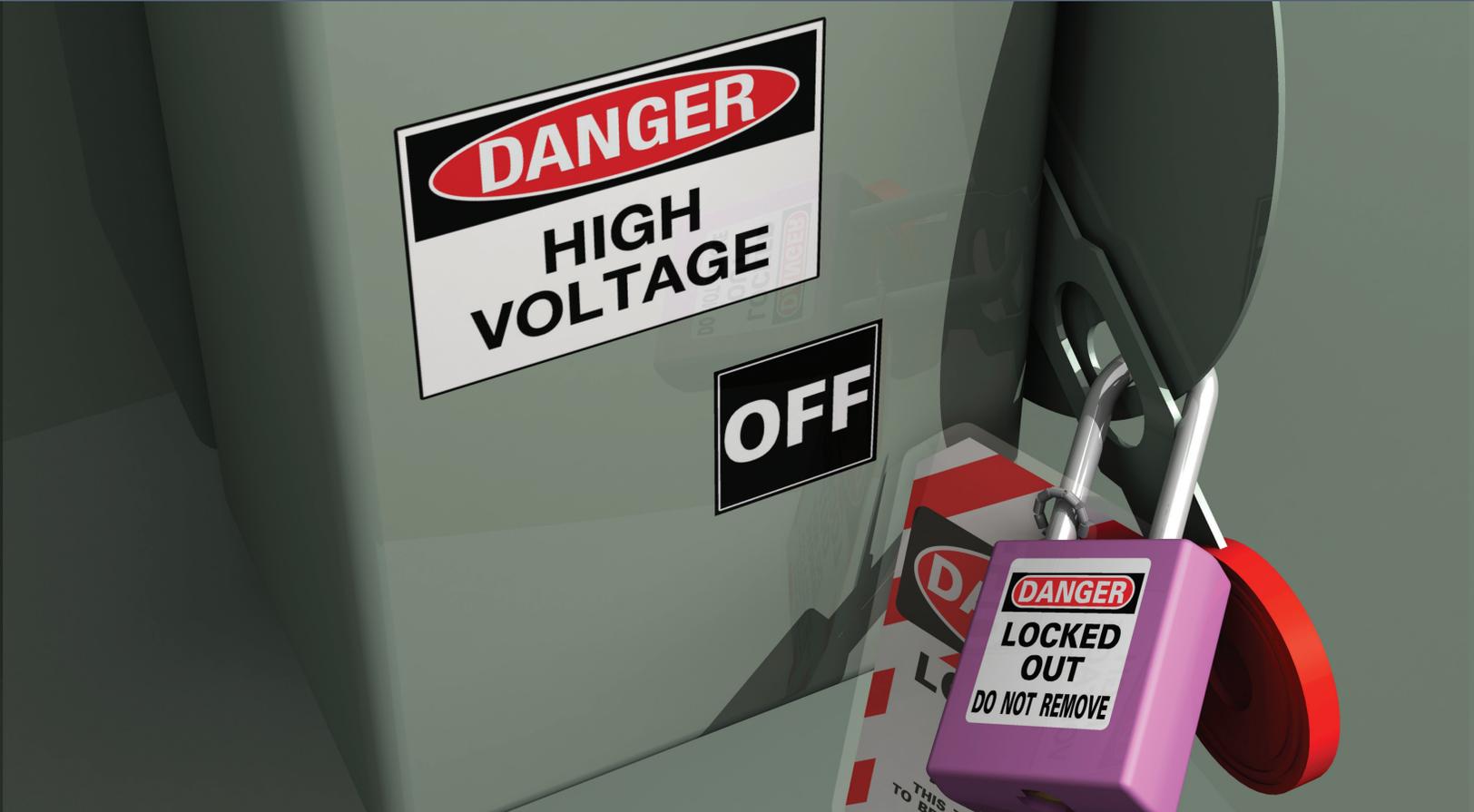


Safety Talk

Lockout/Tagout for Authorized Employees

Before you begin:

To prepare for your discussion, obtain a copy of your company's lockout/tagout written policy. Review all the key elements for controlling hazardous energy during servicing and maintenance of machines and equipment and all worksite specific instructions.



Introduction

To prepare for your discussion, obtain a copy of your company's lockout/tagout written policy. Review all the key elements for controlling hazardous energy during servicing and maintenance of machines and equipment and all worksite specific instructions.

There are several key elements of a lockout/tagout program below. Use this safety talk to lead a discussion with your authorized employees on your lockout/tagout program.

Definitions

Authorized Employee – A person who locks out equipment to perform maintenance on that equipment.

Energy Isolation Device – a mechanical device that physically prevents the transmission or release of energy.

Lockout – a positive means of holding an energy isolation device in a safe position to prevent the transmission or release of energy ensuring no release of stored energy and/or the equipment can not start-up.

Discussion

For each question below, ask the team to give answers. Have a volunteer record the answers by writing them down for all participants to see. If the team answers do not include the key-points below then discuss the missed key-points in more detail.

