


## Create a Complex Isolation Certificate

**Use this PermitMe Job Aid to:** Progress a complex isolation procedure request.

**Requirements:**  User must be assigned “Operations Support” Permission Role in PermitMe.

PermitMe users assigned with ‘Operations Support’ permission will be able to configure and generate a ‘green’ Isolation Certificate (I/C) form for use with complex isolation procedures.

The I/C number is computer generated at the ‘New Isolation Request’ submission stage and is retained as the Isolation number. The number series is set to generate next number with a start point of 400,001.

The Isolation request number is the same as the new Isolation Certificate number and once the request has been submitted, can be added to the PermitMe Permit for tracking.

Where a user does not have ‘Operations Support’ permission in PermitMe they will only be able to create an isolation request.

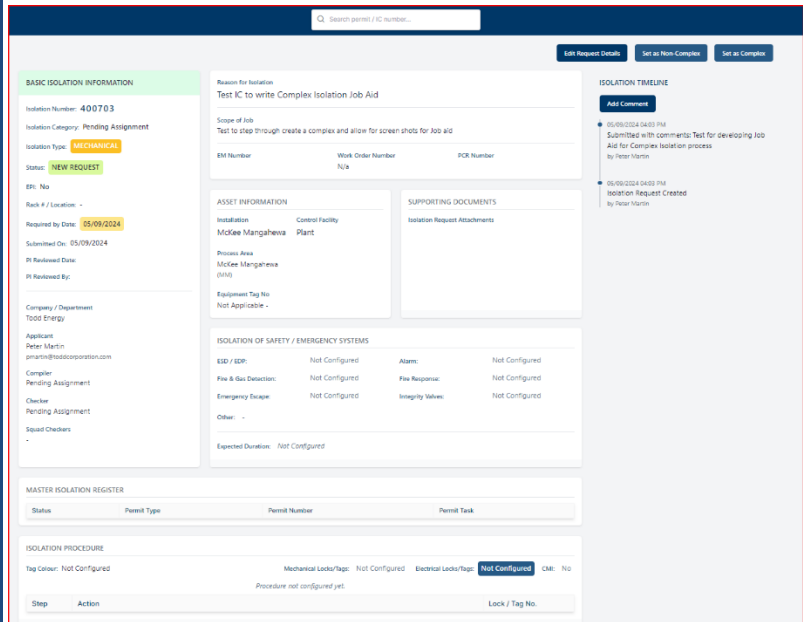
These steps are contained within a separate PermitMe Job Aid: Request a New Isolation.

## To Add a Request to the PermitMe Isolation Register:

1

On submitting a New Isolation request, PermitMe Applicant with Operations Support permission will see the following (on right) with three buttons

- “Edit Request Details”
- “Set as Non-Complex”
- “Set as Complex”



The screenshot shows the 'NEW REQUEST' form in the PermitMe system. The form is divided into several sections:

