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WESR Combined Rulebook

Top-level Governance & Navigation.

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WESR Combined Rulebook — Top-Level Governance & Navigation

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Purpose: Define scope, hierarchy, boundaries, and navigation across the WESR suite (HV, LV, COHE, EIR, LI Process, ESI) and specify how to select the right document, role, and safety document for any situation.



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1. Scope & Applicability

The Combined Rulebook governs all work and operations within the WESR boundary, covering **electrical HV and LV** activities and **Control of Hazardous Energy (COHE)** for all energy forms (mechanical, hydraulic, pneumatic, chemical, thermal, gravitational, stored/latent). It stitches together the standalone rules and add-ons to provide one point of navigation and precedence.

In scope: WESR-controlled sites, onshore/offshore, employees/contractors/visitors.

2. Hierarchy & Precedence

- 1) Applicable **law & site rules** (most stringent).
- 2) **This Combined Rulebook (WESR-CRB)** — top-level governance and navigation.
- 3) **Discipline Standards:**
 - **WESR-HV-OPS** — High-Voltage Operating Rules (HV).
 - **WESR-LV-OPS** — Low-Voltage Operating Rules (LV)(≤ 1 kV AC / ≤ 1.5 kV DC).
 - **WESR-COHE** — Control of Hazardous Energy (all energy types).
 - **WESR-ESI** — Electrical Shock Instruction.
 - **WESR-EIR** — Electrical Injury Response & Reporting.
 - **WESR-LI-PROC** — Lockout Instruction Process.
- 4) **Local procedures** and manufacturer instructions.

Rule of more stringent control: If two requirements conflict, the **more stringent** shall apply.

3. Roles & Single-Point-of-Control

- **PCEI — Person in Control of the Electrical Installation:** owns operational control of the electrical installation outside normal service, issues/controls Safety Documents (PTW/SfT/AA) until restoration.
- **D-PCEI — Delegate:** written delegation for a bounded area/time.



- **PCWA — Person in Charge of Work Activity:** owns the workplace, boundaries, on-site risk review (**RISK-W**), team briefing, and clearance.
- **HV Switching Assistant (HV-SA):** assists PCEI during HV switching and earthing with order/confirmation protocol.
- **Isolation Lead (IL) / Isolation Verifier (IV) / Lock User (LU):** COHE lockout roles with independence rule **IL ≠ IV**; LU applies personal lock.
- **Test Lead (HV-TL):** leads technical execution under **SfT/TEP** when testing/commissioning.

Single-point-of-control: For any affected installation part, there is exactly **one** PCEI (or D-PCEI) in control at a time. Handovers are recorded.

4. Operating Model & Statuses (Universal)

Default principle: **Dead/zero-energy** working. Live/energised work is **exceptional** and requires justification, authorisation, and a **TEP/SfT** when primary precautions vary.

Standard statuses:

Normal Operation → **Isolated** → **Proved Dead** → (**Earthed/Bonded** if applicable) → **Work in Progress** → **Suspended (Made Safe)** → **Under Test (Controlled)** → **Ready for Energisation** → **Restored / Normal Operation**.

Suspensions: Primary precautions remain intact; resumption requires re-confirmation and team re-brief.

5. Boundary Rules

5.1 HV vs LV

- **HV (WESR-HV-OPS):** > 1 kV AC or > 1.5 kV DC.
- **LV (WESR-LV-OPS):** ≤ 1 kV AC / ≤ 1.5 kV DC.
- **Mixed cabinets/systems:** Establish and maintain a **documented boundary** (drawings/schedules) and apply the ruleset of the **highest hazard** present unless physically segregated.



5.2 Electrical vs Other Energies (COHE)

- Where **any** non-electrical hazardous energy exists (mechanical, hydraulic, pneumatic, thermal, chemical, gravitational, stored/latent), the **COHE add-on** governs lockout governance end-to-end.
- Electrical isolation within COHE follows the HV/LV rules for verification and, where warranted, earthing/bonding.

