



Colorado Springs
School District 11
Risk Related Activities

Lock Out/Tag Out (LOTO) Safety Standard

Colorado Springs School District 11

SAFETY STANDARD

1. This Safety Standard was developed by the Safety Office, Risk Related Activities Department.
2. A technical review and content acceptance was performed by:
 - Chief Operations Officer
 - Senior Executive Director, Information Technology
 - Director of Human Resources - Secondary
 - Director of Transportation
 - Director of Tech and Support Services
 - Director of Food and Nutrition Services
 - Senior Director of Facilities
 - Assistant Director of Facilities
 - Fleet Manager - Transportation
 - Facilities Operations and Maintenance Manager
 - Project Manager – Video Editor
 - Capital Program Manager
 - Facilities Quality Assurance and Safety Manager
 - Custodial Foreman - Inspector
 - All Facilities Shop Foremen
3. This Safety Standard was reviewed and accepted by the Director, Risk Related Activities Department.

Approved: _____

A handwritten signature in blue ink, appearing to read 'Br. Comfort'.

Date: _____

12/4/24

Dr. Brandan Comfort
Chief Resource Officer

Lock Out/Tag Out (LOTO) Safety Standard

Purpose and Scope:

The purpose of this safety standard is to provide students, staff and visitors of Colorado Springs School District 11 with procedures to protect health and safety while making repairs to equipment where the control of potentially hazardous energy is required.

Responsibilities:

Risk Related Activities Department:

- Develop and administer the standard.
- Assist all District locations in the implementation of this standard.
- Coordinate with all parties involved in the initial technical review of this standard to complete an annual review of this standard.
- Establish the Manager, Safety and Loss Prevention as the program administrator

Program Administrator:

- Implement each location's program in order to satisfy federal, state and local lockout/tagout requirements in accordance with this policy.
- Provide a training program for identified authorized employees to their supervisor.
- Ensure that energy control procedures are established and current for all machines and equipment.
- Coordinate with authorized employee supervisors to ensure appropriate energy isolation devices are available for all machines and equipment.
- Coordinate with Capital Program Department to assure new equipment has LOTO capability.
- Perform annual review of this Safety Standard and re-certify program using Appendix C.
- Ensure retention and access to training records.

Capital Program Department:

- Ensure all new equipment has LOTO capability.
- Coordinate contractor activities involving LOTO and energy control procedures at worksite locations for new equipment installation projects.

Facilities Department:

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- Evaluate the potential hazards of specific equipment within department's areas of responsibility.
- Develop machine specific procedures that are tailored to each specific location and equipment therein for each location within the District.
- Provide LOTO supplies and devices to all authorized department employees.
- Ensure that LOTO devices use are restricted to LOTO purposes only.
- Identify and maintain an accurate list of all authorized employees within each shop within the department.
- Adhere to the procedures specified in this Safety Standard.
- Coordinate contractor activities involving LOTO and energy control procedures at worksite locations for equipment repair projects.

Transportation Department:

- Evaluate the potential hazards of specific equipment within department's area of responsibility.
- Develop machine specific procedures that are tailored to each specific piece of equipment serviced.
- Provide LOTO supplies and devices to all authorized department employees.
- Identify and maintain an accurate list of all authorized employees within the department.
- Adhere to the procedures specified in this Safety Standard.

Food and Nutrition Services Department:

- Coordinate contractor activities involving LOTO and energy control procedures at worksite locations for new equipment installation and/or existing equipment repair projects.

Authorized Employees:

- Strictly comply with the provisions of this Safety Standard.
- Either observe and follow an existing energy control procedure or fill out and complete an energy control procedure when performing maintenance or service.
- Follow all safe shutdown and start up procedures found in Appendix F.
- Communicate with all affected employees whenever maintenance is being performed in their area.
- Ensure security of lock out devices and their keys.

