­**Using this template**

The following template can be used to help your organization develop a written Lockout/Tagout policy. This template **cannot** **be used as is**—you must customize the template to meet the needs of your organization. We have made this template easier for you to customize by adding visual prompts that identify some areas where your input is needed. These are identified by yellow highlighted, red text in the template. You may also change any of the text in the template to meet your organization’s needs—for example, department names, job titles and listed responsibilities and procedures.

*Example:*

<COMPANY NAME>

Lockout/Tagout Program

becomes

XYZ Company

Lockout/Tagout Program

To remove the colored highlighting from your text, left click and drag your mouse over the yellow text and click on the highlighter button from the Font menu. To change the font color to black, select the text and click on the font color button.



*Disclaimer. This sample safety program template cannot be used as is. You must customize the template to meet the needs of your organization. United Fire Group does not guarantee that this template is or can be relied on for compliance with any law or regulation, assurance against preventable losses, or freedom from legal liability. We make no representations or warranties of any kind whatsoever, either express or implied, in connection with the use of this template. United Fire Group will not be liable for your use of the template as customized by you. All safety programs and policies, including this template and the information you supply to complete it, should be reviewed by your legal counsel and/or risk management staff.*

**COMPANY POLICY**

 is dedicated to the protection of its employees from occupational injuries and illnesses.

 is responsible for providing a safe working environment and the employees have and assume the responsibility of working safely.

The objective of this program is to supplement the safety policy by providing specific standards regarding the lockout/tagout program, and to ensure that each employee is adequately trained and fully aware of safety procedures associated with the lockout/tagout program.

Elimination of injuries and illnesses improves employee morale, improves customer service, improves product quality, and reduces workers compensation costs. The lockout/tagout program serves as a tool to increase employee protection and to reduce jobsite hazards.

 will conduct routine safety inspections of jobsites to ensure compliance with this program. has the authority to enforce the personal protective equipment (PPE) program in accordance to any and all safety rules and applicable OSHA regulations.

Employees are required to comply with the guidelines set forth and to comply with the instruction of . In the event an unsafe condition arises in the absence of , employees shall alert the lead person on the jobsite immediately.  Employees shall alert co-workers of any unsafe conditions that arise.

Any employee who disobeys and/or disregards the guidelines set forth in this program, or the company’s safety program, shall be subject to disciplinary action.

**LOCKOUT/TAGOUT PROCEDURE FOR .**

***Objectives***

* To establish a means of positive control to prevent the accident starting or activating of machinery or systems while they are being repaired, cleaned and/or serviced.
* To establish a safe and positive means of shutting down machinery, equipment and systems.
* To prohibit unauthorized personnel or remote control systems from starting machinery or equipment while it is being serviced.
* To provide a secondary control system (tagout) when it is impossible to positively lockout the machinery or equipment.
* To establish responsibility for implementing and controlling lockout/tagout procedures.
* To ensure that only approved locks, standardized tags and fastening devices provided by the company will be utilized in the lockout/tagout procedures.

***Areas of responsibility***

* will be responsible for implementing the lockout/tagout program.
* is responsible to enforce the program and ensure compliance with the procedures in their department.
* is responsible for monitoring the compliance of this procedure and will conduct the annual inspection and certification of the authorized employees.
* Authorized employees (those contained in Attachment A-1) are responsible to follow established lockout/tagout procedures.
* Affected employees (all other employees in the facility) are responsible for ensuring they do not attempt to restart or re-energize machines or equipment which are locked out or tagged out.

**PROCEDURES**

***Preparation for lockout/tagout***

* Employees who are required to utilize the lockout/tagout procedure (see Attachment A-1) must be knowledgeable of the different energy sources and the proper sequence of shutting off or disconnecting energy means.
* The four types of energy sources are:

 1. Electrical (most common form)

 2. Hydraulic or pneumatic

 3. Fluids and gases

 4. Mechanical

* More than one energy source can be utilized on some equipment and the proper procedure must be followed in order to identify energy sources and lockout/tagout accordingly. See Attachment D for specific procedure format.

***Electrical***

* Shutoff power at machine and disconnect.
* Disconnecting means must be locked or tagged
* Press start button to see that correct systems are locked out.
* All controls must be returned to their safest position.
* Points to remember:
1. If a machine or piece of equipment contains capacitors, they must be drained of stored energy.
2. Possible disconnecting means include the power cord, power panels (look for primary and secondary voltage), breakers, the operator’s station, motor circuit, relays, limit switches, and electrical interlocks.

**Note:**

1. Some equipment may have a motor isolating shutoff and a control isolating shutoff.
2. If unplugging the power cord disconnects the electrical energy, the cord must be kept under the control of the authorized employee or the plug end of the cord must be locked out or tagged out.

***Hydraulic/pneumatic***

* Shutoff all energy sources (pumps and compressors). If the pumps and compressors supply energy to more than one piece of equipment, lockout or tagout the valve supplying energy to this piece of equipment.
* Stored pressure from hydraulic/pneumatic lines shall be drained/bled when release of stored energy could cause injury to employees.
* Make sure controls are returned to their safest position (off, stop, standby, inch, jog, etc.).

***Fluids and gases***

* Identify the type of fluid or gas.
* Close valves to prevent flow, lockout/tagout.
* Determine the isolating device, close, and lockout or tagout.
* Drain and bleed lines to zero energy state.

**Note:**
Some systems may have electrically controlled valves; if so, they must be shutoff, locked or tagged out.

* Check for zero energy state at the equipment.

