Safety programs are most effective when they are designed to meet the specific and individual needs of each company. This safety program does not constitute a complete and comprehensive safety program. The intent of this safety program is to encourage the development of individual company specific programs by providing a sample format and suggested wording for program components.

This safety program is not intended to be an exhaustive treatment of the subject, and should not be interpreted as precluding other procedures, which would enhance the safety and health of your place of work or project sites.

Midwest Builders’ Casualty makes no guarantee, warranty or assurance, expressed or implied, that these procedures will insure compliance or are in compliance with requirements of any OSHA regulations or any other laws or regulations dealing with safety and health as it pertains to employees, or the safety and health regulations as it pertains to hazardous substances and/or the work environment.

-Sample-

Hazardous Energy Control Program

Prepared by:

Midwest Builders’ Casualty
-SAMPLE-
HAZARDOUS ENERGY CONTROL PROGRAM

STATEMENT OF POLICY

Our policy is to ensure that authorized personnel lockout or tag out potentially hazardous energy before any servicing, repairs, or maintenance work is conducted. As such, ALL employees will perform their work in accordance with the company's LOCKOUT/TAG OUT PROCEDURES which address the servicing, repair, and maintenance of machines and equipment during which unexpected startup or energization COULD result in injury.

SCOPE

All work activities; including, but not limited to, service, repair, or maintenance on machines or equipment; that requires an employee to remove/bypass a guard or other safety engineered control. Included are any activities that require an employee to place any part of his/her body into an area or machine or a piece of equipment where work is actually performed upon process material (point of operation) or where an associated danger zone exists during machinery or equipment operating cycles.

PURPOSE

This program is to prevent injury and accidents that result from the unexpected release of energy. As such, all requirements establish the minimum acceptable level of performance.

DEFINITIONS

AUTHORIZED PERSON  - An employee who implements a lockout and/or tag out procedure on machinery or equipment in order to perform work on that machinery or equipment.

AFFECTED EMPLOYEE  - An employee whose job activities requires him/her to operate, use or be in the area of machinery or equipment that is being serviced or maintained subject to the control provisions of the company's lockout/tag out program.

BUMP TEST  - Equipment and machinery must be bump tested before being put back in service after a lockout/tag out procedure. This is done by quickly starting/stopping the equipment in a repetitious manner until the equipment has fully cycled and it is determined that full startup of the equipment will not present a hazard.

ENERGY ISOLATION DEVICE  - A mechanical device that physically prevents the transfer or release of energy. It includes, but is not limited to, manually operated circuit breakers, fusible disconnect switches, plug and receptacles, normally operated switches (where the circuit conductor can be disconnected from all ungrounded supply conductors and no pole can be operated independently), and process line blanks/blinds.

NOTE: Push button switches and other control circuit actuators are not energy isolation devices.
**ENERGY SOURCE** - Electrical, hydraulic, mechanical, pneumatic, chemical, thermal, or other energy; both active and stored.

**FUNCTION CHECKS** - The act of ensuring equipment and/or machinery is at a Zero Energy State after lockout/tag out is completed. A minimum electrical function check is accomplished by using a meter rated for the equipment being worked on and by operating all controls in every mode.

**ISOLATE** - To prevent the transfer or release of energy through the use of an Energy Isolation Device. (i.e. switching circuit breakers to the off position, installing line blanks/blinds, etc.)

**LOCKOUT** - Placement of a lockout device on an Energy Isolating Device in accordance with established procedures, ensuring that the Energy Isolation Device and the machinery/equipment being controlled cannot be operated until the lockout device is removed.

**LOCKOUT DEVICE** - A device that employs a positive method of securing an Energy Isolation Device in a safe position to prevent the energization of machinery or equipment. This generally refers to a lock or multiple locking hasp and lock.

**MAINTENANCE or SERVICE** - Workplace activities such as constructing, installing, setting up, adjusting, inspecting, modifying, and maintaining and/or servicing machines or equipment. These activities include lubrication, cleaning or unjamming of machines or equipment and making adjustments or tool changes, where the employee may be exposed to the unexpected energization or startup of the equipment or release of hazardous energy.

**MULTIPLE LOCKING HASP** - A manufactured device designed to accommodate a number of locks (usually 6) to allow more than one person, craft, etc., to secure an Energy Isolation Device.