Affected Employees:

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- Communicate the need for maintenance/service through a work order.
- Follow the direction of authorized employees as it affects the operation of their equipment.
- Upon observing a machine or piece of equipment which is locked and/or tagged out of service, do not attempt to start, energize or use that machine or piece of equipment, nor attempt to remove, circumvent or override the lockout/tagout device.

Definitions:

Affected Employee - An employee whose job requires him/her to operate or use a machine or equipment which is being serviced or maintained under lockout or tagout, or whose job requires him/her to work in an area in where such service or maintenance is being performed.

Authorized Employee - A person who locks out or tags out machines or equipment in order to perform service or maintenance on that machine or equipment. An affected employee becomes an authorized employee when that employee's duties include performing servicing or maintenance covered under this section.

Capable of being locked out - A machine or equipment is capable of being locked out if it has a hasp or other means of attachment to which, or through which, a lock can be affixed, or if it has a locking mechanism built into it. Other energy isolating devices are capable of being locked out, if lockout can be achieved without the need to dismantle, rebuild, or replace the energy isolating device or permanently alter its energy control capability.

Energized - Connected to an energy source or containing residual or stored energy.

Energy Isolating Device - A mechanical device that physically prevents the transmission or release of energy, including but not limited to the following: A manually-operated electrical circuit breaker; a disconnect switch; a manually-operated switch by which the conductors of a circuit can be disconnected from all ungrounded supply conductors; and, in addition, no pole can be operated independently; a line valve; a block; and any similar device used to block or isolate energy. Push buttons, selector switches, on-off switches and other control circuit type devices are not energy isolating devices.

Energy Source - Any source of electrical, mechanical, hydraulic, pneumatic, chemical, thermal, or other energy.

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Lockout - The placement of a lockout device on an energy isolating device, in accordance with an established procedure, ensuring that the energy isolating device and the equipment being controlled cannot be operated until the lockout device is removed.

Lockout Device - A device that utilizes a positive means such as a lock, either key or combination type, to hold an energy isolating device in the safe position and prevent the energizing of a machine or equipment.

Multi Lock Hasp – a device that provides a means to use multiple locks to lock-out an energy source.

Normal Production Operations – Using a machine or equipment to perform its intended function.

Service and/or Maintenance - Workplace activities such as constructing, installing, setting up, adjusting, inspecting, modifying, and maintaining and/or servicing machines or equipment. These activities (including lubrication, cleaning or unjamming of machines or equipment and making adjustments or tool changes) present situations where the employee may be exposed to unexpected energization or startup of the equipment or release of hazardous energy.

Setting Up - Any work performed to prepare a machine or equipment to perform its normal production operation.

Tagout - The placement of a tagout device on an energy isolating device, in accordance with an established procedure, to indicate that associates are prohibited from operating the tagged equipment/machinery until the tagout device is removed.

Tagout Device - A prominent warning device, such as a tag, which can be securely fastened to an energy isolating device, to indicate that an employee is forbidden to operate the tagged machine/equipment until the tagout device is removed.

Procedures:

1) New Equipment, Major Repairs and Renovation

Whenever replacement or major repair, renovation or modification of a machine

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or equipment is performed, and whenever new machines or equipment are installed, energy isolation devices shall be designed to accept a lockout device.

2) Application and Equipment Survey

Each building in the District shall have a physical survey of equipment completed and documented to determine if the machines/equipment can safely be locked out.

- A. The survey should determine if energy-isolating devices are available, adequate, and accessible for use in the lockout/tagout procedures.
- B. If deficiencies are discovered during the survey, a plan shall be developed to correct the deficiencies revealed by the survey or provide interim alternative protection in order to make the lockout/tagout system effective.
- C. The survey shall be reviewed and updated annually.

