Candidate Data Packages shall be maintained as long as the formulations the packages support are supplied.

### 5.2 Marketer/Blender Practices to Support Chain of Custody

#### 5.2.1 Batch Quality and Tracking Management

The marketer/blender shall implement and maintain a quality testing and tracking system to allow identification of and assure conformance to the API service category claimed for every batch of engine oil delivered to distributors and installers.

##### 5.2.1.1 Tracking System

The tracking system shall include, at minimum:

- a) A separate, unique code for each blend/batch.
- b) Blend code traceable to Part Q of the API Engine Oil Licensing and Certification System (EOLCS) Application for Licensure.
- c) Certificates of Analysis for components used in oil batches.
- d) Records of the results of quality certification testing (See 5.2.1.2) on each batch.
- e) Record of batches in a tank for a given day (identify the most recent two batches added to a tank).
- f) The customers for all deliveries made each day from each engine oil storage tank.

##### 5.2.1.2 Batch/Quality Certification Testing

The marketer/blender shall run appropriate tests on each batch to certify the oil has been blended to meet identifiable properties. Tests should include the following (appropriate ASTM procedures, when available, are recommended):

- a) Kinematic viscosity at 100°C—ASTM D445 or D7279.
- b) Cold Cranking Simulator (CCS) @ temperature for viscosity grade (defined in SAE J300)—ASTM D5293.
- c) Additive elements sufficient to confirm additive package and additive component level (Ca, Mg, P, Zn, Molybdenum, Na, B & N and/or others if appropriate)—ASTM D4951; D4927; and D6481, D5762 or D6443.
- d) Appearance (Visual).
- e) Color (ASTM D1500).
- f) Specific gravity/density (ASTM D4052).
- g) Pour point (ASTM D5949, D5950, D5985).

### 5.2.1.3 Retain Samples

The marketer/blender shall retain at least 8 ounces of product from each blend, and these retain samples shall be traceable to the batch. The marketer/blender shall retain samples for a minimum of 3 months (up to 6 months is recommended) in an environment free from exposure to UV light to prevent deterioration and contamination.

## 5.3 Chain-of-Custody Documentation—Marketer/Blender Delivery to Distributor

### 5.3.1 Order Information

The marketer/blender shall provide a paper or electronic record with each sale of product that identifies the quality of the product. At minimum, the record shall include the following:

- a) Brand name.
- b) SAE viscosity grade.
- c) API service category.
- d) API license status (API-licensed or unlicensed). The API license status of the oil shall be confirmed by the distributor. API-licensed oils are listed on-line at [www.api.org/eolcs](http://www.api.org/eolcs).
- e) Information necessary to ensure traceability to product performance claim.

### 5.3.2 Bill of Lading

The marketer/blender shall provide a Bill of Lading, consisting of a paper or electronic record, for each oil delivery to each distributor or installer receiving an engine oil or oils. This Bill of Lading shall include the information below for each oil in each compartment delivered or the distributor shall be able to link to a system [for example, through product or stock-keeping unit (SKU) numbers] that defines the following:

- a) Marketer/blender name(s).
- b) Brand name(s).
- c) SAE viscosity grade(s).
- d) API service category.
- e) Oil quantity(s).
- f) Date of shipment.
- g) Delivery vehicle compartment from which oil is dispensed.

### 5.3.3 Quality Statement

**5.3.3.1** The marketer/blender shall provide, if requested by an API-licensed distributor, a quality statement for all engine oil deliveries to the distributor at the time of product delivery. The quality statement shall certify that the product has been inspected and tested and conforms to established specifications. The person responsible for the product quality shall sign the quality statement either by actual signature or electronic identification.

**5.3.3.2** The quality statement shall be in the form of a Certificate of Analysis (C of A), Certificate of Conformance (C of C) or other document as agreed between the parties prior to product delivery.

**5.3.3.3** The quality statement should contain at least the following information about each engine oil being transferred:

- a) Marketer/blender name(s).
- b) Brand name(s).
- c) SAE viscosity grade.
- d) API service category.
- e) API license status (API-licensed or unlicensed).
- f) Oil quantity.
- g) Date of shipment.

