



**Template Program
For
Control of Hazardous Energy
(Lockout/Tagout)**

**In accordance with SPS 332 and OSHA 29
CFR 1910.147**

Note: This document provides a template of a written Lockout/ Tagout program. It is not intended to supersede the requirements in OSHA standards. Employers should consult the applicable OSHA standards when developing their own customized program tailored to their workplace. Contact the State of Wisconsin Occupational Safety Inspector for your region to request help in developing a customized program.

1910.147
The Control of Hazardous Energy (Lockout/Tagout) Procedure
Table of Contents

- I. Objective
- II. Assignment of Responsibility
- III. Procedures
 - A. Preparation for Lockout/ Tagout
 - B. Sequence of Lockout/ Tagout
 - C. Release from Lockout/Tagout
 - D. Service or Maintenance Involving More than One Person
 - E. Removal of an Authorized Employee's Lockout/Tagout by the Employer
 - F. Shift or Personnel Changes
 - G. Procedures for Outside Personnel/Contractors
 - H. Training and Communication
 - I. Periodic Inspection
- IV. Attachments (Samples of Required Documents)
 - A. List of Authorized Personnel for Lockout/Tagout Procedures Form
 - B. Certification of Training of Authorized Personnel Form
 - C. Certification of Training of Affected Personnel Form
 - D. Lockout/Tagout Inspection Certification Form
 - E. Equipment Specific Procedure Form

Lockout/Tagout Procedure

I. OBJECTIVE

The objective of this procedure is to identify and establish a means of control to prevent the accidental energizing or starting of machinery or equipment, or release of stored energy, which could harm employees. This procedure establishes minimum performance requirements for the control of hazardous energy, such as:

- A. Establish a safe and controlling means of shutting down machinery and equipment.
- B. Prohibit unauthorized personnel from starting machinery or equipment while it is being serviced.
- C. Establish responsibility for implementing and controlling lockout/tagout procedures.
- D. Ensure that only approved hardware (locks, tags, fastening devices) provided by the employer will be utilized in the lockout/tagout procedure.

II. ASSIGNMENT OF RESPONSIBILITY

- A. The Department Head will be responsible for implementing the lockout/tagout program.
- B. His/ her designee is responsible for enforcing the program and ensuring compliance with the procedures in their departments.
- C. His/ her designee is responsible for monitoring the compliance of this procedure and will conduct the annual inspection and certification of the authorized employees.
- D. Only authorized employees are permitted to perform established lockout/tagout procedures.
- E. All other employees are responsible for ensuring they do not attempt to restart or re-energize machines or equipment that are locked or tagged out.

III. PROCEDURES

The following items are to be followed to ensure compliance with 1910.147 (Control of Hazardous Energy) and the safety of the employees.

A. Preparation for Lockout/ Tagout

Survey the machine or equipment to locate and identify all energy isolating devices. More than one hazardous energy source and/ or means of disconnect may be present. For machines or equipment which do have more than one hazardous energy source contact the Department Head for specific instructions. No work shall proceed until the Department Head develops and provides the authorized employee with a specific instruction.

B. Sequence of Lockout/ Tagout

1. Notify all affected employees that a lockout or tagout system is going to be utilized and the reason therefore. The authorized employee shall know the type and magnitude of energy that the machine or equipment utilizes and shall understand the hazard thereof.
2. If the machine or equipment is operating, shut it down by the normal stopping procedure. Additionally, ensure all stored energy is dissipated or properly restrained.
3. Lockout or tagout the energy isolating devices with assigned individual lock or tag. Note: If the machine/ equipment will accept a lock the system shall be locked out.
4. Press start button to ensure correct systems are locked out.
5. All controls must be returned to their safest position.
6. The equipment is now locked or tagged out.

C. Release from Lockout/Tagout

1. After the servicing and/ or maintenance is complete and equipment is ready for normal production operations, check the area around machines or equipment to ensure no one is exposed.
2. Remove all tools from machines or equipment.
3. Replace all guards on machines or equipment.
4. Remove all lockout or tagout devices from energy isolating devices.
5. Operate the energy isolating devices to restore energy to the machine or equipment.

D. Service or Maintenance Involving More than One Person

When servicing and/or maintenance is performed by more than one person, each authorized employee shall place his/ her own lock or tag on the energy isolating source. This shall be done by utilizing a multiple lock scissors clamp if the equipment is capable of being locked out. If the equipment cannot be locked out, then each authorized employee must place his/ her tag on the equipment.

