



## Equipment Assessment Form

Equipment Name:	Equipment ID:
Serial Number:	Model:
Building:	Location:
Assessor(s):	Date Assessed:

### 1. EVALUATION OF ENERGY SOURCES:

	Y/N	Energy Source	Magnitude and Unit of Measure	Method to Dissipate or Restrain
<b>A</b>		<b>Chemical:</b>		
<b>B</b>		<b>Hydraulic:</b>		
<b>C</b>		<b>Pneumatic:</b>		
<b>D</b>		<b>Mechanical:</b>		
<b>E</b>		<b>Electrical:</b>		
<b>F</b>		<b>Thermal:</b>		
<b>G</b>		<b>Radioactive:</b>		
<b>H</b>		<b>Other:</b>		

### 2. SHUTTING DOWN THE EQUIPMENT:

*\*Further Detailed on Attachment:  Yes  No*

Types of Operating Controls	Location on Unit

### 3. TYPE(S) OF ENERGY-ISOLATING DEVICE(S):

*\*Further Detailed on Attachment:  Yes  No*

Types of Energy-Isolating Devices:



<b>4. METHODS TO VERIFY ISOLATION OF THE UNIT: *Further Detailed on Attachment: <input type="checkbox"/> Yes <input type="checkbox"/> No</b>
Verification Method:
<b>COMMENTS:</b>
<b>COMMENTS: Contact affected personnel.</b> This Form should be used as a guideline to focus the authorized employee on the energy in this type of system. Actual locations of controls must be identified for all similar types of equipment prior to any maintenance activities.

**STANDARD INSTRUCTIONS**

1. Notify affected employees.
2. Review existing lock out tag out procedures.
3. Shut down equipment by normal stopping procedures.
4. Locate and de-activate energy isolating device(s) and isolate from energy source(s).
5. Dissipate and/or restrain stored or residual energy.
6. Lockout and tagout energy isolating device(s).
7. Ensure no personnel are exposed, then verify isolation of equipment; operate push button, normal operating controls or test to ensure equipment will not operate. Return to neutral condition. Check that no voltage is present.
8. Equipment locked out, perform task(s).
9. Restore equipment to service
  - a. Check machine & area- remove unnecessary items.
  - b. Ensure personnel are safely positioned or removed from area.
  - c. Verify off or neutral control position.
  - d. Remove LOTO devices.
10. Notify affected employees that work is complete, and equipment is ready for use.