



eBook

# What Is a Permit to Work System?

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# Introduction

**If you've ever worked in a high-risk industry, like construction, manufacturing or electrical maintenance, you're familiar with permit to work (PTW) systems.**

If you're based in the US, you may refer to these processes as "work authorization permits" or simply "work permits." These systematic processes, applied to hazardous operations in both high- and low-risk industries, authorize designated workers to undertake a certain task at a specific place and time.



**For example, if a group of workers were tasked with erecting a traffic sign near electrical cables, a PTW system would be used to track and mitigate the risks involved in that task.**

**While the central aim of these processes is to minimize risk in a hazardous workplace, just checking the boxes of a PTW system won't make a job safe.**

Only strict adherence to the preparations, precautions and processes laid out in a PTW system can lower the likelihood of incidents. When properly followed, the strict controls established in these systems can ensure that safe conditions are upheld before, during and after work.

Many companies still use spreadsheets to comply with a PTW system. While this method can be effective, it's certainly not efficient. Today's innovative software solutions can provide an efficient, centralized approach to the PTW system, saving companies time, money and energy, as well as providing key data points that can help identify potential risks that might not have been made clear with pen and paper.



# What Is a Permit to Work System?

Permit to work (PTW) systems are complex and serve varying purposes.

They serve many functions in high-risk situations, including establishing precautions before work can commence, delineating a method of communication between personnel involved in the work and providing a record of procedures, precautions and permissions.



Because of their many purposes, organizations define and use PTW systems differently.

The Health and Safety Executive (HSE), Britain's national regulator for workplace health and safety, provides a comprehensive description of the PTW system as "a documented procedure that authorises certain people to carry out specific work within a specified time frame."

It sets out the precautions required to complete the work safely, based on a risk assessment. It describes what work will be done and how it will be done; the latter can be detailed in a "method statement."

Most PTW systems can be outlined as follows:



## Purpose

The work to be performed and the purpose of the PTW system.



## Scope

The scope of the work to be performed, including the time frame during which work is allowed and the precise location of the work.



## Responsibilities

The roles and responsibilities of each person involved in the work.



## Procedure / Method Statement

The exact nature of the procedure workers will follow when performing the work.



## Precautions

The precautions that will be taken as the workers carry out the procedure.



## Documentation

Documents that support the PTW system, such as a risk assessment.



## Approval and Issue

The names of those who approve the system, the date of approval and any records of previous versions of the document.



## Definitions

Definitions of terms used in the system.



## References

References made in the document, often to regulations laid out by organizations such as HSE or OSHA.







## Why Do Businesses Need PTW Systems?

While high-risk industries tend to be the most frequent users of PTW systems, the decision of whether one is required does not depend on an industry's hazard level.

Rather, it depends on the hazard level of the specific work to be performed. This information can be gathered in a risk assessment, often performed before a PTW system is established.

### Examples of work situations that require PTW systems include:

Work that involves a source of **ignition or an open flame**, i.e., welding, cutting, brazing, soldering, using open flames, blowlamps, torches, bitumen, tar boilers. These processes are known as **hot work**, and without taking proper precautions, workers risk burns, respiratory conditions, eye damage and more.

Work in **confined spaces**, such as tunnels, tanks or silos. Without taking precautions, workers in these enclosed or partially enclosed **spaces risk potential asphyxiation** from noxious fumes, reduced oxygen levels and fire.

Working with or near electricity. Without taking precautions, workers performing **electrical work** or work adjacent to an electrical source risk electric shock, injury and explosions.

**But PTW systems don't just aim to create safe conditions before work begins. Using a PTW system can have many added benefits, including the following:**



### Written Record

Properly utilizing a PTW system ensures that risks, precautions and people involved in requesting and performing the work are documented.



### Consistent Safety

A safe working situation is maintained throughout the work, even as conditions, such as the weather, change.



### Communication:

Establishes methods of communication regarding health and safety between all those involved in the system and performing the work.



### Acknowledgement of Process

Provides a checklist that businesses can reference, ensuring all conditions and requirements are both implemented effectively and understood by all individuals involved.



### Compliance

Ensures regulatory compliance.

# Key Elements of a PTW System

According to the HSE, a permit to work system must include the following elements:

## Determine which working areas are considered hazardous

Must define hazardous spaces in which workers will perform tasks.

