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Document Change Form

This ‘Online Permit Portal User Guide’ is a controlled document and shall be updated as required and reviewed annually or when other significant changes are needed.

<table>
<thead>
<tr>
<th>Revision</th>
<th>Date</th>
<th>Amendment</th>
<th>Amended By</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>08.03.23</td>
<td>Initial Version</td>
<td>J Rensink</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Daniel Connal Partnership</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Prepared in consultation with the University of Essex)</td>
</tr>
<tr>
<td>B</td>
<td>10.05.24</td>
<td>Revisions made as per 2024 system update</td>
<td>Daniel Hunt</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Technical Assistant UoE Estates Management</td>
</tr>
</tbody>
</table>
Introduction

The University of Essex Permit to Work (PTW) and Permit to Access (PTA) system is in place to manage all high-risk activities and control access into restricted areas. This applies across all our campus’s located at

- Colchester Campus, Wivenhoe Park, Colchester CO4 3SQ
- Southend Campus, 36 Queens Rd, Southend-on-Sea SS1 1BF
- Loughton Campus, Hatfields, Rectory Lane, Loughton IG10 3RY

It is primarily run by the Estate Management team with authorised signatories from other Departments throughout the University. The purpose of the Permit to Work system is to maintain a safe working environment within the University and it is mandatory across all elements of the estate.

The University of Essex utilises the Pisys 360 Permit to Work System (‘PTW’) which is a web-based system for creating and managing Permits to Work and Permits to Access across all of our Campuses, for all types of hazardous work. The implementation of the E-Permit system is in accordance with the expectations set out within HSG250.

This guide has been developed for the purpose of assisting any person applying for a permit.

Separate reference should be made to arrangements, instructions, and guidance on the management of contractors which are available on the University’s Health and Safety web pages. All contractors and associated sub-contractors must abide by these procedures.

https://www.essex.ac.uk/staff/health-and-safety-support/contractor-health-and-safety

For the purposes of works at Colchester Campus, persons should watch the Universities Site Induction found at the link below, or alternatively viewed within the Helpdesk at Estate Management.

https://www.youtube.com/watch?v=x30eK84c2Uc

Separate inductions are completed at our Southend and Loughton Campus’s which shall be provided to interested parties by those responsible for the works

The University of Essex has a dedicated inbox for E-Permit queries, epermit@essex.ac.uk, and should be used for all queries regarding the system.
Login or Register as a New User

Setting your Password

Pisys PTW Permit System Login Details

This is an automated email sent by Pisys Permit to Work System

Dear

Welcome to Pisys PTW Permit System.
Your account is ready to use.

Your Username is:
Please click on the following link to set your password http://ptw.pisys.co.uk///Home/
This link can only be used once, and it will expire in 24 hours.

If you have any questions, please contact your System Administrator.
Click here http://ptw.pisys.co.uk//Account/Login/289591 to login to Permit system.

Please do not reply to this email.

This is an automatic email sent by Pisys PTW Permit to Work System.

You are receiving this email because you have an account on the Pisys Permit System, and/or you are involved with the permit referred to in this email.

Pisys Limited, Pisys House, Grandholm Crescent, Aberdeen, AB22 8AA

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Login Page

Link: https://ptw.pisys.co.uk_ACCOUNT/Login/289591

If you have a username and password, then enter them in the appropriate fields
Forgotten your Username or Password

If a user **forgets their username**, they can find it in the “Welcome to Permit to work” email or if they do not have it at hand by contacting epermit@essex.ac.uk

If a user **forgets their password**, they can recover it by clicking on the “Forgot Password” link and follow the instructions on screen. Once completed an email with a link to reset the password will be sent out. Alternatively, the email to reset your password can be requested by contacting epermit@essex.ac.uk
Permit Application Process

On the home page, click on Create permit

Select the Campus to which the permit shall apply to

Select the Permit Settings

By Company ID, your company name should automatically appear. If not, please select your company name from the dropdown list

Should you be acting as a sub-contractor, you can enter the name of the company who sub-contracted you the work below the Company ID. If not applicable please leave this field blank

The time and date you initially created the permit is recorded

Enter the Area ID that will be the location of the Permit by selecting from the dropdown list. Where applicable, you can also manually enter specific location details such as a specific room
Enter a brief description of the works to be carried out

Enter a brief description of the main equipment to be used or Asset ID to be worked on if applicable

Enter the Department ID that the work has been organised with/you are working for

Enter or select the date and time the permit is required to start. This will be confirmed at the approval stage.

