

# Permit to Work Instructions for Contractors

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## Version History

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1.0	New document. To provide work instruction to contractors on how to apply for a PTW using Planon and general principals.	20/01/26	R.Corrigan	20/01/28

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## 1 Overview

### 1.1 Purpose

This Work Instruction provides full guidance to all approved contractors and third parties working for the University of Bristol Campus Division on:

- How to access and use the Planon Contractor Portal
- How to submit Permit to Work (PTW) applications
- Required documentation and notice periods
- Activities requiring PTW authorisation
- Competency expectations
- How to upload documents, manage permits, request changes, and close permits
- Conditions under which work may or may not proceed
- Emergency Works arrangements
- Frequently Asked Questions (FAQs)

It ensures contractors understand their responsibilities and comply with Campus Division safe systems of work.

### 1.2 Scope

This work instruction applies to all vetted and approved contractors and third-party organisations engaged by Campus Division or working anywhere on the University of Bristol estate who engage with the Permit to Work system.

### 1.3 Procedure / Policy Reference

Permit to Work Procedure

Activities Requiring a Permit to Work

Scaffold Procedure

Asbestos Management Plan

**Note** – Third party access to the IMS is restricted. Documents linked here are available on the Campus Division Information for Contractors Page. A full list of relevant procedures is available at the end of this document. If you require additional information or procedures, please contact **campus-division-safety@bristol.co.uk**

## 2 Definitions

Term	Meaning
AP	Authorising Person
AuP	Authorised Person
CD	Campus Division
Change Request	A formal update submitted when permit conditions, dates, scope, or documents change after submission or rejection.
Contractor Portal (Planon)	The University's digital system for submitting, managing, and tracking PTWs.
Dynamic Risk Assessment	A live, on-site assessment used during Emergency

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(DRA)	Works to identify hazards and controls when immediate action is required.
Emergency Works	Unforeseen tasks presenting immediate risk to safety or essential services, allowed to start without a live PTW but requiring retrospective PTW within 48 hours.
HSQA Team	Health, Safety & Quality Assurance Team, Campus Division. Administratively close PTWs and support safety processes.
Permit to Work (PTW)	A formal written system used to control high-risk work by identifying hazards, defining controls, specifying boundaries, and verifying authorisation.
RAMS	Risk Assessment and Method Statement — job-specific documentation required for PTW approval.
Scaffold Register	Digital register used by the Campus Division to track all scaffolds erected across the campus estate.
UoB	University of Bristol

### 3 Authorisations

All contractors must be pre-approved through **UoB Procurement**.

All contractors must obtain **Planon access** before applying for any PTW.

Contractors must ensure all operatives are competent, trained, and able to demonstrate competence with evidence uploaded as part of RAMS.

### 4 Accessing Planon (The Contractor Portal)

To access Planon and apply for Permit to Work at the University of Bristol, you will need a unique login and password.

- You may apply for a Planon account via the Information for Contractors webpage
- Contact our digital team at **campus-digital@bristol.ac.uk** to get set up with your login credentials. Please allow up to 5 working days for your account details to be emailed to you.
- **Login Issues:** If you experience any issues with logging in, please contact the Campus Division Safety Team at **campus-division-safety@bristol.ac.uk** for assistance; we will triage your request.
- Once you have your login, you can access the Contractor Portal through the Information for Contractors webpage.

## 5 Understanding Basic PTW Requirements

Contractor must review the Permit to Work procedure to understand their roles, responsibilities and expectations with regards to the Campus division Permit to Work system

Contractors must check **HAS-WI-007 Activities Requiring a PTW** to confirm if their task requires a permit.

High-risk PTW categories include (full list):

- Asbestos – Analytical
- Asbestos – Entering Ceiling Voids & Service Risers
- Asbestos – Removal/Remediation
- Asbestos – Surveying
- Building Energy Management System
- Confined Space Entry
- Electrical Service Isolation - HV
- Electrical Service Isolation - LV
- Excavation (Including Marquees and Fencing)
- Fire Alarm Isolation (Bagging Off Smoke & Heat Detectors)
- Fire Alarm Panel Isolation
- Gas System Isolation
- Hot Works
- LEV and Fume Cupboard Isolation
- Lift Isolation
- Mechanical Services Isolation
- Water System Isolation
- Work at Height - Access Equipment (MEWPS) and Lifting
- Work at Height – Fixed Scaffolding Structures
- Work at Height – Roof Access

## 6 Notice Period for PTW Applications

All PTW applications must be submitted **10 working days** before work begins.

This enables:

- RAMS review

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- Consultation with area owners
- Requesting further documentation
- PTW approval and re-submission if needed

Late submissions may be rejected, delaying project timelines.

Change requests must be submitted 3 working days before the change to the PTW is required.

