

## CHAPTER 24

### ENERGY CONTROL PROGRAM (LOCKOUT TAGOUT) FOR ASHORE

2401. Purpose. This chapter provides minimum guidance and procedures for locking out or tagging out the sources of energy to equipment or systems under the requirements of reference 24-1, 24-2 and 24-3.

2402. Scope. These requirements apply to the control of energy during servicing and maintenance of machinery and equipment ashore. They are to be used only when the unexpected energizing or movement of machinery or equipment parts or the release of energy during the maintaining or servicing of such equipment/machinery could cause injury to personnel and/or property damage.

#### 2403. Application

a. The following operations require the lockout/tagout procedure to be applied:

(1) When performing maintenance or servicing on equipment or machinery and is working in a position where the unexpected startup of the equipment or release of stored energy could result in an injury.

(2) When an employee removes or bypasses a guard or safety device.

(3) When an employee is required to place any part of his/her body into an area where work is actually performed upon the material being processed or where a danger zone exists during a machines operating cycle.

(4) To ensure that the machine or equipment is isolated from all potentially hazardous energy.

b. Areas in which lockout/tagout procedures do not apply include the following:

(1) Work on cord and plug-connected electrical equipment where exposure to the hazards of unexpected start-up of the equipment is controlled by unplugging the equipment and the plug is under the exclusive control of the worker performing the servicing or maintenance.

(2) For other areas in which lockout/tagout procedures do not apply, consult reference 24-1.

2404. Definitions:

a. Affected Employee: A person whose job requires them to operate or use machinery or equipment on which servicing or maintenance is being performed under lockout or tagout, or whose job requires them to work in an area in which such servicing or maintenance is being performed.

b. Authorized Employee: A person who implements a lockout/tagout on machine or equipment to perform the servicing or maintenance. An authorized employee and the affected employee may be the same person when the affected employee's duties also include performing maintenance or servicing on a machine or equipment that is to be locked or tagout.

c. Capable of Lockout: An energy isolating device will be considered to be capable of being locked out only if it is designed with a hasp or other attachment or integral part to which, or through which, a lock can be affixed, or if it has a locking mechanism built into it. Other energy isolating devices will also be considered 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.

d. Energized: Connected to an energy source or containing residual or stored energy.

e. Energy Isolating Device: A mechanical device that physically prevents the transmission or release of energy, including but not limited to the following:

- (1) Manually operating circuit breaker,
- (2) Disconnect switch,
- (3) Valve, etc.

Note: The term does not include a push button, selector switch, and other control circuit type devices.

f. Energy source: Any source of electrical, mechanical, hydraulic, pneumatic, chemical, thermal, or other energy.

g. Lockout: A padlock placed on a power source with a lockout device that physically holds an energy control point,

such as a switch, lever, or valve handle in the "off" position and makes it impossible to operate.

h. Lockout Device: A device that utilizes a positive means such as a lock.

i. Tagout: The placement of a tag device on an energy-isolating device, to be used only when a Lockout is not possible and in conjunction with a lockout device. Tagout is a written warning that tells co-worker not to operate a switch, lever, or valve that could release hazardous energy or set a machine in motion. Although the tag acts as a warning device, it does not physically prevent someone from releasing the energy.

2405. General Procedures. The application of energy controls (implementation of lockout or tagout procedures) shall require all of the following elements and actions to be taken in the following sequence:

a. Authorized employees shall be designated in writing by supervisor.

b. Notify all affected employees that a lockout or tagout system is going to be utilized and the reason therefor. The authorized employee shall have knowledge of the type and magnitude of the energy involved, the hazards of the energy to be controlled, and the method or means to control the energy.

c. The machine, piece of equipment, or system shall be turned off or shut down using written procedures which are consistent with references mentioned at the end of this chapter. An orderly shutdown must be used to avoid any additional or increased hazard(s) to employees as a result of equipment unexpected start up.

d. All energy isolating devices that are needed to control the energy to the machine or equipment shall be physically located and operated in such a manner as to isolate the machine or equipment from the energy source(s). Stored energy (springs, elevated machine members, rotating flywheels, hydraulic systems, and air, gas, steam, or water pressure) must be dissipated or restrained by a method such as repositioning, blocking, bleeding down, etc.

e. Appropriate lockout or tagout devices shall be applied. Lockout devices shall be used whenever feasible. Tagout devices shall only be used in those procedures for which lockout devices cannot be used or when equipment designed does not provide a means of positive protection. Additionally:

(1) Lockout or tagout devices shall be affixed to each energy-isolating device by authorized employees only and shall maintain total control of all lockout/tagout devices.