Select whether the permit includes weekend working or out of hours working. Out of Hours working is considered to be work outside of core business hours, 8:00am-17:00pm.

Attach a copy of the Method Statement and Risk Assessment associated with the works.

Select the type of permit you are applying for. You can select more than one if the works have different components.
Confirm that everyone scheduled to work has completed the Estates Contractor Induction.

**Induction**

Has everyone scheduled to work on this job completed a site safety induction in the last 12 months?

--- Select ---

No

UoE Staff

Yes

If everyone scheduled to work has not completed the Estates Contractor Induction, select no and confirm the booking and use the hyper-links to view the induction.

**Induction**

Has everyone scheduled to work on this job completed a site safety induction in the last 12 months?

No

Date of organised induction
Contact the Estates Management Helpdesk to arrange induction Email: ems-helpdesk@essex.ac.uk
URL to Induction Video: https://www.youtube.com/watch?v=x30eK54c2Uc
URL to Further information and access to slides: https://www.essex.ac.uk/staff/health-and-safety-support/contractor-health-and-safety

Acknowledge, using the dropdown, that upon arrival contractors will need to attend either the Estates Helpdesk or Security to sign in. Upon departure, contractors will need to attend either the Estates Helpdesk or Security to sign out.

Acknowledge, using the dropdown, that parking must be booked for the duration of the permit before attending site or by attending the Estates Helpdesk before work commences.

Acknowledge, using the dropdown, if Under Podia access/parking or a reserved compound is required then this must be agreed with the Travel and Transport team a minimum of five days before the works commence.

Confirm if the works will breach Fire Compartmentation

If works do involve the breaching of fire compartmentation, acknowledge the statements that appear and enter details regarding breach location, how the breach will occur, size of breach and method of sealing.
Confirm if any local isolations are required and if so, that the appropriate arrangements shall be adhered to.

**Local Isolations**

Do you need to electrically isolate equipment (locally) in order to work on it?
- Yes

Have you organised appropriate LOTO (Lockout/Tagout) procedure and will you be using approved GS38 test equipment to confirm dead at point of work?
- Yes

Is it a complex isolation? (i.e. more than one source of supply) (Example: Generator or PV Array)
- Select --
- Select --
- No
- Yes

Confirm if any upstream isolations will be required and if so, that these have been organised with the University of Essex Electrical Team

**Upstream Isolations**

Will you need to carry out electrical isolation which will affect other areas or equipment?
- Yes

Has this been organised with the UoE Electrical Team via the UoE project Manager?
- Select --
- Select --
- No
- Yes

Confirm if the works will affect Fire detection in anyway
<table>
<thead>
<tr>
<th>Fire Detection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does this work potentially affect fire detection in any way (e.g. dust, heat etc)?</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>What measures are you putting in place to avoid affecting fire detection?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gas Installations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does this work involve working on or around gas installations?</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Has the UoFe Mechanical Team been engaged through the UoFe Project Manager?</td>
</tr>
<tr>
<td>-- Select --</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lone Working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are you lone working?</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>What measures are your company putting in place to maintain regular communication?</td>
</tr>
</tbody>
</table>

Confirm if the works involve working on or around gas installations

Confirm if any person shall be working alone during the activity. If ‘Yes’, state control measures for regular communication

Once completed, add any further attachments if required and then select save
Once saved and you are ready to request approval on your permit, view the permit using either the permit list or the Home page.

Before submitting ensure that all details are correct, and Risk Assessments and Method Statements have been attached. Once confirmed select Request Approval from the bottom of the permit form.

Once request approve has been selected, chose your permit approver from the list of University of Essex Permit Approvers. The list will update depending on which permit type you have selected, and you will only be able to choose Authorised Persons who can approve and issue that permit type.

Enter email addresses for any relevant parties and select 'Request Approval'.

Send an information only email to

Enter your details to Complete this.

