SmartPermit

Contractor User Guide

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SmartPermit Overview

Smart Permit Overview:
Roles

In the Smart Permit tool, there are four roles. Three roles exist for registered company users, and the fourth role is that of the person completing the permit. Each company can have as many of each role as required:

Customer Administrator

Customer administrators can configure new or existing sites and create and edit users. In addition, they can 'follow' sites and act like a site manager for sites they follow. A customer administrator has full access.

Site Manager

This may be the site manager, permit issuer, or the individual who normally has oversight and responsibility of the site and any works undertaken. This might also be a key contact from the contractor, for example in situations where the work is sub-contracted.

View Only

This is an individual who requires oversight of the sites, permits, and users for a company but does not need to action or edit anything.

Contractor

This is the individual(s) carrying out the work. The contractor will be asked to enter their details at the induction stage and does not need to register for SmartPermit in advance.

Smart Permit Overview:
Permit process

The Permit journey is separated into four key stages: Induction, Work, Watch Period & Closure. The below diagram outlines the end-to-end process of the Smart Permit and demonstrates the interactions between the Contractor and Site Manager.

1. Induction

The site manager shares the site specific QR code or URL with the contractor who completes a new permit request to start work.

The site manager reviews the permit request and either approves or denies it.

2. Work

The contractor is notified of the decision via SMS and if approved can begin work.

If the work is taking longer than expected the contractor must submit a permit extension.

The contractor can delegate the permit to another contractor if needed.

3. Watch Period

Some permit types require the contractor to undertake a watch period via the Smart Permit once they have completed their work.

Progress photos must be submitted every 30 minutes.

The contractor can delegate the permit to another contractor if needed.

4. Closure

Once the watch period is complete the contractor must answer the post watch period questions and close the permit.

For permits that don't have a watch period, the permit is closed after the post work questions.
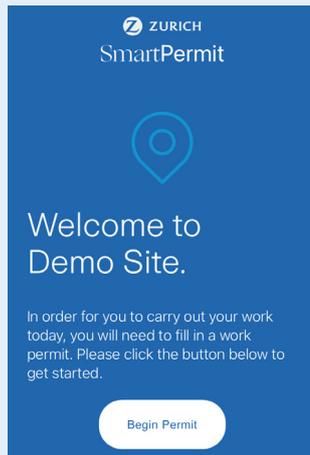
"How to" guide

Induction:
How to create a new permit request

1. The Smart Permit can be accessed via two routes:

i

Scanning a QR code with your phone camera, which the Site Manager will provide

ii

Entering the site-specific URL into your browser, which the Site Manager will provide

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ZURICH
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Welcome to Demo Site.

In order for you to carry out your work today, you will need to fill in a work permit. Please click the button below to get started.

Begin Permit

2. Both these routes will open the Smart Permit homepage specific to your location, then click **'Begin permit'**.

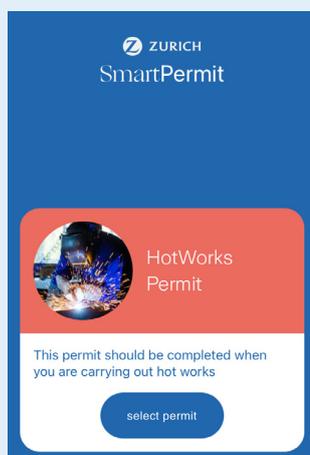Please provide the following information before starting the permit:

Name*

Contact number*
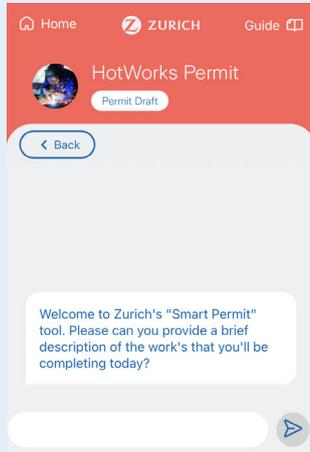
Company*

☐ Agree to the **Terms & Conditions**

Submit

3. Enter your name, phone number (must be 11-digit UK phone number beginning with 07), the name of the company at which the contractor works, and review and accept the Terms & Conditions.


