Lockout / Tagout Procedures

Safety Meeting Packet

Protect Your Workforce

According to the Occupational Safety and Health Administration (OSHA) Control of Hazardous Energy Standard (Lockout/Tagout), employers are responsible for establishing and implementing a written energy control program to protect their employees while they are performing inspection and maintenance duties on machinery. These workers may be at risk for injuries from unexpected energization, startup, or release of stored energy in the equipment. Establishing and maintaining an energy control program and proper lockout/tagout procedures are critical elements of a safe workspace.

Program Requirements

The employer's program must include energy control procedures, employee training, and periodic inspections. Once developed, the program must be reviewed at least annually to ensure that the requirements of the OSHA standard are being met. The review must be performed by an employee who is authorized to lock or tag out equipment and who is not utilizing the energy control being inspected.

If the employer uses lockout for energy control, the inspector must review with each employee his or her responsibilities under the program, if he or she uses equipment that is serviced under lockout, or works in an area with equipment that is serviced under lockout.

If tagout is used for energy control, the inspector must review with each employee his or her responsibilities under the energy control procedure, if he or she uses equipment that is serviced under tagout, works in an area with equipment that is serviced under tagout, or performs the tagout.

The employer must certify that inspections have been performed and identify the equipment that was being utilized, the date of section, the employees included, and the person performing the inspection.

Device Requirements

Lockout and tagout devices may not serve any other purpose other than energy control. The devices used must also meet the requirements described below.

- Durable: Devices must withstand the environment they are exposed to. Tagout devices must be printed to withstand weather, moisture, and chemical exposure.
- Standardized: Lockout/tagout devices within the facility must be the same color, shape, or size. Tagout devices must be printed and formatted in a standardized manner.
- Substantial: Lockout devices must withstand removal without excessive force or unusual techniques. Tagout devices must prevent accidental removal and must be: Non-reusable, attachable by hand, self-locking, non-releasable with a minimum locking strength of 50 pounds, and have the general design and characteristics of a one-piece nylon cable tie.
- Identifiable: Devices shall identify the employee who applied them.
- Tagout devices must warn against hazardous conditions if the machine is energized, including a legend like: *Do Not Start, Do Not Open, Do Not Close, Do Not Energize, Do Not Operate*.

Training

Employers must provide training to employees to ensure that they understand the purpose and function of the program and have the knowledge required to safely apply, use, and remove energy controls. Training varies by the employee's exposure to hazardous energy:

- Employees who perform lockout/tagout must be trained to identify hazardous energy sources, the type and magnitude of the energy in the workplace, and the methods necessary to isolate and control the energy.
- Employees who use or work in an area with equipment that requires lockout/tagout for maintenance must be trained on the purpose and use of the procedure.
- Other employees whose work operations may be in an area where energy control procedures are used must be instructed on the procedure and the ban on attempts to restart equipment that is locked or tagged out.

If tagout systems are used, training must be provided on the limitation of tags.

- Tags are warning devices and do not provide the physical barrier that is provided by a lock. They may give a false sense of security and must be understood.
- Once attached to an energy isolating means, a tag cannot be removed without authorization of the individual responsible for the tag. The tag may not be bypassed, ignored or otherwise overridden.
- Tags must be legible and understandable by all employees who perform the tagout, work in the area, or whose operations may be in the work area to be effective.
- Tags and their mechanism of attachment must withstand workplace environmental conditions.
- Tags must be attached to energy isolating devices so they cannot be accidentally removed.

Once training is complete, re-training must be provided when there is a change in job, machine, equipment, or process that creates a new hazard. Re-training is also required when the energy control program changes or when the employer believes that an employee is deviating from, or does not have a knowledge of the energy control procedures.

Proper Lockout / Tagout Process

OSHA outlines lockout/tagout procedures and indicates that they must be performed in this order:

- Prepare for Shutdown: The employee performing the lockout / tagout must know the type and magnitude of energy, the hazards of the energy to be controlled, and the method or means to control the energy.

- Shutdown: Turn off or shut down the machine according to its established procedure.
- Isolation: Energy isolating devices must be physically located and operated in a way that isolates the machine or equipment from energy source(s).
- Apply Lockout / Tagout Device: Must be attached by an authorized employee. Lockout devices must hold the energy isolating device in a 'safe' or 'off' position. Tagout devices must indicate that moving the equipment out of a 'safe' or 'off' position is prohibited and must be attached at the same point a lock would have been attached or placed in a safe location that is immediately visible to an individual attempting to use the equipment.
- Release Stored Energy: Disconnect or release any potentially hazardous stored or residual energy.
- Confirm Isolation: The employee who locked or tagged the equipment must verify that it was isolated and de-energized.

Once equipment is locked or tagged out, certain procedures must be followed when returning the equipment to service.

- Equipment Inspection: Confirm that non-essential items have been removed and that the equipment is operationally intact.
- Work Area: Ensure employees are in a safe position or have been removed from the work area.
- Notification: Notify all affected employees after removing the lock or tag device but before starting the machine.
- Device Removal: Must be performed by the employee who applied the lock or tag, with limited exception.

For additional information, please review the following:

- The Control of Hazardous Energy (Lockout/Tagout): 29 CFR 1910.147 and 1910.147, App. A
- Occupational Safety and Health Standards: 29 CFR 1910.269 and 1910.333
- Lockout and Tagging of Circuits: 29 CFR 1926.417

Lockout/Tagout Procedure

Safety Meeting Attendance Acknowledgement

Company Name _____

Department / Division _____

Meeting Date & Time _____ _____ ☐ AM ☐ PM

Meeting Location _____

Name & Title of Individual Conducting Meeting _____

Key Meeting Discussion Points / Important Reminders:

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Internal Procedures Reviewed:

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By signing this document, you confirm your attendance at the meeting and acknowledge the issues addressed above!

Employees in Attendance		
(Print):	(Print):	(Print):
(Sign):	(Sign):	(Sign):
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Employees not present: _____

Suggestions/Recommendations to improve workplace safety and health: _____

Actions Taken: _____

Manager/Supervisor: _____ Date: _____

Disclaimer:

The information provided above was assembled using multiple resources. However, these materials do not contain ALL the information available regarding the required safety standards under local, provincial, state, or federal law for your industry.