

**PermitMe Job Aid 4002 - Create a Non-complex Isolation**

**Use this PermitMe Job Aid to:** Create a Non-complex isolation (13 steps or less on a Green I/C).

**Requirements:** User must be assigned “Non-complex” permissions in PermitMe.

**Getting Started:**

This “Non-complex” permission needs to be applied for using the following email link  
[ToddEnergyPTW@toddenenergy.co.nz](mailto:ToddEnergyPTW@toddenenergy.co.nz)

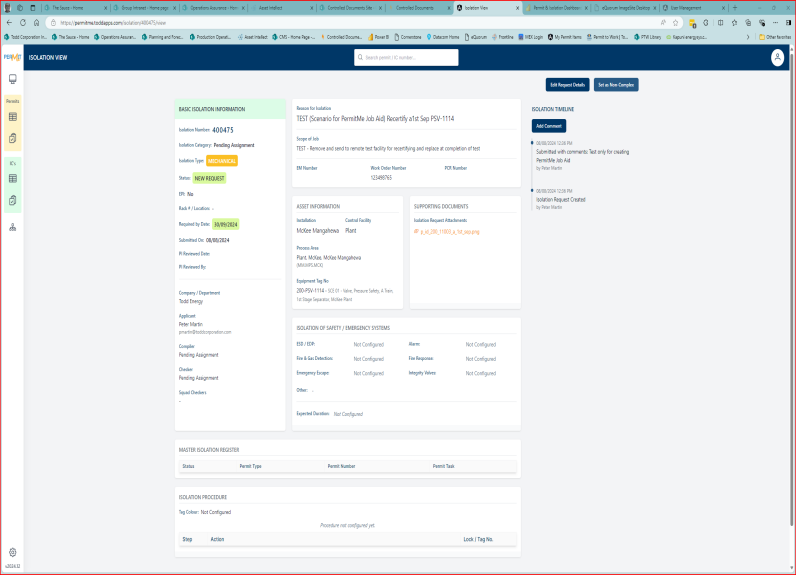
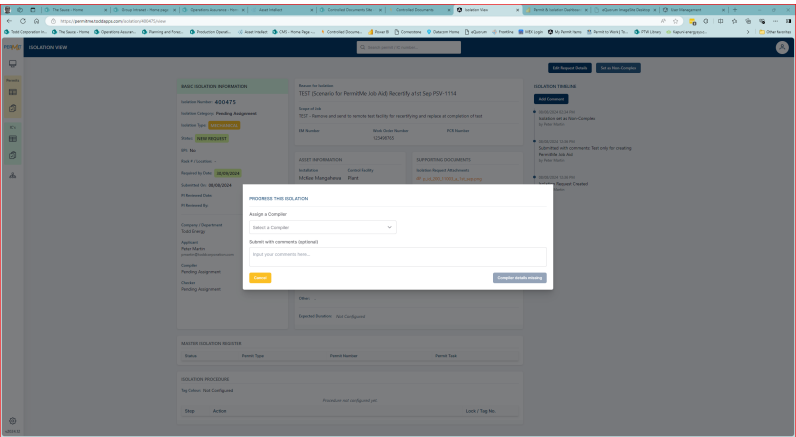
The “Non-complex” permission is only awarded to a User if the non-complex competency or equivalent is recorded for the specified user in the Todd Competency Management System (CMS)

**Some Important User Information about the IsolateMe process:**

- PermitMe users assigned with Non-complex permissions will be able to configure and generate a ‘green’ isolation certificate (I/C) form containing no more than 13 steps once a new request form has been completed and submitted.
- The User or Applicant will become the Complier but can reassign Compiler if necessary.
- The User will need to assign a Checker from a list of PermitMe Users holding Non-complex permissions.
- The I/C number is computer generated at the Request submission and is retained as the Isolation number.
- The I/C number series is set to generate next number with a start point of 400,001.
- The I/C can be printed by the Complier and or the checker for undertaking field checks. The printed version will be watermarked as Draft and is not for use to implement the actual isolation.



