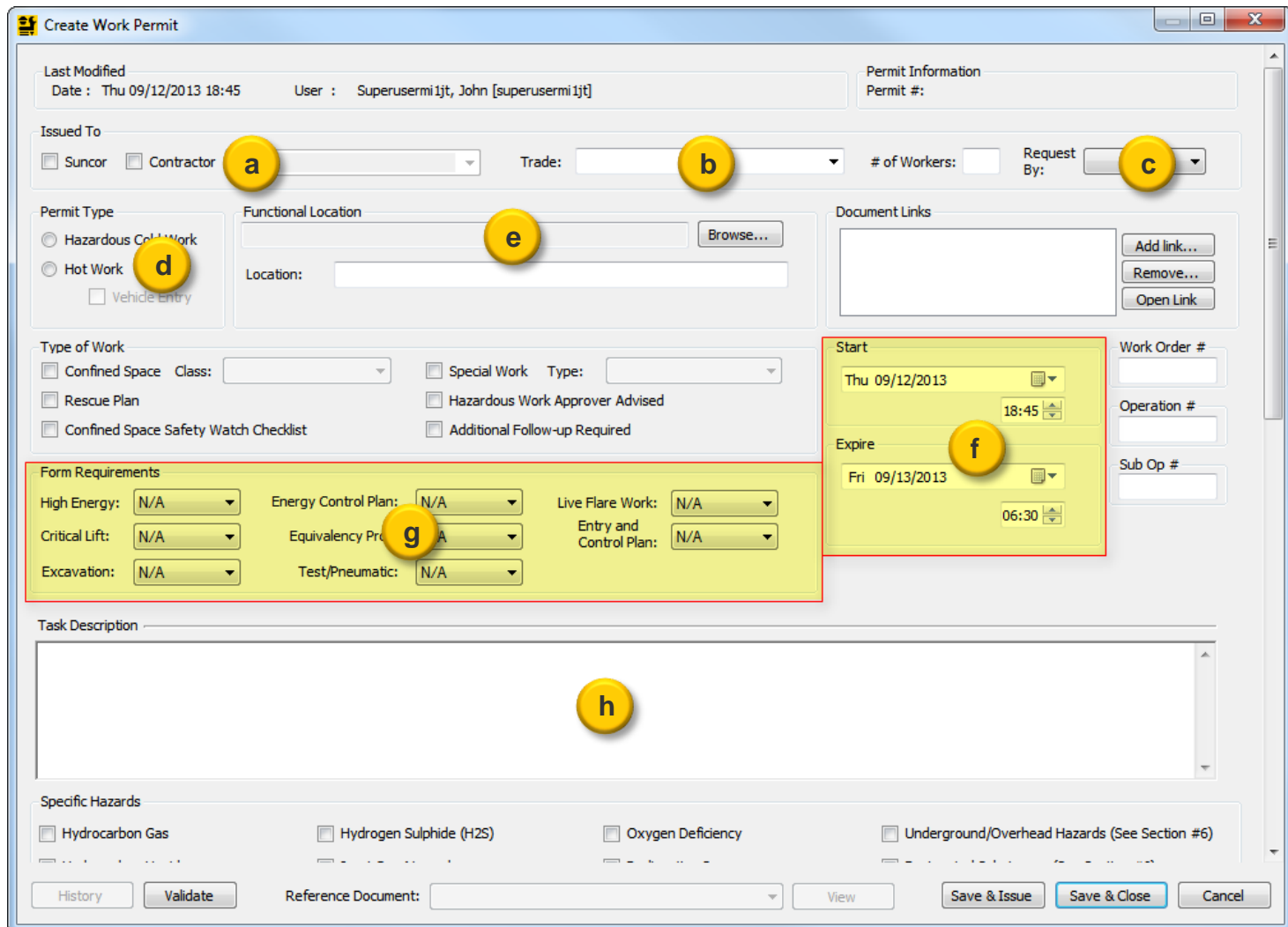# CREATE A WORK PERMIT
QUICK REFERENCE GUIDE (QRG)

Helpful Hints

- The **Safe Work Permit** is a document that describes the work to be performed, the associated hazards, and precautionary measures. It is a legal document that authorizes a specific job.

- A **Safe Work Permit** can be created from a **Permit Request** or created manually from scratch.

Procedure

1. On the navigation pane, click on the **Safe Work Permit** icon ![Safe Work Permits] to navigate to the Permits screen.

2. Click on the **Work Permits** tab ![Safe Work Permits] (located on the top of your screen) to select it.

3. Click on the **New** button ![New] to open a new **Safe Work Permit**. Complete the fields as required.

a) **Select** who the permit is being **Issued To**. If it is a contractor, type the contractor name or select from the list.

b) **Select** the **Trade** (i.e. occupation) that will be completing the work.

c) **Select** the **Group** that will be requesting the permit (i.e. Maintenance, Construction, Turnaround, Outage). This will help users categorize and filter Work Permits in the grid.

d) **Select** the **Permit Type** (i.e. Routine Maintenance, Cold Work, Normal Hot Work, High Energy Hot Work).

e) **Click** the **Browse** button to select the Functional Location for where the work will be occurring.

f) **Enter** the **Requested Start and Expired Date/Time** of the permit.
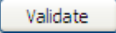
g) For the **Form Requirements** section **Select** any forms that will need additional approvals (i.e. High Energy, Critical Lift, Excavation, etc.) prior to submission.

> Any forms set to "**Required**" must be changed to "**Approved**" once the all approvals have been received otherwise the **Permit Request** cannot be submitted as a **Work Permit**.

h) **Enter** the scope of work in the **Task Description** text box. Enter any safety hazards or requirements in the **Other Hazards and/or Requirements** text box.

4. Scroll down to continue completing the rest of the Safe Work Permit form.

5. Click on the **Validate** button [Validate] to verify the form to identify/address any error(s) or warning(s) found.

> All **Errors** 🛑 must be correct before the **Permit Request** can be saved. Any **Warnings** ⚠ must be addressed before the form will be considered complete and ready for submission as a **Work Permit**.

6. Click on **Save & Close** or **Save & Issue** button to save your work and close the **Safe Work Permit** window.