What activities require LOTO?

Servicing and maintenance activities where the release of stored energy or start-up could injure an employee. Servicing and maintenance activities may include constructing, repairing, adjusting, inspecting, unjamming, set-up, testing, troubleshooting, cleaning, or dismantling. It is also worth repeating that anytime someone opens, removes, or disables a fixed guard or sensing device for maintenance they need LOTO.

(An exclusion worth discussing is for cord and plug equipment when the only energy source is electricity, controlled by unplugging the unit, and the plug is under the constant control of the maintenance technician.)

What energy sources do we have at our facility? What other sources should we consider?

- Electrical - electrical circuits, panel boards and capacitors, motor controls, etc.
- Mechanical - moving parts, blades, conveyors, springs, etc.
- Hydraulic - hydraulic presses, injection-molding machinery, etc.
- Pneumatic - compressed air.
- Chemical - corrosive materials, acids, bases, etc.
- Thermal - steam, hot fluids, furnaces, etc.
- Gravity - press dies, overhead doors, dump-truck beds, etc.

What are examples of energy isolation devices?

Circuit breakers, disconnect switches, line valves, line blocks, and restraints (chains, pins, die-blocks) are examples of energy isolation devices. These devices stop the supply or the source of energy.

On/off devices such as wall switches, push buttons, e-stops, or selector switches are subject to single point failure and so are not energy isolation devices. These devices control energy within a machine and do not control the source of energy for purposes of a LOTO program.

How do we know who has locked out a machine? When may we use lockout locks? What special hardware do we use, if any, to lockout devices?

Lock identification and special hardware is specific to your facility. Review your lock identification methods, and display and discuss all the special hardware you use to aid with lockout.

Only use lockout locks for the lockout program. The integrity of the lockout program requires that you never use lockout locks for lockers, defunct machines, or any purpose other than “lockout.”

What is exclusive control?

Exclusive control means the authorized person that locked an energy control device is the only person who has the key for that lock. (Management may control a second key with extremely limited access.)

Who can work on machines/equipment when locked-out?

Only the authorized employee(s) who locked-out the equipment may work on that equipment. Each authorized employee working on the equipment should have control over each energy isolation device with their lock (this includes group lockout). If you use group lockout, discuss how you perform this at your facility.

Who can remove a lock?

Only the authorized employee may remove their lock or locks. In some cases, management may remove locks when they have exhausted and documented all attempts to notify the authorized employee.

What are the general steps for locking out equipment?

- Step 1: Authorization. Specifically authorize the employee to lockout the equipment.
- Step 2: Notification. Notify all the employees affected prior to shut down.
- Step 3: Shut Down. Turn-off the equipment.
- Step 4: Energy Isolation and Lockout. Shutoff each energy isolation device and lockout.
- Step 6: Stored Energy. Release, disconnect, restrain, or block.
- Step 7: Verification. Test for zero energy state.

What are the general steps for releasing equipment from lockout?

- Step 1: Inspect Work Area. Remove all tools, non-essential items, and other employees and replace all guarding and safety devices.
- Step 2: Notification. Notify all affected employees that you are restarting the equipment.
- Step 3: Stored Energy. Reconnect or unrestrain all stored or residual energy sources.
- Step 4: Remove Locks/Tags. Remove locks from the energy isolation devices.
- Step 5: Reenergize the equipment.

What else should authorized persons know about Lockout at our facility?

- Where to find the written lockout procedures
- Annual reviews of the lockout procedures
- Group lockout procedure (if you do it).
- Procedures when contractors are performing servicing and maintenance.
- Corrective actions and discipline for not following the LOTO policy.

What to do if you find that a lockout procedure does not sufficiently control a hazardous energy source?

Stop the lockout procedures at once and do not continue with the service until you are confident the lockout procedures fully protect you from all hazardous energy sources.

What is the “Minor Servicing Exception?”

The minor servicing exception allows for minor tool changes, adjustments, cleaning, lubricating, and other minor servicing operations without lockout as long as: the service takes place during normal production operations; the service is routine, repetitive, and integral to the use of machines or equipment for production; and the work is performed using alternative protective measures which provide effective employee protection.

Conclusion

The purpose of this safety talk is to reinforce your lockout/tagout training by helping you lead a discussion with authorized employees on the key points of your lockout/tagout program. It does not replace the training required for authorized employees to properly lockout equipment.

Group Activity

Have one employee walk through a lockout procedure and have the remaining employees evaluate the process using your standard lockout evaluation forms.

Resources

[OSHA 29 CFR 1910.147 *The Control of Hazardous Energy \(Lockout and Tagout\)*](#)

[OSHA 29 CFR 1910.333\(b\)\(2\) *Working on or near exposed deenergized parts*](#)

[NFPA 70E, *Standard for Electrical Safety Requirements for Employee Workplaces*](#)

[OSHA Publication 3120 – *Control of Hazardous Energy- Lockout/Tagout*](#)

[OSHA online *Lockout-Tagout Interactive Training Tool*](#)