LOCKOUT - TAGOUT

INTRODUCTION

Workers performing service or maintenance on machinery and equipment may be exposed to injuries from the unexpected energization, startup of the machinery or equipment, or release of stored energy in the equipment.

The Lockout/Tagout standard requires the adoption and implementation of practices and procedures to shut down equipment, isolate it from its energy source(s), and prevent the release of potentially hazardous energy while maintenance and servicing activities are being performed.

The OSHA Lockout/Tagout standard contains minimum performance requirements, and definitive criteria for establishing an effective program for the control of hazardous energy. Employers have the flexibility to develop lockout/tagout programs that are suitable for their respective facilities.

WHAT IS THE INTENT OF THE ENERGY CONTROL PROGRAM?

☑ To ensure that before any employee services equipment where the potential exists for unexpected energization or start-up of equipment or the release of stored energy, the machine or equipment is isolated from the energy source and rendered inoperative

WHAT SPECIFIC ELEMENTS MUST BE DOCUMENTED IN THE EMPLOYER'S ENERGY CONTROL PROCEDURES?

☑ The procedures must outline the scope, purpose, authorization, rules and techniques that the employer will use to control hazardous energy

☑ The procedures must state the means to be used to enforce compliance.

At a minimum, the procedures must include:

☑ A specific statement of the intended use of the procedure

☑ Specific procedural steps for shutting down, isolating, blocking, and securing machines or equipment to control hazardous energy

☑ Specific procedural steps for the placement, removal, and transfer of lockout devices or tagout devices, and a description of who has responsibility for them
Specific requirements for testing a machine or piece of equipment to determine and verify the effectiveness of lockout devices, tagout devices, and other energy control measures

WHO DOES THIS STANDARD APPLY TO?

Workers performing servicing and/or maintenance on machines or equipment and who are exposed to the unexpected energization, startup, or release of hazardous energy. Under the standard, the term "unexpected" also covers situations in which the servicing and/or maintenance is performed during ongoing normal production operations if:

- An employee is required to remove or bypass machine guards or other safety devices or
- An employee is required to place any part of his or her body into a point of operation or into an area on a machine or piece of equipment where work is performed, or into the danger zone associated with the machine's operation.

WHAT ACTIVITIES OR OPERATIONS ARE COVERED?

- Any servicing and/or maintenance of machines or equipment when the source of energy to the machines or equipment is electrical, mechanical, hydraulic, pneumatic, chemical, thermal, or other energy
- Constructing, installing, setting up, adjusting, inspecting, modifying, maintaining and/or servicing machines or equipment, including lubrication, cleaning or unjamming of machines or equipment, and making adjustments or tool changes, where employees could be exposed to the unexpected energization or startup of the equipment or release of hazardous energy

Tagout System

Additional training is required when tagout systems are used. Employers must train employees in the following limitations of tags. **Tags are essentially warning devices affixed to energy isolating devices and do not provide the physical restraint on those devices that is provided by a lock.**

- When a tag is attached to an energy isolating means, it is not to be removed without authorization of the authorized person responsible for it, and it is never to be bypassed, ignored, or otherwise
- Tags must be legible and understandable by all employees
☑ Tags and their means of attachment must be made of materials which will withstand the environmental conditions encountered in the workplace

☑ Tags may evoke a false sense of security and their meaning needs to be understood as part of the overall energy control program

☑ Tags must be securely attached to energy isolating devices so that they cannot be inadvertently or accidentally detached during use

PERIODIC INSPECTION

What is the intent of the requirement for the employer to conduct periodic inspections?
To ensure that the energy control procedures continue to be implemented properly, that the employees are familiar with their responsibilities, and that any deviations or procedural inadequacies that are observed are corrected.

How often must the inspection take place? At least annually.

Who performs the periodic inspection? An authorized employee not involved in the energy control procedure being inspected.

What does the periodic inspection entail?
☑ The employer must identify any deficiencies or deviations and correct them.
☑ Where lockout is used, the inspector must review each authorized employee’s responsibilities under the procedure with that employee (group meetings are acceptable)
☑ Where tagout is used, the inspector must review both the authorized and affected employee’s responsibilities with those employees for the energy control procedure being inspected, and the additional training responsibilities of under the standard.
☑ The employer must certify that the periodic inspections have been performed.

What must the certification identify?
☑ Identify machine on which the procedure was utilized
☑ Date of inspection
☑ Identify the employees included in inspection
☑ Identify person who performed the inspection
EMPLOYEE TRAINING AND COMMUNICATION

Why must employees be trained?

☑ So that they understand the purpose and function of the energy control program

☑ So that employees acquire the knowledge and skills necessary for the safe application, usage and removal of the energy controls

The standard requires different levels of training for the three categories of employees; what are the differences in the training required for the three categories?

☑ Authorized employees must receive training on the recognition of applicable hazardous energy sources, the type and magnitude of the energy available in the workplace, and the methods and means necessary for energy isolation and control.

☑ Affected employees must receive training on the purpose and use of the energy control procedure.

☑ Other employees (those whose work activities are or may be in an area where energy control procedures may be utilized) must be instructed about the procedure and about the prohibition relating to attempts to restart or reenergize machines or equipment that are locked out or tagged out.

Outside Personnel (Contractors)

What are the obligations of the outside contractor and the on-site employer?

☑ Whenever contractors and other outside servicing personnel perform tasks covered by the Lockout/Tagout standard, they must adhere to all the standard's requirements.

☑ The contractor or outside employer and the on-site employer must inform each other of their respective lockout or tagout procedures.

☑ The on-site employer must ensure that his/her employees understand and comply with the restrictions and prohibitions of the outside employer's energy control program.

Group Lockout/Tagout Requirements

Procedures must be followed that when a group is performing servicing and/or maintenance - will offer group employees the same protection that the standard provides to individual employees.
Protection must be utilized which affords the employees a level of protection equivalent to that provided by the implementation of a personal lockout or tagout device.

Primary responsibility for a set number of employees working under the protection of a group lockout or tagout device must be vested in a single authorized employee.

The single authorized employee must determine the exposure status of individual group members.

If there will be more than one crew, department, or group involved in the activity, a single authorized employee must be designated to coordinate affected workforces and to ensure continuity of protection.

Each authorized employee must affix a personal lockout or tagout device as required in the standard when work begins and remove it when work is completed.

Release from Lockout/Tagout

The Lockout/Tagout standard includes requirements for releasing machines or equipment that have been locked out or tagged out prior to restoring energy to the equipment and using it.

Before lockout or tagout devices are removed, and energy restored, the authorized employee must follow the following procedures:

The work area must be inspected to ensure that nonessential items (e.g., tools, spare parts) have been removed and that all of the machine or equipment components are operationally intact.

Positioning of employees: The work area must be checked to ensure that all employees have been safely positioned or have cleared the area. In addition, all affected employees must be notified that the lockout or tagout devices have been removed before the equipment is started.

Lockout or tagout device removal: Each lockout or tagout device must be removed from the energy-isolating device by the employee who applied the device.