



## ***LOCKOUT / TAGOUT PROGRAM***

Rev. 2 – Updated per WCF Lockout/Tagout Program, added LOTO Periodic Inspection Form, added training requirements. (1/6/2023)

Rev. 1 – Digitized the document & Updated Letterhead (2/5/2022)

Rev. 0 – Original Document (8/15/1996)

# **BISH'S LOCKOUT / TAGOUT PROCEDURE**

## **Objectives**

To establish a means of positive control to prevent the accidental starting or activating of machinery or systems while they are being repaired, cleaned, and/or serviced. This policy will ensure machinery or equipment is stopped, isolated from all hazardous energy sources, and properly locked and/or tagged\* out.

\*OSHA requires that if tagging without use of locks is to be utilized, then additional safety measures must be taken to demonstrate that the tagout program will achieve a level of safety equivalent to using locks. The additional safety measures are described as: removal of an isolating circuit element, blocking of a controlling switch, removal of a valve handle, etc.

## **Compliance with this Program:**

- All employees are required to comply with the restrictions and limitations imposed upon them during the use of lockout.
- All employees, upon observing a machine or piece of equipment which is locked out to perform service or maintenance shall not attempt to start, energize, or use that machine or equipment.
- Employees who are authorized to perform the lockout are required perform the lockout in accordance with this procedure.

Failure to comply with this procedure can result in any of the following disciplinary actions: verbal warning, reprimands, or termination of employment.

## **Training and Communication**

- **A Training Log MUST be kept.**
- Each affected employee and all other non-authorized employees shall be instructed in the purpose and use of the lockout/tagout procedure and the prohibition relating to attempts to restart or re-energize machines or equipment, which are locked or tagged out.
  - This training will be given at the start of employment with the company and then on an annual basis.
- Each authorized employee who will be performing the lockout/tagout procedure will be trained in the recognition of applicable hazardous energy sources and the methods and means necessary for energy isolation and control.
- A periodic inspection (at least annually) will be conducted of each authorized employee under the lockout/tagout procedure.

## **Sequence of Lockout:**

1. The Shop Foreman or person he designates shall notify all affected employees that service or maintenance is required on a machine or equipment and that the machine or equipment must be shut down and locked out to perform the servicing or maintenance. Notice shall be given verbally and also a sign or tag shall be placed on the item being serviced, stating **DO NOT OPERATE**.
2. The Shop Foreman or person he designates shall refer to the machine or equipment manual to identify the type and magnitude of the energy that the machine or equipment utilizes, shall understand the hazards of the energy, and shall know the methods of controlling the energy.
3. If the machine or equipment is operating, shut it down by the normal stopping procedure (depress the stop button, open switch, close valve, etc.)
4. De-activate the energy isolating device so that the machine or equipment is isolated from the energy source (shut off main power on machines breaker box, shut off main power at junction box or breaker box, or turn off main valves to air, water, etc.)
5. Lockout the energy isolating devices with assigned individual lock. Locks shall be kept in Shop Foreman's desk drawer or in another place he designates.
6. Stored residual energy (such as that in capacitors, springs, elevated machine members, rotating flywheels, hydraulic systems, and air, gas, steam, or water pressure, ect.) must be dissipated or restrained by methods such as grounding, repositioning, blocking, bleeding down, etc.)
7. Ensure that the equipment is disconnected from the energy source by first checking that no personnel are exposed, then verify the isolation of the equipment by operating the push button or other normal operating controls or by testing to make certain the equipment will not operate.
  - a. **Caution:** Return operating controls to neutral or "off" position after verifying the isolation of the equipment.
8. The machine or equipment is now locked out.

## **Restoring Equipment to Service:**

- ***Only authorized employee who perform lockout/tagout procedure are allowed to restore equipment to service.***

When the service or maintenance is completed and the machine or equipment is ready to return to normal operating condition, the following steps shall be taken.

1. Check the machine or equipment and the immediate area around the machine to ensure that nonessential items have been removed and that the machine or equipment components are operationally intact.
2. Check the work area to ensure that all employees have been safely positioned or removed from the area.
3. Verify that the controls are in neutral.
4. Remove the lockout devices and reenergize the machine or equipment.
5. Notify the affected employee that the servicing or maintenance is completed and the machine or equipment is ready for use.