6. Which Document Do I Use? (Selection Matrix)

Situation	Discipline Standard	Primary Safety Document(s)	Supporting Forms
HV switching, isolation, earthing	WESR-HV-OPS	SS-HV-001 → PTW-HV-001	EBL-HV-001, OCLOG-HV-001, RISK-W-HV-001
HV testing/commissioning	WESR-HV-OPS	SfT-HV-001 + TEP-HV-001	EBL-HV-001, OCLOG-HV-001, Audit checklist
LV dead/vicinity work	WESR-LV-OPS	PTW-LV-001	ILOR-LV-001, SS-LV-001, RISK-W-LV-001, TMC-LV-001, EBL-LV-001
LV testing under control	WESR-LV-OPS	SfT (via TEP-LV-001)	Instrument logs, barriers/screens record
Multi-point/multi-energy lockout	WESR-COHE	Lockout Instruction (LI-HE-001) + PTW/SfT as applicable	ILOR-HE-001, GLSS-HE-001, SIBA-HE-001, APLR-HE-001
Non-electrical tasks in electrical areas	WESR-LV-OPS/HV-OPS	Access Agreement (AA)	RISK-W, boundary sketch
Electrical shock incident	WESR-ESI / WESR-EIR	EIR-Form-001 (medical handover)	Evidence Register, Photo Log, Chain-of-Custody, RTW

Tip: If more than one row fits, start with the **highest hazard** (HV over LV; live over dead; multi-energy over single-energy) and apply **all** applicable documents. When in doubt, consult PCEI.

7. Safety Documents: When & How

- **PTW (Permit-to-Work)** — default for Dead/Vicinity work; issued by **PCEI** (or D-PCEI) to **PCWA** after primary precautions verified.
- **SfT (Sanction for Test)** — mandatory when primary precautions vary or energisation is required for testing; **exclusivity**: no parallel permits on same equipment; **presence**: PCEI/D-PCEI as defined.
- **AA (Access Agreement)** — for non-electrical work within electrical hazard zones protected by boundaries/barriers.



- **LI (Lockout Instruction)** — written isolation plan for complex/multi-point or multi-energy lockouts (COHE).
- **ILOR (Isolation & Lockout Record)** — point-by-point verification of isolations, lock/tag IDs and zero-energy checks.
- **GLSS (Group Lock Sign-on Sheet)** — personal lock control for each worker (LU).

Four-eyes / independence: SS approvals, LI review/field validation, and verification of absence of voltage/zero-energy require independent checks (e.g., **IL ≠ IV**).

8. Interfaces & Concurrent Work (SIMOPS)

- **Single PCEI** controls an affected installation part.
- No **conflicting Safety Documents** on the same equipment; interfaces between permits are documented (mechanical/lifting/scaffolding, etc.).
- **SIMOPS meeting** required where boundaries overlap; record hold points and communication rules.

9. Training, Competence & Authorisation

- **Person categories:** Skilled, Instructed, Ordinary (per EN definitions).
- **Role authorisations:** Written appointment for PCEI/D-PCEI; competence matrix for PCWA, IL/IV/LU, HV-SA, HV-TL.
- **Re-authorisation triggers:** incident/near-miss, long absence, equipment upgrades, procedural change.
- **Drills:** Annual EIR/ESI drills; periodic HV switching/earthing simulations; LOTO practicals for multi-energy scenarios.

10. Tools, PPE & Instrument Governance

- **Insulated tools & live-working equipment:** approved and in-date; category/class as applicable.



- **Portable earthing/bonding:** rated for system fault; governed by earthing logs (LV/HV).
- **Measurement instruments:** selection by category; **self-test before/after** for presence-of-voltage tests; calibration records maintained.
- **PPE:** hazard-based selection; arc-rated where arc risk exists; task-appropriate gloves/face/eye/foot protection.

11. Records, Versioning & Change Control

- **Controlled repository only** — use current versions; IDs and semantic versioning (vX.Y.Z).
- **Change proposals** captured in a **Change Log (CJL)** with review by PCEI/PCWA/HSE/Compliance and approval by PREI (or delegate).
- **Retention** per the Form Index/Retention Matrix (Annex F) — ensure COHE/EIR/LV/HV specific periods are met or exceeded.
- **KPIs & audit** — permit quality, four-eyes compliance, SfT exclusivity adherence, calibration conformance, incident learning closure.