(2) Lockout devices, where used, shall be affixed in a manner that will hold the energy isolating devices in the "safe" or "off" position.

(3) Tagout devices, including their means of attachment, shall be substantial enough to prevent inadvertent or accidental removal. Tagout devices attachment means shall be of a non-reusable type, attachable by hand, self-locking, and non-releasable with a minimum unlocking strength of no less than 50 pounds and having the general design and basic characteristics of being at least equivalent to a one-piece.

(a) Where a lockout cannot be implemented, tagout devices shall be used with procedures approved by the Regional Safety office, and only for equipment types specified. If tagout procedures will be used, refer to appendix 24-A. Appendix 24-B may be used for identifying such equipment.

(b) When tagout procedures are used, comply with 29 CFR 1910. 147(c)(7)

(c) Where a tag cannot be affixed directly to the energy isolating device, the tag shall be located as close as safely possible to the device, in a position that will be immediately obvious to anyone attempting to operate the device.

(d) Remove fuse(s) or disconnect from circuit breaker(s).

(e) Remove valve handle to reduce the likelihood of inadvertent start up. Following the application of lockout or tagout devices to energy isolating devices, all potentially hazardous stored or residual energy shall be relieved, disconnected, restrained, and otherwise rendered safe. If there is a possibility of accumulation of stored energy to a hazardous level, verification of isolation shall be continued until the servicing or maintenance is completed, or until the possibility of such accumulation no longer exists.

(f) Prior to starting work on machines or equipment that have been locked-out or tagged-out, the authorized employee shall verify that equipment has been isolated and de-energized. The authorized employee shall verify that all affected employees are not in an area that could be dangerous during equipment start

up. The authorized employee shall verify the system or equipment is de-energized by testing with an appropriate instrument or by attempting to energize the system or equipment.

(4) In situations that require lockout or tagout devices to be temporarily removed from the energy isolating device to test or position the machine, equipment or a component thereof, the following sequence of actions shall be followed:

(a) Clear the machine equipment or system of tools and materials.

(b) Clear the area of nonessential tools and materials and ensure that the machine, equipment, or system components are operationally intact.

(c) Remove all employees not required for the test or positioning from the machine or equipment area.

(d) Verify affected employee(s) is/are in a safe location.

(e) Remove lockout or tagout devices.

(f) Energize and proceed with testing or positioning.

(g) De-energize all systems and reapply energy control measures and lockout/tagout devices to continue the servicing and/or maintenance.

(5) Before lockout or tagout devices are removed permanently and energy is restored to the machine or equipment, procedures shall be followed and actions taken by the authorized employee(s) to ensure the following:

(a) The work area shall be checked to ensure that nonessential items have been removed and that machine and/or equipment components are operationally intact.

(b) Employee notification: Before lockout or tagout devices are removed and before machines and/or equipment are energized, affected employees shall be notified that the lockout or tagout devices are being removed. Also, the work area shall be checked to ensure that all employees have been safely positioned or removed.

(6) The authorized employee who applied the device shall remove lockout and/or tagout devices from each energy-isolating device. When the authorized employee who applied the lockout or

tagout device is not available, the device may be removed under the direction of the authorized employee's supervisor, provided:

(a) Authorized employee is not on station; and

(b) There is no more than one authorized employee lockout device attached.

(7) A log shall be kept of energy control maintenance performed and an inventory for all machinery and equipment on site.

2406. Responsibilities:

a. Regional Safety office shall:

(1) Review all Lockout/Tagout procedures

(2) Conduct annual audit/inspection of program and generate a consolidated summary of all command specific annual audit/inspection results to be submitted to the Regional Safety Program Manager.

(3) Maintain records of current and if available, previous inspections

(4) Conduct periodic checks/prepare certification

(5) Conduct Lockout/Tagout training

b. Supervisors shall:

(1) Ensure that equipment or systems under their cognizance that fall under section (2402) of this chapter shall use appendix 24-C in assisting them in establishing equipment energy control procedures.

(2) Ensure that affected employees are familiar with the procedures and requirements of the energy control procedures implemented in the area.