## Determine the level of risk associated with hazardous activities

Must provide an assessment of the level of risk associated with hazardous working areas and activities.

## Ensure adequate training is provided

Must outline the training processes and methods workers must undertake to perform the designated activities safely.

## Ensure an agreed hazard communication strategy is implemented

Must outline a communication strategy that applies to all personnel involved in carrying out the designated activities.

## Designate individuals responsible for authorizing and supervising hazardous activities

Must include the names and permissions of those responsible for authorizing and supervising hazardous activities.

## Ensure the permit to work system is monitored proactively

Must outline the way it will be monitored.

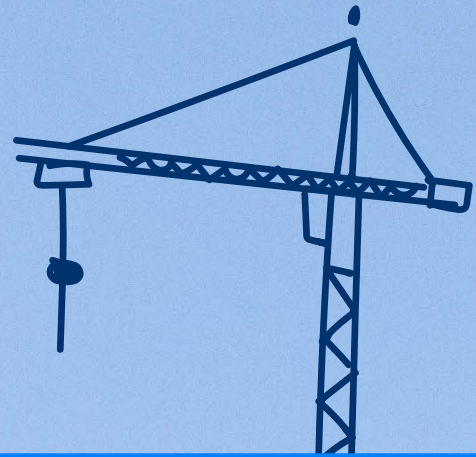




# Common Types of Work Permits

Work permits are not a one-size-fits-all approach. They are distinguished by the nature of work being performed to ensure that the permit includes thorough details specific to the work.

They also enable permit originators to determine which permit should be applied to the hazardous work in question. These are the most common types of work permits:



## Hot Work Permit

This permit should be applied to any operation involving open flame or that generates a source of ignition, including welding, flame cutting, drilling and brazing.



## Cold Work Permit

This permit should be applied to tasks involving hazardous, but non-flammable, materials. These activities may include cleaning or using chemicals, working on pipelines and constructing scaffolding.



## Confined Space Permit

This permit should be applied to any operation in which workers enter confined spaces, such as vessels or tanks. It should detail practices for entering, working within and exiting confined spaces safely.



## Electrical Permit

This permit should be applied to activities that involve the usage of charged electrical conductors. These operations could include the installation, maintenance or removal of electrical conductors.



## General Permit

This permit should be applied to any hazardous work situation that doesn't delve into specific categories covered by the permits listed above.





# Who Is Involved in the Management of a PTW System?

The management of a PTW system requires the involvement of many people. In the UK, the following individuals will take part.

## Permit User (Worker)

This person works under the terms of the permit. They must have the necessary permissions and training required to undertake the specific work listed in the permit.

## Permit Authorizer

This person authorises the permit. They must be knowledgeable about the work detailed in the permit.

## Issuing Authority

This person issues the permit to the permit user(s).

## Area Authority

This person is in control of the area in which the work detailed in the permit is to take place.