E. Removal of an Authorized Employee's Lockout/Tagout by the Employer

Locks will only be removed in cases where the authorized employee who applied it is not available. When the authorized employee who applied the lockout or tagout device is not available to remove it, that device may be removed by the Department Head or his/ her designee by following the specific procedure:

Each location must develop written emergency procedures that comply with 1910.147(e)(3) to be utilized at that location. Emergency procedures for removing lockout/tagout should include the following:

1. Verification by the employer that the authorized employee who applied the device is not at the facility by checking time cards, parking lot, radio announcement, etc.
2. Making all reasonable efforts to contact the authorized employee to inform him/her that the lockout or tagout device has been removed.
3. Ensuring the machine or equipment components are operationally intact.

F. Shift or Personnel Changes

In the case of shift or personnel changes, a change over period will be established so that the authorized employees may exchange their assigned locks/ tags. Authorized personnel assuming control of lockout of equipment will be fully briefed in the scope and stage of the work by those whom are being relieved.

G. Procedures for Outside Personnel/Contractors

The Department Head or his/ her designee will inform all outside personnel/ contractors of the elements of this procedure and ensure work efforts covered by this procedure are fully coordinated and complied with.

H. Training and Communication

Each authorized employee who will be utilizing the lockout/tagout procedure will be trained in the recognition of applicable hazardous energy sources, type and magnitude of energy available in the work place, and the methods and means necessary for energy isolation and control.

Each affected employee (all employees other than authorized employees utilizing the lockout/tagout procedure) shall be instructed in the purpose and use of the lockout/tagout procedure, and the prohibition of attempts to restart or re-energize machines or equipment which are locked out or tagged out.

Training will be certified by documenting the date the training occurred and the employees who were present.

I. Periodic Inspection

The effectiveness of the entire program will be evaluated at least annually. The date of the inspection will be documented and maintained as part of this program until the next annual evaluation replaces it.

In order to ensure the lockout/tagout program is being properly utilized, random audits and planned visual observations will be conducted by the Department Head or his/ her designee. Specific areas to be reviewed are:

1. Whether the steps in the energy control procedures are being followed.
2. Whether the employees involved know their responsibilities under the procedure.
3. Whether the procedure is adequate to provide the necessary protections and what changes are needed, if any.
4. The inspection will be made by an authorized employee other than the one implementing the energy control procedures being inspected (recommend having another department perform inspection).
5. If deviations are identified or if employees do not clearly understand the procedure, retraining will be conducted to the extent that procedures are properly understood and followed.
6. If problems with procedures are encountered, the process will be reevaluated and appropriate procedures implemented.
7. The inspection will be done on an individual basis, and through meetings with the entire staff.
8. Where a tagout system is used, the inspection will be extended to include affected persons, because with tags, the role of the affected employee is important in avoiding accidental or inadvertent activation of the equipment or machinery being serviced.

ATTACHMENT B

**Certification of Training
(Authorized Personnel)**

I certify that I received training as an authorized employee under *Employer*
Name Lockout/Tagout program. I further certify that I understand the
procedures and will abide by those procedures.

AUTHORIZED EMPLOYEE SIGNATURE

DATE

ATTACHMENT C

**Certification of Training
(Affected Personnel)**

I certify that I received training as an Affected Employee under *Employer*
Name Lockout/Tagout Program. I further certify and understand that I am
prohibited from attempting to restart or re-energize machines or equipment
that are locked out or tagged out.

AUTHORIZED EMPLOYEE SIGNATURE

DATE

ATTACHMENT D

Lockout/Tagout Inspection Certification

I certify that *Equipment* was inspected on this date utilizing
lockout/tagout procedures. The inspection was performed while working on
 Equipment .

AUTHORIZED EMPLOYEE SIGNATURE

DATE

INSPECTOR SIGNATURE

DATE

ATTACHMENT E

Equipment Specific Procedure

Machine Identification

General Description:

Manufacturer:

Model Number:

Serial Number:*

** If more than one piece of same equipment, list all serial numbers.*

Location of equipment:

Operator Controls

The types of controls available to the operator need to be determined. This should help identify energy sources and lockout capacity for the equipment.

List types of operator controls:

Energy Sources

The energy sources, such as electrical, steam, hydraulic, pneumatic, natural gas, stored energy, etc.) present on this equipment are:

ENERGY SOURCE	LOCATION	Lockable		Type lock or block needed
		Yes	No	

Shutdown Procedures

List the steps in order necessary to shut down and de-energize the equipment. Be specific. For stored energy, be specific about how the energy will be dissipated or restrained.

Procedure:

Lock Type & Location:

How Will De-energized State Be Verified?

Affected and Authorized Employees

List each person affected by this procedure and those authorized to use this procedure.

AFFECTED EMPLOYEES	
Name	Job Title

AUTHORIZED EMPLOYEES	
Name	Job Title

Approved by _____ Date _____

Approved by _____ Date _____