**Lockout / Tagout  
Written Program**

Lockout / Tagout (LOTO) Written Program

# Purpose

## The purpose of this program is to establish procedures for the safe control of energy through the locking and/or tagging of equipment and machinery at (insert company name).

# Policy

## This program supports compliance with the Occupational Safety and Health Administration (OSHA) Control of Hazardous Energy (Lockout/Tagout) standard, as found in 29 CFR 1910.147.

# Eligibility

## This program applies to all (insert company name) employees who are authorized to perform maintenance activities on equipment or processes that present energy hazards and to any employees who are affected by these activities.

# Definitions

## *Affected Employee:* An employee whose job requires him or her to operate or use a machine or equipment on which service or maintenance is being performed under LOTO or whose job requires him or her to work in an area in which such service or maintenance is being performed. Affected employees must be informed when LOTO is being performed.

## *Authorized Employee:* A person who locks and tags machines or equipment in order to perform service or maintenance on it.

## *Energy-Isolating Device:* A mechanical device that physically prevents the transmission or release of energy, including a manually operated electrical circuit breaker, a disconnect switch, a line valve, a block and any similar device used to block or isolate energy.

## *Lockout:* The process used to identify, cut off and secure all energy sources before beginning repair, adjustment or maintenance. A lockout device is used to secure equipment or machinery in the “off” position, ensuring that it cannot be operated.

## *Lockout Device:* A lock (either key or combination type) that holds an energy-isolating device in a safe position and prevents the machine or equipment from energizing.

## *Machine Specific Lockout/Tagout Procedures:* Written LOTO Procedures which detail the steps to be taken for that particular machine/similar machines. These can be kept at the machine or in a book. They must be updated/tested/ evaluated annually.

## *Servicing and/or Maintenance:* Workplace activities that require LOTO on the equipment before beginning the activity because employees may be exposed to the unexpected energy or startup of the equipment or the release of hazardous energy. Servicing and/or maintenance includes constructing, installing, setting up, adjusting, inspecting, modifying, lubricating, cleaning or unjamming and making tool changes.

## *Tagout:* Attaching a tag to the lock on the power source that has been shut off, indicating the time and reason for the lockout and the name of the person doing the work. The tag acts as a warning not to restore energy to the equipment or machinery.

## *Tagout Device*: A prominent warning sign, such as a tag, that can be securely fastened to an energy-isolating device to indicate that the energy-isolating device and the equipment it controls can’t be operated until the tagout device is removed.

## *Zero-Energy State:* All energy has been controlled in the machinery or equipment.

# Procedures

## All equipment that contains energy of any form will be locked out prior to being serviced or maintained. Four types of energy sources are:

### Electrical

### Hydraulic or pneumatic

### Fluids and gases

### Mechanical

## An energy control procedure will be completed for each piece of equipment requiring LOTO. It will identify all energy-isolation points to be locked and tagged as well as any special information required to safely achieve a zero-energy state. Authorized Employees will follow equipment specific procedures when performing LOTO. Equipment procedures should include the following information:

### The intended use of the procedure

### Steps for shutting down, isolating, blocking, and/0r securing equipment

### Steps for placing, removing, and transferring lockout devices

### Equipment-testing requirements to verify the effectiveness of the energy-control procedures

## Employees must do the following to LOTO equipment, before beginning service or maintenance work:

Inform all affected employees of equipment shutdown.

Shut down equipment.

Isolate or block hazardous energy.

Remove any potential (stored) energy.

Lockout or tagout the energy source(s).

Verify the equipment is isolated from hazardous energy and de-energized.

## Employees must do the following to remove LOTO devices and re-energize equipment:

* + - 1. Remove tools and replace machine or equipment components.
      2. Inform coworkers about energy-control device removal.
      3. Ensure all workers are clear of the work area.
      4. Verify machine or equipment power controls are off or in a neutral position.
      5. Remove the lockout or tagout device.
      6. Re-energize equipment.

## Special LOTO Conditions.

### When an energy-isolating device is locked or tagged and it is necessary to test or position equipment, do the following:

* + - 1. Remove unnecessary tools and materials.
      2. Ensure that all other employees are out of the area.
      3. Remove locks or tags from energy isolating devices.
      4. Proceed with test.
      5. De-energize equipment and lockout or tagout energy-isolating devices.
      6. Operate equipment controls to verify that the equipment is de-energized.

## Work Requiring More Than One Person

### If more than one person is required to lock or tag out equipment, each person will place his or her own lock and tag on the energy-isolating device.

### When an energy-isolating device cannot accept multiple locks and tags, a multiple lockout device or hasp will be used.

## Shift Changes

### When work involving LOTO extends beyond a single shift, the Authorized Employee going off-shift shall not remove their lock and tag until an Authorized Employee coming on-shift has placed their lock and tag on the energy-isolating device(s).

