

## Cheat Sheet #7 How to create an Energy Isolation (Lockout/ Tagout) Permit in NS5

The energy isolation (EI) procedure is designed to prevent injuries and deaths caused by accidental start up of machinery during maintenance or servicing. All electrical, mechanical, hydraulic, and pneumatic systems including secondary power supplies need to be isolated prior to starting work. All electrical lines must be locked and tagged.

Machinery needs to be not only turned off, but also disengaged or de-energized AND tested to be sure it cannot be accidentally started.

**The permit needs to be documented in the NS5 work order and a copy posted at the work site.**

Before work begins, an energy isolation permit must be filled out by the crewman doing the work and signed by the Chief Engineer or Port Engineer. All TDI permits are posted on the TDI Forms page.

<http://linux.geodatapub.com/publicweb/client%20TDI%20forms.html>

The Energy Isolation permit is the ONLY permit that is valid for more than 12 hours. Quite often you will be waiting on parts or contractors for weeks or months to repair equipment. The EI permit can be open indefinitely since that equipment cannot be operated until repaired.

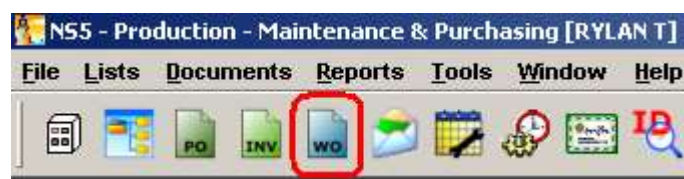
Remember to document the work order with updates to repair status: parts ordered, received, installed, etc. until the repair is complete.

### **Open EI Permits & Engineer Handover**

If you have equipment locked out or tagged out at the time of your Engineer Handover, the engineer who opened the permit will need to close his permit out and the new engineer must create and sign a new permit. (The original NS5 work order will not change.) This is documented on the Engineer's handover.

**To Create the Work Order:** Log in to NS5 and open the Maintenance and Purchasing module.

If creating a new work order, click the **New Work Order** icon from the **Maintenance and Purchasing** window toolbar. Otherwise, create the work order from a standard job.



The **New Work Order** window opens.

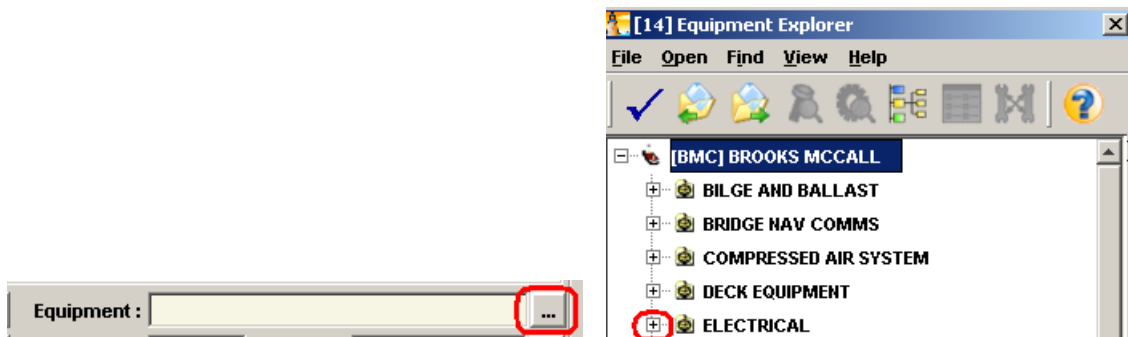
For **Title** on new jobs, put “EI- followed by a short description of the work to be done”.

Some examples would be:

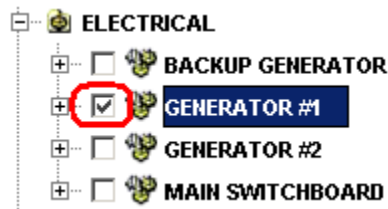
**EI-A FRAME- REPAIR HYDRAULIC CONTROLS** or

**EI-STBD GENERATOR- REPLACE MOTOR**

Next, go to the **Equipment** field and click on the button to the right. You will get a list of ship’s systems. Click on the plus sign to the left of the system to drill down to the components and parts of the system.



Drill down until you find the part you are repairing and click on the box next to it to select. This step links the job to the maintenance history of that equipment so you can easily find it in the future.



If the equipment is not listed, e-mail me at [shannonsmith@tdi-bi.com](mailto:shannonsmith@tdi-bi.com) and tell me what needs to be added and where. Leave the **Equipment** field blank in the meantime.

In the **Description** field, put a summary of the work to be done and then write “Permit filed on Bridge” followed by your name and the date.

Description	Admin Info	Materials	Labor
COMPLETELY REPLACED MOTOR WITH NEW UNIT. PERMIT FILED ON BRIDGE. SHANNON 19 NOV 2010			

When finished, the work order should look something like this:

**Remember to go back and write the work order number on the top of the permit:**

When the work has been completed, the permit signed to closure and filed on the bridge and all the locks/ tags removed by authorized personnel, you may complete the work order.