**TAG** - A prominent warning device incorporating the warning message "DANGER - DO NOT OPERATE" and accommodating attachment that will withstand 50 pounds of pull stress, to an Energy Isolation Device.

**AUTHORIZATION**

Any employee performing lockout/tag out must obtain authorization from the job foremen/shop foremen before beginning any lockout/tag out procedure. A Project Lockout/Tag Out Information Log must be filled out by the authorized employee and the job foremen/shop foremen to verify and document that lockout/tag out procedures are being followed when servicing the machine.

**GENERAL LOCK OUT RULES**

The following are general lockout/tag out rules that must be followed when locking out/tagging out equipment during servicing, repair, or maintenance work. In addition, the specific lockout/tag out procedures for the machine being serviced must be followed. Machine specific lockout/tag out procedures are posted on every piece of equipment.

1. The employee performing the work must receive authorization for lockout/tag out from the job foremen. If lockout/tag out is done on a jobsite, the job foremen must obtain clearance from the owner or other responsible party to determine the effects and timing of lockout/tag out.
2. All affected employees must be notified.
3. The job foreman, with the employee who will be performing the work, will identify and be in agreement that the correct control point (i.e. Energy Isolation Device) and method has been selected (circuit breaker, disconnect).

   **NOTE:** Control circuits, stop buttons, etc., shall not be used for purpose of lockout.

4. The person performing the work will shut down the equipment by the normal stopping procedure.

5. The authorized employee will lockout/tag out the energy isolation device with assigned individual locks and identification tags. The tag(s) will be legible and each block of information will be completed.

   **NOTE:** Control circuits, starts/stop mechanism, etc., are not to be used as lock out control points.

6. After all locks and tags have been applied to the energy isolating devices, all potentially hazardous stored or residual energy must be relieved, disconnected, restrained, and otherwise rendered safe.

7. After lockout is complete, verify that equipment is at zero energy state with all power isolated. This is accomplished by performing voltage meter checks and/or by operating control mechanisms to make certain the machinery or equipment will not operate.

8. If more than one employee is working on the de-energized equipment or system, each employee must attach their individual lock and completed information tag at the lockout control point.

9. When work is completed, the employee, with the job foremen, will verify that equipment/system start-up poses no danger to personnel or equipment. Once this check is complete and all parties who might be affected have been informed of planned start-up, then the employee who performed the work will remove the lock and/or lockout device and tag. This will allow the equipment/system to be re-energized.

10. All lockout devices, identification tags, and the Project Lockout/Tag Out Information Log are located at ________________________________.

### TAG OUT PROCEDURE

Some equipment may not physically accommodate a lock or lock out device. If this is the case, the employee must follow the tag out procedure. The tag out procedure follows the same steps and has the same requirements for insuring de-energization as the lockout procedure. However, because tag out does not provide the same level of security that is present with lockout the conditions listed below must be met:

- Tag Out shall only be implemented when there is no physical engineered accommodation for lock out and the employee(s) performing the work can maintain continuous line of sight monitoring of the tag location(s).
- Tag Out requires the use of completed "DANGER - DO NOT OPERATE" tag(s).

### EMERGENCY LOCKOUT/TAG OUT REMOVAL

If an individual is not available on site and cannot be contacted away from site and it becomes necessary to remove or otherwise alter the lockout/tag out that the employee installed, the job foreman may re-energize by implementing the following steps:

1. The job foreman will verify that the authorized employee is not at the facility.
2. The job foreman will make all reasonable efforts to contact the employee to inform him/her that his/her device will be removed.
3. If contact with the authorized employee performing the work cannot be established, the job foreman will, with the benefit of all knowledgeable personnel available, determine the status of the work.
4. If all personnel who might be affected by start up of the equipment are in agreement that the work is complete and that no hazard to personnel and/or equipment is presented by equipment/system start up, then the job foreman can remove equipment/system locks, locking devices and tags.

5. Upon removal of lockout/tag out controls and re-energization, a bump test should be performed to further ensure safe operation.

6. The job foreman will ensure that the authorized employee knows that the device has been removed prior to resuming work at the facility.

TRAINING

Upon hire, authorized employees will receive training on this Hazardous Energy Control Program and the procedures to effectively lockout/tag out the specific equipment they operate. Retraining will be provided for all authorized employees whenever there is a change in their job assignments, a change in machines, equipment or processes that present a new hazard, or when there is a change in the lockout/tag out procedures. In addition, authorized employees will receive training when any deficiency in the Hazardous Energy Control Program is identified during periodic inspections.

