

CONSTRUCTION & FIELD OPS PERMIT CONTROL TEMPLATE

Permit-to-Work Compliance Checklist

Audit permit scope, authorization, isolations, hot work, confined space entry, linked high-risk work, monitoring, handback, and corrective actions.

PROJECT / LOCATION

PERMIT DATE

AUDITOR

APPROVER

1. Permit system setup, scope, governance, and work classification

- 1 Confirm the project, location, permit date, work area, requesting contractor, permit issuer, performing authority, supervisor, and approving authority.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use one permit number and one clearly defined work boundary for the job.

- 2 Define the exact task, equipment, system, boundary, work zone, start time, planned finish time, and permit type required for the activity.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Describe equipment and location precisely enough to avoid wrong-asset work.

- 3 Verify the site permit-to-work procedure clearly defines which high-risk or non-routine activities require a permit and which activities follow other approved controls.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Keep the permit system proportional to risk but explicit for high-hazard work.

- 4 Confirm the correct permit category is being used for the work, such as hot work, confined space, electrical isolation, excavation, work at height, lifting, line breaking, or other site-defined hazardous work.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use site-defined permit categories and local legal requirements.

- 5 Review previous permit breaches, near misses, conflicting work, isolation failures, unauthorized work, expired permits, and overdue corrective actions relevant to the area.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Trend permit failures by contractor, area, shift, and permit type.

- 6 Capture the permit issue time, work location, geo-location where used, and approved reference photos showing the work area and required controls before work begins.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Photograph the work area before controls are disturbed.

2. Work description, risk assessment, method, and prerequisites

- 7 Verify the permit describes the work clearly enough that the task, equipment, location, boundaries, and intended method cannot be misunderstood.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: The permit should reflect the actual method being used at the workfront.

- 8 Confirm a current task risk assessment, job hazard analysis, method statement, or equivalent safe-work assessment supports the permit and matches the actual work.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Do not rely on a generic risk assessment when task conditions differ.

- 9 Check identified hazards include energy sources, fire and explosion, atmosphere, falls, excavation, lifting, pressure, chemicals, moving equipment, access, and nearby operations as applicable.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Review nearby work and process conditions as well as task hazards.

- 10 Verify required permits, drawings, utility information, certificates, approvals, test results, and supporting documents are attached or referenced before authorization.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Linked certificates should be easy to trace from the permit.

- 11 Confirm prerequisite controls such as barricades, access restriction, housekeeping, lighting, ventilation, fire protection, rescue equipment, and communication are ready before work starts.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Verify prerequisites physically before signing the permit.

- 12 Record any missing prerequisite, unresolved hazard, design uncertainty, or conflicting condition and prevent permit release until the issue is resolved or formally controlled.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Do not release a permit with unresolved critical controls.

3. Permit authorization, competence, communication, and acceptance

- 13 Verify the permit issuer is authorized and competent for the permit type, area, hazards, and isolation arrangements being approved.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Authorization should match the permit type and site rules.

- 14 Confirm the performing authority, supervisor, workers, attendants, fire watch, standby personnel, or other required roles are identified and competent for their assigned duties.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Confirm standby and emergency roles as well as the work crew.

- 15 Check the permit has been reviewed at the work location by the people responsible for issuing, accepting, and supervising the work where site rules require it.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: A worksite review helps identify conditions missed from paperwork.

- 16 Confirm workers understand the work scope, hazards, boundaries, prohibited actions, emergency arrangements, permit validity, and conditions that require stopping work.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use a brief permit acceptance or toolbox discussion before starting.

- 17 Verify signatures, names, dates, times, permit numbers, linked certificates, and approvals are complete before work begins.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Check all mandatory fields before the work begins.

- 18 Confirm the permit or an approved copy is available at or near the work area and can be checked by supervisors, safety personnel, and affected teams during the job.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Keep the permit visible or readily accessible during the job.

4. Isolation, lockout/tagout, stored energy, and safe state

- 19 Identify all electrical, mechanical, hydraulic, pneumatic, pressure, thermal, chemical, gravity, process, and stored-energy sources that could affect the work.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Trace every energy source that could move, release, heat, pressurize, or energize the system.

- 20 Verify isolation points match approved drawings, equipment identification, line diagrams, single-line diagrams, valve schedules, or other reliable references.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Verify identity before applying an isolation.