3) Use of Lockout/Tagout Equipment

- A. Only authorized employees are permitted to lockout/tagout equipment for servicing and repair. District employees who are not authorized employees are **strictly prohibited** from performing service or maintenance on machines and equipment.
- B. Only authorized employees may apply or remove lockout/tagout devices.
- C. Any authorized employee who applies a lockout device must accompany it with a standard tag. The tag must include the name of the equipment being secured, reason for applying the tag (out of service, repair, etc.), a statement prohibiting removal or tampering with the lock or tag, the date the lock and tag were applied, and the authorized employee's name and contact information.
- D. Authorized employees may only lock out equipment if that equipment has specific lockout/tagout instructions.
- E. If a specific piece or type of equipment does not have specific lockout/tagout instructions, no District employee will be permitted to perform the lockout until a written procedure is developed, approved and certified using the form found in Appendix F "Written LOTO Procedure", or its equivalent.
- F. When lockout/tagout is required, authorized employees shall use the machine-specific procedures for said machine.
- G. Only authorized employees or designated contractors may perform work on a locked-out device.
- H. There must be a separate lock and tag for every authorized employee who is performing work on a locked-out machine or equipment.
- I. Each authorized employee who applies a lockout device will keep the key to the lock in his or her sole possession. Every lockout device must be locked and secured.

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- J. Authorized employees may only use locks, tags, and lockout devices provided by the District. All LOTO devices shall meet the following criteria:
 - i. Durable – Lockout devices must work under the environmental conditions in which they are used. Warning on tagout devices must be legible even in wet, damp or corrosive conditions.
 - ii. Standardized – Lockout and tagout devices must be designated by color, shape or size. Tagout devices must have a standardized print and warning format.
 - iii. Substantial – 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-securing material such as a nylon cable tie.
 - iv. Identifiable – Any employee who sees a lockout or a tagout device must be able to identify who and understand its purpose. Each lock must have a unique key or combination; this means that only the employee who attached the lock has the key or the combination to that lock.
 - v. Tagout devices shall include a legend such as *Do Not Start; Do Not Operate; Do Not Open; Do Not Close; or Do Not Energize*.
- K. Tags will be used as the sole means of lockout/tagout only when locking devices cannot be applied to a particular piece of equipment.
- L. Lockout locks will not be used for any other purpose other than lockout/tagout.
- M. LOTO procedures will be reviewed at least annually.
- N. Specific LOTO procedures are referenced in Appendix B "List of Equipment with Specific LOTO Procedures", and specifically spelled out in Appendix F "Equipment Specific Lockout/Tagout Procedures".

4) Use of Other Energy Control Devices

Other energy control devices may be required in the specific equipment energy control procedures to supplement or be used in lieu of lockout locks:

- A. Machines and equipment may be isolated, secured or blocked from unexpected energization by wedges, blocks, chains, adaptor pins, self-locking fasteners, or other hardware. (i.e. a block may be used to wedge open a mechanical power press during tool changes to prevent the machine from cycling.)
- B. Generators and similar stand-alone equipment must have the energy source controls, through the disconnecting of the spark plug and/or lock out of the controls for the engine.

5) Steps to Lockout/Tagout

- A. Use appropriate machine/equipment shutdown procedure(s) to deactivate operating controls or return them to neutral mode.

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- i. All involved energy isolating devices shall be operated or positioned in such a manner as to isolate the machine/equipment from the energy source(s).
- ii. Locks and employee tags shall be applied to each energy isolating device by authorized employees only.
- B. After lockout/tagout and prior to commencement of service or maintenance, one or more of the following actions shall be taken to verify the effectiveness of the lockout procedure:
 - i. Examine the machine/equipment to determine if residual energy exists. If detected, action must be taken to relieve, disconnect or restrain the stored energy.
 - ii. Operate the machine/equipment process controls (push buttons, switches, etc.) to verify the energy isolation has been accomplished. Then return the machine to the off position(s).
 - iii. Check the machine/equipment by use of test instruments (volt/amp meter) and/or visual inspection to verify that energy isolation has been accomplished.
- C. Release from lockout/tagout – each lock/tag shall be removed by the authorized employee who applied it prior to returning the equipment to service.
 - i. Check the work area to ensure that tools and other non-essential items have been removed and the machine/equipment components are intact.
 - ii. Check the area to ensure that employees have been safely moved away from the work area.
 - iii. Verify that the machine controls are in neutral or off.
 - iv. Remove the lockout/tagout device(s).
 - v. Reenergize the machine or equipment. NOTE: the removal of some forms of blocking may require energizing the machine before safe removal.
 - vi. Notify area employees that the servicing or maintenance work is completed and the machine is ready for use.
 - vii. If it becomes necessary to remove a lock or tag to reenergize equipment and the authorized employee who applied the lock or tag is not present, he or she should be notified and asked to return to the machine/equipment.
 - viii. If that person is unavailable and it is imperative that the machine or equipment be put back into service, the lock or tag may only be removed by or at the discretion of the Program Administrator, or the Program Administrator's designee following the procedure for "Lock Removal for Absentee Employee Process" and be documented on the form included in Appendix E.