**5.3.3.4** The C of A should include results from tests as agreed between the marketer/blender and the oil recipient (see 5.2.1). Examples of tests include the following:

- a) Kinematic viscosity at 100°C—ASTM D445 or D7279.
- b) CCS @ temperature for viscosity grade (defined in SAE J300)—ASTM D5293.
- c) Elemental analysis—ASTM D4951, D4927, D6481 or D5762.
- d) Appearance (Visual).
- e) Density and relative density by digital density meter (ASTM D4052) or API gravity by D1250.
- f) Pour point (ASTM D5949, D5950, D5985).

The C of A should list industry specification limits for tests run, when available, for the engine oil(s) supplied. The marketer/blender and distributor shall agree on what test results will be shown in the C of A or C of C.

**5.3.3.5** A C of C should contain a statement of conformity that states that the engine oils manufactured meet the industry standards claimed.

#### **5.3.4 Retain Sample**

The marketer/blender shall draw a minimum of 4 ounces of engine oil loaded onto the delivery vehicle. If the vehicle is loaded from more than one storage tank, the marketer/blender shall take a retain that represents product from each storage tank. Retain samples shall be traceable to the delivery, including the unique delivery vehicle identification and compartment number. Retain samples shall be retained for a minimum of 3 months (up to 6 months is recommended) from the date of shipment in an appropriate environment free from exposure to UV light to prevent deterioration and contamination.

#### **5.3.5 Invoice**

All invoices for engine oil delivered to a distributor shall contain at least the following information or link to a system (for example, through product or SKU numbers) that defines the following:

- a) Marketer/blender name(s).
- b) Brand name(s).
- c) SAE viscosity grade(s).
- d) API service category.
- e) Oil quantity(s).
- f) Date of shipment.

#### **5.3.6 Record Retention**

The marketer/blender shall maintain copies of the order, Bill of Lading, quality statement and invoice for at least 6 months in paper or electronic format.

## 6 Requirements for Distributor of Bulk Engine Oil

### 6.1 General Requirements and Record Retention

**6.1.1** This section applies to all bulk engine oils handled by the distributor. Unless record retention requirements are specified in a specific paragraph, records required by this section shall be maintained a minimum of 1 year in paper or electronic format.

**6.1.2** A distributor's engine oil offerings shall comply with the latest edition of API 1509.

### 6.2 Chain-of-Custody Documentation—Distributor Receipt of Engine Oil

#### 6.2.1 Order Information

The distributor shall order engine oil from a marketer/blender by requesting and ensuring receipt of, at minimum, the information listed below:

- a) Brand name.
- b) SAE viscosity grade.
- c) API service category.
- d) API-license status (API-licensed or unlicensed). The API license status of the oil shall be confirmed by the distributor. API-licensed oils are listed on-line at [www.api.org/eolcs](http://www.api.org/eolcs).
- e) Information necessary to ensure traceability to product performance.

#### 6.2.2 Purchase Order

**6.2.2.1** When ordering engine oil from a marketer/blender, the distributor shall order by requesting the information listed in 6.2.1. As an example, a distributor would order 2,000 gallons of Brand X SAE 5W-30 API-licensed ILSAC GF-5/API SN engine oil. The distributor shall confirm the API license status of the engine oils ordered. API-licensed oils are listed on-line at [www.api.org/eolcs](http://www.api.org/eolcs).

**6.2.2.2** The distributor shall document in writing the order placed including the information required in 6.2.1. If the distributor places a verbal order, the distributor should request a written summary from the marketer/blender or draft a dated summary and fax or email it to the marketer/blender for return verification. The written summary shall include at least the information required by 6.2.1.

#### 6.2.3 Receiving Inspection

The distributor shall ensure that the Bill of Lading and quality statement, if requested, meet the purchase order requirements prior to product off-loading. This review must include confirmation of the following:

- a) Marketer/blender name.
- b) Brand name.
- c) SAE viscosity grade.
- d) API service category.
- e) Oil quantity.
- f) Date of shipment.
- g) Delivery vehicle compartment from which oil is dispensed.
- h) Bill of Lading number.
- i) Carrier identification.
- j) Density and relative density by ASTM D4052 or API gravity by D1250.
- k) Batch number or other method of traceability.
- l) Supply point.
- m) Person taking delivery.

