

# Permits

## high-risk work, authorised before it starts

How to raise a permit to work, get it approved, run it while the job is live, and close it out - for hot work, confined space entry, energised work, excavation, working at height, line breaking and critical lifts, whether the crew is yours or a contractor's.

USER GUIDE – FOR EVERYDAY USERS

VERSION 1.0

SCREENS CAPTURED SEPTEMBER 2026

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ShieldSphere's Permits module is where high-risk work gets written down and authorised before anyone starts. You raise a permit against a type - hot work, confined space, energised work and so on - submit it for approval, mark it active when the job begins, and close it when the job is done. Every step is recorded, for your own crews and for contractors alike.

## 1 What Permits does

A permit to work is a promise that somebody competent looked at this job, in this place, today, and said it was safe to start.

The module carries that promise as a record with a lifecycle. A permit is raised as a draft, submitted, approved by someone other than the person doing the work, marked active when the job actually starts, and closed when it finishes. Nothing about that is new - it is how permits have always worked on paper. What the module adds is that the paper cannot be lost, backdated, or signed by the person it was meant to check.

Daily Work → **Permits**

**TSG Safety**

Organization Overview  
CURRENT PROFILE  
5.18.26

Site Overview

**AI TOOLS**

- Hazard Scanner
- Job Hazard Analysis
- Ergonomic Evaluation
- ZeroState

**DAILY WORK**

- Compliance
- Training
- Policies
- Inspect
- Incidents / OSHA 300
- Assets
- SDS
- Risk Assessments
- Resources

**CONTRACTORS**

- Contractors
- Projects

### Permits

Hot work, confined space, energized work and more - for your own crews and your contractors.

+ Raise a permit

All statuses

| Permit                                               | Type                  | Contractor       | Valid until     | Status    |
|------------------------------------------------------|-----------------------|------------------|-----------------|-----------|
| Hot work - pipe cutting, boiler room<br>PMT-00007    | Hot Work              | Internal crew    | Sep 6, 10:10 PM | Closed    |
| Crane lift of press die, Bay 1<br>PMT-00006          | Critical Lift         | Internal crew    | Sep 10, 6:10 AM | Draft     |
| Roof plant access - HVAC unit 3<br>PMT-00005         | Working at Height     | Internal crew    | Sep 9, 8:10 AM  | Submitted |
| Panel MCC-2 breaker replacement<br>PMT-00004         | Energized / LOTO Work | Internal crew    | Sep 9, 7:10 AM  | Approved  |
| Entry to settling tank T-4 for cleaning<br>PMT-00003 | Confined Space Entry  | Internal crew    | Sep 9, 5:10 AM  | Active    |
| Weld handrail replacement, Bay 3<br>PMT-00002        | Hot Work              | Internal crew    | Sep 9, 4:10 AM  | Active    |
| Line Breaking Oil Pipeline<br>PMT-00001              | Line Breaking         | Hosin Electrical | Aug 19, 5:41 PM | Expired   |

**Permits.** Status is the column that matters. Anything sitting in Submitted is somebody waiting on you.

## PERMITS ARE NOT JUST FOR CONTRACTORS

A permit can be raised for an **internal crew** or for a **contractor**. Contractors are where most organizations start, but your own people doing hot work need the same authorisation - and the module treats both the same way.

## 2 Words you'll see

| WORD        | WHAT IT MEANS                                                                                                              |
|-------------|----------------------------------------------------------------------------------------------------------------------------|
| Permit type | The kind of work being authorised, and the questions that go with it. Hot work asks different things than a critical lift. |
| Draft       | Being written. Not yet asking anyone for anything.                                                                         |
| Submitted   | Waiting for approval. This is the queue that needs watching.                                                               |
| Approved    | Authorised, but the work has not started yet.                                                                              |
| Active      | The work is happening now.                                                                                                 |
| Closed      | The job finished and the permit was closed out properly.                                                                   |
| Rejected    | Approval was refused, with a reason recorded.                                                                              |
| Expired     | The valid-until time passed without the permit being closed.                                                               |
| Valid until | When the authorisation runs out. A permit is not open-ended.                                                               |

## 3 Set up your permit types

Before the first permit you will see **Permits are not set up yet** and an invitation to **Set up your permit types**. That one step seeds the standard set:

### **Hot Work**

Welding, cutting, grinding - anything producing sparks, flame or heat.

### **Confined Space Entry**

Tanks, vessels, pits and any space with restricted entry and exit.

### **Energized / LOTO Work**

Work on or near energised systems, and the isolation that goes with it.

### **Excavation / Trenching**

Digging, with the ground conditions and services that come first.

### **Working at Height**

Work where a fall is the hazard being controlled.

### **Line Breaking**

Opening pipework or systems that carried something hazardous.

### **Critical Lift**

Lifts where the load, the radius or the surroundings put it outside routine.

#### **SET UP THE TYPES YOU ACTUALLY USE**

Seven types is a starting point, not a requirement. An organization that never enters a confined space is better off with three types people recognise than seven that make them hunt.