Annexes

Annex A — Decision Tree: “Which WESR Document Applies?”

Step 1 — Voltage level

- **HV (>1 kV AC / >1.5 kV DC)** → Use **WESR-HV-OPS** (then go to Step 3).
- **LV (≤1 kV AC / ≤1.5 kV DC)** → Use **WESR-LV-OPS** (then go to Step 3).

Step 2 — Other hazardous energies present?

- If **mechanical/hydraulic/pneumatic/thermal/chemical/gravitational/stored** energy exists or could be introduced → **also** apply **WESR-COHE** with **LI/ILOR/GLSS**.

Step 3 — Nature of work

- **Dead/Vicinity work** → **PTW** (HV or LV variant).
- **Testing/energised diagnostics** → **SfT** (HV) or **TEP (LV/HV)** as applicable; maintain **exclusivity** (no parallel permits on same plant).
- **Access only in an electrical area** → **AA** (HV/LV variant).



Step 4 — Complexity

- **Single isolation point without stored energy** → PTW + ILOR (as applicable).
- **Multi-point / multi-feed / multi-energy** → **Lockout Instruction (LI-HE-001) + ILOR-HE-001 + GLSS-HE-001.**

Step 5 — Incident

- Electrical shock/injury → **ESI/EIR** with **EIR-Form-001**, Evidence Register, Photo Log, Chain-of-Custody, RTW.

Rule of thumb: When more than one applies, use the **highest hazard** and **most controlling** set first, then layer others.



Annex B — Roles & RACI (Summary)

Activity	PREI	PCEI	D-PCEI	PCWA	HV-SA	IL	IV	LU	HV-TL	ILI	ML
Define governance & approve standards	A	C	I	I	I	I	I	I	I	I	I
Appoint PCEI / delegates	A	R	R	I	I	I	I	I	I	I	I
Prepare Switching Schedule (SS)	I	R/A	R (if delegated)	C	C	I	C	I	C	I	I
Execute HV switching/earthing	I	R/A	R	I	R	I	I	I	C	I	I
Issue PTW/SfT /AA	I	R/A	R	C	I	I	I	I	C	I	I
Workface control & team brief	I	C	I	R/A	I	C	C	R (own lock)	C	I	I
Develop Lockout Instruction (LI)	I	C	I	C	I	R	C	I	I	I	I
Review/validate LI (field)	I	C	I	C	I	C	R	I	I	I	I
Testing under SfT/TEP	I	A	R (if delegated)	C	I	C	C	I	R	I	I
Incident investigation	I	C	I	C	I	C	C	I	I	R	C
Medical liaison & follow-up	I	I	I	I	I	I	I	I	I	C	R

A = Accountable, R = Responsible, C = Consulted, I = Informed.



Annex C — Document Map (Suite Navigation)

HV (WESR-HV-OPS):

- **Primary:** SS-HV-001 → PTW-HV-001; **SfT-HV-001 + TEP-HV-001** for testing.
- **Logs/Support:** EBL-HV-001, OCLOG-HV-001, RISK-W-HV-001, AUD-HV-OPS-CHK-001, GLSS-HV-001.

LV (WESR-LV-OPS):

- **Primary:** SS-LV-001 → PTW-LV-001, TEP-LV-001 for controlled tests.
- **Logs/Support:** ILOR-LV-001, RISK-W-LV-001, TMC-LV-001, EBL-LV-001, CJL-LV-001, GLSS-LV-001.

COHE (WESR-COHE):

- **Primary:** LI-HE-001 (plan) + appropriate PTW/SfT/AA.
- **Logs/Support:** ILOR-HE-001, GLSS-HE-001, SIBA-HE-001, APLR-HE-001, RISK-W-HE-001, TEP-HE-001, EDC-HE-001.