### **Lockout/Tagout Documentation Form**

(To be completed by Authorized Employees for Lockout/Tagout of equipment)

Authorized Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Employees must do the following before they begin service or maintenance work:

#### ***Identify Machine/Equipment***

| Machine/equipment |
|-------------------|
|                   |
|                   |
|                   |

#### ***Inform all affected employees of equipment shutdown***

| Affected Employees | Method of Notifying Affected Employees |
|--------------------|----------------------------------------|
|                    |                                        |
|                    |                                        |
|                    |                                        |
|                    |                                        |
|                    |                                        |
|                    |                                        |
|                    |                                        |

#### ***Shut down equipment***

| Machine/equipment controls | Location of controls |
|----------------------------|----------------------|
|                            |                      |
|                            |                      |
|                            |                      |

#### ***Isolate or block hazardous energy***

| Type of energy-isolating device | Location/identify of energy-isolating device |
|---------------------------------|----------------------------------------------|
|                                 |                                              |
|                                 |                                              |
|                                 |                                              |

- ***Remove any potential (stored) energy***
- ***Lockout or tagout the energy sources***
- ***Verify the equipment is isolated from hazardous energy and de-energized***

| Method of verifying isolation of equipment |
|--------------------------------------------|
|                                            |
|                                            |
|                                            |

**Release from Lockout/Tagout**

The following will be used to remove lockout/tagout devices and re-energize equipment:

1. Check the machine or equipment and the immediate area around the machine to ensure that nonessential items have been removed and that the machine or equipment components are operationally intact.
2. Check the work area to ensure that all employees have been safely positioned or removed from the area.
3. Verify that the controls are in neutral.
4. Remove the lockout devices and reenergize the machine or equipment.
5. Notify the affected employee that the servicing or maintenance is completed and the machine or equipment is ready for use.

### **Lockout / Tagout Periodic Inspection**

<https://www.osha.gov/etools/lockout-tagout/hot-topics/energy-control-program/periodic-inspections>

- A periodic inspection of each energy control procedure must be performed at least annually to ensure that the energy control procedures continue to be implemented properly and that employees are familiar with their responsibilities under those procedures.
- The inspection must also ensure that the procedure is adequate to provide effective protection to the authorized employee during servicing and maintenance operations covered by this standard.
- The employer is required to correct any deficiencies observed during the periodic inspection. Inadequacies in the energy control procedure could be the result of using a general procedure that does not effectively handle a specific application. They also may arise from changes made to equipment or processes without modifying the existing energy control procedure.
- The periodic inspection must be performed by an authorized employee other than the one(s) who is using the energy control procedures. This individual will be referred to as the "inspector." The inspector must be able to determine:
  - Whether the steps in the energy control procedure are being followed.
  - Whether the employees involved know their responsibilities under the procedure.
  - Whether the procedure provides the necessary protection, and what changes, if any, are needed.

### **Periodic Inspection Requirements:**

1. **A Periodic Inspection Log MUST be kept.**
2. The inspector must observe a representative sample of authorized employees performing the servicing and maintenance operation using the lockout/tagout procedure.
  - a. It is not required that the periodic inspection be conducted in separate one-on-one meetings; it can involve the inspector meeting simultaneously with a group of authorized employees. Group meetings can be one of the most effective methods to conduct the inspection and make clear to the employees that they need to follow the procedure carefully.
3. The inspector must perform a review with each authorized employee of that employee's responsibilities under the energy control procedure being inspected.
  - a. When the periodic inspection involves a tagout procedure, the inspector's review of responsibilities extends to the affected employees as well, because of the increased importance of their role in avoiding accidental or inadvertent activation of the equipment or machinery being serviced or maintained.

4. The employer must certify that a periodic inspection has been performed at least annually. The certification must include information on each of the following:
  - a. The machine or equipment on which the energy control procedure was used.
  - b. The date of the inspection.
  - c. The employees included in the inspection.
  - d. The name of the inspector who performed the inspection.