









PERMIT STATUSES & REQUIRED SIGNATURES


SHAPE	STATUS	SIGNATURE
	Draft	Permit requester
	Awaiting Validation	Permit validator
	Awaiting Approval	Permit approver
	Live	Permit holder
 (flashing)	Overdue	Permit holder or approver
	Suspended	Permit holder or approver
	Closing	Permit holder
	Closed	Permit approver

SIGNING

Throughout the permit workflow, specific roles will be required to “sign” to confirm completion of activities and progress the workflow.

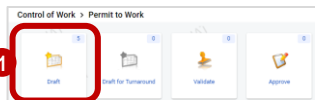
Users will often see 2 signing options:

Sign as logged in

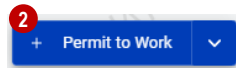
- **Sign as logged in** indicates the permit is being signed by the individual who is logged into the computer. Because the user is already logged in, they will not have to enter a password.
- **Sign** (accessible via ) can be used by another user who is not logged into the computer (e.g., over-the-shoulder signing) or by a user of a mobile device. Using the Sign option requires the entry of username (email) and password.

DRAFTING A PERMIT

1. Select **Control of Work > Permit > Draft**.



2. In bottom right corner of Draft permit list, select + Permit to Work (v shows other options for initiating permit (i.e., template, WO, questionnaire))



DRAFTING A PERMIT cont'd

3. Complete permit fields below:



FIELD	DESCRIPTION
Type	Select the permit type from the list.
Title	Enter a title for the permit following your site naming conventions.
Company Name	Select company performing the work from the list
Number of People	Indicate number of people on work crew.
High Level Approval Required	Indicate if high-level approval is required.
Site	Select the Site associated with permit from the list.
Planned Start Date	Select date the work is expected to start.
Planned End Date	Select date the work is expected to be complete.
Planned Working Hours	Enter the starting and ending planned working hours.
Maximum Lifetime	Defaults to value based on permit type. If necessary, update the maximum lifetime of permit.
Work Description	Enter a description of the work being performed.
Tools/Equipment to be used	Document the tools and equipment to be used in performing the work.
Work Location	Click the Select Work Location icon to indicate the location of the work on a site map. 12
Affected Locations	Click the Select Affected Locations icon to indicate affected locations on a site map.
Offline Approval and Execution	Select Yes or No to indicate if some approvals will be completed offline via paper signing.
Equipment	Select the equipment to be worked on from the equipment list. Expand sites as necessary to locate equipment.
Work Order	Enter the work order number associated with the permitted work.
Turnaround	Check the box if the work is associated with a turnaround.
Lead Craft	Select the primary craft or discipline from the list.
Isolation Requirement	Select Yes or No to indicate if isolations are required for this permit.
Critical Bypass Required	Select Yes, No, or External BCP Certificate to indicate if critical bypass required. Yes indicates it will be completed within tool; external indicates if will be attached
Required Measurements	Select Required or Subsequent next to any required measurement. If selected, user will be promoted to indicate a value and unit of measure.
External HA/Consequence Plan	Select Yes or No to indicate if an external hazard analysis or consequence plan is needed.
Hazard Analysis Level	Select either L1 HA or L2 HA to indicate the hazard analysis level required.

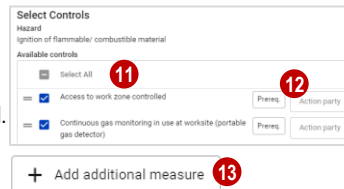
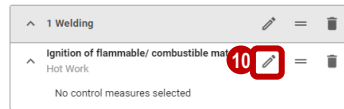
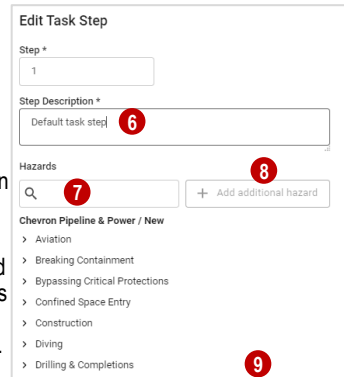
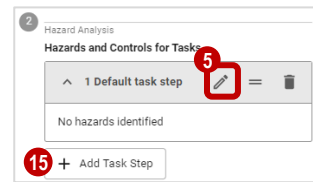
4. Click **Save** icon at the top right of the screen.



