



2024 UWPC Changes to Rules, Forms, and Tags

Overview of Changes

- All rules have been reviewed and reformatted
- Forward has been rewritten
- Table of contents updated to reflect rule number changes (i.e., Rule 5.020, 6.020)
- New rules and definitions
- Tables have been removed
- “Notes,” bullets and numerical requirements adjusted to suit specific requirements
- Forms and Tags updated – all colour references removed from Code
- Index updated

Glossary of Terms

- Reformatted to align with CSA/CAN ULC style.
- Vocabulary section to assist in understanding the requirements and use of the Code.
 - Have the audience read paragraphs themselves. Ask if anyone has questions

Definitions

- Reworded all definitions, in addition to aligning with EUSR (e.g., dynamically alive)
- “Notes” added to definitions to separate explanatory information
- Block (as applied to blocking)
- Control (as applied to Exemption to tagging and Approved Isolation Procedure)
- De-Energized (as applied to electrical equipment)
- De-Energized (as applied to mechanical equipment)
- Device
- Emergency
- Energized
- Hazard (as applied to energy)
- Structure
- Switching

Section 1: The Fundamentals of Work Protection

Rule 1.001 – Safe Conditions for Work

- Removed numerical requirement
- Expanded wording around AIP from definition

Rule 1.013 – Elements of a Work Permit

- New rule – old rule is in Glossary of Terms

Rule 1.021 – Exemptions to Tagging for Work Protection

- Control definition removed and incorporated as a new definition

Rule 1.034 – Unreliable Isolation

- Added paragraph requirement to obtain permission to align with connection agreement

Rule 1.062 – Electrical Devices with Concealed Contacts

- 2012 note was incorporated as a rule. Numerical requirements were removed to allow methods to be performed in any order

Rule 1.081 – Working on the Isolated Portion

- The table was removed

Rule 1.091 & 1.092 – Types and Use of Do Not Operate Tags

- Rules amalgamated and table removed

Rule 1.092 – Non-Series Numbered PC3 Tags

- New rule, and requirements – departure occurred for Toronto Hydro

Rule 1.100 – Using Work Protection Forms and Tags

- Updated title to incorporate all work protection forms and tags

Rule 1.101 – Transmission, Copying and Retention of Work Protection Forms and Tags

- Separated rules around form use and identification (i.e., Agent’s Copy)
- Increased retention 2 years + current year to align with legal and regulatory requirements (provincial and federal)

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- to preserve organization's ability to pursue or defend a legal claim
- to facilitate compliance with legal and regulatory requirements
- to allow needed information to be located quickly

Rule 1.102 – Signing Work Protection Forms and Tags

- Signatures are mandatory in addition to printed names

Rule 1.114 – Corrections to Non-Series Numbered PC3 Tags

- New rule, and requirements – departure occurred for Toronto Hydro

Rule 1.115 & 1.52 – Authorized departure From the Code

- Reworded and strengthened rules to ensure compliance with OHSA

Rule 1.160 – Adherence to the Code

- New rule for all organizations to conduct, at minimum, an annual review of the application and use of the Code within their workplace

Section 2: Responsibilities - Work Group Members and Holders

Rule 2.001 – Awareness

- New rule designed to promote UWPC awareness for workers in the role they have for that day (e.g., crane operator, heavy equipment operator)

Rule 2.003 – Approval to Enter a Safe Work Area

- Reworded to strengthen rule

Rule 2.011 – Controlling Authority Permission

- Reworded to strengthen rule around obtaining permission
- A key addition was the term “operate”
- A key deletion was the term “work permit” – since you cannot work on isolated equipment without formal work protection or with permission if using an exemption to tagging for work protection

Rule 2.023 & 2.024 – Holder's Initial Responsibilities

- Step 3. Additional De-Energizing & Step 4. Hazards
 - Added note to align with requirements and 2.022, 2.024

Rule 2.031 – Daily Duties of a Holder #6

- Strengthened rule around Holder availability

Rule 2.052 – When a Work Permit is Surrendered

- Rule title change (2012 Daily surrender of an Issued PC2 Work Permit)
- Reworded rule to incorporate all types of permits