#### **6.2.4 Record Retention**

The distributor shall maintain records of product deliveries received from marketer/blenders for at least 6 months. Records shall include the batch identification, the purchase order, the Bill of Lading, and the quality statement as well as the product identification information in 6.2.1, date of delivery and the unique identification of the delivery vehicle, including compartment number.

#### **6.2.5 Retain Samples**

The distributor shall draw a minimum of 4 ounces of engine oil from each delivery vehicle compartment from which delivery is accepted. The sample shall be traceable to the specific production batch and shall be retained for a minimum of 3 months (up to 6 months is recommended) in an appropriate environment free from exposure to UV light to prevent deterioration and contamination.

### **6.3 Chain-of-Custody Documentation—Distributor Delivery to Installer**

#### **6.3.1 Customer Order**

The distributor shall document the specific engine oil(s) ordered by the installer including product identification information (see 3.2).

#### **6.3.2 Drop Ticket**

**6.3.2.1** The distributor shall provide a drop ticket for each engine oil delivery that includes at least the following information for each oil delivered:

- a) Marketer/blender name(s).
- b) Brand name(s).
- c) SAE viscosity grade(s).
- d) API service category.
- e) Oil quantity(s).

**6.3.2.2** If the format for the drop ticket limits the number of characters that can be used, abbreviations may be used as long as the brand, viscosity grade, and API service category are discernible. For example, “Brand X SAE 5W-30 ILSAC GF-5/API SN” could be abbreviated as “BrdX5W30GF5SN.”

#### **6.3.3 Invoice**

All invoices for engine oils delivered to installers shall contain, at minimum, the following information on the engine oils delivered:

- a) Marketer/blender name.
- b) Brand name.
- c) SAE viscosity grade.
- d) API service category.

#### **6.3.4 Pre-Dispensing Verification**

Before dispensing engine oil into an installer’s bulk tank, the distributor shall confirm with the installer that the brand name, SAE viscosity grade and API service category of the engine oil being delivered matches the oil ordered. This confirmation shall be provided in written form (paper or electronic format). The distributor should dispense the oil in accordance with API 1525.



### **6.3.5 Post-Dispensing Verification**

After the engine oil has been dispensed, the distributor shall allow the installer to verify that the meter-head on the delivery vehicle is zeroed out.

### **6.3.6 Retain Samples**

The distributor should as a best practice retain at least 4 ounces of engine oil from each compartment of the delivery vehicle either after loading product into a compartment or at time of delivery to an installer. The sample shall be traceable to the delivery of oil from each compartment at each drop and shall be retained for a minimum of 3 months (up to 6 months is recommended) in an environment free from exposure to UV light to prevent deterioration and contamination.

### **6.3.7 Record Retention**

The distributor shall maintain records of product deliveries to installers for at least 6 months. Records shall include the customer order, the drop ticket, and the invoice as well as the product identification information, date of delivery, and unique identification of the delivery vehicle including compartment number.

## **6.4 Direct Delivery from Marketer/Blender to Installer**

If a marketer/blender delivers engine oil directly to an installer, the requirements in paragraph 6.3 shall apply.

### **6.4.1 Retain Samples from Compartments**

The marketer/blender shall retain at least 4 ounces of engine oil loaded into each compartment of the delivery vehicle. The samples shall be retained for a minimum of 3 months (up to 6 months is recommended) in an environment free from exposure to UV light to prevent deterioration and contamination.

### **6.4.2 Retain Samples from Intermediate Bulk Container (IBC)**

A marketer/blender delivering engine oil by intermediate bulk container (IBC) shall retain at least 4 ounces of engine oil loaded into the IBC. The samples shall be retained for a minimum of 3 months (up to 6 months is recommended) in an environment free from exposure to UV light to prevent deterioration and contamination.

## **6.5 Multiple Transfers Between Initial Distributor and Installer**

**6.5.1** If an engine oil is transferred more than once after being shipped to a distributor by a marketer/blender, practices outlined in Section 6 shall be followed by each entity transferring the oil. This is mandatory to maintain chain of custody and ensure the final user of the engine oil receives the proper information on the oil.

