

NUMBER 8.0 – LOCKOUT/TAGOUT PROGRAM

Number: 8.0

Issued: 7/2018

Revised: 1/2023

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1.0 PURPOSE:

To ensure equipment is in a zero-energy state prior to work being performed which may endanger a worker(s) due to unexpected start-up and/or release of stored energy. To prevent injury to an employee performing service or maintenance on equipment by accidental, unexpected start-up, or release of stored energy. To ensure that all employees who work with, or are exposed to, energy sources and machinery controlled by energy sources are trained in the proper lockout/tagout procedures for such energy. To ensure all workers are trained in lockout/tagout procedures. To communicate de-energized systems and equipment.

2.0 POLICY:

All Signature facilities will comply with OSHA Standard 29 CFR 1910.147, the "Lockout/Tagout" standard and/or local regulatory requirements as required for work performed outside the jurisdiction of OSHA standards. All equipment requiring service or maintenance will be stopped, isolated from all hazardous energy sources to obtain a zero-energy state, locked out and/or tagged out before such servicing can begin. All employees will be trained in lockout/tagout procedures.

3.0 RESPONSIBILITIES:

- A. It is the responsibility of the **Facility Leader** to ensure compliance with this procedure in its entirety.
- B. It is the responsibility of all **Employees** to follow the requirements of this procedure.

4.0 PROCEDURE:

- A. This procedure involves both authorized and affected employees. An authorized employee is a person who locks out and/or tags out equipment to set-up, service or maintain the equipment. An affected employee is one whose work involves the use of such equipment or works in the area where service is being performed.
- B. The Facility Leader must complete an Energy Identification Sheet (see attached) for their facility. Completed copies of the Energy Identification Sheet should be kept in a safety notebook or electronic folder at the facility. The Energy Identification Sheet shall be updated each January or when physical conditions change at the facility (i.e., new machinery is introduced to the facility). Completed forms shall be retained for three years after the preparation date.
- C. A lockout/tagout device is required to be affixed:
 - 1. When maintenance services are performed on any machine that uses or stores energy.
 - 2. Prior to a guard or other safety device must be removed to perform repairs, inspection, etc.
 - 3. When an employee must place any part of their body (or a device that extends the point of operation) in or around the point of operations / moving parts or where stored energy may be present that could cause injury. Examples include, but not limited to:
 - Changing saw blades
 - Changing belts/blades
 - Changing hydraulic or pneumatic valves or lines
 - Removing jammed parts from machinery where a guard must be removed
 - Cleaning equipment when a guard must be removed

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- D. The Lockout/Tagout Program has three major components: 1) employee training, 2) operating procedures, and 3) periodic inspections.
1. **Employee Training:** The following six items will ensure that all employees receive adequate training in lockout/tagout procedures:
- a. Employee Training: Authorized Employee - Training for an authorized employee will include recognition of applicable hazardous energy sources, the type and magnitude of the energy available in the workplace, and the methods or means necessary for energy isolation control.
 - b. Employee Training: Affected Employee - Training for an affected employee will include an overview of the Lockout/Tagout Program, a review of the Lockout/Tagout procedures, and the prohibition from attempting to restart or re-energize machinery or equipment which is locked or tagged out.
 - c. As part of every new employee orientation, all affected employees will be instructed on lockout/tagout procedures. Also, each supervisor will have an authorized employee perform an actual lockout demonstration to all new hires. All new employees who are authorized to lockout/tagout will be trained by an authorized trainer.
 - d. Lockout/tagout training is to be reviewed annually with all employees. This training should be done at a routine safety meeting.
 - e. All employees (including maintenance employees) who will have the responsibility of locking out devices and machinery must be trained by an authorized trainer before being issued a lock or lockout/tagout device. These employees will be retrained annually on lockout/tagout procedures and methods.
 - f. Certification of Training (see attached training form or form issued by the authorized trainer) will be completed when an employee has received lockout/tagout training and will be retained in the personal file of each trained employee. A copy of the certificate should also be kept in a safety notebook or electronic folder at the facility for the length of employment of the employee.
2. **Operating Procedures:** Each facility should develop equipment specific lockout/tagout procedures. Such procedure should specifically identify the items listed below. Equipment specific lockout/tagout procedures must be developed for all equipment with an energy source.

The following six steps must be performed at a minimum to lockout/tagout and de-energize equipment.

- a. Preparation – Know the location the equipment is getting its energy source from before working on it.

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- b. Shutdown – Turn off the equipment as directed by the Company procedure. Check with a supervisor if you are unaware or unsure of any part of the shutdown.
- c. Isolation – Find and isolate every form of energy that the machine uses (see completed Energy Identification Sheet).
- d. Application – Locks or tags must be applied to all energy-isolating equipment, valves and switches. Anything that might restore the flow of energy to the work area must be locked out. Include tags with locks to help employees identify a lockout/tagout situation. Tags explain the work being done. If a piece of equipment cannot be locked out, the Facility Leader must be notified and advised how to proceed.

A crew or group working on a machine must have each authorized employee affixing their own lockout and tagout device before the work begins and each individual will remove their lockout/tagout device when the work is completed. Each individuals' key must remain on their person while a lockout/tagout device is in use.