6. Lockout/Tagout Training

- A. Authorized employees will be trained on the following topics prior to using lockout/tagout, and at least annually thereafter:
 - i. Recognition of hazardous energy sources;

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- ii. Type and magnitude of energy they may encounter;
- iii. Methods and means of energy isolation; and
- iv. Localized application, procedure and equipment-specific instruction, including written procedures and hands-on instruction in LOTO application.
- B. Affected employees will receive annual training in the purpose and use of the lockout/tagout program, and their limitations and responsibilities under the program.
- C. At least annually, each authorized employee must receive training and demonstrate proper use of lockout/tagout procedures.
- D. Authorized and affected employees will receive annual training about the lockout/tagout program and procedure, and regarding the prohibition against attempting to start or energize locked out devices. Records of each training event and participants shall be maintained on file.
- E. Authorized and affected employees shall receive re-training if energy control procedures are changed and additional training when new equipment is brought into use.
- F. All employees will be trained on who serves as the responsible person designated for the Lock Removal for Absent Employee process.
- G. Re-training is required for both authorized and affected employees when:
 - i. Employee lock-outs are performed incorrectly, reviews reveal deficiencies, or when there is a reason to believe there are inadequacies in the employee's knowledge of the energy control procedures.
 - ii. A change in job assignment requires re-training.
 - iii. Modifications to equipment occur which affects the LOTO procedure or present a new hazard.
 - iv. A procedure has been changed since the last time the employee performed LOTO on that equipment or machinery.

7. Group Lockout/Tagout

- A. When service or maintenance is performed by multiple employees, each employee should utilize his/her own locking device or tag, and multiple locks or tags should be used.
- B. Each authorized employee should both apply and remove his/her locking device or tag at the appropriate time.
- C. Group lockouts will incorporate the use of a group lockout device. Devices may include a multiple lock adapter (that will not release until all locks have been removed) for single machines that require more than one lock or a lockable container to hold the process lock and keys and tag-out records for large jobs and long duration work.
 - i. One primary authorized employee will be assigned and vested as responsible for all the locks on the project and assuring continuity of energy control for the group.

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- ii. A master locking device provides protection from the main energy source. The primary authorized employee is solely responsible for applying and removing this device.
- iii. Each authorized employee involved in the group lockout must affix a personal lockout or tag-out device to the machine, equipment, or into the group lockbox or onto the master locking device when their work begins, and remove it when their work is completed.

8. Lock Removal for Absentee Employee Process

- A. Each LOTO device shall be removed from the energy isolating device by the authorized employee who applied the device.
- B. When the authorized employee who applied the LOTO device is not available to remove it, the device may be removed under the direction of a single designated person provided this designated person follows specific procedures. These procedures are found on the form in Appendix E “Lock Removal for Absentee Employee”. At a minimum, the designated person must:
 - i. Verify that the Authorized Employee who applied the device is not at the location.
 - ii. Efforts are made to contact the Authorized Employee to inform them that their LOTO device has been removed.
 - iii. Ensure the Authorized Employee knows their device has been removed **before** they resume work.