CREATING A HAZARD PLAN

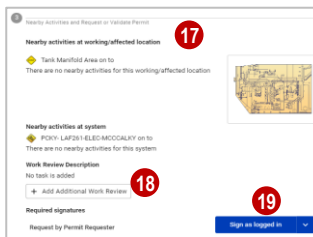
In **Step 2**, Hazard Analysis:

5. Click **Edit** () next to Default task step.
6. Edit **Step Description** as desired.
7. Select **hazards** from applicable hazard categories.
8. If a hazard is not listed in Search, click **+ Add additional hazard**.
9. After all hazards have been identified, click **OK**.
10. Select **Edit** () next to each hazard to access and select from a list of controls that may be utilized to mitigate identified hazards.
11. Check each **Available Control** intended to be used.
12. If a control is not listed, **+ Add additional measure** at the bottom of the list.
13. If a control is prerequisite to a permit being issued, check **Prereq** box and indicate an **Action party** associated with the control.
14. Click **OK** to save the controls.
15. Click **+ Add Task Step** to add steps (optional for L1 HA).
16. Repeat steps #5 -15 to add more hazards and controls.



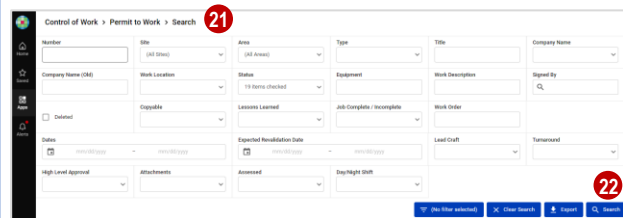
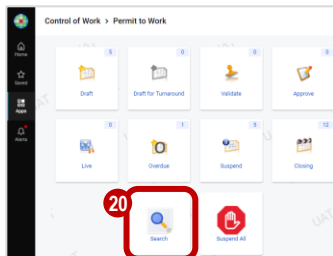
FINALIZING / SUBMITTING A PERMIT REQUEST

17. Review the info in the permit summary, noting nearby activities at working/ affected locations for potential conflicts and SIMOPS.
18. Click **+ Add Additional Work Review** to add a work in progress review.
19. Click **Sign** or **Sign as Logged In** to move the permit status from *Draft* to *Awaiting Validation*.



ACCESSING A PERMIT

20. From the Control of Work > Permit to Work page of the ePTW tool, click **Search**.
21. Select one or more **search parameters** for a permit, including permit number, title, type, status, etc.



22. Click the **Search** button to view the results of your search.
23. Click any of the fields in the permit you desire to access the permit record.

<input type="checkbox"/>	Number	Site	Title	Compan...	Compan...	Number...	Type	Work Lo...	Status	Equipm...
<input checked="" type="checkbox"/>	CPF-389...	CPP	Install (W...	GIS	5	Open Fla...	Tank Farm	Closed	Terminal	
<input type="checkbox"/>	CPF-389...	CPP	Blasting a...	Gulf South	5	Open Fla...	Tank Man...	Closed	Terminal	

VALIDATE PERMIT

24. Access the permit.
25. Permit Validator reviews:
 - General information in the permit and risk assessment.
 - Nearby activities at working/affected locations to understand potential conflicting activities or simultaneous operations.
 - Other permitted activities for the equipment to understand potential conflicts in work with the equipment.
26. After review: the Permit Validator may *either*:
 - **Sign** the permit, moving the status from *Awaiting Validation* to *Awaiting Approval*.
 - **Revert** the permit back to the Permit Requester with a reason for return



ADD GAS MEASUREMENTS

27. From the **Actions** in the lower right corner of a permit, click **Add Measurements**.

28. Enter **Value** for the designated substance.

29. Enter the **Gas Detector Number**.

30. Add **Remarks**, as needed.

31. Click **Sign as logged in** or **Sign** to complete.

APPROVE PERMIT

32. Access the permit.

33. **Review** the permit information.

