



GOALS

This safety session should teach employees to:

- Know the basic lockout/tagout shutdown procedures.
- Understand the need for lockout/tagout.

Applicable Regulations: 29 CFR 1910.147



1. Lockout/tagout prevents injuries from unexpected equipment energization.

- Equipment that starts, moves, or releases stored energy unexpectedly during service or repair can cause serious injuries.
- The Occupational Safety and Health Administration's (OSHA) lockout/tagout procedures prevent these accidents.

2. OSHA defines lockout/tagout roles and responsibilities.

- Only specially trained authorized employees must perform lockout/tagout.
- Affected employees and other employees must:
 - Understand the value and basics of lockout/tagout.
 - Never try to remove locks or tags or try to start locked/tagged out equipment.

3. Authorized employees follow a series of specific lockout/tagout steps.

The authorized employee knows the equipment's energy sources and energy quantity, and means of control. He or she must take the following steps in the order presented:

- Notify affected employees that the equipment will be shut down and locked out.
- Turn off the machine or equipment.
- Isolate/deactivate the energy control switch, circuit breaker, etc. and lock/tag it "off" or "safe," using special lockout/tagout locks and tags, to prevent accidental start-up.
- Use tags only when the equipment can't be locked out.

4. The authorized employee next releases or blocks any stored energy.

If energy is stored in springs, capacitors, hydraulic systems, etc., he or she must:

- Reposition or block spring tension or block spring-driven parts.
- Relieve trapped pressure by venting, draining, or bleeding lines or blocking parts.
- Block or brace gravity-driven moving parts.

5. The authorized employee tests operating controls to assure that power is locked/tagged out.

- He or she makes sure all employees are a safe distance away.
- All controls are put in the "on" position.
- All controls are turned on and tested to make sure that the equipment isn't receiving power.
- Controls are returned to the "off" position once it is assured the equipment can't operate.



6. Locked/tagged out equipment receives necessary service or maintenance.

If energy is needed to test or position equipment, the authorized employee:

- Follows all lockout removal steps
- Tests or positions the equipment
- Performs the full sequence of lockout steps again and completes the job

7. The authorized employee who installed the lock/tag removes it.

Once work on the equipment is complete, the authorized employee must:

- Remove all tools, etc., from the work area, replace machine guards, and check that equipment is ready to operate.
- Notify employees of lockout removal and keep them a safe distance away.
- Remove the locks/tags.
- Turn on equipment and energy and test for proper operation.
- Tell affected employees that locks/tags are off and the equipment can be used

If the authorized employee who placed the lock or tag isn't available, another authorized employee removes the lock/tag and notifies the original employee.



DISCUSSION POINTS:

Go through the lockout/tagout steps on a specific machine to illustrate points in this session.



CONCLUSION:

- Be sure equipment is locked/tagged out properly before repair or maintenance
- If you're an authorized employee, follow all the steps. If you're not, protect yourself and others by not trying to restart equipment that's locked or tagged out.



TEST YOUR KNOWLEDGE:

Have your employees take the Preparing for & Performing LO/TO Shutdown quiz. By testing their knowledge, you can judge their ability to understand lockout/tagout and whether they need to review this important topic again soon.



PREPARING FOR & PERFORMING LO/TO SHUTDOWN QUIZ

1. **Lockout/tagout can be performed only by:**
 - a. Authorized employees
 - b. Affected employees
 - c. Experienced employees
2. **Even if you don't perform lockout/tagout, you must know the importance of:**
 - a. Making sure all locks and tags are standardized
 - b. Providing help to employees who are performing lockout/tagout
 - c. Never trying to start locked or tagged out equipment or remove the locks or tags
3. **After turning off equipment, the next lockout/tagout step is to:**
 - a. Test whether it's really off.
 - b. Deactivate the energy control device.
 - c. Place the authorized employee's name on the lock or tag.
4. **Tags are used instead of locks only when:**
 - a. Locks are in short supply.
 - b. The authorized employee prefers tags to locks.
 - c. The equipment can't be locked out.
5. **Lockout/tagout includes releasing or blocking any energy stored in springs, hydraulic systems, etc.**
 - a. True
 - b. False
6. **Before working on locked/tagged out equipment, the authorized employee:**
 - a. Tests that energy is truly off by trying to turn on the equipment
 - b. Makes sure that all employees in the area are at least 20 feet away
 - c. Removes the locks or tags
7. **If energy is turned back on to test or position equipment during servicing, you can just turn it off again without completing all the lockout/tagout steps.**
 - a. True
 - b. False
8. **Any authorized employee can remove a lockout lock.**
 - a. True
 - b. False
9. **Before removing a lock or tag, the authorized employee:**
 - a. Removes tools from the area and replaces the machine guards
 - b. Inspects the lock or tag to be sure it's not damaged
 - c. Gets at least one other authorized employee to witness the removal
10. **If affected employees are around when the lock is removed, it's not necessary to tell them the equipment is ready for use.**
 - a. True
 - b. False

When you have completed this quiz, turn it in to your supervisor.

Name: _____

Date: _____



ANSWERS TO PREPARING FOR & PERFORMING LO/TO SHUTDOWN QUIZ

1. a. Authorized employees.
2. c. Never trying to start locked or tagged out equipment or remove the locks or tags.
3. b. Deactivate the energy control device.
4. c. The equipment can't be locked out.
5. a. True.
6. a. Tests that energy is truly off by trying to turn on the equipment.
7. b. False. You must follow all the steps to remove locks or tags and then to replace them.
8. b. False. The employee who installed it must remove it. Only if that employee is not present can another authorized employee perform the job.
9. a. Removes tools from the area and replaces the machine guards.
10. b. False. Affected employees should be told that locks/tags are removed and that the equipment is ready for use.