ZURICH
SmartPermit

HotWorks Permit

This permit should be completed when you are carrying out hot works

select permit

4. Select the permit that matches the work being completed.

Smart Permit **Contractor User Guide**

How to create a new permit request

5. Respond to the chatbot-style series of questions, which include questions about the work area, the safety measures in place, and the nature of the work to be undertaken

6. When prompted, enter the time you intend to start the hot work using the scrolling selection

7. When prompted, enter the time you intend to finish the work.
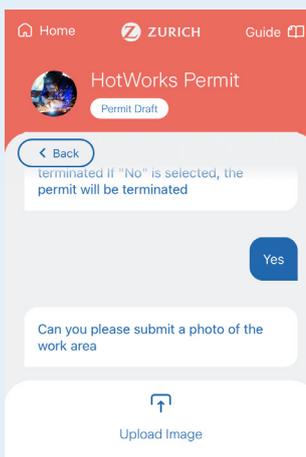
8. A photo of the work area is required to demonstrate the area is safe for work to begin. Click **'Upload an image',** then access your camera to take a current image. You will also be able to upload photos directly from the camera roll on your device. ***Note: Please do not include people in your images for data protection purposes. Please note that the time/date of the photo being taken and uploaded will be used by Smart Permit.***
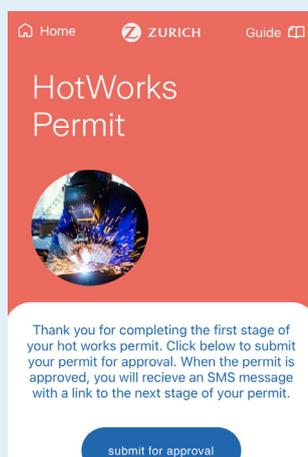
9. Now click **'Submit for approval'** to submit your request for Site Manager approval. You will be moved to the permit dashboard, where the status of your permit will be "pending".

10. Once request has been reviewed by the Site Manager, you will receive an SMS notification confirming permit has been approved or denied. ***Note: You must NOT start the work until the permit has been approved. However, you will be able to extend the permit and delegate the permit to another contractor, if necessary, whilst the permit is pending approval.***
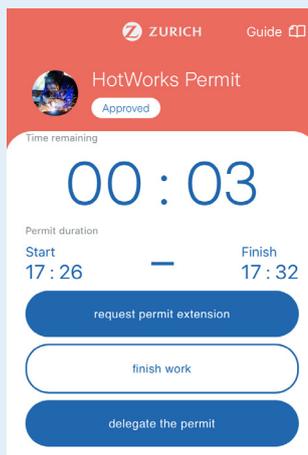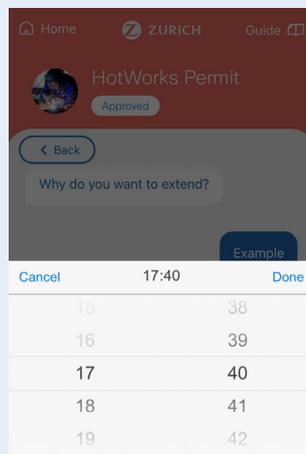
Permit:
How to view my permit dashboard
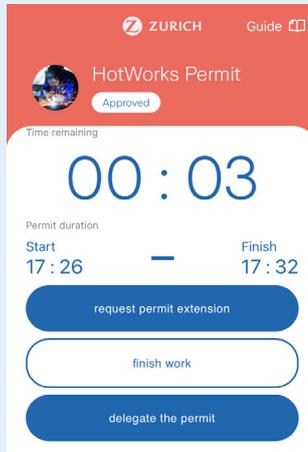
1. When your permit is approved you will receive an SMS notification with a link to your Permit Dashboard. *Note: If you close the permit by mistake at any point in the process, you can click this link to return to the permit.*

2. From the permit dashboard you will be able to view the status of your permit and the time remaining.

3. You will also have the option to extend the permit, delegate the permit, or finish work/end watch period.
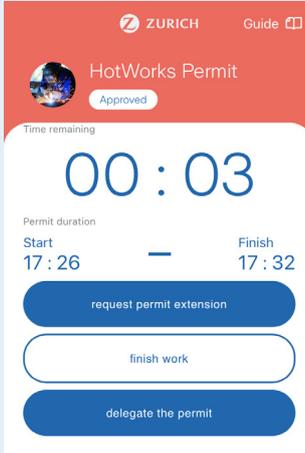
Permit:
How to extend my permit

1. From the Permit Dashboard click **'request permit extension'**.

2. Enter a reason as to why the extension is required.

3. Enter the updated estimated finish time. *Note: Maximum overall time for a permit is 12 hours including the watch period. If work is going to take longer you will need to request a new permit.*