### When equipment is to be taken out of service for an extended period of time, an Authorized Group Leader will also place a lock and tag on the energy-isolating device(s) until all work is completed and all other Authorized Employees’ locks and tags have been removed.

### At no time should the machine being worked on be without LOTO.

## LOTO Devices

### LOTO devices must meet the following criteria to ensure that they are effective:

#### Lockout devices must work under the environmental conditions in which they are used. Tagout device warnings must remain legible even when they are used in wet, damp, or corrosive conditions.

#### Lockout and tagout devices must be designated by color, shape, or size. Tagout devices must have a standardized print and warning format.

#### Lockout devices and tagout devices must be strong enough that they can’t be removed inadvertently. Tagout devices must be attached with a single-use, self-locking material such as a nylon cable tie.

#### Any employee who sees a lockout or tagout device must be able to recognize who attached it and its purpose.

#### Each lock must have a unique key or combination.

### Energy-isolating devices are the primary means for protecting (insert company name) employees who service equipment and must be designed to accept a lockout device. Energy isolating devices must clearly identify function.

## Contractors who perform work on (insert company name) equipment will comply with all LOTO requirements in this program.

## Training

### Employees who may be exposed to hazardous energy will be trained to ensure they understand this program and have skills to apply, use, and remove energy controls. The training is required annually and will include the following:

* + - * Affected employees will be trained in the purpose and use of energy-control procedures, will be trained about the procedures and the prohibition against starting machines that are LOTO’d.
      * Authorized employees will be trained to recognize hazardous energy sources, the type and magnitude of energy in the workplace, the methods and means necessary for isolating and controlling energy, and the means to verify that the energy is controlled.

### Authorized and affected employees will be retrained whenever their job assignments change, energy-control procedures change, equipment or work processes present new hazards, or when they don’t follow energy-control procedures.

### Current training records will be maintained for each authorized and affected employee including the employee’s name and the training date.

## Inspections

### Annual inspections will be completed to ensure that employees understand and use LOTO procedures correctly and to verify each procedure’s accuracy, completeness, and effectiveness. Documentation of inspections will include the following:

* + - * The equipment on which the procedure is used.
      * The date of the inspection.
      * The employees included in the inspection.
      * The inspector.

### If it is found that employees are not following LOTO procedure or that the procedure is not protecting them, employees must be retrained and the procedure’s deficiencies corrected.

# Responsibilities (required section)

## ***The Position Title (e.g., Program Coordinator, Safety Coordinator, Safety Manager, Operations Manager, etc.)***

### This person is responsible for the following tasks:

* + - * Issuing and administering this program and making sure that it satisfies the requirements of all applicable federal, state and local lockout/tagout requirements
      * Providing initial and annual training of employees on LOTO procedures
      * Maintaining the training records of all employees included in the training sessions
      * Verifying through annual audits that the LOTO program effectively protects employees who are servicing powered equipment

## ***Insert Position Title (e.g., Maintenance Supervisor)***

### This person is responsible for the following tasks:

* + - * Ensuring that all employees who are authorized to service equipment within the facility have received training on appropriate LOTO procedures and energy control procedures
      * Completing Machine Specific LOTO Procedures for each specific piece of equipment or process within the facility
      * Assuring that appropriate energy-isolating devices are available for all equipment and processes within the facility
      * Assigning locks to authorized employees
      * Coordinating activities of contractors that may affect LOTO and energy control procedures on (insert company name) equipment

## ***Insert Position Title (e.g., Supervisors, Line Management, Operations Director, etc.)***

### These people are responsible for this task:

* + - * Ensuring that only authorized employees service the equipment and machinery in their department

## **Authorized Employees**

### These people are responsible for these tasks:

* + - * Complying with this written LOTO program
      * Following all safe shutdown and startup procedures
      * Communicating activities to all affected employees and other authorized employees
      * Ensuring the security of their own locks and keys

## **Affected Employees**

### These people are responsible for these tasks:

#### Advising the maintenance department when equipment needs servicing

#### Following the direction of the authorized employee as it affects the operation of their equipment

# Associated Documents (Add laws and/or relevant documents or policies)

## Occupational Safety and Health Administration (OSHA) Control of Hazardous Energy (Lockout/Tagout) Standard, 29 CFR 1910.147

# Change Control (optional section)

## Table 1 describes revisions made to this document since the previous version.

Table 1: Change Control Record

|  |  |  |  |
| --- | --- | --- | --- |
| Revision # | Date | Description of Changes | Author |
| 0 |  | Original Documentation for Release. |  |

Appendices (*The following forms are recommended for application of this procedure*)

Appendix A – Lockout Checklist

Appendix B – Safe Startup Checklist

Appendix C – Energy Control Diagram

Appendix D – Lockout/Tagout Evaluation Form

Appendix E – Lockout/Tagout Training Record