(3) Ensure authorized employees are appointed in writing.

(4) Ensure training is documented as per chapter (6) of this instruction.

(5) Submit Original training rosters to the Regional Safety Office.

(6) Conduct a periodic review of the energy control (Lockout/Tagout) procedures, whenever an accident or incident occurs, and at least annually to ensure the procedures and requirements of references 24-1, and 24-3, are being followed. Appendix 24-D is an example of a periodic review.

c. Authorized Employees shall:

(1) Be familiar with the type and magnitude of the energy involved, hazards, and methods or means to control the energy.

(2) Follow set procedures to avoid any additional or increased hazards(s) to employees as a result of equipment de-energization.

(3) Be familiar with applicable energy control devices, where to physically locate and place devices, and use lockout devices whenever feasible.

(4) Be familiar with tagout requirements.

(5) Verify and ensure that isolation and de-energization of machine or equipment have been accomplished, by approved instruments and by attempting to energized or start equipment.

(6) Be familiar with written procedures when lockout/tagout devices are required to be temporarily removed to test or position equipment.

2407. Training.

a. Supervisors shall ensure that all personnel receive required training per reference 24-1. Also, new employee shall be trained on energy control requirement using appendix 24-E.

b. Ensure that affected employees receive instructions in the requirements of the lockout/tagout program.

c. Supervisors shall ensure that all authorized and affected employees are retrained; whenever there is a change in their Job/task assignments, a change in the machine, equipment or processes that present a new hazard, or when there is a change in the energy control procedures.

d. Provide and emphasize extra training whenever a tagout procedure is used as per reference 24-2.

## REFERENCES

### CHAPTER 24

- 24-1. OPNAVINST 5100.23E
- 24-2. 29 CFR 1910, Section 147 and 332
- 24-3. American National Standards Institute (ANSI) Standard Z244.1-1982, Safety Requirements for Lockout/Tagout of Energy Sources (NOTAL)

Appendix 24-A

**SPECIFIC TAGOUT PROCEDURE  
(For use on systems/processes that cannot be locked out)**

Equipment, Machinery, or Process: \_\_\_\_\_

Tagout Procedure No.: T/O \_\_\_\_\_ - \_\_\_\_\_ Date Approved/Implemented: \_\_\_\_\_

**NOTE:** Required for all equipment, machinery, and/or processes that fail to have lockout capabilities.

Follow and use sequence of lockout/tagout procedure to properly comply with standard.

1. The purpose of this specific procedure is to protect the life and limb of the employees of:
2. Type(s) and magnitude(s) of energy and hazards:
3. Name(s)/job title(s) of employees authorized to lockout/tagout:
4. Name(s)/job title(s) of affected employees and how to notify:
5. Name(s)/job title(s) of other employees:
6. Type(s) and location of energy isolating means:
7. Type(s) of stored energy – methods to dissipate or restrain:
8. Additional method(s) selected to ensure that tags provide adequate level of safety (i.e., removal of an isolating circuit element, blocking of a controlling switch, opening of an extra disconnecting device or the removal of a valve handle to reduce the likelihood of inadvertent energization):
9. Type(s) of equipment checked to ensure disconnection:
10. Name(s)/job title(s) of employees authorized for group tagout:
11. Special precautions not noted above (i.e., fire hazards, chemical reactions, required cool down periods, etc.):







## **ENERGY CONTROL PROCEDURES**

### **Purpose**

This procedure establishes the minimum requirements for the lockout of energy isolating devices whenever maintenance or servicing is done on machines or equipment. It shall be used to ensure that the machine or equipment is stopped, isolated from all potentially hazardous energy sources and locked out before employees perform any servicing or maintenance where the unexpected energization or start-up of the machine or equipment or release of stored energy could cause injury.

### **Compliance with this Program**

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

***NOTE: Disciplinary action will be taken for the above violation.***

### **Responsibility**

The responsibility for seeing that this procedure is followed is binding upon all employees. All employees shall be instructed in the safety significance of the lockout procedure by (designate individual). (Designate individuals) shall instruct each new or transferred affected employee in the purpose and use of the lockout procedure.

### **Preparation for Lockout:**

Employees authorized to perform lockout shall be certain as to which switch; valve or other energy-isolating devices apply to the equipment being locked out. More than one energy source (electrical, mechanical, or others) may be involved. The employees shall clear any questionable identification of sources with their supervisors. Before lockout commences, job authorization should be obtained.