Affected employees will be instructed on the purpose and use of the energy control procedure.

PERIODIC INSPECTIONS

A periodic inspection of lockout/tag out procedures will be performed at least annually to ensure that the lockout/tag out procedures continue to be implemented properly and that employees are familiar with their responsibilities under those procedures. Any deficiencies observed during the inspection will be corrected.

The periodic inspection will be performed by the job foremen/shop foremen. This inspection will determine:

- Whether the steps in the energy control procedure are being followed.
- Whether the employees involved know their responsibilities under the procedure.
- Whether the procedure provides the necessary protection, and what changes, if any, are needed.

The employee performing the periodic inspection will:

- Observe a representative number of authorized employees implementing lockout/tag out procedures
- Hold a group meeting with all authorized employees to reemphasize the employees’ responsibilities and the importance of following the lockout/tag out procedures.

Periodic Inspection will be documented with the following information:

- The machine or equipment on which the lockout/tag out procedure was used.
- The date of the inspection.
- The employees included in the inspection.
- The name of the inspector who performed the inspection.
The following Lockout/Tag Procedures have been developed and must be followed to effectively lockout this specific piece of equipment during servicing and maintenance. The use of these procedures, which have been developed to protect against the unexpected energization, startup, or release of hazardous energy, are fully enforced by our disciplinary policy.

1. The employee will RECEIVE APPROVAL for Lockout/Tagout from the job foreman/shop foreman.
2. The employee will NOTIFY all affected employees.
3. The job foreman/shop foreman, with the employee who will be performing the work, will LOCATE and IDENTIFY energy sources, potential hazards, and all energy isolation devices (e.g. circuit breakers, disconnects). *Name of specific machine* power sources include *List of power sources* (e.g. electrical, hydraulic, mechanical, pneumatic, chemical, thermal, or other energy; both active and stored). The energy isolation devices for *Name of specific machine* is located *Identify location of energy isolation device*.
4. The employee performing the work will TURN OFF the machine by using the normal stopping procedure and ISOLATE all power sources listed above at the energy isolation device(s).
5. The employee will LOCKOUT all energy isolation devices by placing their lock(s), lockout device(s), and identification tag(s) at the agreed upon energy isolation device. The tag(s) will be legible and each block of information will be completed.
6. After all locks and tags have been applied to the energy isolating devices, all potentially hazardous stored or residual energy must be relieved, disconnected, restrained, and otherwise RENDERED SAFE. Potentially hazardous stored energy for this machine includes *List all potentially hazardous stored energy*. Energy will be rendered safe by *List all methods used to eliminate stored energy*.
7. After lock out is complete, the employee will VERIFY that equipment is at zero energy state with all power isolated. This is accomplished by performing voltage meter checks and/or by operating control mechanisms such as circuits, switches in all modes. If there is any question about secondary or temporary power (s) to the equipment, it should be resolved at this time.
8. RETURN all operating controls to the “OFF” position.
9. PERFORM all necessary work on equipment.
10. When work is completed, the employee, with the job foreman/shop foreman, will verify that equipment/ system start-up poses no danger to personnel or equipment. Once this check is complete and all parties who might be affected have been informed of planned start-up, then the employee who performed the work will REMOVE the lock and/or lockout device and tag. This will allow the equipment/system to be re-energized.

Note:
- *Machine specific LOTO procedures should be posted on all machinery.*
- *Control circuits, starts/stop mechanism, etc., are not to be used as lock out control points.*
- *If more than one employee is working on the de-energized equipment or system, each employee must attach their individual lock and completed information tag at the lock out control point.*
- *The employee performing the LOTO procedure is responsible for their own lock and key. Key(s) will remain on that individual at all times, and keys will not be exchanged between employees.*
### PROJECT LOCKOUT / TAG OUT INFORMATION LOG

<table>
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<tr>
<th>DATE</th>
<th>TIME</th>
<th>SHIFT</th>
<th>AUTHORIZED PERSON</th>
<th>SUPERVISOR</th>
<th>EQUIP/MACH #</th>
<th>REASON FOR LO/TO</th>
<th>TIME RETURNED TO SERVICE</th>
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