9. Shift Change

- A. Whenever work is required on successive shifts or otherwise transferred from one authorized employee to another, a procedure must be used that protects both employees.
- B. On-coming workers shall attach their locking device before off-going workers remove theirs.
- C. On-coming workers must assure de-energization of the equipment.

10. Non-District Personnel

- A. Whenever non-District personnel such as contractors are engaged, they shall be required to follow this Safety Standard and these procedures.
- B. Locking devices and tags may be provided by District personnel to a contractor for use at a District location only.

11. Record Retention

- A. District departments will create appropriate documentation of training and

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attendance logs.

- B. The Program Administrator will coordinate with departments to assure access to and retention of training records.

12. Periodic Inspection

An “Authorized Person” shall inspect LOTO procedures and actual lock-outs at least annually. This person must be someone other than the one performing the lockout. The inspection requirements include:

- A. Verify employees have been trained to the required level by verifying training records.
- B. Verify the procedure was reviewed within the last 12 months.
- C. Verify that the review included participation by a majority of the employees authorized to use that procedure.
- D. Field check the actual lockout to assure the equipment is being secured properly. The inspector and the employee locking out the equipment are required to participate at a minimum.
- E. Ask authorized employees how they would lockout/tagout equipment, and verify by demonstration.
- F. Note and correct any deficiencies.
- G. Document the inspection using the form found in Appendix D “Periodic Inspection Form”.

13. Annual Review and Certification

In accordance with regulatory requirements, the program and procedures shall be reviewed and certified on an annual basis. The form to complete this process is included in Appendix C “Annual Program Certification” of this safety standard.



APPENDIX A – LOTO PROGRAM AUTHORIZED EMPLOYEES

[illegible]



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[illegible]

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Appendix C – Annual Program Certification

Department: _____

Definitions:

Affected Employee – An employee whose job requires him/her to operate or use a machine or equipment which is being serviced or maintained under lockout or tag out, or whose job requires him/her to work in an area where such service or maintenance is being performed.

Authorized Employee – A person who locks out or tags out machines or equipment in order to perform service or maintenance on that machine or equipment. An affected employee become an authorized employee when that employee's duties include performing servicing or maintenance covered under this section.

Certification Questions:

Item	Description	YES	NO
1	The "Appendix A" list of Authorized Employees has been reviewed and is current.		
2	In the event the Authorize Employees list needs updated, the necessary changes have been made.		
3	Lockout Tag Out procedures have been reviewed with all Authorized Employees.		
4	Authorized Employees have received appropriate training and demonstrated an understanding of applicable LOTO procedures.		
5	All Affected Employees have received appropriate LOTO training.		
6	The Appendix B list of equipment contains all equipment requiring LOTO procedures.		
7	The LOTO procedures associated with the listed equipment remain current and correct.		

Certification:

Printed Name:

Date:

Signature

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Appendix D – Lockout/Tagout Periodic Inspection Form

