

This sample procedure should be customized to fit the needs of your company. It should be integrated into other procedures and processes, such as Emergency Prevention and Preparedness. This is not meant to be used as-is, but should be adjusted to reflect your company needs.

[insert company info here]

LOCKOUT & TAGGING PROCEDURE

Date of Issue:	
Written by:	Date:
Reviewed by:	Date:
Approved by:	Date:

PURPOSE

The purpose of this procedure is to provide a step-by-step guide for performing the task of lockout and tagging.

SCOPE

This procedure applies to all employees involved in managing, administering or completing work on energized equipment of all energy sources (electrical, hydraulic, and potential) at all locations. This includes any contractors working at any shops or sites.

RELATED DOCUMENTATION

Internal

Hazard Identification & Risk Assessment Procedure
 Workplace Violence Risk Assessment
 Health and Safety Policy
 Legislation & Standards Log
 Hazard & Risk Log
 Health & Safety Objectives

External

Duties of Employers- OHSA, s. 25 (1)(a-d)
 Every Reasonable Precaution- OHSA, s. 25 (2)(h)
 Housekeeping- O. Reg. 213/91, s. 35-48
 Electrical Hazards- O. Reg. 213/91, s. 181-195.3
 Lock out- O. Reg. 851, s. 36, 42, 42.1, 75, 76
 Electrical Hazards – O. Reg. 213/91, s.183, 190.4

DEFINITIONS

Lockout	Act of attaching a lock to a device, thereby rendering it incapable of operation
Tagging	Act of attaching a tag made of non-conductive material to the lock used to provide information and instructions.

ROLES & RESPONSIBILITIES

Senior Management is responsible for:

- Ensure that work-specific or site-specific lockout and tagging procedures conform to requirements of the company's health and safety program.
- Provide general and system-specific lockout and tagging training.

Supervisors are responsible for:

- Providing workers with tags, individual keys, padlocks and scissors.
- Consulting with management and/or the owner/client if a secure lockout is not possible.
- Checking that all workers are clear of the work area before re-energizing the system.
- Obtaining the owner/client's authority to re-energize any system.
- Ensuring that all potential hazards are evaluated, the necessary precautions are taken and that personnel assigned to isolate energy sources are properly trained prior to any work being done on machinery, equipment or process

Employees are responsible for:

- Complying with the corporate Lockout and Tagging Procedure and/or the owner/client's lockout and tagging procedure or risk disciplinary action.
- Being familiar with evacuation routes and alternate means of escape

PROCEDURE

1. Prepare for Shutdown

- Identify which sources of energy are present and must be controlled
- Identify which method of control will be used, which involves completing sets of specific work instructions that outline what controls and practices are needed to lock and tag out a system before performing any activity

2. Notify all Affected Employees

Communicate the following information to all personnel:

- What method of lockout is to be used
- Reason for the lockout and tagging

- Person responsible for the lockout and tagging
- How the system will remain locked out through-out the duration of the specific work

3. System Shutdown

- The system should be shut down in its normal manner.
- Ensure to refer to the manufacturer's instructions or company instructions on proper shutdown techniques.
- Ensure that controls are in the off position and all moving parts have come to a complete stop.

4. Isolation of System from Hazardous Energy

In general, the following procedures should be used:

Electrical

- Switch electrical disconnects to the off position
- Visually verify that the breaker connections are in the off position
- Lock the disconnects into the off position
- Maintain an isolation log that identifies which panels and systems have been isolated.

5. Removal of Residual or Stored Energy

Electrical Energy

- Contact the manufacturer for specific instructions (if needed)
- Ensure capacitors are discharged in the lockout process in order to protect workers from electrical shock

6. Lockout and Tagging of Electrical Panels and Breakers

- Each lock should have only one key. There should be as many locks on the system as there are people working on the tool/equipment.
- Lockout tags should clearly show the:
 - Name that applied the lock
 - Date of the application
 - Reason for lockout
- Locks and tags must be durable enough to withstand the environment in which it is being used
- Each worker who may be required to work on the system must be protected by placing an individually keyed safety lock on the isolation device.
- Tags should be noticeable that read **DANGER** to prevent accidental start-up of system.
- The tag should identify the purpose of the lock and must clearly identify that the system is not to be energized/operated until work is complete.
- All electrical systems that may be subject to induction must be temporarily grounded using approved grounding components.

7. Verify Isolation

- Verify that the system is properly locked out before beginning work. If there is no response from the activation, isolation is verified.
- Electrical panels and breakers must be tested with a CSA certified potential test indicator to ensure that all components are de-energized and de-activated.
- Workers testing electrical systems must:
 - Remove all watches, rings, neck chains and other conducting jewelry
 - Wear electric shock resistant footwear
 - Wear safety glasses with UV protection

8. Lockout and Tagging Interruption

- If there is a locked and tagged out tool/equipment and there is a need for testing or positioning the following steps should be followed:
 1. Clear the equipment/process of tools and materials
 2. Ensure workers are at a safe distance from any potential hazard
 3. Remove locks/tags according to established procedure
 4. Proceed with the test
 5. De-energize all systems and re-lock/tag the controls before resuming work

9. Perform Maintenance

10. Remove Lockout and Tag Devices

- Inspect the work area to make sure all tools and items have been removed.
- Confirm that all employees and persons are safely located away from hazardous areas.
- Verify that controls are in a neutral position.
- Remove tags and re-energize tool/equipment.
- Notify affected employees that servicing is completed
- If there are multiple work groups, the supervisor must inform all work groups that the system is no longer locked and tagged out.

Dated at _____ this _____ day of _____, 20__.

Signature

Witness

Name & Title (please print)

Name

Continuous Improvement Review Tracking		
Date of Review/Change	Notes	Name of Reviewer