### **LOCKOUT/TAGOUT SEQUENCE (*Fill-out the information on the lockout/tagout log*)**

**Step 1.** Notify all affected employees that servicing 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. Notification could be done through the E-mail, verbally tell the people around the areas and/or by posting notice in work area.

**Step 2.** The authorized employee shall refer to appendix A of this procedure 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 to control the energy.

- Step 3.** If the machine or equipment is operating shut it down by the normal stopping procedure (depress stop button, open switch, close valve, etc.)
- Step 4.** Deactivate the energy isolating device(s) so that the machine or equipment is isolated from the energy source(s).
- Step 5.** Lockout the energy isolating device(s) with assigned individual lock(s) if practical. If it's not possible to lock the system then the tag must be secured directly or as closed as possible to the isolation device so that affected personnel are clearly warned to stay away.
- Step 6.** Stored or residual energy (such as that in capacitors, 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 grounding, repositioning, blocking, bleeding down, etc.)
- Step 7.** Ensure that the equipment is disconnected from the energy source(s) by first checking that no personnel are exposed, then verify the isolation of the equipment by operating the push button or other normal operating control(s) or by testing to make certain the equipment will not operate.

**CAUTION**

**Return operating control(s) to neutral  
or OFF position after verifying  
the isolation of the equipment.**

- Step 8.** Restoring Equipment to Service: When the servicing 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 or equipment 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 no harm.
  - 4) Remove the lockout devices and re-energize the machine or equipment.
  - 5) Notify affected employees that the servicing or maintenance is completed and the machine or equipment is ready for use.
- Step 9.** Give the Lockout/Tagout log to the supervisor/foreman to be filed for future audit

## Lockout/Tagout Log

Date: \_\_\_\_\_ Type of Equipment: \_\_\_\_\_ Type of Tag: Danger

Base: \_\_\_\_\_ Building: \_\_\_\_\_ Lock #: \_\_\_\_\_

Authorized employee: \_\_\_\_\_ Work to be performed: \_\_\_\_\_

Step 1: Affected employees (*Notification method*): \_\_\_\_\_

Step 2: Energy to be controlled:

Type: \_\_\_\_\_  
Hazard: \_\_\_\_\_  
Method of control \_\_\_\_\_

Step 3: Method of shutdown (*Type/Location*): \_\_\_\_\_

Step 4: Energy isolation devices used/location (*Type/Location*): \_\_\_\_\_

Step 5: Type of lock to be installed: \_\_\_\_\_

Step 6: Method of restrained (*Circle one or more*): N/A, Dissipation, Grounding, Repositioning, blocking, bleed, other: \_\_\_\_\_

Step 7: Verification of isolation (*Circle one or more*): Start-up attempt, Test, Visual inspection

Step 8: Restoring equipment to Service (*Signature*): \_\_\_\_\_ Date: \_\_\_\_\_

Step 9: Submit this log to your supervisor.

---

Date: \_\_\_\_\_ Type of Equipment: \_\_\_\_\_ Type of Tag: Danger

Base: \_\_\_\_\_ Building: \_\_\_\_\_ Lock #: \_\_\_\_\_

Authorized employee: \_\_\_\_\_ Work to be performed: \_\_\_\_\_

Step 1: Affected employees (*Notification method*): \_\_\_\_\_

Step 2: Energy to be controlled:

Type: \_\_\_\_\_  
Hazard: \_\_\_\_\_  
Method of control \_\_\_\_\_

Step 3: Method of shutdown (*Type/Location*): \_\_\_\_\_

Step 4: Energy isolation devices used/location (*Type/Location*): \_\_\_\_\_

Step 5: Type of lock to be installed: \_\_\_\_\_

Step 6: Method of restrained (*Circle one or more*): N/A, Dissipation, Grounding, Repositioning, blocking, bleed, other: \_\_\_\_\_

Step 7: Verification of isolation (*Circle one or more*): Start-up attempt, Test, Visual inspection

Step 8: Restoring equipment to Service (*Signature*): \_\_\_\_\_ Date: \_\_\_\_\_

**Step 9:** Submit this log to your supervisor.

### **Procedure Involving More Than One Person:**

In the preceding steps, if more than one individual is required to lock out equipment, each shall place their own personal lock on the energy isolating device(s). One designated individual of a work crew or a supervisor, with the knowledge of the crew, may lock out equipment for the whole crew. In such cases, it shall be the responsibility of the individual to carry out all steps of the lockout procedure and inform the crew when it is safe to work on the equipment. Additionally, the designated individual shall not remove a crew lock until it has been verified that all individuals are clear.