Locks must be durable, so that they can withstand the environment to which they are exposed for the maximum period that exposure is expected. All locks must be singularly identified. All locks used for lockout must not be used for other purposes. All locks must be standardized within the facility with one of the following criteria: color, shape, or size. All locks must be identifiable, in that it indicates the identity of the employee applying the devices.

If the facility has equipment with multiple lockout/tagout points, the facility should create a "group lockout/tagout station". A group lockout/tagout station will contain 10 secure, identifiable locks that are keyed alike (but not keyed like any other lock), this will enable the authorized employee to lockout all lockout points simultaneously.

Tags are warning devices affixed to energy isolating devices and do not provide the physical restraint on those devices that is provided by a lock. A tag is attached to equipment is only to be removed by authorized personnel and it is never to be bypassed, ignored, or otherwise defeated. Tags must be legible and understandable by all employees. Tags, their markings and their means of attachment must be made of materials, which will withstand the environmental conditions encountered in the workplace. Tags must be securely attached to energy isolating devices so that they cannot be inadvertently or accidentally detached during use.

- e. Control – Even after equipment is locked out, you must control stored energy:
 - Relieve, disconnect or restrain any residual hazardous energy that could be present.
 - Check that all moving parts have stopped.
 - Relieve trapped pressure.
 - Install ground wires to discharge electrical capacitors.
 - Block or support elevated equipment.

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- f. Verify:
 - Verify that the equipment is in a zero-energy state.
 - Make sure every energy source is shut down, blocked off, controlled and locked or tagged out.
 - Warn everyone in the lockout/tagout area and be sure they are moved to a safe place.
 - Activate all controls that might restore power to the machine you are working on.
 - If equipment does not start, restore all controls to the OFF position and begin work.
- g. The following three steps must be performed when removing lockout/tagout devices and re-energizing equipment.
 1. Restore work area:
 - Remove all tools and double-check all equipment components.
 - Replace all safety features, such as machine guards.
 - Close access panels that were opened to perform service on equipment.
 2. Notify personnel - Notify all employees in that area that lockout/tagout devices are being removed.
 3. Remove lockout/tagout devices. The person who placed each device must be the one to remove it. If a lockout/tagout device is believed to be inadvertently left on a machine, the Facility Leader must make verbal contact with the individual to ensure it is acceptable to remove the device. In the event that the individual cannot be reached, controls must be in place to ensure that the equipment is unlocked in a safe manner prior to energizing the equipment and every attempt is made to notify the person who placed the lock. Under no circumstances shall a lock be removed without the Facility Leader's authorization.

3. Periodic Inspections: The effectiveness of the Equipment Lockout/Tagout Program will be evaluated in the following ways:

1. The authorized employee's supervisor is expected to exercise close supervision during the application and removal of energy isolating devices. In addition, area supervision will ensure that all affected personnel have been properly trained.
2. Three random audits shall be conducted by the authorized employee's supervisor, within six months, to ensure that procedures are being properly implemented. Such audit will be performed using a Lockout/Tagout Audit Form (see attached). Completed audit forms will be retained in a safety notebook or electronic folder at the facility for two years.
3. Should a deficiency in the program or in the knowledge of an employee be identified, the deficiency should be addressed with the Facility Leader and retraining of the authorized or affected employee will be required.



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- E. Outside Contractors: The outside contractor and the facility must exchange energy control information regarding the Signature Lockout/Tagout procedure, rules, and regulations, the type of lockout device to be used, and obtain a full understanding of one another's programs. Under no circumstances shall an outside contractor disregard the Signature Lockout/Tagout procedure. It is the Facility Leader's responsibility to ensure that outside contractors comply with the company procedures regarding lockout/tagout.
- F. Management will have a green lock to lock out any equipment that they feel is unsafe to operate. Management is the only one who can remove a green lock.
- G. Employees failing to comply with this procedure will be disciplined in accordance with normal progressive disciplinary procedures for the facility.

5.0 ATTACHMENT / FORMS:

- A. Energy Identification Sheet
- B. Lockout/Tagout Certificate of Training
- C. Lockout/Tagout Audit Form

6.0 PROCEDURE HISTORY

Original Issue - 7/2018
Revised – 10/2021
Revised – 1/2023

Facility Leader



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ATTACHMENT B – LOCKOUT/TAGOUT CERTIFICATE OF TRAINING

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Certificate of Training

This is to certify that

on this date

has completed the necessary training in

“Lockout/Tagout”

The employee named above was trained in safe practices and procedures, which included but were not limited to:

- Recognition of hazards energy
- Type and magnitude of energy found in the workplace
- The means and methods of isolating and/or controlling energy
- The means of verification of effective energy control, and the purpose of procedures to be used

Employee's Signature

Trainer's Signature

Facility Leader's Signature



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ATTACHMENT C – LOCKOUT/TAGOUT AUDIT FORM

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Supervisor performing audit: _____

Date of audit: _____

Location of audit: _____

Machine / Equipment audited: _____

Employee(s) audited: _____

Are all power sources isolated and locked out? Yes ☐ No ☐

(Check all that apply):

Electrical: ☐

Pneumatic: ☐

Hydraulic: ☐

Mechanical: ☐

Chemical: ☐

Thermal: ☐

Gravity/Raised Supports: ☐

NOTES: _____

Signature: _____

****This completed form shall be retained in the safety notebook or electronic folder at the facility for two years****