

OPERATORS · FOUNDATION · 1 DAY

Permit-to-Work, Isolation and Safe Work Practices

Permits, energy isolation and the hand-over of equipment between operations and maintenance

SHIFT LOG · Unit 100 · Night

22:10 PSV-201 lifted, reseated

23:40 FIC-105 in manual – fouling

01:15 Permit 4471 closed

03:30 Round B · P-102 seal weep

Carried forward – Day shift

HANDOVER

Critical ☐

Open tasks ☐

Overrides ☐

DURATION
1 day

LEVEL
Foundation

FORMAT
On-site classroom · virtual instructor-led

LANGUAGE
English

MAX. PARTICIPANTS
16

1

isolation plan built on a real P&ID

5

permit types worked through

LOTO

audit on the plant

Overview

Most maintenance-related process safety incidents trace back to a permit that was signed but not understood, or an isolation that was assumed rather than proven. This course covers the full permit-to-work cycle from job planning to close-out, positive isolation and lock-out/tag-out, gas testing and confined-space entry, and the hand-back to operations. Participants build an isolation plan on one of their own P&IDs and audit a live permit in the plant.

Learning outcomes

- Explain the roles of issuer, receiver, area authority and performing authority in the permit cycle
- Select the correct isolation method — valve, double block and bleed, spade or physical disconnection — for the fluid and the job
- Apply lock-out/tag-out so that stored energy, not just the main supply, is controlled
- Specify gas testing, confined-space and hot-work controls that match the hazard
- Recognise simultaneous-operations conflicts and manage permit interactions
- Hand equipment back to operations with a documented de-isolation and leak test

Who should attend

Field operators, area authorities, permit issuers and receivers, maintenance supervisors and contractor supervisors

Course outline

MORNING

Incidents caused by permit and isolation failures · permit-to-work system: types, roles and authorities · job hazard analysis at the permit desk · isolation standards: single valve to positive isolation · lock-out/tag-out and stored energy · isolation plan workshop on a participants' P&ID

AFTERNOON

Gas testing, confined-space entry and hot work · working at height, excavation and lifting interfaces · simultaneous operations and permit conflicts · permit suspension, extension and close-out · de-isolation, leak testing and hand-back · live permit audit walk-down and debrief

Standards referenced

OSHA 29 CFR 1910.119(f) / (g)

OSHA 29 CFR 1910.147 (Lockout/Tagout) API RP 2201

CCPS Guidelines for Safe Work Practices

CCPS Conduct of Operations

Tools & exercises

Isolation plan and permit walk-down exercises on the site's own P&IDs and permit forms

What's included

- ✓ Course manual and slide pack
- ✓ Software access for the course
- ✓ Post-course Q&A with the instructor
- ✓ Exercise and case-study pack
- ✓ Competency quiz and certificate
- ✓ Templates used in the exercises

PREREQUISITES

None; area familiarity helps for the walk-down

CERTIFICATION

Certificate of completion; competency record for permit issuer/receiver authorisation

INSTRUCTORS

Practising engineers — TÜV HAZOP Leader, CCPSC and IEC 61511 Functional Safety certified — with 200+ years of cumulative plant experience.

Book this course or build a custom curriculum

On-site at your plant or virtual · in-house groups · competency assessment included

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