- 21 Confirm required isolation devices, locks, tags, blanks, disconnects, blocks, restraints, grounding, venting, draining, purging, or other physical controls are applied.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use physical separation where the risk requires more than a control switch.

- 22 Verify a competent person has tested or otherwise confirmed the required safe state before work begins, including zero-energy or safe-atmosphere conditions where applicable.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Test the safe state before relying on the isolation.

- 23 Check isolation ownership, lock or tag identification, key control, group isolation arrangements, transfer arrangements, and linked certificates remain traceable throughout the work.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Group isolations need clear ownership through shift and crew changes.

- 24 Confirm no isolation is removed, defeated, bypassed, or altered until the permit is formally suspended or closed and the required authorization for restoration is complete.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Restoration should follow a controlled handback sequence.

5. Hot work, ignition control, fire watch, and fire prevention

- 25 Confirm hot work is permitted in the selected location and that nearby combustible, flammable, explosive, or dust hazards have been removed, protected, isolated, or otherwise controlled.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Remove combustible material where practical before hot work begins.

- 26 Verify welding, cutting, grinding, heating, brazing, or other ignition-producing work is covered by the correct hot-work permit and matches the approved work scope.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: The permit should cover the exact ignition-producing work being performed.

- 27 Check suitable fire-extinguishing equipment is immediately available and maintained ready for use during the hot-work activity.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Keep extinguishers immediately available for instant use.

- 28 Confirm screens, spark containment, fire-resistant covers, ventilation, gas testing, cylinder controls, hose routing, and access restrictions are in place where required.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Control sparks, slag, fumes, cylinders, and access around the work.

- 29 Verify the assigned fire watch or equivalent monitoring role understands the hazards, work area, emergency response, stop-work criteria, and required post-work monitoring period.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Fire-watch duties should continue for the required site-defined period.

- 30 Confirm the permit is suspended or revalidated if fire conditions, ventilation, nearby materials, atmosphere, weather, or surrounding work change in a way that affects the original controls.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Reassess conditions whenever nearby work or atmosphere changes.

6. Confined space entry, atmosphere, attendants, and rescue readiness

- 31 Confirm the space has been evaluated to determine whether it is a permit-required confined space and that the correct entry permit process is being used.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Have a competent person determine whether the space is a permit space before entry.

- 32 Verify the entry permit identifies the space, purpose, authorized entrants, attendants, entry supervisor, hazards, acceptable entry conditions, and authorized duration.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Entry permits should identify who may enter and who controls the entry.

- 33 Check the space is isolated from hazardous energy, materials, movement, engulfment, or other physical hazards before entry.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Isolate mechanical and process hazards as well as atmosphere hazards.

- 34 Verify atmospheric testing or monitoring is completed using suitable equipment and records oxygen, flammable, and toxic hazards as required by the identified risk.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Record test results and acceptable limits before and during entry as required.

- 35 Confirm ventilation, communication, entrant tracking, attendant coverage, access control, retrieval equipment, and other required entry controls remain effective throughout occupancy.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Maintain communication and attendant coverage for the full entry period.

- 36 Verify rescue and emergency arrangements are available, suitable for the space and hazards, understood by the entry team, and capable of being activated without relying on improvised response.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Rescue arrangements should be planned before entry, not after an incident.

7. Special high-risk permits, work boundaries, and linked controls

- 37 Confirm work at height, excavation, lifting, electrical testing, line breaking, pressure work, energized work, or other site-defined high-risk activities use the required permit or linked authorization.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use linked permits rather than hiding specialist risks inside a generic permit.

- 38 Verify each linked permit, certificate, or isolation references the same work scope, equipment, location, time window, and responsible parties so conflicting boundaries are not created.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Cross-reference permits so boundaries and timing remain consistent.

- 39 Check work-at-height permits address access, edge protection, fall prevention or arrest, anchor points, rescue, dropped-object controls, and weather where applicable.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Include rescue planning where fall arrest is used.

- 40 Confirm excavation permits address underground services, utility clearance, ground conditions, protective systems, access, spoil placement, water, plant interaction, and public protection where

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Verify underground-service information before breaking ground.

- 41 Verify lifting or critical-lift authorizations address lift planning, crane and rigging suitability, load information, ground conditions, exclusion zones, communication, and competent personnel where

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Coordinate lifting exclusion zones with other active permits.