To Add a Request to the PermitMe Isolation Register:

<div>1</div> <p>On submitting a New Isolation request, PermitMe Applicant with Non-complex permission will see the following (on right) with an additional button: <b>“Set as Non-Complex”</b></p>	
<div>2</div> <p>Applicant selects: <b>“Set as Non-Complex”</b> button. On the pop-up menu to select themselves as compiler</p> <p>Then select: <b>“Assign and Notify Compiler”</b> button. (This can be yourself).</p>	

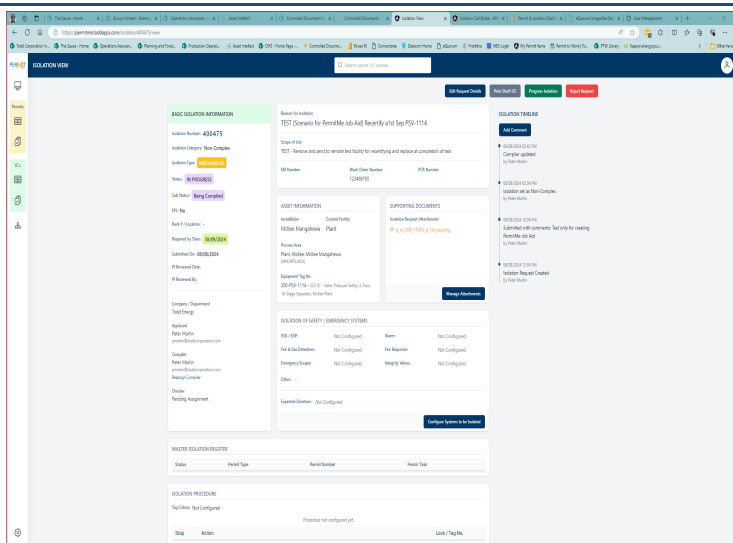
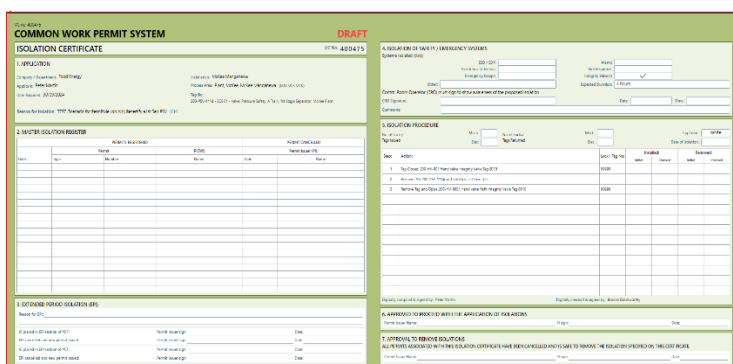
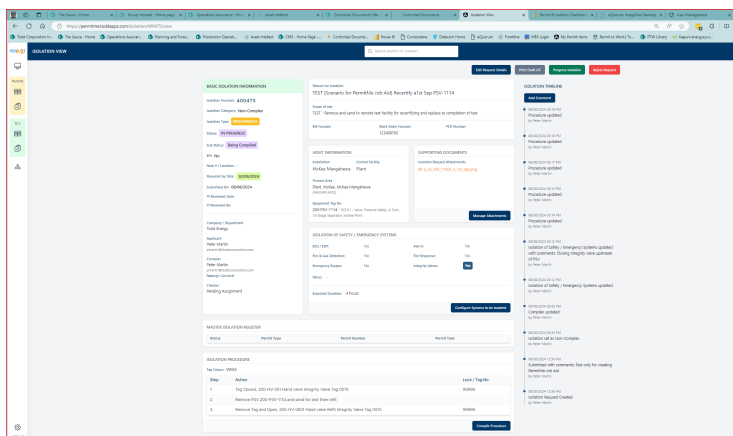
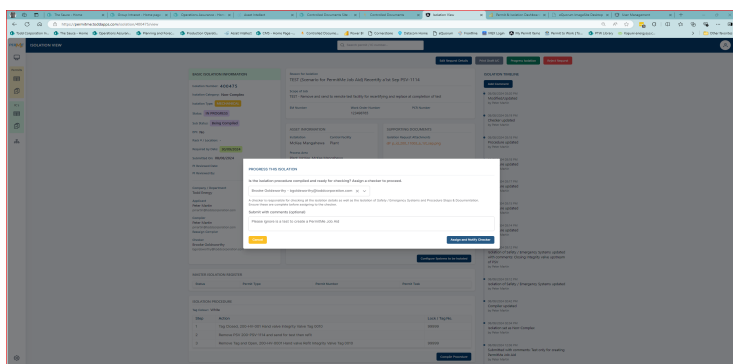
3