### **Requirements for Contractors or other Outside Personnel:**

When a system is locked and tagged to support contractor work, the use of locks and crew locking hasps is mandatory. The employee locking out the equipment for the contractor will attach a crew hasp, lock and tag on the energy-isolating device. This lock and tag will remain until the completion of the contractor(s) work. The contractor will use their locks and tags as an additional safeguard. An employee, who must work on the system, while locked and tagged for the contractor, must attach their own lock to the crew hasp for the duration of their own work. Lock and tags used to support contractor(s) work will not be removed until the following checks have been performed: Guards have been reinstalled, a detailed inspection of the contractors work has been performed and that all personnel are in the clear.

### **Turnover for shift or personnel changes:**

- a. Turnover includes outgoing shift employee providing the incoming employee with all pertinent information on job progress and lockout or tagout status.
- b. Outgoing employees shall remove their lockout or tagout devices when corresponding incoming employees attach theirs.
- c. In the event prior shift employees are not available (second or third workshift) authorized employees shall ensure pertinent information regarding job progress and lockout or tagout process is documented and forwarded to the supervisor. The supervisor shall then effect continuity of the lockout or tagout process by releasing the equipment or machine to the incoming shift.

### **NOTES:**

- 1) The removal of some forms of blocking may require re-energization of the machine before safe removal.
- 2) If equipment cannot be locked-out/tagged-out, post necessary personnel to protect against unauthorized access.
- 3) Never remove someone else's lock. Always notify your supervisor or upper management that a lock is attached and the person it belongs to is not available.
- 4) The line supervisor shall make a reasonable effort to contact the authorized employee in order to verify that the authorized employee who applied the device is not at the activity before removing energy isolating device. Ensure that the energy isolating device removal is logged in the Energy Control logbook immediately.



Method of Isolating or Blocking Energy	Method of Securing Point of Control (Lockout/Tagout)	Remarks	Method of Isolating or Blocking Energy	Method of Securing Point of Control (Lockout/Tagout)	Remarks	Method of Isolating or Blocking Energy	Method of Securing Point of Control (Lockout/Tagout)	Remarks
<b>Type of Energy: Mechanical - Rotational/Linear</b>			<b>Type of Energy: Electrical</b>			<b>Type of Energy: Potential (Pressure)</b>		
1) Remove segments of operating mechanical linkages such as dismantling push rods and removing belts or flywheels.	a) Tag the linkages and place them in a locked cabinet away from the machine and/or  b) Attach warning tags where the linkages were removed and restrict access to trained personnel and/or  c) Post a person to protect against unauthorized reinstallation of the linkage.		1) Place main electrical disconnect switch in OFF position	a) Secure by a padlock or a bar and padlock and/or  b) Attach a warning tag and restrict access into the area to trained personnel and/or  c) Post a person to protect against unauthorized actuation of the switch.		Close valves and maintain open vent to relieve pressure.	a) Secure, block, blind flange, slip blind, or valve with locking device and/or  b) Attach warning tags and restrict access to trained personnel and/or  c) Station a person at the valves to protect against unauthorized actuation.	Energy could be dissipated by lowering to a point where gravity could no longer cause inadvertent falling
2) Use blocking devices such as wood or metal blocks.	a) Chain and lock at the point of control and /or  b) Attach warning tags on the blocking devices and restrict access into the area to trained personnel and/or  c) Post a person to protect against unauthorized removal of the blocking devices.		2) Remove segments of electrical circuit, such as printed circuit modules.	a) Tag the module and place in a locked cabinet center and control center and tag the control center door  b) Attach a warning tag at the module location and restrict access to trained personnel  c) Have a person remain at the control center to protect from unauthorized installation of a spare or replacement module		Block in place by using metal or wood blocks under the mechanism, or pin the linkages in a position where gravity will not cause the mechanism to inadvertently fall.	a) Secure, block, or pin with a locking device and/or  b) Attach warning tags to blocks, linkages, and pins and restrict personnel and/or  c) Station a person at the mechanism to prevent unauthorized removal of blocks and pins and reinstallation of linkages.	
<b>Type of Energy: Mechanical - Rotational/Linear</b>			<b>Type of Energy: Electrical</b>			<b>Type of Energy: Potential (Gravity)</b>		
3) Remove power or energy from the driving mechanism such as main disconnect electrical source	a) (1) Padlock in the OFF position. (2) Disconnect pneumatic and hydraulic lines and tagout and/or  b) Attach warning tags at control points and restrict access to trained personnel and/or  c) Post a person to protect against unauthorized reconnection of the energy sources.	Check for alternate sources of power. Check for residual pneumatic and hydraulic energy.	<b>Type of Energy: Thermal (Steam)</b>			<b>Type of Energy: Potential (Springs)</b>		
			Close valves and maintain an open bleed.	a) Chain and padlock valve or use blind flanges or slip blinds and/or  b) attach warning tags to the valves and restrict access to the area to trained personnel and/or  c) Station a person at the valve locations to protect against unauthorized or inadvertent opening of valves	Allow time for residual heat to dissipate	Block in a safe position by pinning or clamping the device, eliminating the potential of unrestricted and undesired travel.	a) Secure, pin, or clamp in place with a locking device and/or  b) Attach warning tags to the pins and clamps and restrict release or access to trained personnel and/or  c) Station a person at the control point to protect against pin or clamp removal and unauthorized activation of the spring mechanism.	Spring energy could be dissipated by release or dismantling of the mechanisms.



