**Lockout/Tagout Equipment Specific Procedures Template**

The procedures are designed to meet all applicable regulatory requirements, to prevent unexpected startup, energization or release of hazardous energies that could cause injury.

A general lockout/tagout procedure is outlined in the safety program.

The general procedure includes:

1. Employee notification and preparation
2. Equipment shutdown
3. Equipment isolation from hazardous energy
4. Application of locks and/or tags
5. Release of stored energy
6. Verification of isolation - test starting/tryout
7. Equipment restarting procedure

A written, equipment-specific lockout/tagout procedure is required if any of the following factors exist:

* Equipment has potential for stored or residual energy
* Equipment has multiple energy sources
* The isolation and lockout of that energy will not completely deenergize and deactivate the equipment

Use a template to create equipment specific procedures. Try to keep the procedural statements short and direct. Avoid excessive detail but yet provide enough information to perform the task. It is important to note that more than one procedure can represent duplicate pieces of equipment.

Including pictures and posting at the point of lockout are recommended.

Note: Written, equipment-specific lockout/tagout procedures must contain all the minimum elements contained in the template. Energy isolation points must be labeled with the points clearly identified in the steps of each equipment-specific procedure.

| **Lockout/Tagout Equipment Specific Procedures Template**  Insert information in the Blue font areas below (note – delete this line when is complete). | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Title: Equipment Name (ID#)** | | **Equipment Name (ID#) Lockout/Tagout Procedure** | | | | | | | | |
| **Department:** | |  | | | **Area:** | | | |  | |
| **System:** | |  | | | **ECP (Asset) #:** | | | |  | |
| **Prepared By:** **Preparation Date:** | |  | | | | **Reviewed By:**  **Last Review Date:** | | | |  |
| **Put an X in the boxes that apply** | | | | | | | **Fill in the number of items to be used (place 0 if none used)** | | | |
| **Energy Source** | | | | | | | | **Required Lockout Devices** | | |
| Add additional rows as necessary to list all energy sources including, multiple sources of the same type, e.g., 2 electrical disconnects | | | | | | | | Add additional rows as necessary to list all LOTO devices | | |
|  | Electrical # of Volts | |  | Vacuum (pressure) | | | | **# of** Padlocks – One for each energy source | | |
|  | Pneumatic (pressure) | |  | Hydraulic | | | | **#** **of** Personal ID tags | | |
|  | Mechanical | |  | Radiation | | | | **#** **of** Multi-Lock Hasps | | |
|  | Thermal (temperature) | |  | Chemical | | | | **#** **of** Turn Valve Sleeves | | |
|  | Potential Stored Energy | |  | Other | | | | **#** **of** Other Devices | | |

The purpose of this procedure is to prevent injury from the unexpected startup of the equipment. The scope of this procedure applies to <Insert Equipment Name, ECP (Asset) #>

**STEPS YOU MUST TAKE TO LOCK OUT EQUIPMENT:**

Only trained and authorized personnel can lock out this equipment using these steps. This procedure is enforceable and not following it could result in disciplinary action.

| **STEPS** | **PROCEDURES** | **HAZARDS** |
| --- | --- | --- |
| 1. Employee Notification and Preparation | What energies involved? Personnel to contact? Special equipment or tools? | Hazards for each procedural step |
| 1. Equipment Shutdown | Procedure for shutting down equipment  Note: Disconnect switches are NOT acceptable stop switches. |  |
| 1. Equipment Isolation from Hazardous Energy | Pulling disconnects...  Turning valves...  Blocking...  Installing locks/tags...  Note: Incorporate photos and energy isolation label identifiers as necessary to clarify energy isolation locations and lockout points. | Hazards remaining after lockout |
| 1. Application of Locks and/or Tags | Approved locks/tags placed on all the energy sources? |  |
| 1. Release of Stored Energy | Releasing hydraulic or pneumatic pressure...  capacitor discharge... |  |
| 1. Verification of Isolation - Test Start/Tryout | Attempt to operate or startup equipment |  |
| 1. Equipment Restarting Procedure | Personnel notification Equipment inspection Lock/tag removal |  |

**Note:** This form is NOT to be used for work that involves exposed electrical parts. If you have any questions about proper procedure, see your Team Leader.