Procedure Number (if applicable):		
Machine/Equipment Name or Type:		
Elements of Inspection: Preparation for Shutdown – knowledge of the type and magnitude of the hazardous energy. Machine or Equipment Shutdown – performed using established procedures. Machine or Equipment Isolation – all energy sources located and isolated. Hazardous Energy Control Device Application – affixed to the energy isolation device by authorized individuals. Stored Energy – all potentially hazardous stored or residual energy shall be relieved, disconnected, restrained and otherwise rendered safe. Verification of Isolation – authorized employee will verify the isolation and de-energization of the machine or equipment has been accomplished.		
Energy Sources ☐ Electrical ☐ Hydraulic ☐ Chemical ☐ Mechanical ☐ Pneumatic ☐ Thermal ☐ Other		
Energy Isolating Devices ☐ Manually operated electrical circuit breaker ☐ Line Valve ☐ Disconnect switch ☐ Block ☐ Manually operated switch by which the circuit's conductors can be disconnected from all supply conductors (no pole can be operated independently) ☐ Similar device used to block or isolate energy ☐ Other		
NOTE: Push buttons, selector switches, and other circuit type devices are not energy-isolating devices.		
☐ The authorized employees understand the energy control procedures for this machine/equipment. ☐ The authorized employees understand how the requirements of this safety standard apply. ☐ The authorized employees understand which locks/tags are to be used on this machine/equipment. ☐ The lockout/tagout procedures are being followed. ☐ Employees understand their responsibilities in the energy control procedures. ☐ Any identified deviations or inadequacies that requires attention are listed on the following page.		
☐ Tagout procedures have been reviewed when tagout alone is the only means of energy isolation. ☐ Tagout also used the removal of an isolating circuit element. ☐ Tagout also uses blocking a controlling switch. ☐ Tagout also uses valve handle removal. ☐ Tagout also uses the opening of an extra disconnect switch.		
A field-check of the utilization of this procedure was performed on the following authorized employees. Affected employees were included if Tagout alone was used. Checked items were reviewed/explained with these employees.		
Employee (Print Name)	Employee (Signature)	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
Inspection Statement: I hereby certify the periodic inspection for compliance with lockout/tagout standards on this machine/equipment has been satisfactorily completed with the employees identified above.		
Authorized Inspector:		
Printed Name	Signature	Date
_____	_____	_____

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Appendix E – Lock Removal for Absentee Employee Form

FOR IMMEDIATE HELP WITH THIS FORM CONTACT ELECTRIC SHOP FOREMAN		
General Information:		
Name of Person Requesting Removal of Lock: _____	Phone: _____	
Name of Absentee Person: _____	Phone: _____	
Name of Absentee Person's Supervisor: _____	Phone: _____	
Name of Responsible Individual (RI): _____	Phone: _____	
Equipment Information:		
Equipment Name: _____		
Equipment ID: _____		
Equipment Location: _____		
Isolations Used: _____		
Reason Equipment was locked out (List LOTO Permit or Procedure Number): _____		
Type of LOTO Lock:		
☐ Personal LOTO Lock		
☐ Responsible Individual LOTO Lock (New RI must be assigned)		
☐ Group LOTO Lock		
If Absentee Person is a Subcontractor: ☐ Not a Subcontractor		
Subcontractor Company: _____		
Subcontractor Contact: _____		Phone: _____
Is the LOTO Plan on file with the District? ☐ Yes ☐ No (If no must be obtained prior to approval)		
Does the Subcontractor LOTO Plan contain any specific requirements for lock requirements? ☐ Yes ☐ No		
If "Yes", list: _____		

Attempts to Contact the Absent Person:		
Date/Time	Phone Number Called	Made Contact
_____	_____	☐ Yes ☐ No ☐ Left
Voicemail	_____	☐ Yes ☐ No ☐ Left
_____	_____	☐ Yes ☐ No ☐ Left
Voicemail	_____	☐ Yes ☐ No ☐ Left
_____	_____	☐ Yes ☐ No ☐ Left
Voicemail	_____	☐ Yes ☐ No ☐ Left
_____	_____	☐ Yes ☐ No ☐ Left
Attempts to Contact the Absent Person's Supervisor:		



Date/Time	Phone Number Called	Made Contact [] Yes [] No [] Left
Voicemail		[] Yes [] No [] Left
Voicemail		[] Yes [] No [] Left
Voicemail		[] Yes [] No [] Left

Information Obtained from Absent Person or Absent Person's Supervisor:

Is the Absent Person expected to return to work? [] Yes (If yes, When?) _____
[] No

What is the status of the equipment? [] Equipment needs additional repair
[] Equipment is safe to operate

Was the Absent Person informed that his/her LOTO lock was to be removed? [] Yes [] No

Checklist (Complete Prior to Authorizing the Removal of Absent Person's Lock)

Absent Person has been verified absent from the site and unavailable to return. [] Yes [] No

Absent Person or Absent Person's Supervisor has been notified. [] Yes [] No

Equipment has been verified safe to energize. [] Yes [] No

Specific Subcontractor requirements have been fulfilled [] Yes [] No [] N/A

Complete the Checklist prior to granting authorization

Authorization to Remove the Absent Person's Lock:

Name/Signature/Date/Time of Absent Person's Supervisor Authorizing Lock Removal:

Name/Signature/Date/Time of Requesting Person Authorizing Lock Removal:

Name/Signature/Date/Time of Senior Manager Authorizing Lock Removal:

Return to Work: [] **Not Returning**

Before the Absent Person returns to any work duty, the Absent Person's Supervisor must ensure that the person is presented with the removed lock and is informed of the reason for the removal.