Section 3: PC10A Self-Administered Work Permits

Rule 3.032 – Before and After Conducting Tests

- Rule title change
- Added rule to strengthen what must occur after conducting tests

PC10A Work Permit Tag

- Removed reference to “Red Tag”
- Updated tag to align with requirements and training practices with PC17B form
- CA of switching operations – approved by – signing requirements

Section 4: PC17B Self-Administered Work Permits

Rule 4.000 – Using PC17B Work Protection

- Rule title change – Note: change is throughout section 4
 - Changed “Work Permit” to “Work Protection”
 - Allows for rules to be applied to all uses on a PC17B form

Rule 4.013 – Sequence and Tagging

- Added bullet to capture the use of equipment protection and test tags

Rule 4.015 – When Only Supporting Guarantees are Required

- Changed rule to align with other rules that describe the requirement to state no additional isolation is required in the “device” column (4.081, 5.037)
- Updated tag to align with requirements and training practices with PC17B form

Rule 4.023 – When Switching Is Performed at a Remote Location

- Reworded to strengthen the rule around switching accountabilities
- Removed reference to Holder and incorporated the use of the terms Switching Agent and Establishing Authority
- Made the steps numerical to support procedural adherence

Rule 4.071 – Transfer to a Substitute Holder

- Reworded Rule 4.061 to strengthen the rule around procedural adherence as Rule 4.071 became an administrative control
- Added terminology to support PC17B form changes where the substitute Holder must sign in the “accepted by new Holder” space on the PC17B Work Permit

Rule 4.093 – Authorize and Establish a Test or Pretest Condition

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- Added requirement for the Holder to be present to authorize a test or pretest condition and direct each operation

PC17B Work Permit Form

- Increased Purpose of Order space
- Notice section formatting changes (e.g., date and time, dotted lines)
- CA of switching operations – approved by – signing requirements
- Increased space for signing and printing names
- Updated requirement for signing the accepted by new Holder

Section 5: PC2 Issued Work Permits

Rule 5.002 – When to Use a PC2 Work Permit

- Rule title change (2012 – When can a WP be issued)
- Reworded to strengthen the rule

Rule 5.011 – Plan Ahead was deleted

- Rule was process-driven and not a rule

Rule 5.010 – the PC2 Work Permit Application section was realigned to amalgamate rules within 5.020, while other rules in 5.010 were moved to align within the section with adjustments to strengthen the rules

Rule 5.012 – Reuse of a PC1 Application

- Moved from 5.020 to align with application rules

Rule 5.013 – Receiving and/or Referring the PC1 Application to Another Authority

- Rule title change – added “referring” from 2012 5.015
- Reworded to strengthen the rule around the PC1 receiving and referring process.

Rule 5.016 – Information Required on the PC1 Application for the PC2 Work Permit

- Rule was reformatted with minor adjustments (i.e., administration section, note)

Rule 5.018 – Late PC1 Application for Additional Work or Tests

- Rule title change to align with application rules – 2012 5.021

Rule 5.020 – Section deleted - intentionally left blank to ensure the continuity of rule numbering within the Code Book. All previous rules under 5.020 have been integrated within Section 5 of the Code:

- 2012 5.021 moved to 5.018
- 2012 5.022 moved to 5.011
- 2012 5.023 moved to 5.012

Rule 5.033 – Sequence and Tagging

- Added bullet to capture the use of equipment protection and test tags

Rule 5.037 – When Only Supporting Guarantees are Required

- Changed rule to align with other rules that describe the requirement to state no additional isolation is required (4.015, 4.081)

Rule 5.042 – Performing the Operations Rule

- Rule title was changed to align with establishing the guaranteed conditions rule for both PC17A and PC17B Order to Operate forms (4.022)

Rule 5.043 – When Switching is Performed at a Remote Location

- Reworded to strengthen the rule around switching accountabilities
- Incorporated the use of the terms Switching Agent and Issuing Authority
- Made the steps numerical to support procedural adherence

Rule 5.053 – Safety Precautions and Instructions not Listed on the Original PC1 Application(s)

- Rule title change to align with application rules
- Condition of issuance is now stated in Rule 5.052 along with rule title 5.060