## Permit Originator

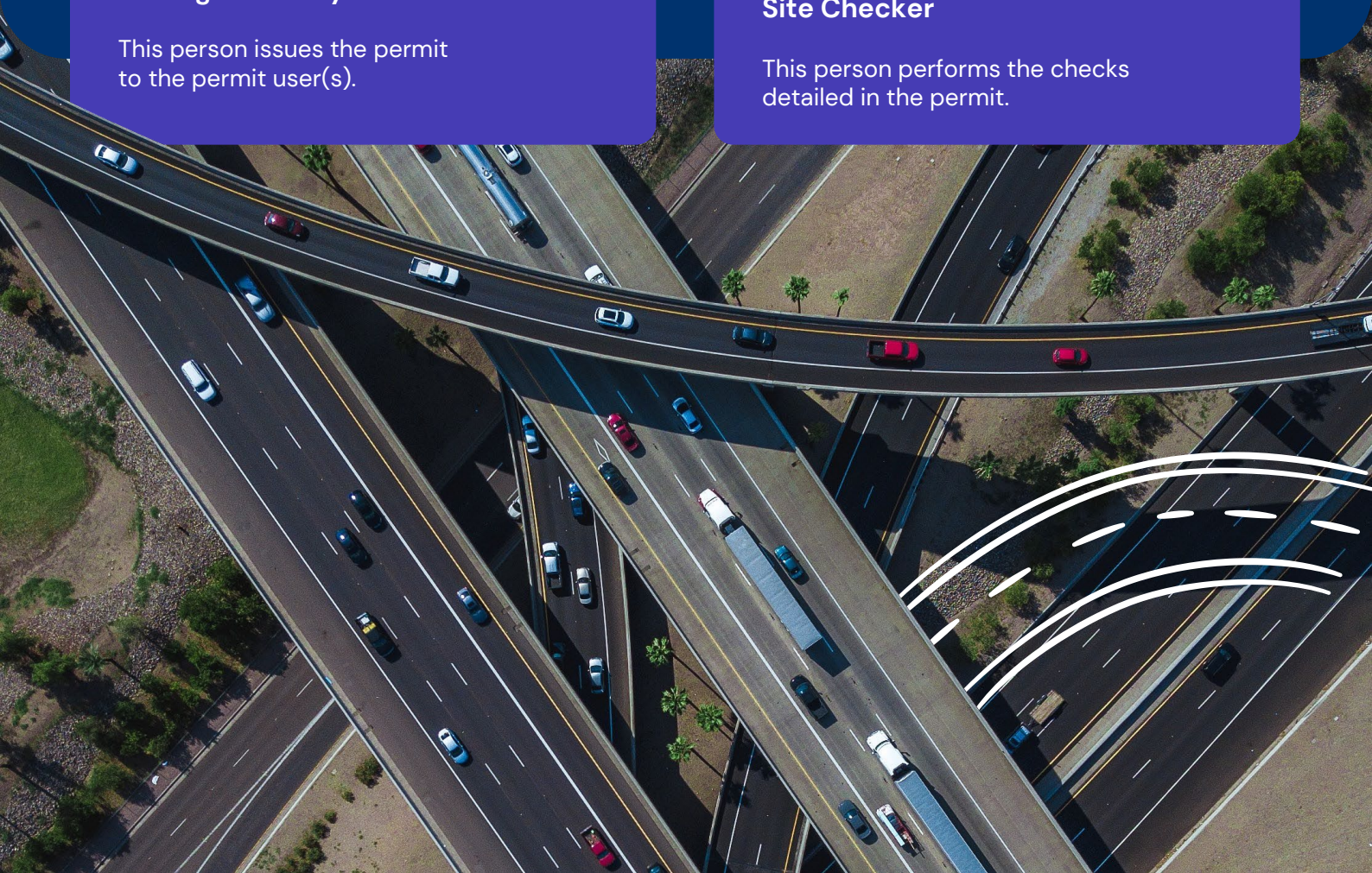
This is the person requiring the work detailed in the permit. They must be knowledgeable about the work detailed in the permit.

## Isolating Authority

This person is responsible for making isolations as outlined in the permit. They must have the necessary training required to perform isolations.

## Site Checker

This person performs the checks detailed in the permit.





# How Can Using Software Streamline Your PTW System?

It's clear that using EHS software can boost the efficiency and effectiveness of many health and safety processes, and the PTW system is no exception.

Today's software solutions create a centralized, secure location for all relevant documentation to be stored. This simplifies the method of obtaining contractor approval and creates an effective way of ensuring regulatory compliance.



**Today's market-leading software solutions can identify various types of permits as well as the hazards and risks associated with each.**

They can help your organization through the application process to ensure all steps are taken and regular checks of your site are maintained. This helps to ensure safety throughout the engagement.

In addition, software solutions can be used to train users in the flow of learning to ensure they're using the equipment properly, adhering to the PTW system and keeping themselves safe.

Plus, with a software solution, your company can update the PTW system in real time, giving your entire team access to updates as they are added.



## Summary

The PTW system is a systematic process designed to authorize a certain group to perform a specific task at a designated place and time.

PTW systems are most commonly used in high-risk work situations, which occur most commonly in industries like construction and manufacturing.

Software can streamline a PTW system, making it more effective at minimizing human error, eliminating workplace hazards and establishing a record of risks, precautions and personnel.

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# Let's chat

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Our Evotix team is passionate about applying market leading technology to create safer, smarter workplaces, partnering with organizations that value people's safety, communities and the planet.

As safety professionals and long-term leaders in the Verdantix EHS Green Quadrant, our deep and practical insight addresses your evolving needs, helping you achieve your health, safety and sustainability goals.

**Evotix: your all-around partner for the journey.**