Name/Signature/Date/Time of Absent Person

Name/Signature/Date/Time of Absent Person's Supervisor

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Appendix F – Equipment Specific Lockout/Tagout Procedures

LOCKOUT/TAGOUT OF POTENTIAL HAZARDOUS ENERGY SOURCES

[INSERT MACHINE/EQUIPMENT NAME HERE]

Purpose

The purpose of this procedure is to establish the minimum requirements for the lockout/tagout of energy. It shall be used to ensure that before an employee performs any servicing or maintenance activities where the unexpected energization, start-up or release of stored energy could occur and cause injury, all potentially hazardous energy sources shall be isolated and locked out/tagged out.

Rules for Using Lockout/Tagout Procedures:

All equipment shall be locked out/tagged out to protect against accidental or inadvertent operation when such operation could cause injury to personnel. Do not attempt to operate any switch, valve, or other energy isolating device bearing a lock or a tag.

Only **Authorized Employees** who are knowledgeable of the written Lockout/Tagout procedures shall perform service or maintenance that requires lockout/tagout.

Responsibility:

All employees shall be instructed in the safety significance of the lockout/tagout procedure by their Supervisor. Each new or transferred employee shall be instructed by his or her Supervisor in the purpose and use of the lockout/tagout procedure.

Preparation for Lockout/Tagout:

A survey shall be made to locate and identify all energy sources to be certain when switch, valve or other energy-isolating device(s) apply to the equipment to be locked out and/or tagged out. More than one energy source (electrical, mechanical, etc.) may be involved. Questionable energy source problems shall be resolved before job authorization is obtained and lockout/tagout is performed.

Sequence of Lockout/Tagout Procedure:

- 1) Authorized employee shall notify all affected employees that a lockout/tagout is required and the reason therefore.
- 2) Detailed Shutdown Procedure:

[INSERT SPECIFIC PROCEDURE STEPS HERE]

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- 3) After assessing scope of work, identify all stored energy sources and isolate by blocking, bleeding, disconnecting, etc. Detail below:

[INSERT SPECIFIC DETAILS HERE]

- 4) Visually ensure that “**DO NOT OPERATE**” tag is attached.
- 5) Visually inspect the machine/equipment to verify that all energy sources have been isolated.
- 6) Visually ensure that no personnel are in the work area.
- 7) Other specific requirements (if any):

[INSERT REQUIREMENTS IF APPLICABLE]

Testing Equipment After Servicing or Maintenance is Complete:

- 1) Remove tools from unit.
- 2) Replace all guards.
- 3) Notify all personnel in area of testing procedure.
- 4) Turn the power switch to the “On” position
- 5) Be in an operating position.
- 6) Test equipment serviced.
- 7) If the unit needs further repair, de-energize and reapply control measures in Item 2, “Shutdown Procedure.”

Restoring Equipment to Normal Production Operations Equipment to Normal Production Operations

- 1) After the servicing and/or maintenance is complete and equipment is ready for normal operations, check the area around the equipment to ensure that no one is exposed.
- 2) Notify all affected employees that equipment is being put in operation.
- 3) After all tools have been removed from the equipment, guards have been reinstalled and employees are in the clear, the employee who applied the lockout/tagout device(s) will remove them. Operate the energy-isolating devices to restore energy to the equipment.

Procedure Involving More Than One Person

In the preceding steps, if more than one individual is required to lock out the equipment, each shall place their own lock and tag on the energy isolating device(s).