

Paper Permits vs Digital: The Design Checklist

One page. Fill it in for one permit type at one site, then take it to a vendor demo or your next procedure review. Use it with the guide it comes from.

Site _____ Permit type _____ Owner and date (DD/MM/YYYY) _____

The seven tests: does the system do it?

- ☐ Refuses to submit a permit with a required question unanswered.
- ☐ Sends each section to its own reviewer and records who approved what, and when.
- ☐ Shows every open permit by site and location, as it stands now.
- ☐ Expires at an hour, and an expired permit cannot be signed in to.
- ☐ Links permits that touch the same plant, so the isolation and the hot work appear together.
- ☐ Puts the crew on the permit: who signed in, who signed out, who confirmed it.
- ☐ Keeps answers, attachments, approvals and sign-ins together and findable.

Ask to see all of it on a phone, in your building, with no signal, including a permit refused for an expired licence.

Link the SWMS and competency

- ☐ SWMS attached to the permit by version.
- ☐ Workers named on the permit, not counted as a crew.
- ☐ Competencies listed for this permit type, for example the licence for the equipment or the isolation.
- ☐ Competency checked against the worker's record when the permit is issued and again at sign-in.
- ☐ Close-out section: area left safe, everyone off, the person who closed it named.

Section and reviewer map

Section	Reviewer (role)	Backup	Must be complete before authorisation?
Method statement (SWMS)			
Isolation			
Hot work or entry conditions, fire watch or stand-by			
Authorisation			
Close-out			

Automate

- ☐ Required answers, reminders, routing.
- ☐ Expiry at the hour and an overrun alert.
- ☐ Flagging two permits on the same plant.
- ☐ Checking the SWMS against our criteria for missing sections.
- ☐ Sign-in, sign-out and the live list.
- ☐ The record, its search and its export.

A person signs

- ☐ The decision to authorise the work.
- ☐ The physical isolation: lock, tag, proved dead.
- ☐ The gas test or hot work area check, at the place.
- ☐ Declaring a worker competent for this job.
- ☐ The fire watch and the check after hot work.
- ☐ The close-out walk.

AI reading the SWMS: it may, it must never

It may

Read the SWMS against criteria we set and say what is missing, with the reason for each mark so the approver can disagree. The person filling in the form runs it, and it is optional.

It must never

Approve a permit. Waive a failed criterion. Declare a worker competent. Our rule says what must arrive with the permit (an AI review attached, every failed criterion answered, or it goes back), and the approver reads the SWMS. A person reads 1 SWMS in 10 in full for the first month.

Six numbers: take the paper baseline first, then the pilot

Measure	Paper baseline	Pilot, week 5	Our target
Complete at first submission (share of permits)			
Request to approval, median minutes, by permit type			
Open past expiry (target 0)			0
Minutes to list every open permit at the site			
Closed the same shift (share)			
Overlaps caught at issue, against found afterwards			