

# Establishing effective equipment guidelines



## Implementing safer operational practices

Creating specific procedures to turn off equipment, isolate power sources and stop potentially hazardous energy while service and maintenance activities are being performed can help create a safer work environment.

### Simple steps for an effective program

1. Notify all affected employees that you have implemented a lockout/tagout program. Explain the purpose of the program and familiarize employees with the type(s) of energy that the machinery uses. Warn all affected employees about the potential hazards.
2. Assign each authorized employee a standardized lock with a single key for locking out equipment. Maintain documentation on file that lists the specific lock assigned to each employee. Keep duplicate keys in a secured location, for emergency use only.
3. If the machine or equipment is operating prior to lockout, instruct employees to shut it down using normal stopping procedures.
4. Operate the switch, valve, or other shut-off device to isolate the energy source from the machinery.
5. Lockout or tagout the energy isolating device (using a switch, valve, or other shut-off device) only by using the authorized employee's assigned lock.
6. After verifying that all employees are clear of machinery, attempt to operate machinery using normal start-up procedures to confirm that the equipment will not operate. (Caution: Return control to off position after testing.)
7. While the equipment is locked out, the employee whose key locked the machinery must retain the key in his or her possession at all times. Only the person who applied the lock is authorized to remove it.
8. Once work is completed, clear the machine of all non-essential tools and materials, issue a warning to workers to stay clear of the machinery, and notify all affected employees that the lockout/tagout device has been removed. Locks must only be removed after all work is completed, the equipment is closed, and all guards are replaced.

### Guidelines to control hazardous energy

- Employers must develop and implement a written lockout/tagout program to minimize exposure to hazards associated with the unexpected startup of machinery or equipment, or the release of stored or residual energy.
- Whenever workers perform service or maintenance on machinery or equipment, they must isolate that equipment from all energy sources. Workers must use an energy-isolating locking device to lockout equipment, or place a tagging device on it, according to established and documented procedures.
- Employers are responsible for training employees involved in the energy control program. They must keep written documentation of the training on file, including dates and the names of participants.
- Employers are required to review lockout/tagout procedures annually to ensure the program's continued effectiveness. They must conduct reviews with all employees who are authorized to lockout equipment whenever lockout procedures are used. Employers should also review tagout procedures with all authorized employees, as well as those workers whose jobs are impacted by lockout/tagout procedures.
- When hiring outside contractors to perform equipment service or maintenance, each authorized employee must affix a personal lockout or tagout device to the affected energy source.
- When service or maintenance extends beyond a normal work shift, employees must establish procedures that assure the continuity of lockout/tagout protection, including the orderly transfer of lockout/tagout control.