- 42 Confirm special-permit controls are verified at the workfront before work begins and remain compatible with the general permit-to-work conditions.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Check specialist controls at the actual workfront before release.

8. Simultaneous operations, changes, extensions, handovers, and revalidation

- 43 Review other active permits, contractors, isolations, equipment, vehicle movements, tests, commissioning, or maintenance work that could interact with the permitted task.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use a permit board or digital view to identify overlapping active work.

- 44 Confirm simultaneous operations are coordinated so one permit does not remove, weaken, bypass, or invalidate controls required by another activity.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: One permit must never depend on a safeguard another task is removing.

- 45 Verify changes to scope, method, personnel, equipment, location, weather, atmosphere, process condition, isolation, or surrounding work trigger review and reauthorization when required.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Scope changes require review before continuing.

- 46 Check permit extensions remain within site rules, include a new validity period, confirm controls are still effective, and are approved by the required authority.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Avoid automatic extensions without checking current conditions.

- 47 Confirm shift changes, supervisor changes, contractor handovers, or permit transfers include a documented review of work status, hazards, isolations, and outstanding conditions.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Handovers should transfer knowledge, not only signatures.

- 48 Suspend work and place the permit in the correct status when conditions become unsafe, alarms occur, emergency response is activated, work stops for an extended period, or original controls are no longer

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Suspended permits should be visibly different from active permits.

9. Worksite monitoring, compliance checks, stop-work, and permit control

49

Verify supervisors periodically check that the work being performed still matches the permit scope, method, location, personnel, and approved conditions.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Audit actual work against the permit, not only the completed paperwork.

50

Confirm required gas tests, atmosphere readings, fire-watch checks, isolation checks, barricades, access controls, or other monitoring records are completed at the specified frequency.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Monitoring frequency should match the risk and permit conditions.

51

Check workers are using the required PPE, tools, equipment, grounding, ventilation, fall protection, rescue equipment, and other permit controls correctly.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Verify controls remain in use after the job has been running for some time.

52

Confirm unauthorized persons, unapproved tools, conflicting materials, bypassed safeguards, or scope changes are identified and corrected before work continues.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Stop scope creep before it becomes an unauthorized job.

53

Verify stop-work authority is understood and used whenever permit conditions, safe limits, isolations, atmosphere, emergency arrangements, or work boundaries are no longer acceptable.

CRITICAL

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Workers should know they can stop work when permit conditions fail.

54

Record permit deviations, unsafe acts, unauthorized changes, near misses, or repeated control failures and escalate them according to the site permit governance process.

PERMIT CHECK

Compliant

Needs attention

Stop work

N/A

Execution tip: Use repeated deviations to improve permit design and supervision.

10. Completion, handback, reinstatement, audit findings, and sign-off

55 Confirm the permitted task is complete or placed in an agreed safe condition, with tools, temporary equipment, waste, materials, and personnel removed from the controlled area. PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Check the work area before signing handback.

56 Verify guards, covers, barriers, access systems, process connections, fire protection, housekeeping, and other affected safeguards are restored or formally left under controlled status. CRITICAL PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Restore safeguards before returning the area to normal operation.

57 Confirm isolations are removed or transferred only after required inspections, testing, clearances, personnel checks, and authorization for reinstatement are complete. CRITICAL PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Never remove an isolation before confirming people are clear and authorization is complete.

58 Complete the permit handback or closure with actual finish time, work status, remaining restrictions, incomplete work, linked certificates, and responsible signatures. CRITICAL PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Record unfinished work and restrictions so they are not lost at closure.

59 Assign each permit nonconformance an owner, priority, due date, root-cause requirement, corrective action, escalation path, and closure evidence rule. CRITICAL PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Separate immediate correction from underlying permit-system improvements.

60 Record the final permit audit decision, recurring control gaps, outstanding restrictions, next review date, permit issuer, performing authority, supervisor, approver, date, time, and sign-off. PERMIT CHECK

Compliant Needs attention Stop work N/A

Execution tip: Use audit results to strengthen permit training, authorization, and controls.

RUN THIS CHECKLIST DIGITALLY

Turn permit deviations into accountable stop-work, reauthorization, and verified handback

Capture permits, isolations, evidence, monitoring, corrective actions, and handback in Taqtics.

Try Permit Control in Taqtics