34. Note whether **Revalidate by Permit Approver required?**

35. Click **Sign**.

36. **Acknowledge** review of hazard analysis and permit requirements.

37. Confirm prerequisite measures in place.

38. Confirm **permit times**.

39. Provide **remarks**, if desired.

40. **Sign as logged in** or **Sign** the permit.

After approval, the permit status will move to *Approved*.

ACCEPT PERMIT

41. Permit holder accesses the permit.

42. **Review** the permit information, including hazards and controls.

43. After review, the Permit Holder may *either*:

- **Sign** the permit, moving the status from *Approved* to *Live*.
- **Revert** the permit back to the Permit Approver with a reason for return.

44. If signing, **acknowledge** understanding and communication of permit conditions.

45. **Sign** the permit, moving the status from *Approved* to *Live* or *Live (Awaiting Activation)* depending on whether the permit period has started..

SUSPEND PERMIT

46. From the **Actions** in the lower right corner of a permit, click **Suspend by Permit Approver / Permit Holder**.

47. Enter the **Expected Revalidation Date**.

48. Click **Sign** button.

49. Select the **Reason** for suspending the permit.

50. Add **Remarks** to provide additional information, as needed.

51. **Sign as logged in** or **Sign** the permit suspension.

After suspension, the permit status will change to *Suspended for Revalidation* or *Suspended for Emergency*.

CLOSE PERMIT

52. Click **+ Add Lesson Learned** to record learnings associated with a permit, equipment or location, if applicable.

53. Click **Sign** next to **Close by Permit Holder**.

54. Update the **Work Status** to note whether work is complete or incomplete.

55. Add **Remarks**, as needed.

56. Click **Sign as logged in** or **Sign** to initiate permit closing.

After closing, the permit status will change to *Closing* and is ready for closure by Permit Approver.

57. The Permit Approver may also **add lessons learned** and then **Sign** next to **Close by Permit Approver**.

After approval for closing by Permit Approver, the permit status will move to *Closed*. Permits that remain in *Closing*, *Overdue* or *Expired* status more than 40 days will automatically be closed.

ADDITIONAL PERMIT ACTIONS

From **Actions** of a given permit, the following additional actions may be initiated at specific times in the permit workflow:

- Add Attachment (e.g., File, Toolbox Talk, BCP, etc.)
- Adding or editing permit dependencies.
- Take over responsibilities on a permit.
- Create a template from a permit.

The following actions are available from the **header** of a permit:

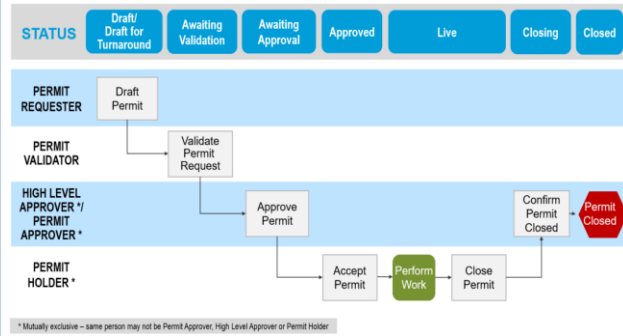
- View audit trail of permit
- Copy a permit.
- Mark a permit as not copyable.
- Various print options
- Delete a permit (prior to permit approval)



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Quick Reference Guide
Electronic Permit-to-Work Tool (ePTW)
Modern User Interface

PERMIT WORKFLOW



PERMIT TYPES

ICON	PERMIT TYPE	LIFETIME
	General Work	30 days
	Non-Open Flame	30 days
	Open Flame	30 days
	Confined Space Entry	30 days
	Excavation	30 days
	Radiography	30 days
	Commercial Diving	30 days
	Energized Electrical	30 days
	Breaking Containment	30 days
	Permit Not Required	30 days