

# Audit Checklist - Energy Isolation of Pumping Units



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Title Procedure Audit Checklist  
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Approval Authority Alf Tilchler

Observer name

Place of observation

Date

Time

## Hazard and Risk Management Process

Think 6

Look 6



| No | Procedural Step   | Done safety              | Not done                 | NA                       |
|----|---|--------------------------|--------------------------|--------------------------|
| 1  | Does the Hess Representative (HR) check and verify that the weather is suitable for energy control and LOTO to occur on the PU?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2  | Is a pre-job safety meeting held?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3  | Is the Hess PU Energy Control Procedure reviewed during the meeting?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4  | Does the HR highlight the energy isolation Hess Rule?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5  | Is a JSA reviewed or a new one written?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6  | Does the HR ensure that no person enters the safety cage surrounding the PU until the electrical and kinetic energy is confirmed as being isolated and LOTO applied?                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7  | Does the Rig Operator (RO) test the utility of the friction brake by stopping the PU with the counterweights at the ten o'clock or two o'clock position?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8  | Are the weights held in position for at least 1 (one) minute to test the friction brake?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9  | Assuming the test is successful, does the RO turn the Hand-off Automatic Switch (HOA) to "off" position and set the brake simultaneously when the counter-weights are in the "up" position at 12 o'clock? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| No | Procedural Step   | Done safety              | Not done                 | NA                       |
|----|---|--------------------------|--------------------------|--------------------------|
| 10 | Is the friction-brake lever pulled in a continuous movement to fullest ratchet point?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11 | Does the RO turn the power handle in the breaker-box to the "off" position?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12 | Is a hasp, lock(s), and tag placed to lock-out and tag-out the breaker power handle?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13 | Does the RO turn the HOA to "on" position and check for presence of electricity in the PU?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14 | If no power is identified in the PU (i.e., PU won't start), is the HOA turned back to the "off" position and left in the "off" state? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15 | Does the RO use the remote Pawl locking/unlocking handle to engage the pawl?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 16 | Does the HR confirm that the friction-brake and mechanical pawl are both engaged?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17 | Is a hasp, lock(s), and tag placed to lock-out and tag-out the pawl handle?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18 | Is a hasp, lock(s), and tag placed to lock-out and tag-out the friction brake handle?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19 | Is the HR present for the duration of the energy control and LOTO process?  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20 | Is house-keeping undertaken on completion of the energy isolation and LOTO process?   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Comments