

Lockout Tagout Quick Reference Guide

The [Lockout Tagout \(LOTO\) Program](#) facilitates a consistent approach for performing LOTO to control the release of hazardous energy (electrical, mechanical, hydraulic, pneumatic, chemical, kinetic, thermal, or gravitational) during servicing and maintenance activities on production equipment and machinery (e.g., owned, leased, rented, etc.) when the unexpected energization or startup, or the release of stored energy could harm cast and crew members. This is achieved by utilizing training, procedures, and physical lockout tagout devices to de-energize and secure machinery and equipment.

Lockout The placement of a lockout device on an energy-isolating device, in accordance with an established procedure, ensuring that the energy-isolating device and the equipment being controlled cannot be operated until the lockout device is removed.

Tagout The placement of a tagout device on an energy-isolating device, in accordance with an established procedure, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tagout device is removed



When does this apply?

A crew member or third-party contractor performs service or maintenance activities such as constructing, installing, setting up, adjusting, inspecting, modifying, and maintaining and/or servicing machines or equipment. These activities include lubrication, cleaning, repair or unjamming of machines or equipment and making adjustments or tool changes, where the worker may be exposed to the unexpected energization or startup of the equipment or release of hazardous energy.

When does this not apply?

Work on “Cord and Plug” connected electric equipment for which exposure to the hazards of unexpected energizing or startup of the equipment is controlled by the unplugging of the equipment from the energy source and the plug is under exclusive control of the crew member when performing the servicing or maintenance.

Who this applies to

- **Authorized crew member:** A crew member who performs lockout tagout on machines or equipment during servicing or maintenance.
- **Affected crew member:** A crew member who is required to use machines or equipment on which servicing, or maintenance is performed under the lockout tagout standard, or who performs other job responsibilities in an area where such servicing is performed.
- **Other personnel:** All cast, crew, and visitors who are or may be in an area where lockout tagout procedures may be utilized.

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Lockout Tagout (LOTO) Procedures

Documented LOTO procedures are required for equipment and machinery where there are multiple energy sources requiring multiple lockout devices.

- When documented procedures are deemed necessary, procedures shall be documented by a trained and authorized crew member using the [Lockout Tagout Equipment Specific Procedure – Template](#)
- Contact your Production Safety Representative for further information and guidance.

When a documented procedure is not required, authorized crew members performing service or maintenance activities must still follow the Standard 8-steps of LOTO. The Standard 8-Steps of LOTO will guide trained and authorized crew members through the application of LOTO to any required equipment. Equipment specific manufacture operating manuals must also be referenced.

The following 8-Steps of LOTO shall be followed in sequence when service or maintenance activities on machines or equipment require the use of lockout tagout. The steps for LOTO should only be performed by a trained and authorized crew member or qualified third-party contractor, wearing the proper PPE, who is trained on and familiar with the specific machine or equipment. Refer to the LOTO Program for when [Equipment Specific Procedures](#) are required.

#	8-Steps of Lockout Tagout (LOTO)
1	Prepare for Shutdown and Notify Others
2	Shutdown the Machine or Equipment
3	Isolate All Energy Sources
4	Apply the Lock and Tag to the Energy Isolating Device
5	Dissipate Stored Energy
6	Verify the machine or equipment is in an isolated zero-energy state. Perform the work after verification.
7	Remove Lock and Tag
8	Release from Lockout Tagout and Notify Others

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LOTO Decision Tree

Before conducting servicing or maintenance on machinery or equipment, authorized crew members should utilize this decision tree to determine if LOTO is required to perform the work.