## **4 Raise a permit**

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Permits → **Raise a permit**

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DAILY WORK

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Incidents / OSHA 300

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Permits

INSIGHTS

Trends

Employees

Profile Settings

ACCOUNT

Team

Account Settings

Admin

Log out

← All permits

Weld handrail replacement, Bay 3

Active PMT-00002 Hot Work Internal crew

Details

|              |                                 |
|--------------|---------------------------------|
| Location     | Demo Company                    |
| Work         | —                               |
| Requested by | Derek Calloway                  |
| Project      | —                               |
| Valid        | Sep 8, 8:10 PM → Sep 9, 4:10 AM |
| Approved     | Sep 8, 10:11 PM                 |

Hot Work requirements

|                                                |                                       |
|------------------------------------------------|---------------------------------------|
| Type of hot work                               | Oxy-acetylene cutting and MIG welding |
| Fire watch assigned to                         | Marcus Bell                           |
| Post-work fire watch (minutes)                 | 60                                    |
| Combustibles removed or protected within 35 ft | Yes                                   |
| Extinguisher on hand and charged               | Yes                                   |
| Sprinklers in service                          | —                                     |

Actions

Reason / notes

Required when rejecting

Close permit

Mark expired

History

Approved → Active  
9/8/2026, 10:11:52 PM

Submitted → Approved  
9/8/2026, 10:11:51 PM

Draft → Submitted  
9/8/2026, 10:11:51 PM

Draft  
9/8/2026, 10:10:39 PM  
Permit created

**Inside a permit.** The questions below the details change with the permit type - hot work asks about the fire watch, a confined space asks about the atmosphere.

## 1 Pick the type, then describe the job

**Permit type** decides which questions you are asked, so choose it first. Then give the permit a **title** that says what the work actually is - *Weld handrail, Bay 3*, not *Hot work*.

## 2 Say where, who and when

Set the **location**, and optionally the **project** the work belongs to. Choose **Internal crew** or name the **contractor**. Set when the permit becomes valid and when it expires - the permit will not save if it expires before it starts.

## 3

### Answer the type's questions and set the PPE

Each type carries its own checks. The **PPE** picker lists the standard protective equipment, with **Add other PPE** for anything specific to this job.

Saving leaves the permit as a **draft**. Nothing has been asked of anyone yet, so a permit half-written at the end of a shift is safe to leave.

## 5 The approval path

A permit moves through a fixed sequence, and the buttons you see depend on where it is and what you are allowed to do. If you have no action available, the permit says so rather than showing you a button that will fail.

| ACTION                     | WHAT IT DOES                                                                                     |
|----------------------------|--------------------------------------------------------------------------------------------------|
| Submit for approval        | Moves the draft into the approval queue.                                                         |
| Approve                    | Authorises the work. Recorded against the person who approved it.                                |
| Reject                     | Refuses it. A reason is required - a rejection nobody can explain is no use to the crew waiting. |
| Return to draft            | Sends it back for changes without rejecting it outright.                                         |
| Mark active (work started) | Says the job is now happening.                                                                   |
| Mark expired               | Ends a permit whose window has passed.                                                           |
| Close permit               | The job finished and the permit is closed out.                                                   |

### APPROVED IS NOT THE SAME AS ACTIVE

**Approved** means the work is authorised. **Active** means it is happening. Keeping them apart is what lets you answer "what is going on right now" without guessing - which matters most in an emergency, when the difference between a permit that was approved this morning and one where people are inside a vessel is the whole question.

## 6 While the work is live

Every permit keeps a history of what happened to it and when. The **Details** view holds the answers given when it was raised; the activity beside it records each transition and who made it.

Filter the list by **status** to work the queue that matters at that moment:

### Submitted

People waiting on an approval. Work this queue first - it is the one that stops jobs.

### Active

What is happening on site now. The list to check before you leave for the day.

### Expired

Permits whose window ran out without being closed. Each one is either work that overran or paperwork nobody finished.

### CLOSE PERMITS OUT ON THE DAY

A permit closed at the time records who finished the job and when. A permit closed a week later records only that somebody tidied up. The expired list is the honest measure of how well this is going.

## 7 Troubleshooting

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### WHAT YOU SEE

### WHAT TO DO

"Permits are not set up yet"

Nobody has seeded the permit types. Use **Set up your permit types** - it is a one-off.

"No actions available to you for this permit"

The permit is in a state you cannot move it from, or approving it is not yours to do. Approval is deliberately not available to the person who raised it.

The permit will not save

Check the dates: a permit must expire after it becomes valid. A title and a permit type are both required.

A permit expired while the job was still running

Its window was too short. Close it out, note what happened, and raise the next one with a realistic window rather than extending indefinitely.

You cannot find a contractor in the list

The contractor has to exist in Contractor Management first. Raise it as an internal crew permit only if the work really is yours.

A rejected permit needs to go ahead after all

Rejection is final for that permit - the reason is part of the record. Raise a new one that addresses the reason it was refused.

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**ShieldSphere Permits – User Guide.** Published at [shieldspheresafety.com/guides/permits-user](https://shieldspheresafety.com/guides/permits-user). Screens are illustrative; the written steps are what to follow if the two ever disagree.