***Mechanical energy (Gravity activation or stored in springs, etc.)***

* Block out or use die ram safety chain.
* Lockout or tagout safety device.
* Shutoff, lockout or tagout electrical system.
* Check for zero energy state.
* Return controls to safest position.

***Release from lockout/tagout***

* Inspection: Make certain the work is completed and inventory tools and equipment used.
* Clean up: Remove all towels, rags, work-aids, etc.
* Replace guards: Replace all guards possible. Sometimes a particular guard may have to be left off until the start sequence is over due to possible adjustments. However, all other guards should be put back into place.
* Check controls: All controls should be in their safest position.
* The work area shall be checked to ensure that all employees have been safely positioned or removed and notified that the lockout/tagout devices are being removed.
* Remove locks/tags: Remove only your lock or tag.

 ***Procedure involving more than one person***

When servicing and/or maintenance is performed by more than one person, each authorized employee shall place his 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 tag on the equipment.

***Procedure for the removal of an authorized employee’s lockout/tagout by the company***

* Verification by employer that the authorized employee who applied the device is not in the facility.
* Make reasonable effort to advise the employee that his device has been removed (this can be done when he returns to the facility).
* Ensure that the authorized employee has this knowledge before he resumes work at the facility.

***Procedures for shift or personnel changes***

* Each facility must develop their own written procedures based on their need and capabilities.  However, your procedure must specify how you will ensure the continuity of lockout or tagout protection during that time.

***Procedures for outside personnel/contractors***

* Outside personnel/contractors shall be advised that the company has and enforces the use of lockout/tagout procedures. They will be informed of the use of locks and tags and notified about the prohibition relating to attempts to restart or re-energize machines or equipment that are locked out or tagged out.
* The company will obtain information from the outside personnel/contractor about their lockout/tagout procedures and advise affected employees of this information.
* The outside personnel/contractor will be required to sign a certification form (see Attachment C). If the outside personnel/contractor has previously signed a certification that is on file, there is no need to have them sign a new certification.

***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 relating to attempts to restart or re-energize machines or equipment which are locked out or tagged out.
* Training will be certified using Attachment A-2 (Authorized Personnel) or A-3 (Affected Personnel).  The certification will be retained in the employee’s personnel file.

***Procedures for periodic inspection***

* A periodic inspection (at least annually) will be conducted of each authorized employee under the lockout/tagout procedure. This inspection shall be performed by the , provided they are not the ones utilizing the energy control procedure being inspected.
* The inspection will include a review between and each authorized employee. It will include a review of that employee’s responsibilities under the energy control (lockout/tagout) procedure. The inspection will also consist of a physical inspection of the authorized employee while performing work under the procedures.
* shall certify, in writing, that the inspection has been performed. The written certification (see Attachment B) shall be retained in the individual’s personnel file.

**Attachment A-1**

**LIST OF AUTHORIZED PERSONNEL FOR LOCKOUT/TAGOUT PROCEDURES**

|  |  |
| --- | --- |
| **NAMES** | **JOB TITLE** |
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**Attachment A-2**

**CERTIFICATION OF TRAINING (AUTHORIZED PERSONNEL)**

I certify that I received training as an authorized employee under Company Name lockout/tagout program. I further certify that I understand the procedures and will abide by those procedures.

Authorized Employee Signature:

Date:

**Attachment A-3**

**CERTIFICATION OF TRAINING (AFFECTED PERSONNEL)**

I certify that I received training as an affected employee under Company 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 B**

**LOCKOUT/TAGOUT INSPECTION CERTIFICATION**

I certify that \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ was inspected on this date utilizing lockout/tagout

procedures. The inspection was performed while working on:

Authorized Employee Signature:

Date:

Inspector Signature:

Date:

**Attachment C**

**OUTSIDE PERSONNEL/CONTRACTOR CERTIFICATION**

I certify that Company Name and Outside Personnel/Contractor have informed each other of our respective lockout/tagout procedures.

Name (Printed):

Signature:

Date:

Outside Personnel Contractor Name (Printed):

Signature:

Date:

**Attachment D**

Equipment specific procedure for:

Date:

 **MACHINE IDENTIFICATION**

General description:

Manufacturer:

Model number:

Serial number:

***Note: If there is more than one piece of the same equipment, list all serial numbers.***

Location of equipment:

**OPERATOR CONTROLS**

The type of controls available to the operator needs 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 present on this equipment are: (electrical, steam, hydraulic, pneumatic, natural gas, stored energy, etc.)

|  |  |  |  |
| --- | --- | --- | --- |
| **Energy source** | **Location** | **Lockable****Yes No** | **Type lock or block needed** |
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**SHUTDOWN PROCEDURES**

Please 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 and location:

De-energized state to be verified?  How?

***Notify all affected employees when this procedure is in application.***

**START-UP PROCEDURES**

Please list the steps (in order) necessary to reactivate (energize) the equipment. Be specific.

Procedure:

Energy source activated:

***Notify all affected employees when this procedure is in application.***

**PROCEDURES FOR OPERATIONS AND SERVICE/MAINTENANCE**

List those operations where the procedures above do not apply. Alternate measures that provide effective protection must be developed for these operations. Job safety analysis is one method of determining appropriate measures.

Operation name:

**AFFECTED AND AUTHORIZED EMPLOYEES**

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

|  |
| --- |
| **Affected employees** |
| **Name** | **Job title** |
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Approved by:

Date: