Easy to Follow Documentation
by Joe Sobieralski, ASA

Actuarially I believe in easy-to-follow documentation when it exists, and if not, it is my goal to produce more of it for the next man or woman in my shoes.

My belief began as a Calculus teacher where I spent years reading aloud and writing countless directions and solutions to exams and projects that purposefully guided students in a narrative to understand the greater picture of the what, why, and how things needing to be done. Needless to say, my documenting mindset is always "writing to a non-actuarial audience". And it is from this perspective that I value the accountability, detailed instruction, and shared knowledge that actuaries have shown me at work. Regardless of my field, I see myself as fortunate to serve with those who are considerate of the fact that I continue to learn on the job, and unfortunate to serve with those who do not show such consideration.

After being hired into Life Valuation and given my first project---understanding how a quarterly valuation process worked in MS Access (which I had just taken responsibility for)---I wondered why there wasn't better documentation for someone new to follow. It didn't take long to see there aren't many work hours available to write or rewrite documentation that has either never existed, or is too advanced or out-of-date to comprehend. But as an actuarial student in a rotation program, being pressed for time does not stop me from the constant realization that my responsibilities will be in someone else's hands in approximately 2 years if everything goes to plan. So it is best to keep my documentation alert-level set to 'elevated risk'.

Having spent years both learning and instructing dense material, I know the payoff of introducing complex topics using Lehman's terms and explicit language is two-fold: it increases comprehension efficiency and alleviates the stress of understanding how and why things are as they appear. For actuarial, think of adding rows above the column headers to put the file paths of sources or commenting the first cell to include the SQL query to provide where the data set came from; or in a different facet, including whom to contact in a when value looks out-of-tolerance; or keep track of how situations are resolved and when they last occurred. To that end, there is immense value in copying instructions every time a process is performed to document what needed to be added, changed, and/or removed.

The way I see it, the more I document what I do in the near-term, the less I will have to explain later on and fewer questions will be asked of me in the weeks and months that follow. Better yet, the more I do now, the more I can focus on many other items as my rotation grows near.

Besides good karma, there are benefits to documenting day-by-day well beyond rotations. In a pinch, you can hand off responsibility to others, even interns. It can jog your memory of a process done just once a year. And you would also be preparing for the unexpected: audits, departures, leaves, and promotions.

In short, producing documentation provides evidence that you are doing your job, possibly *even* better than those before you. So I consider it a prudent mission to document for both myself and others, taking care of how others will evaluate my actuarial work when I am gone. And I think that evaluation starts with documentation being easy to follow. Though it can be an exhaustive exercise, actuarially I believe there's a payoff for all parties involved.