



LOCKOUT TAGOUT PROCEDURE

Instructions:

- Complete each section of the form. Where a step or section does not apply, write n/a.
- Return completed forms to the department supervisor or manager for review and approval.
- Save an electronic copy of the approved procedure according to the department specific guidelines.
- Ensure completed procedures are readily accessible, such as having a printed copy on or near the equipment, or having the procedures available in a binder in the location of the equipment.
- Review the procedure at least once per year by completing the Periodic Inspection Certification Form.
- This form may be altered by the user, so long as it remains in compliance with the LOTO Procedure Guidance document.

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PURPOSE

This procedure establishes the minimum requirements for the lockout / tagout of energy isolating devices whenever maintenance or servicing is done on machines or equipment where employees may be exposed to the unexpected energization of equipment or release of hazardous energy could cause injury.

COMPLIANCE

All employees are required to comply with the restrictions and limitations imposed upon them during the use of lockout. Authorized employees are required to perform equipment isolation in accordance with this procedure. **Disciplinary action will be taken against all violators according to their organization's disciplinary action policy.**

GENERAL INFORMATION			
DEPARTMENT / SHOP:			
EQUIPMENT / SYSTEM NAME:			
LOCATION OF EQUIPMENT (BUILDING, ROOM, ETC.):			
REASON FOR EQUIPMENT / SYSTEM ISOLATION:			
AUTHORIZED PERSONNEL		AFFECTED PERSONNEL	
HAZARD ASSESSMENT (CHECK ALL THAT APPLY)			
<input type="checkbox"/> Electrical		<input type="checkbox"/> Thermal (cryogenic)	
<input type="checkbox"/> Chemical		<input type="checkbox"/> Radiation, ionizing	
<input type="checkbox"/> Pressure (hydraulic, pneumatic)		<input type="checkbox"/> Radiation, non-ionizing	
<input type="checkbox"/> Mechanical		<input type="checkbox"/> Stored energy	
<input type="checkbox"/> Thermal (heat)		<input type="checkbox"/> Other:	
LOCKOUT TAGOUT SEQUENCE			
Step 1 – NOTIFY AFFECTED EMPLOYEES THAT SERVICING WILL TAKE PLACE UNDER LOCKOUT TAGOUT.			
Step 2 – SHUT DOWN (I.E. TURN OFF) THE EQUIPMENT OR SYSTEM FOLLOWING THE NORMAL STOPPING OR SHUTDOWN PROCEDURES.			
Step 3 – FOLLOW THE STEPS BELOW TO PROPERLY ISOLATE EACH ENERGY SOURCE, APPLY LOCKOUT TAGOUT AND VERIFY THAT THE EQUIPMENT IS IN A ZERO ENERGY STATE:			
HAZARD	MAGNITUDE	METHOD OF ISOLATING	VERIFICATION CHECK
<input type="checkbox"/> ADDENDUM – PROCEDURE STEPS CONTINUED ON SEPARATE PAGE.			
Step 4 – RELEASE / CONTROL STORED ENERGY (LIST):			

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STEP 5 – ATTEMPT TO RESTART EQUIPMENT; VERIFY THAT EQUIPMENT WILL NOT START. RETURN OPERATING CONTROL(S) TO NEUTRAL OR “OFF” POSITION AFTER VERIFYING THE ISOLATION OF THE EQUIPMENT.		
RETURN EQUIPMENT TO SERVICE		
Step 1 – Check the equipment and the immediate area around the machine to ensure that nonessential items have been removed and that the machine or equipment components are operationally intact.		
Step 2 – Check the work area to ensure that all employees have been safely positioned or removed from the area.		
Step 3 – Verify that the controls are in neutral or “off” position.		
Step 4 – Remove the lockout devices and reenergize the machine or equipment.		
Step 5 – Notify the affected employees that the servicing or maintenance is completed, and the machine or equipment is ready for use.		
DOCUMENT REVIEW AND APPROVAL		
AUTHORIZED EMPLOYEE COMPLETING FORM / PROCEDURE	DATE COMPLETED	
SUPERVISOR REVIEWING PROCEDURE	DATE APPROVED	NEXT REVIEW DUE