Appendix 24-D

WORKCENTER PERIODIC REVIEW OF ENERGY CONTROL PROCEDURES

(To be performed by a supervisor or authorized person, other than those utilizing the energy control.)

Machine/Equipment/System under review: \_\_\_\_\_

BLDG #: SHOP: Location: \_\_\_\_\_

Employee(s) being reviewed:

Authorized Employee	Affected Employee

Person performing review: \_\_\_\_\_ Date of review: \_\_\_\_\_

**Note:** (1) This review shall be performed by a supervisor or authorized person other than those utilizing the energy control.

a. Review shall target and identify any deviations or inadequacies.

b. The inspector shall ensure that there is documentation available to indicate that the authorized employee has received training on the recognition of applicable specific training for the type and magnitude of the energy available, methods and means necessary for energy isolation, controls, procedures and responsibilities.

**Note:** (2) If the review being performed is utilizing the use of a **Tagout**.

The inspector shall include a discussion with the authorized and affected employees on their responsibilities under the energy control procedures and elements of the program.

**Limitations of Tags**

1. \_\_\_ Only warning devices, not physical restraints.
2. \_\_\_ Do not remove without authorization; never bypass, ignore, or otherwise defeat tag.
3. \_\_\_ Must be legible and understandable.
4. \_\_\_ Tags and means of attachment must be made of materials that will withstand workplace environmental conditions.
5. \_\_\_ May evoke false security; understand meaning.
6. \_\_\_ Securely attached to energy isolating devices.



**Affected Employee Training Checklist**

Supervisors are to provide new employees involved with lockout/tagout situations the following information. This checklist is to be signed, dated, and retained by the supervisor. *Provide a copy to the Safety Office.*

**Employee Name:** \_\_\_\_\_ **Code:** \_\_\_\_\_

**Machinery/Equipment Type(s):** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- \_\_\_\_\_ Explain the significance of why a machine is locked or tagged out.
- \_\_\_\_\_ Explain what an employee is to do (and not do) when encountering a tag or lock on a switch or device they want to operate.
- \_\_\_\_\_ Explain the importance of notification of affected employees.
- \_\_\_\_\_ Show the employee the location of all locks, tags, and lockout devices.
- \_\_\_\_\_ Explain how to recognize the applicable hazardous energy sources.
- \_\_\_\_\_ Explain the type(s) and magnitude of energy to be isolated on the machinery and how to control.
- \_\_\_\_\_ Explain the proper sequence of locking out or tagging out - “Standard Operating Procedure”.

**Employee Signature:** \_\_\_\_\_  
(\* Signature acknowledges full understanding of the above subject matter program elements.)

**Supervisor Name:** \_\_\_\_\_

**Supervisor Signature:** \_\_\_\_\_

**Date Training Completed:** \_\_\_\_\_