

First-Level Supervisor Safety Training Guide

Lockout/Tagout

SSO TG # 6

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Training Requirement: ANNUALLY

PREPARED BY THE STATE SAFETY OFFICE, DEPARTMENT OF
MILITARY AND VETERANS AFFAIRS, TO PROVIDE SAFETY TRAINING
GUIDANCE FOR FIRST-LEVEL SUPERVISORS

Questions or suggested changes to this training guide should be addressed to the
PAARNG State Safety Office at 717-861-8813

This training guide was created to help first-level supervisors conduct OSHA required safety training. If the supervisor presently has a training program in place that covers the training requirements and certifies the training with a training roster, this guide does not need to be used. It may be used in whole or in part to satisfy requirements. Any questions or suggestions for improvement of this training guide should be directed to the PAARNG State Safety Office.

SUBJECT: Lockout/Tagout

REFERENCE: 29 CFR PART 1910.147.

TRAINING REQUIREMENTS: 1. All employees will receive *initial* training. *Initial* training will be conducted by the State Safety Office for all new employees. Supervisors are responsible for contacting the State Safety Office as soon as the employee starts work to schedule *initial* training. Records of *initial* training will be retained by the State Safety Office.

2. **Refresher** training will be conducted annually by the first-level supervisor and additionally for any of the following reasons:

(a) Whenever there is a change in an employees job assignment that makes them an **affected employee** (operates equipment that require lockout/tagout) or **authorized employee** (person who implements lockout/tagout procedures).

(b) New machinery is added that requires lockout/tagout.

(c) When equipment or processes produce a new hazard requiring lockout/tagout.

(d) When there is a change in lockout/tagout procedures.

REFRESHER TRAINING OUTLINE: 1. The following outline was established to aid the supervisor conduct refresher training. It is recommended the supervisor also refer to 29 CFR PART 1910.147 and the SSO SOP #11 (lockout/tagout) before conducting the training.

A lack of respect for the hazards of stored energy and not following lockout/tagout procedures could cost an employee their life or the life of a co-worker.

2. 29 CFR PART 1910.147 requires the following minimum training:

(a) **Purpose of the lockout/tagout program.** Prevent stored energy from accidentally being released while machines and equipment are being serviced or repaired.

(b) **What the program does not cover.** Cord and plug equipment if the individual is in control of the plug at all times. Minor tool changes and adjustments to machinery. Lockout/tagout does not apply to vehicles.

(c) **Types of energy that need control.** Electrical, Pneumatic, Chemical, Thermal, Hydraulic, and Mechanical. *Remember that some machines have more than one source of stored energy.*

(d) **Lockout vs. Tagout.** Using a lock on a disconnect switch, or valve handle will always be used as long as it accepts one. When it is not possible to place a lock on an isolation device a tag will be used. Remember that locks are safer than tags. Locks may only have one key that is in the possession of the individual performing services on the equipment. Locks and tags are distributed by the Energy Control Officer (Shop Foreman) (*Show the type of tags and locks that are used*).

(e) **When to Lockout/Tagout.** When performing service or repairs on machinery where unexpected start-up or release of stored energy could cause injury to personnel. It is not necessary to lockout/tagout machinery during normal operating procedures unless:

- (1) A guard is removed or bypassed.
- (2) Part of the body is placed where it could be caught by moving machinery.

(f) **Six step procedure for controlling hazardous energy.**

(1) *Prepare for shutdown* - Notify all affected employees that servicing or maintenance on a piece of equipment will require it to be shut down. Before you begin service or repairs on equipment, know the following:

-] All types of energy involved.
-] Hazards presented by energy.
-] How to control the energy.

(2) *Shut Down the equipment* - Turn off the equipment or machinery by using the on-off switch.

(3) *Isolate the equipment or machinery.* Isolate machine or equipment from the energy source. This is a disconnect switch, main circuit breaker, or closing a valve to the “off” position.

(4) *Apply lockout/tagout device.* Apply the lock. Be sure it holds the isolating device in the “OFF” position. Also apply a tag. Ensure the person working on the equipment has their name on the tag. Or, if a lock can not be applied, apply the tag. Only the individual performing services on the piece of equipment is authorized to apply and remove locks. *An exception is the shop foreman.*

(5) *Release all stored energy.* Carefully release all stored energy. Be careful of machinery that contains more than one energy source.

(6) *Verify isolation of equipment or machinery.* Try the on-off switch **(NOT THE ISOLATION SWITCH)** or other controls to be sure the machine won't start. This verifies all stored energy has been released.

g. **Three step procedure for restart.**

(1) *Inspect equipment and area.* Inspect the equipment to be sure of the following:

-] All tools and other materials are removed.
-] Machine is fully reassembled.
-] Guards and other safety devices are installed.

(2) *Inform effected employees.* Ensure all effected employees are in a safe position before starting the machinery.

(3) *Remove lockout/tagout devices.* Remember that only the individual who installed the lock or tag is authorized to remove the devices with the exception of the shop foreman.

h. **When to follow written procedures for lockout/tagout.** When machinery has more than one energy source, or has more than one lockout/tagout device, written procedures will be followed as mentioned in SSO SOP #11, the *Energy Control Program*.

i. **Contractors performing services on equipment.** Whenever contractors perform repairs or services on equipment that requires lockout/tagout procedures, they are responsible for supplying their own locks and must inform the supervisor. Any employee noticing a contractor performing repairs or services and are in violation of lockout/tagout procedures, will notify their supervisor immediately. Contractors are required to follow lockout/tagout procedures in accordance with OSHA and the National Electric Code (NEC).

RECORD KEEPING: The supervisor is responsible for maintaining this guide as proof of what training material was covered during the refresher training. The supervisor must also maintain the training roster (Enclosure 1) for the current and previous year. Ensure the names of ALL personnel trained are recorded on the training roster.