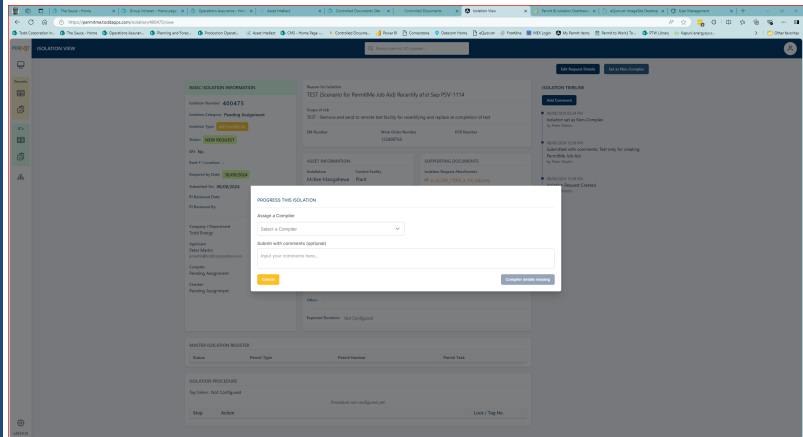
- BASIC ISOLATION INFORMATION:** Includes fields for Isolation Number (400703), Isolation Category (Pending Assignment), Isolation Type (MECHANICAL), Status (NEW REQUEST), EPI, Risk # / Location, Required by Date (05/09/2024), Submitted On (05/09/2024), PI Reviewed Date, PI Reviewed By, Company / Department (TODD Energy), Applicant (Peter Martin), Compiler (Pending Assignment), Checker (Pending Assignment), and Signed Checkers.
- Reason for Isolation:** Test IC to write Complex Isolation Job Aid.
- Scope of Job:** Test to step through create a complex and allow for screen shots for job aid.
- ASSET INFORMATION:** Includes Installation (McKee Mangrove), Control Facility (Plant), Process Area (McKee Mangrove (PAG)), Equipment Tag No (Not Applicable), and Isolation Request Attachments.
- ISOLATION OF SAFETY / EMERGENCY SYSTEMS:** Includes fields for ESD / SDP, Alarm, Fire & Gas Detection, Fire Response, Emergency Escape, Integrity Valves, and Other. All are currently 'Not Configured'.
- ISOLATION TIMELINE:** Shows a timeline with two entries: 'Submitted with comments: Test for developing Job Aid for Complex Isolation process by Peter Martin' and 'Isolation Request Created by Peter Martin'.
- MASTER ISOLATION REGISTER:** A table with columns for Status, Permit Type, Permit Number, and Permit Task.
- ISOLATION PROCEDURE:** Includes fields for Tag Colour (Not Configured), Mechanical Locks/Tags (Not Configured), Electrical Locks/Tags (Not Configured), CME (No), and a table for the procedure steps.

2

Applicant selects: “Set as Complex” button. On the pop-up menu select themselves or alternative person from the drop-down list to ‘Assign Compiler’.

Then select: “Assign and Notify Compiler” button.

During the “IN PROGRESS - Being Compiled” status of the procedure, the Compiler can revert to Non-Complex by clicking the “Non-Complex” button.



The screenshot shows the same PermitMe Isolation Register form, but with a pop-up menu open over the 'Set as Complex' button. The pop-up menu has a dropdown list for 'Assign Compiler' and a 'Assign and Notify Compiler' button. The background form is dimmed.

In the Isolation view:

Additional buttons will be available to the Compiler. The FIVE buttons at top of ISOLATION VIEW are:

1. **"Quick Edit"** allows some fields to be edited without changing the status of the isolation.
2. **"Edit Request Details"** button will take the isolation back to the request, pre-submission of the request stage and restart the process.
3. **"Set as Non-Complex"** allows the compiler to take the isolation back to a Non-Complex isolation if required.
4. **"Print Draft I/C"** this will print a draft for checking with a water mark at the top of the I/C showing **DRAFT**.
5. The Compiler should configure procedure fields: use **"Configure Systems to be Isolated"** and complete the table, then use the function: **"Compile Procedure"** to create the isolation procedure steps.

Note:

*If either of the two are not completed. Then “Progress Isolation” will redirect to complete before proceeding to pop up for Assigning a Checker*

6. Select “Progress Isolation” button to Assign a Checker.

Note:

*To reject this, contact PI or ROS Isolations for assistance to perform this function.*

Quick Edit

Edit Request Details

Set as New-Complete

Print Draft V0

Progress Isolation

### BASIC ISOLATION INFORMATION

Isolation Number:

400703

Isolation Category:

Complex

Isolation Type:

MECHANICAL

Status:

IN PROGRESS

Sub Status:

Being Completed

EP: No

Rack # / Location :

Required by Date:

05/09/2024

Submitted On:

05/09/2024

PI Reviewed Date:

PI Reviewed By:

Company / Department

Todd Energy

Applicant

Peter Martin

pmartin@toddcorporation.com

Complex

Peter Martin

pmartin@toddcorporation.com

Reasoning Complex

Checker

Pending Assignment

Squad Checkers

Reason for Isolation

Test IC to write Complex Isolation Job Aid

Scope of Job

Test to step through create a complex and allow for screen shots for job aid

EMI Number

Work Order Number

PCR Number

N/A

ASSET INFORMATION

Installation

Control Facility

McKee Mangasha

Plant

Process Area

McKee Mangasha

(NMH)

Equipment Tag No

Not Applicable -

SUPPORTING DOCUMENTS

Isolation Request Attachments

Manage Attachments

ISOLATION OF SAFETY / EMERGENCY SYSTEMS

ESD / EOP:

Not Configured

Alarm:

Not Configured

Fire & Gas Detection:

Not Configured

Fire Response:

Not Configured

Emergency Escape:

Not Configured

Integrity Values:

Not Configured

Other: -

Expected Duration:

Not Configured

Configure Systems to be Isolated

ISOLATION TIMELINE

Add Comment

05/09/2024 04:08 PM

Complexer updated by Peter Martin

05/09/2024 04:08 PM

Isolation set as Complex by Peter Martin

05/09/2024 04:03 PM

Submitted with comments: Test for developing Job Aid for Complex Isolation process by Peter Martin

05/09/2024 04:03 PM

Isolation Request Created by Peter Martin

MASTER ISOLATION REGISTER

Status	Permit Type	Permit Number	Permit Task

ISOLATION PROCEDURE

Tag Colour:

Not Configured

Chemical Locks/Tags:

Not Configured

Electrical Locks/Tags:

Not Configured

CM:

No

Procedure not configured yet.

Step

Action

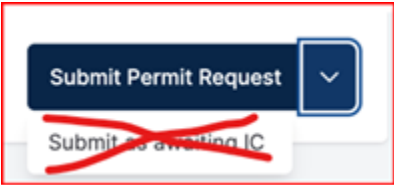
Lock / Tag No.

Complete Procedure

The screenshot shows the AWS IAM console interface. On the left sidebar, there are navigation links for Users, Groups, Roles, Policies, and Accounts. The main content area displays the 'Groups' page under the 'Users' column. A modal dialog box is open in the center, titled 'PROVIDE THE SOLUTION'. The dialog provides step-by-step instructions:

- Create a new group named 'IAM-Access-Group'.
- Add the 'AWS-IAM-Access' policy to the group.

The dialog also includes a link to the 'AWS IAM Access Guide' and a button labeled 'Go to the solution'.

<p>4</p>	<p>To attach an I/C to a Permit:</p> <p>Go to the Permit and add the I/C number into permit I/C field.</p> <p>Note: <i>The I/C and Permit will now be linked, allowing quick access between both the Permit and I/C.</i></p> <p>Note: <i>Permit Status will also show on the I/C MASTER ISOALTION REGISTER. Fill out all the fields on the form.</i></p>	
<p>5</p>	<p><b>“Submit Permit Request”</b> function will now automatically update statuses as follows: PermitMe will look to see if it can match the IC number written on the permit to an IC # listed in PermitMe. If it does, it checks the IC status, if the permit is not in the PI's hands yet (pre ‘Pending PI Review’ status), it will mark the Permit as Awaiting IC automatically.</p> <p>Once the IC has been progressed to the PI, and checking is complete, PermitMe will automatically update statuses of all connected permits to ‘New’ so they appear in the PI ready for review list.</p> <p>The ‘Submit as awaiting I/C’ drop down will be removed in a future update.</p>	
<p>6</p>	<p>Do not save it as ‘Draft’ otherwise the automatic progression function will not work.</p> <p>Once the Checker confirms the I/C is OK and the check is complete, the Permit will automatically change statuses to ‘New’ from ‘Awaiting I/C’.</p>	
<p>7</p>	<p>End of process to create a Complex isolation.</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>