

# Discussion Guide – Scope Change and Proper communication during Permit to Work activities



## Scenario

You are part of an operations team isolating and de-isolating a line that contains hazardous chemicals. The isolation work includes closing, locking, and tagging valves in order to swing blinds. The operations team has the responsibility to permit the task to swing the spectacle blinds which requires breaking of containment. The task includes discussion of the correct isolation process, verification of a zero state of energy and identification of the blind locations to the mechanics. The Job will likely carry over to the next shift. The job includes performing a review of the job scope and taking the proper actions to update the permit, risk assessment and other documentation if more work is added to the project.

**Q1: What steps do you take to make sure that permits and associated requirements and activities are communicated during shift change?**

## What happened next?

This permit was handed over from the day supervisor to the night supervisor. While checking the risk assessment and list of de-isolations against a P&ID the night supervisor identified an additional blind and verbally instructed the mechanics to swing this blind in addition to the others noted in the permit documentation.

**Q2: How should newly identified work be managed in the permit process prior to and during work execution?**

(The night shift supervisor was not aware that the day shift supervisor had specifically stated “DO NOT” swing this blind on the original isolation documentation - and as a result the valves to isolate this blind were in the open position and therefore this blind was not isolated.) After the mechanics opened the flange and swung the “additional” blind into the open position material began leaking and quickly covered the PPE of the mechanics. The mechanics made their way to the safety shower. There were no injuries associated with this incident.

**Q3: How could you make certain that this doesn't happen at your site?**

# Discussion Guide – Instructor notes



**Instructions:** This scenario can be used as a safety moment for any team, but is primarily focused on workers using the permitting process. As the leader of the safety moment, you should pass out copies of the 1<sup>st</sup> page discussion guide. Have the team members read the scenario, then you lead the discussion. The goal is to lead your team to discuss the hazard and develop actions for your team to reduce the risk. The goal is to understand that; allowing work on a system that is not properly isolated is not acceptable.

## **Some things to look for in the discussion on the questions.**

### **Question 1:**

It is required that the status of continuing work, changes of site conditions, and the list of control measures associated with the permitted job be discussed during shift change. This includes the status of the permit which includes a list of isolations, and verification that the permit is accurate. Taking the time and effort to have a good shift hand-off meeting that verifies that all necessary information associated with the permitted task is discussed properly is vital to effective and safe execution of a permitted activity. All changes, including personnel and scope change should be evaluated and discussed.

### **Question 2:**

Add-on work should be considered a change in scope of the original permit. The add-on work should be properly risk assessed to identify and quantify any risks that the work might generate. After conducting the risk assessments, all risk reduction activities (such as verification of installation or position of blinds, verification of zero energy, PPE, additional isolation, etc.) shall be performed and verified. The permit should be revised, or a new permit issued to include the new activities with all necessary documentation. The employees working the job should be notified of the changes and all verification processes should now include the new or additional activities. The responsible employee is responsible for ensuring that the site conditions still comply with the permit requirements. The site monitoring activities should also be changed to include the new activities. If there is still any concern with the job going forward under the new scope, then Stop the Job and get your supervisor involved.

### **Question 3:**

All employees that are involved with permit to work should be very familiar with the local requirements for their roles and activities. Good verification processes along with worksite monitoring is important to ensure the success of permitted activities. Communication is critical. When changes occur which impact the work (including personnel changes) it is important to take another look at the work process, make the necessary changes to the permit, or issue a new permit and properly communicate these changes to all involved. Hazard awareness, risk assessment and keeping the permit process current is required to safely conduct permitted activities. Verification of zero energy state must be completed before any breaking of containment activities are allowed to commence.