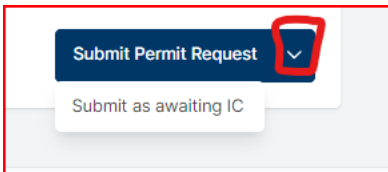
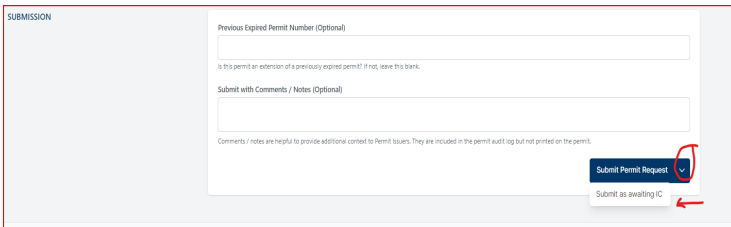
In the Isolation View.

Additional buttons will be available to Compiler. The Four buttons at top of ISOLATION VIEW.

1. **“Edit Request Details”** button will take the isolation back to request pre-submission of request stage and restart the process.
2. **“Print Draft I/C”** this will print a draft for checking with a water mark at top of I/C showing **DRAFT**
3. **“Progress Isolation”**  
Before using this function, the Compiler should use:  
**“Configure Systems to be Isolated”** and complete table then using function:  
**“Compile Procedure”** to create the isolation procedure steps.  
*If either of the two are not completed. Then “Progress Isolation” will redirect to complete before proceeding to pop up for Assigning a Checker*
4. Select **“Progress Isolation”** button to Assign a Checker
5. **“Reject Request”** Displays in Non-complex permissions but is not currently available.

Note:

	<p>Contact PI or ROS Isolations for assistance to perform this function.</p>	
4	<p>To attach I/C to a Permit</p> <p>Go to the Permit and add I/C number into permit I/C field.</p> <p>Note: The I/C and permit will now be linked allow quick access between both permit and I/C</p> <p>Note: Permit Status will also show on the I/C MASTER ISOLATION REGISTER Fill out all the fields on the form.</p>	
5	<p>Ensure permit is submitted as "Awaiting I/C".</p> <p>Select: down arrow to select Submit as awaiting I/C</p> <p>Do not save it as 'Draft' otherwise the automatic progression function will not work.</p> <p>Checker confirms I/C OK and Check complete the Permit will automatically submit with the isolation for Permit Issuer Review.</p>	 
6	<p>End of process To Add an Isolation Request.</p> <p>Email notifications will be generated as the document progresses, so you will be kept updated as to the status of your request,</p>	



Revision History

<a href="#">Revision</a>	<a href="#">Published Date</a>	<a href="#">Reason for Issue</a>	<a href="#">Author</a>	<a href="#">Reviewer</a>	<a href="#">Reviewed Date</a>	<a href="#">Approver</a>	<a href="#">Approved Date</a>	<a href="#">Document Initiated</a>
0	09/08/2024	Review	Peter Martin	Brooke Goldsworthy / Rhys Harvey	09/08/2024	Peter Martin	09/08/2024	08/08/2024