4. When you click **'Done'**, the permit will be extended. *Note: There is no requirement for Site Manager acceptance, but the site manager will receive an email notifying them of the permit extension.*
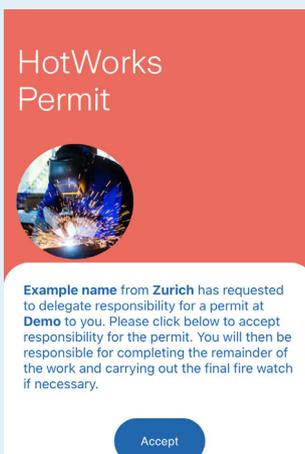
Permit:
How to delegate my permit

1. From the permit dashboard click **'delegate the permit'**. *Note: The option to delegate will be available both during the works and during the watch period.*
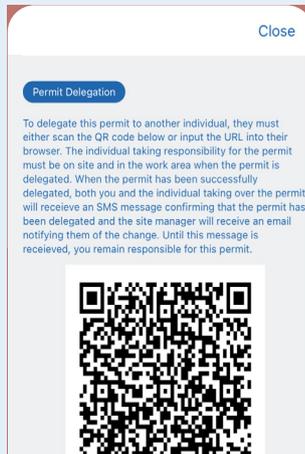

2. Share the URL or QR code with the contractor to whom you wish to delegate (contractor 2). *Note: The contractor who you delegate the permit to must be at the location of the works before you delegate to them.*

3. Contractor 2 will be asked to accept the permit, enter their details, and agree to the Terms and Conditions.


4. You will receive an SMS notification stating that you have successfully delegated the permit, and Contractor 2 will receive an SMS notification stating that they now have full responsibility for the permit, along with a link to access the permit in their browser. If you return to your permit dashboard after successfully delegating the permit, your permit dashboard will state that the permit is no longer assigned to you. *Note: Until contractor 2 accepts the permit, completion of the permit is still your responsibility.*
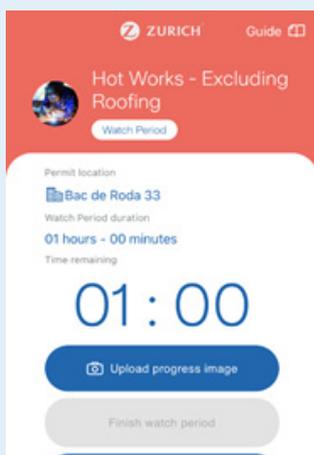
Watch period:

How to start the watch period (if applicable to your permit type)
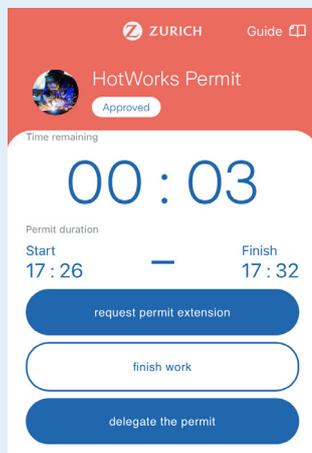
1. From the permit dashboard click **'finish work'**.
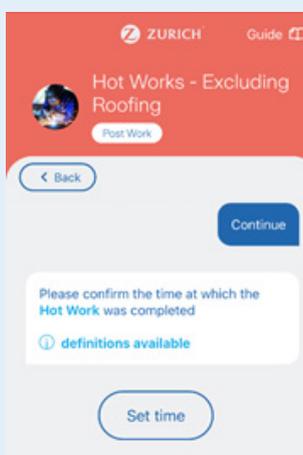
2. Respond to the chatbot-style questions.

3. Enter the actual time the work was completed using the slider bar.
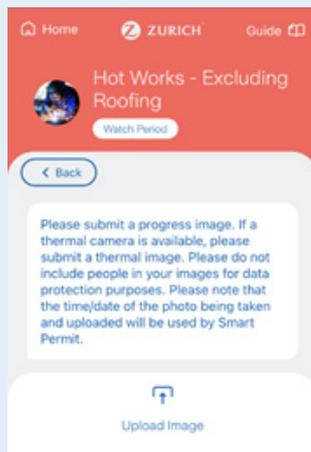

4. Upload a current image of the work area. ***Note: Please do not include people in your images for data protection purposes. Please note that the time/date of the photo being taken and uploaded will be used by Smart Permit. If you are completing a hot works permit and a thermal camera is available, please submit a Thermal Image. Please note, however, that thermal cameras are line of sight cameras only and therefore users of thermal cameras should receive training in their use, understanding images and the limitations.***

5. Click **'start watch period'**. The Site Manager will receive a notification that the watch period has been started and the permit dashboard will display the Watch Period Status.