Rule 5.091 and 5.092

- Rules have been reversed in sequence
- Strengthened both rules when reformatted

Rule 5.120 – Testing Responsibilities

- Rule title changes to align with testing accountabilities
- Amalgamated rules within the section to provide specific direction
- Made Rule 5.122 and Rule 5.123 numerical steps to support procedural adherence

PC1 Application Form

- Add space for station/circuit
- Adjusted “issued in test” space right margin to align with “none”
- Controlling/Issuing Authority “date and time” moved to right margin to allow for signatures
- PC1 forwarded to PC2# space created to clearly identify instruction, which supports the rule

PC1 Holder’s Record Form

- Increased space for documenting safety precautions and instructions

PC2 Form

- Increased space in general description space
- Adjusted spacing in PC3 boxes to support new Non-Series PC3 use
- Increased spacing for signatures in the prepared by, checked by, issued by, and terminated by spaces.

PC14 Form (front and back)

- Added Order to Operate section on the top and bottom of the form to clearly define the section

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- Clearly identified the Issuing Authority section for authorizing and establishing a test condition
- Increased spacing for signatures in all sections applicable to signing

Section 6: Supporting Guarantees

Rule 6.002 (2012)

- 2012 Rule “When it Requires Supporting Guarantees” has been amalgamated into Rules 6.013, 6.053, and 6.073 applicable to the Issuing Authority instructions on who obtains a Supporting Guarantee
- Strengthened all rules with changes

Rule 5.120 – The Supporting Guarantee Application

- Rule title changes to align with application requirements and accountabilities
- Amalgamated rules within the section to improve clarity

Rule 6.020 (2012)

- Deleted – was not a rule
- moved to Glossary of Terms under Supporting Guarantee

Rule 6.032

- Reformatted for improved clarification of rules when establishing a PC10C
- Created two additional descriptive steps for the Holder and Issuing Authority

PC10C Tag (front and back)

- Amalgamated boxes (equipment isolated and description of work)
- New title to align with PC17B form - training - list condition (e.g., to isolate)
- Title changed to describe equipment isolated, work, location
- Accepted by and surrender by Holder space increased for signature and highlighted to clearly identify where the Holder must sign
- Issued by space increased for signature
- Temporary non-working de-energizing devices space adjusted to align with form changes to allow for more space in other sections
- All sequences completed space changed to align with other OTOs and increased signing space

Rule 6.053 – Establishing a PC17B Supporting Guarantee

- Reformatted for improved clarification of rules when establishing a PC10C SG
- Created two additional descriptive steps for the Holder and Issuing Authority

Rule 6.032

- Reformatted for improved clarification of rules when establishing a PC17B SG
- Created two additional descriptive steps for the Holder and Issuing Authority

Rule 6.032

- Reformatted for improved clarification of rules when establishing a PC2 SG
- Created two additional descriptive steps for the Holder and Issuing Authority

Rule 6.090 and 6.091

- New titles and amalgamation of 6.091 (2012) within other rules (5.181, 6.091)

Rule 6.103

- Reformatted for improved clarification of rules and procedural adherence when testing is requested

Rule 6.104

- Title change – list Issuing Authority

Section 7: De-Energizing Isolated Equipment

Changed titles to align with the Equipment Protection flow of rules

Rule 7.011 – De-Energizing with Permanently Installed Devices

- Reformatted for improved clarification of rules
- Table removed

Rule 7.021 – De-Energizing with Temporary Devices

- Reformatted for improved clarification of rules when installing temporary DED
- Reworded to align with EUSR Rule 119 #5 reference coloured conductor jacket

Rule 7.031 - When to Use a PC4 De-Energizing Device Tag

- Changed title to align with the equipment protection flow of rules
- Purpose was not a rule

Rule 7.033 – PC4 Tag Placement

- Reformatted for improved clarification of rules and procedural adherence

Section 8: Equipment Protection

Changed titles to align with all Equipment Protection rules and flow

- Purpose was not a rule
- Minor changes to the location of equipment protection rules within each section

Caution Tag Record Form

- Minor changes to formatting – tag series and CA approved by
- Increased space for signatures