**6.5.2** Distributors operating in accordance with this standard that receive engine oil from another distributor shall draw a minimum of 4 ounces of engine oil from each delivery vehicle compartment from which delivery is accepted.

**6.5.3** Two or more products with different properties as identified in items a through e of 5.3.3.3 shall not be commingled, even if the products are similar. Mixing different oils with different additive systems is in conflict with the requirement under 5.3.1 to provide sufficient documentation to identify product properties and quality. The distributor shall ensure that tanks are drained and flushed between different products, different grades of the same product, and different products or product groups. The tank should be flushed with the next product to be pumped into the tank.

## 7 Installer Ordering, Receipt and Installation of Bulk Engine Oil

### 7.1 Product Offering

An installer's bulk engine oil offerings shall comply with the latest edition of API 1509.

### 7.2 Order Information

**7.2.1** The installer shall order engine oil from a distributor by requesting, at minimum, the information listed below:

- a) Brand name.
- b) SAE viscosity grade.
- c) API service category.
- d) Verification of API-license status. The API license status of the oil shall be confirmed by the distributor. API-licensed oils are listed on-line at [www.api.org/eolcs](http://www.api.org/eolcs).

**7.2.2** The distributor shall designate how the oil will be described on its drop ticket and invoice in accordance with 6.3.2.1.

**7.2.3** The installer should request that the distributor notify him or her every time the information above changes.

### 7.3 Oil Ordering Practices

**7.3.1** When ordering engine oil from a distributor, an installer shall request a specific brand, SAE viscosity grade, API service category, and quantity of oil per the information agreed-upon by the entities involved. As an example, the installer staff member responsible for ordering engine oil would order 2,000 gallons of Brand X SAE 5W-30 API-licensed ILSAC GF-5/API SN engine oil. If the distributor no longer carries the brand requested, the installer shall request and receive the information required under 7.2.1 before accepting a substitute brand.

The API license status of the oil shall be confirmed by the distributor. API-licensed oils are listed on-line at [www.api.org/eolcs](http://www.api.org/eolcs).

**7.3.2** If a verbal order is placed, the installer may request a written summary from the distributor or draft a dated summary and fax or email it to the distributor for return verification. The written summary shall include at least the information required by 7.2.1.

### 7.4 Installer Receiving Practices

**7.4.1** The installer should request that the distributor assist the installer in labeling all bulk oil tanks with the brand name, SAE viscosity grade, and API service category of the engine oil being stored.

**7.4.2** Prior to allowing a distributor to dispense product into a bulk tank, the recipient of the delivery shall complete the following steps:

- a) Using the paper or electronic confirmation provided by the distributor in accordance with 6.3.4, confirm that the brand name, SAE viscosity grade, and API service category match the product ordered.
- b) Measure via tank gauge or other device the contents of the tank into which the engine oil will be dispensed. The installer may also check the distributor's meter-head to make sure it is zeroed out. After delivery, the installer should take the same measurements again. The installer should document these measurements in a written log maintained by the installer to provide a long-term record that can be used to verify the quantity of deliveries.

**7.4.3** Drop tickets or any other written documentation associated with the quality and quantity of the bulk engine oil delivered shall be kept for at least 6 months by the installer.

## **7.5 Installation Practices**

**7.5.1** Engine oil change options shall be clearly and accurately represented to consumers through a menu board, list of services, or other promotional methods.

**7.5.2** Bulk engine oil installation hoses, hose reels or nozzles and bulk tanks shall be clearly labeled with the brand name, SAE viscosity grade, and API service category of each oil being dispensed.

## **7.6 Customer Receipts**

The customer receipt for the engine oil change shall clearly identify the brand name, SAE viscosity grade, and API service category of the oil installed. For example, the receipt would provide the following information: "Specific Brand SAE 5W-30 SN/GF-5."

An installer has the option to indicate that the brand of oil is a "house brand." Note, however, that an API engine oil license is not transferable and the licensee does not have the right to grant sublicenses. If an installer chooses to rename an engine oil as a "house brand," the receipt would provide the following information: "House Brand SAE 5W-30 SN/GF-5."