



2600SEG118
STANDARD FOR EQUIPMENT LOCKOUT / TAGOUT

APPENDIX A

LOCKOUT / TAGOUT PROCEDURE FOR ENERGY SOURCE ISOLATION

1. PURPOSE

This procedure establishes the minimum requirements for lockout/tagout (or other form of isolation) of energy sources that could cause injury to personnel and/or damage systems, machinery, or equipment during inspection, servicing, or repairs.

2. RESPONSIBILITY

The responsibility for seeing that this procedure is followed is binding on all employees. All employees shall be instructed in the purpose and use of this procedure by their immediate supervisors. Employees who observe violations of this procedure shall immediately point this out to those violating the procedure and report it to their own supervisor, and in the case of contractors, to the contract representative (inspector).

3. GENERAL LOCKOUT / TAGOUT RULES.

- a. All systems shall be isolated (locked out) and tagged out, to protect against accidental or inadvertent operation when such operation could cause injury to personnel and/or damage the system, machinery, or equipment.
- b. Never remove a tag or lock other than your own. The only exception to this rule is when you have specific authorization from a competent authority, as described in paragraph 7(c) of this procedure.
- c. Never attempt to operate any switch, valve, or other energy isolating device bearing a tag and/or lock.

4. PREPARATION FOR LOCKOUT/TAGOUT.

- a. Supervisors shall provide authorized employees the lockout devices and tags (Form 4397). Form 4397L shall be used in the area of the Locks.

The tags shall be filled out in accordance with the ACP "Guidelines for Entries on Standard Lockout /Tagout Tag" (see Exhibit A **GUIDELINES FOR ENTRIES ON STANDARD LOCKOUT /TAGOUT TAG**).

- b. Employees authorized to perform isolation shall identify all energy sources and make sure which switches, valves, or other isolating devices apply to the system being isolated. More than one energy source (electrical, mechanical, or others) may be involved.

5. LOCKOUT/TAGOUT SEQUENCE.

When isolating a system, the following steps shall be taken in the order indicated:

- a. Notify: Notify all employees that a system is to be isolated and the reasons therefore.
- b. Shutdown: If the system is operating, shut it down by the normal stopping procedure.



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- c. Isolate: Isolate the system by operating the switch(es), the valve(s), and other control devices, and perform other procedures so that all energy sources are disconnected or isolated from the system. Stored energy (such as that in capacitors, springs, elevated machine parts, rotating flywheels, pressure in hydraulic, air, gas, steam, or water systems) must also be dissipated or restrained by methods, such as grounding, repositioning, blocking, bleeding down, etc.
- d. Lockout: Lockout the energy isolating devices with locks or other isolating devices (see Section 9).
- e. Tagout: Place a tag along with each lock or other isolating device.
- f. Test: After ensuring that no personnel are exposed, and as a check on having disconnected all energy sources, operate the “on” switch or other operating controls to make certain that the system will not operate.

CAUTION
RETURN OPERATING CONTROLS TO THE “OFF” OR SAFE
POSITION AFTER
THE TEST.

- g. The equipment is now isolated.

6. INTERIM TESTING OR POSITIONING.

In situations in which lockout/tagout devices must be temporarily removed in order to energize the system, machinery, or equipment for the purpose of testing or positioning, the following sequence shall be followed:

- a. Clear the system, machinery, or equipment and area of all tools, materials, and people.
- b. Remove isolation devices.
- c. Energize the system, machinery, or equipment and proceed with testing, or positioning.
- d. Shut down and isolate the system, machinery, or equipment again.

7. RESTORING SYSTEMS TO SERVICE

When the task(s) which required system isolation are completed and the system, machinery, or equipment is ready to be restored to service, follow the steps below in the order indicated:

- a. Clear: Check the system, machinery, or equipment and area to see that it is clear from all tools, material, and people.
- b. Notify: Notify affected people that the system, machinery, or equipment is going to be put back into service.
 - (1) Remove. When the system and area are clear, remove all tags, locks, and other isolation devices. Each lock and tag shall be removed by the authorized person who applied it, or under his or her direct supervision (see Section 9).



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- c. Energize the system.
- d. Check the system and all components to ensure that it is operating properly before returning it to the operating personnel.
- e. Return tags to supervisor.

8. PROCEDURE INVOLVING MORE THAN ONE AUTHORIZED PERSON.

In the preceding steps, if more than one authorized person is required to work on the same system, each authorized person shall place his/her own personally assigned lock/tag on a multiple energy isolating device. However, one designated person from a crew working together on a system may (with the knowledge of the rest of the crew) be assigned to lockout a system, machinery, or equipment for the whole crew. It shall be the responsibility of that person to carry out all the steps of the lockout/tagout procedure and to inform the crew when it is safe to work on the system, machinery, or equipment. As an added precaution, any authorized person in the crew may also place his lock and tag on the energy isolating devices. The person assigned to perform the group lockout/tagout shall not remove a crew lock/tag until he/she has verified that the system, machinery, or equipment and area are cleared of all tools, materials, and personnel.

9. SPECIAL SITUATIONS.

- a. There is no place to install the isolation devices. When there is no site or place to locate or secure an isolation device, the tag shall be adhered or tied to the switch or energy control device of the machinery or equipment. When practical, the resources providing energy to the controls shall be physically disconnected, or a guard shall be assigned at the controls or entry to avoid activation or energizing.
- b. The person who installed the isolation device and tag is not available or accessible. When such circumstance occurs, the isolation device and/or tag can be removed by another authorized person assigned to carry out this task, provided that:
 - (1) The supervisor ensures that the person that placed the padlock and tag is, in effect, not available or accessible, and
 - (2) The supervisor ensures that the area is clear of tools, equipment and personnel and that it is safe to energize or activate the machinery, equipment and space involved.
 - (3) The supervisor ensures that feasible measures have been taken to energize or activate the machinery, equipment of space involved in safe manner, and
 - (4) The supervisor ensures that the person be notified that the padlock or tag have been removed before he/she returns to his/her working position in this location.

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Exhibit A

GUIDELINES FOR ENTRIES ON STANDARD LOCKOUT /TAGOUT TAG

Form 4397

Form 4397-L

1. **CONTROL NUMBER.** The control number should come from a central control. This could be numerically progressive, alpha-numeric, or any other form the unit determines, as long as it is systematic and consistent. Each control number is to be logged and assigned to a person or a job.
2. **PLACED BY NAME/ SIGNATURE/ DATE/ TIME.** The authorized person who places the tag must print his/her name and enter the date and time the tag is placed.
3. **DIVISION.** Print the name of the division you work for.
4. **REQUESTED BY.** Print either the name of the person, the position or division requesting.
5. **TELEPHONE NUMBER.** Print the telephone number of your immediate supervisor.



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6. **LOCATION.** Print the location of the system, machinery, or equipment being isolated as specifically as possible (building number, shop name, transformer house or room, name of launch, etc.)
7. **EQUIPMENT.** Print the name and/or number or other characteristics of the system, machinery, or equipment which identify it.
8. **REASON/COMMENTS.** Print the reason for taking the system, machinery, or equipment out of service.
9. **REMOVED BY NAME/ SIGNATURE/ DATE/ TIME/ TELEPHONE.** The employee who removes the tag must print his/her name and enter the date and time the tag is removed, and the shop or office telephone number.