ESI/EIR (WESR-ESI / WESR-EIR):

- **Primary:** EIR-Form-001 (medical handover/report).
- **Logs/Support:** ER-EIR-001, PL-EIR-001, COC-EIR-001, WS-EIR-001, SCL-EIR-001, RTW-EIR-001.
- **ESI Annexes:** ESI-A1, ESI-B1, ESI-C1, ESI-D1.

Annex D — Status Diagram (Universal)

Normal Operation

↓ (SS/LI prepared)

Isolated

↓ (verify absence of voltage / zero-energy)

Proved Dead

↓ (apply earthing/short-circuiting if required)

Earthed/Bonded

↓ (PCWA briefing; PTW issued)

Work in Progress

↘ (pause) Suspended (Made Safe) ↗ (re-confirm, brief)

↓ (testing authorised via SfT/TEP)

Under Test (Controlled)

↓ (clearance; remove temporary measures)

Ready for Energisation

↓ (restore per SS; confirm indications)

Restored / Normal Operation



Annex E — Form & Template Index (Controlled Repository IDs)

HV Templates: SS-HV-001, PTW-HV-001, SFT-HV-001, TEP-HV-001, EBL-HV-001, RISK-W-HV-001, AUD-HV-OPS-CHK-001, OCLOG-HV-001, GLSS-HV-001.

LV Templates: PTW-LV-001, ILOR-LV-001, SS-LV-001, TEP-LV-001, AA-LV-001, RISK-W-LV-001, TMC-LV-001, EBL-LV-001, CJL-LV-001, GLSS-LV-001.

COHE Templates (WESR-COHE): LI-HE-001, ILOR-HE-001, GLSS-HE-001, SIBA-HE-001, APLR-HE-001, RISK-W-HE-001, TEP-HE-001, EDC-HE-001.

EIR/ESI Templates (WESR-EIR / WESR-ESI): EIR-Form-001, ER-EIR-001, PL-EIR-001, COC-EIR-001, WS-EIR-001, SCL-EIR-001, RTW-EIR-001; ESI-A1, ESI-B1, ESI-C1, ESI-D1.

Use current versions only from the controlled repository. Link file paths/URLs here when published.

Annex F — Retention Matrix (Minimums)

Record Type	Minimum Retention	Notes
PTW / LI / ILOR / GLSS / SS / TEP / SFT / AA	≥ 3 years or next full audit cycle (whichever longer)	Follow stricter local law if applicable
Earthing Logs, Order/Confirmation Logs	≥ 3 years	
Calibration Certificates / TMC	Until superseded + 1 year	Maintain traceability to instrument IDs
EIR/ESI Incident Records (including evidence packs)	≥ 5 years	Or per legal requirement if stricter
Change Logs (CJL)	Life of applicable standard	Keep version history intact

Annex G — Glossary (Selected)

- **AA** — Access Agreement.
- **APLR** — Absent-Person Lock Removal.
- **COHE** — Control of Hazardous Energy (all energies).
- **D-PCEI** — Delegated Person in Control of Electrical Installation.
- **EBL** — Earthing/Bonding Log.
- **EIR/ESI** — Electrical Injury Response / Electrical Shock Instruction.
- **GLSS** — Group Lock Sign-On Sheet.



- **HV-SA** — High-Voltage Switching Assistant.
- **HV-TL** — High-Voltage Test Lead.
- **IL/IV/LU** — Isolation Lead / Isolation Verifier / Lock User.
- **ILOR** — Isolation & Lockout Record.
- **LI** — Lockout Instruction.
- **MAD** — Minimum Approach Distance.
- **PCWA** — Person in Charge of Work Activity.
- **PCEI** — Person in Control of the Electrical Installation.
- **PTW** — Permit-to-Work.
- **SfT** — Sanction for Test.
- **SIMOPS** — Simultaneous Operations.
- **TEP** — Test & Energisation Plan.

Annex H — Version History (Template)

Version	Date	Description of Changes	Author	Approved By
v1.0.0	TBD	Initial issue (Combined Rulebook)		