

## **APPENDIX A – TYPICAL MINIMAL LOCKOUT OR TAGOUT SYSTEM PROCEDURES**

### General

Lockout is the preferred method of isolating machines or equipment from energy sources. To assist employers in developing a procedure which meets the requirements of the standard, however, the following simple procedure is provided for use in both lockout or tagout programs. This procedure may be used when there are limited number or types of machines or equipment or there is a single power source. For more complex systems, a more comprehensive procedure will need to be developed, documented and utilized.

Lockout (or Tagout) Procedure for (Name of Company).

### Purpose

This procedure establishes the minimum requirements for the lockout or tagout of energy isolating devices. It shall be used to ensure that the machine or equipment are isolated from all potentially hazardous energy, and locked out or tagged out before employees perform any servicing or maintenance activities where the unexpected energization, start-up or release of stored energy could cause injury (Type(s) and Magnitude(s) of Energy and Hazards).

### Responsibility

Appropriate employees shall be instructed in the safety significance of the lockout (or tagout) procedure (Name(s) / Job Title(s)) of employees authorized to lockout or tagout). Each new or transferred affected employee and other employees whose work operations are or may be in the area shall be instructed in the purpose and use of the lockout or tagout procedure (Name(s)/Job Title(s) of affected employees and how to notify).

### Preparation for Lockout or Tagout

Make a survey to locate and identify all isolating devices to be certain which switch(s), valve(s) or other energy isolating devices apply to the equipment to be locked or tagged out. More than one energy source (electrical, mechanical, or others) may be involved. (Type(s) and Locations(s) or energy isolating means).

### Sequence of Lockout or Tagout System Procedure

- (1) Notify all affected employees that a lockout or tagout system is going to be utilized and the reason thereof. The authorized employee shall know the type and magnitude of energy that the machine or equipment utilizes and shall understand the hazards thereof.
  - (2) If the machine or equipment is operating, shut it down by the normal stopping procedure (depress stop button, open toggle switch, etc.)
  - (3) Operate the switch, valve, or other energy isolating device(s) so that the equipment is isolated from its energy source(s). Stored energy (such as that in springs, elevated machine members, rotating flywheels, hydraulic systems, and air, gas, steam, or water pressure, etc.) must be dissipated or restrained by methods such as repositioning, blocking, bleeding down, etc. (Type(s) of Stored Energy-methods to dissipate or restrain).
  - (4) Lockout and/or tagout the energy isolating devices with assigned individual lock(s) or tag(s) (Method(s) Selected: i.e., locks tags, additional safety measures, etc.)
  - (5) After ensuring that no personnel are exposed, and as a check on having disconnected the energy sources, operate the push button or other normal operating controls to make certain the equipment will not operate (Type(s) or Equipment checked to ensure disconnections).
- CAUTION:** Return operating control(s) to “neutral” or “off” position after the test.
- (6) The equipment is now locked out or tagged out.

### Restoring Machines or Equipment to Normal Production Operations

- (1) After the servicing and/or maintenance is complete and equipment is ready for normal production operations, check the area around the machines or equipment to ensure that no one is exposed.
- (2) After all tools have been removed from the machine or equipment, guards have been reinstalled and employees are in the clear, remove all lockout or tagout devices. Operate the energy isolating devices to restore energy to the machine or equipment.

### Procedure Involving More Than One Person

In the preceding steps, if more than one individual is required to lockout or tagout equipment, each shall place his/her own personal lockout device or tagout device on the energy isolating device(s). When an energy isolating device cannot accept multiple locks or tags, a multiple lockout or tagout device (hasp) may be used. If lockout is used, a single lock may be used to

lockout the machine or equipment with the key being placed in a lockout box or cabinet which allows the use of multiple locks to secure it. Each employee will then use his/her own lock to secure the box or cabinet. As each person no longer needs to maintain his or her lockout protection, that person will remove his/her lock and the box or cabinet. (Name(s) / Job Title(s) of employees authorized for group lockout or tagout).

Basic Rules for Using Lockout or Tagout System Procedure

All equipment shall be locked out or 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 where it is locked or a tagged out.

## LOCKOUT (OR TAGOUT) PROCEDURE

<u>Entry No.</u>	<u>Description</u>
1.	<u>Name of Company</u>
2.	<u>Type(s) and Magnitude(s) of energy and hazards</u>
3.	<u>Name(s) / Job Title(s) of employees authorized to lockout or tagout</u>
4.	<u>Name(s) / Job Title(s) of affected employees and how to notify</u>
5.	<u>Type(s) and Location of energy isolating means</u>
6.	<u>Type(s) of Stored Energy – methods to dissipate or restrain</u>
7.	<u>Method(s) Selected</u> i.e., locks, tags, additional safety measures, etc.
8.	<u>Type(s) of Equipment</u> checked to ensure disconnections
9.	<u>Name(s) / Job Title(s) of employees authorized for group lockout or tagout</u>