# How to submit a progress photo for the watch period
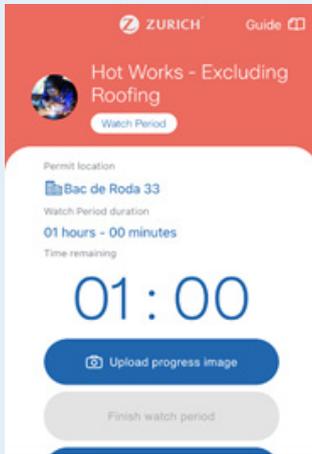
1. During the watch period, you will receive an SMS notification every 30 minutes prompting you to submit a progress image of the work area. ***Note: You are able to submit a progress image at any time during the watch period. Submitting an update photo at least every 30 minutes is best practice.***

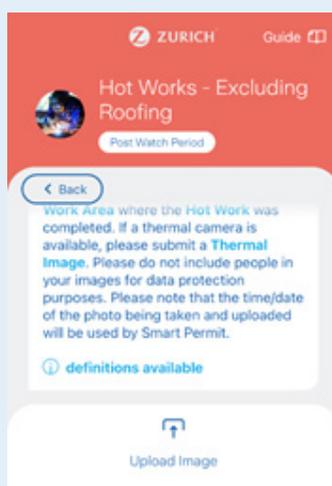2. From the permit dashboard click **'upload progress image'**.

3. Upload a current image of the work area.
   Note: Please do not include people in your images for data protection purposes. Please note that the time/date of the photo being taken and uploaded will be used by Smart Permit. If you are completing a hot works permit and a thermal camera is available, please submit a Thermal Image. Please note, however, that thermal cameras are line of sight cameras only and therefore users of thermal cameras should receive training in their use, understanding images and the limitations.

Closing the permit:
How to submit the permit for closure
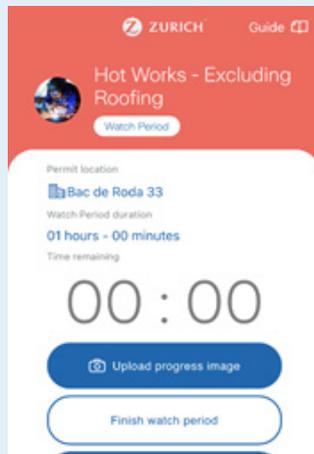
1. You will receive an SMS notification when the watch period has elapsed.

2. From the permit dashboard click **'finish watch period'**.

3. Respond to the chatbot-style questions to confirm the work has been left in a safe state including uploading a current image of the work area. ***Note: Please do not include people in your images for data protection purposes. Please note that the time/date of the photo being taken and uploaded will be used by Smart Permit. If a thermal camera is available, please submit a Thermal Image. Please note, however, that thermal cameras are line of sight cameras only and therefore users of thermal cameras should receive training in their use, understanding images and the limitations.***

4. The permit is now closed and the site manager will receive a notification informing them that the work has been completed and the permit has been closed.

Notifications:
Contractors will receive the following notifications via SMS

Notification	Stage
Contractor receives an SMS notification when the Site Manager has approved the permit	Permit Approval
Contractor receives an SMS notification when the Site Manager has denied the permit	Permit Denial
Contractor receives an SMS notification when they have successfully delegated a permit to another contractor	Delegation of Responsibility
Contractor receives an SMS notification when they have successfully assumed responsibility for a permit	Delegation of Responsibility
Contractor receives an SMS notification 30 minutes before the work time is supposed to expire	Work Ongoing
Contractor receives an SMS notification if, 10 minutes after the work was set to be completed, they haven't confirmed that they have finished the work	Work Ongoing
Contractor receives an SMS notification at 30 minute intervals during the watch period.	Watch Period
Contractor receives an SMS notification 10 minutes after their watch period is set to be completed if they haven't completed the watch period	Watch Period

For more information, you can visit our website at https://www.zurich.co.uk/business/our-expertise/risk-engineering/smart-permit.

If you have any questions or require any assistance, please get in touch via smartpermit@uk.zurich.com.

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