## 7 Documentation Required for PTW Applications

### 7.1 RAMS (Risk Assessment and Method Statement)

RAMS must be:

- Job-specific (not generic)
- Matched to site, dates, times, plant, and environmental conditions
- Include emergency procedures
- Must include **HAS-FT-070 – RAMS Review and Approval Form**, where required

### 7.2 Competency Evidence

Upload certificates such as:

- IPAF, PASMA, NRSWA
- Asbestos training
- Electrical qualifications (City & Guilds, BTEC, etc.)
- Gas Safe, BPEC
- Confined space entry/rescue
- CSCS, IOSH, NEBOSH, SMSTS

### 7.3 Additional Documentation (where relevant)

- Asbestos Plans of Work
- R&D Surveys
- Excavation drawings & utility/service plans (dated <1 month old)
- Local authority permits for highways
- TG20:21 scaffolding drawings
- Rescue plans
- Crane lifting plans
- Statutory inspection records

## 8 Applying for a Permit – Step-by-Step Guide

### 8.1 Step 1 – Access the Contractor Portal

Log into Planon via the Information for Contractors page.

### 8.2 Step 2 – Start a Permit Request

Select **“Request a Permit”** under Permit Options.

### 8.3 Step 3 – Complete the PTW request form

Mandatory fields include:

- Building
- Exact location
- PO number
- Project number
- UoB contact
- Department
- Start & end dates/times
- Detector head isolation bag count (0 if none)

Select all relevant **hazard types** — some browsers may hide ticks, but still generate sub-permits.

**Browser Tip:** Sometimes a browser issue occurs where the tick isn't visible, but clicking the box should still create the sub-permits for each hazard. If not, try again from a new browser or clear cookies and cache.

### 8.4 Step 4 – Upload Documents

Upload RAMS, competency evidence, drawings, and required forms (HAS-FT-070).

### 8.5 Step 5 – Submit the Application

Once documents appear in the upload box, click **Submit**.

### 8.6 Step 6 – Check Permit Status

Use "**Check or change my permit**" in the Contractor Portal

## 9 Carrying Out Activities Under an Issued Permit

Once your PTW is issued, adherence to its conditions is paramount;

- Work must NOT begin until the PTW is issued.
- PTW must be printed or available digitally **on site**.
- All operatives must be briefed on its contents.
- Work must be carried out **exactly** within the PTW time/date window.
- Work will be stopped if PTW conditions are not met

### 9.1 Change Requests

If there are any significant changes to your work activity, or a change to the dates or times, a '**change request**' must be submitted.

A change request must be submitted if:

- Dates or times change
- Scope changes
- Permit is rejected and requires updates

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- Additional documents must be provided

### **Change Requests must be submitted at least 3 days before the permit expires**

This is also required if your permit has been refused/rejected by an approver and needs an update, or if additional information is required.

You can submit a change request via the Contractor Portal.

An exception to the 3 working day notice period may apply if there is a significant change in activities on the day the permit expires.

## 9.2 Completing Works & PTW Closure

Contractors must:

- Return all sign-off sheets (hot works, bagging-off, daily permits) to Contractor Offices
- Ensure PTW is formally closed in Planon
- HSQA Team will complete administrative closure

**Returning Documentation:** You, the contractor, are responsible for returning any paperwork associated with the PTW to the Campus Division Contractors Offices. This includes specific sign-off sheets for hot works and bagging off permits, or any other issued Permit to Work Documentation, daily Sign off Sheets, bags and bands as required at the end of the work or upon expiry of the Permit to Work. This documentation is collected by the HSQA Team and the PTW is administratively closed.

## 9.3 Emergency Works

Emergency Works may begin without a PTW if immediate risk exists (e.g., structural failure, utility failure).

In exceptional and unforeseen circumstances, works that would ordinarily require a PTW may be required to start at short notice.

- **Definition:** Emergency works are those that pose an immediate risk to health and safety or threaten the delivery of essential services (e.g., making building fabric safe following adverse weather, isolations following system or utility failures, damaged asbestos materials requiring immediate remediation, loss of critical IT infrastructure).
- **Procedure:** Under these exceptional and unforeseen circumstances, work can go ahead without a live Permit to Work being issued *initially*. However, a local risk assessment and dynamic risk assessments must still be undertaken. The Project Manager in charge of the remedial works on behalf of the Campus Division, is responsible for ensuring this is done and that the contractor is competent.
- **Retrospective Permit:** If emergency works continue beyond 48 hours, a retrospective Permit must be requested and go through the full approval process.

**Please remember, emergency works are not a substitute for poor planning.**

## 10 References

### 10.1 Internal References

#### 10.1.1 *Procedures*

CDM Policy

Permit to Work Procedure

Activities Requiring a Permit to Work

Scaffold Procedure

Asbestos Management Plan

Incident Reporting and Investigation

#### 10.1.2 *Forms*

Contractors RAMS Review Form

Fire Detection Isolation and Impairment Control Form (Detector Bagging Off)

Hot Works Control Measures

#### 10.1.3 *Other Internal References*

Information for Contractors Web Page

Asbestos Management Share Point