Name

Re-enter your Password
## Permit Approval, Permit Issue and Hand back Processes

Once you have selected ‘Request Approval’ the home page will show any permits that have been applied for:

### Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>The permit has been created but approval has not been requested</td>
</tr>
<tr>
<td>Requested Approval</td>
<td>The permit has been sent for approval and is awaiting the chosen Authorised persons to approve or reject permit</td>
</tr>
<tr>
<td>Approved</td>
<td>The permit has been approved by an Authorised person. Approval times and dates have been set</td>
</tr>
<tr>
<td>Rejected</td>
<td>The permit has been rejected. A rejection reason has been stated on the permit. You can edit the permit and then re submit the permit for approval once requested changes have been made</td>
</tr>
<tr>
<td>Rejected Closed</td>
<td>The permit has been rejected and closed. A new permit will be required if works are to be undertaken</td>
</tr>
<tr>
<td>Status</td>
<td>The permit has been issued and is live</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------------------------------</td>
</tr>
<tr>
<td>Needs Handback</td>
<td>The permit has gone outside of its approval time and requires handing back. Extensions on permits is prohibited so a follow-on permit will be required for works to continue</td>
</tr>
<tr>
<td>Expired</td>
<td>The permit has gone outside of its issue time and date. The permit is currently still within its approval time so can be reissued by an Authorised Person</td>
</tr>
</tbody>
</table>

In the case that the permit application has been rejected, a reason shall be provided under ‘Reject Details’. Complete the required changes and then ‘Request Approve’ again.

<table>
<thead>
<tr>
<th>Reject Date</th>
<th>Rejected By</th>
<th>Rejected Reason</th>
<th>Rejected Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>17/04/2024 12:39</td>
<td>Ben, Matt</td>
<td>Further Information Required</td>
<td>Expires to apply for permit</td>
</tr>
</tbody>
</table>

In the case that the permit has been approved, pending sign off at the time of works, the status will be shown as approved under the permit list. A confirmation email will be received regarding the approval from ‘no-reply@pisys.co.uk’

Obtain the permit by the Authorising Person issuing the permit to you.

Permit 000772 has been Approved: pending sign off at point of work, with the following comment. You shall work in accordance with the Permit to Work Manual sections relevant to your task. You shall also work to your own RAMS and also any other Use policies and procedures which have relevance to your task. Most of these can be found at [https://www.essex.ac.uk/staff/health-and-safety-support/contractor-health-and-safety](https://www.essex.ac.uk/staff/health-and-safety-support/contractor-health-and-safety). If you are unsure about anything, stop work and contact your permit originator.
In liaison with your client (issuer of the permit), you will agree time and location for point of sign off, to commence works. This will include the acknowledgement of the ‘Permit Acceptance Declaration’ and ‘Permit Issue Signatures’. The responsible person will also need to be declared from the list of pre-registered workers on the system for the relevant company.

The Authorised Person will also specify whether the permit can be remotely signed off upon works completion.

Both the Permit Acceptor and University of Essex Authorising Person need to sign the permit.

The permit will then be issued to you, and works can commence in accordance to the agreed Method and Risk Assessments.
Permit Hand Back Process

Once the works are finished, you can arrange to ‘hand back’ the permit in consultation with your client (issuer of the permit or delegated authorised person)

Your client will meet you at an agreed location where you will be able to complete the return to service

The Authorised Person and the contractor will also be required to complete the ‘Permit Handback Signatures’ to close the permit

Remote signing

In consultation with your Client (permit issuer) you can agree to remotely sign off permits, subject to the conditions of the permit. Remote signing some permit types is prohibited and is detailed within the permit.

Confirmation on whether the Authorised Person consents to the permit being remotely signed off is given at the permit issue stage.
If remote signing has been permitted for the permit in question, begin by viewing the issued permit.

Select ‘Sign Permit’ at the bottom of the permit form

Once selected, sign and print name within the signature panel and select your client (permit issuer) to be notified of the signing.

Select to notify permit creator (if required) and select sign permit to complete the signing.

Both the Client and the Permit creator (if selected) will receive an automated email confirming the signature.
The client will complete the handback procedure by signing it when they are available, and the permit will be cancelled.