



# The Importance of Lockout/Tagout

As the WorkSafe People™, we're experts at helping our customers keep their workers safe and their costs down.

One way to keep workers safe is through a dedication to Lockout/Tagout.

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## What is Lockout/Tagout?

Lockout/Tagout is the process of removing the energy source from a piece of machinery and then locking and tagging it. This procedure ensures that no one reconnects the energy source while a person is conducting maintenance or doing repairs. When lockout/tagout procedures are not adhered to, accidents can be catastrophic. Knowing the dangers and following the rules will keep your employees safe.

### Energy sources that require lockout can be:

- Chemical
- Electrical
- Gas/steam
- Gravitational
- Hydraulic
- Pneumatic

### Lockout of a device

A device utilizing a lock, either key or combination-type, to hold an energy-isolating device in the safe position, preventing the energizing of equipment.

### Tagout of a device

A warning device, such as a tag, that is securely fastened to an energy-isolating device indicating that the energy-isolating device and the equipment being controlled cannot be operated until the tag is removed.

## Who Is Authorized?

An authorized employee knows the equipment's energy sources and energy quantity, and means of control. Authorized employees must:

- Notify employees that the equipment will be shut down and locked out.
- Turn off the machine or equipment.
- Deactivate the energy control switch, circuit breaker, etc., and lock/tag it to prevent accidental start-up.

## Who is Affected?

An affected employee is exposed to equipment operation, but not normally authorized to perform maintenance.

- Affected employees must be notified when equipment is locked out.
- Affected employees must never attempt to bypass locks or tags.

## Preparing for Shutdown

Before servicing powered equipment, an authorized employee with knowledge of power sources and controls must follow these steps:

- Alert employees that equipment will be turned off and locked out.
- Turn off the machine or equipment and its energy control device.
- Lock the energy control switch in the "off" or "safe" position.
- Release or block any stored energy. Before maintenance or servicing work can begin, equipment must be at zero energy state (ZES).
- Check that power is off by turning controls "on" and trying to start the equipment.
- Return controls to the "off" position.

After performing the required service or maintenance, employees should take the following steps:

- Remove tools or other materials from the area.
- Replace machine guards and test that equipment is ready to operate.
- Tell employees to stay a safe distance away while locks or tags are removed.
- Remove the locks or tags.
- Turn on the equipment and make sure it operates properly.
- Inform employees that the equipment is ready to use.

## Requirements for an Effective Lockout/Tagout Policy

- Establish a written, documented lockout/tagout procedure.
- Make sure that all personnel are properly trained. Clearly indicate which employees are authorized to lockout/tagout and which aren't.
- Identify all machinery and equipment that needs lockout/tagout.
- Identify all energy sources on every single piece of equipment and machinery.
- Identify the best way to lockout each of the energy sources.
- Tagout ONLY those energy sources that cannot be locked out.
- Make sure that all locks and tags clearly identify the worker who put them on.
- Make sure that only the employee who put the lock or tag on is allowed or able to remove it.

## Want to know more?

As your WorkSafe Consultants, we're committed to providing you unrivaled loss control services and online safety materials, including:

- Safety-training modules accessible 24/7 for policyholders' employees
- Loss control booklets and other printed materials available to print and order from our website
- Low-cost safety-training videos from our online library

Check them out today at [AccidentFund.com](http://AccidentFund.com).

## Key Aspects of Lockout/Tagout

- The machine or equipment has no potential for stored or residual energy or the re-accumulation of stored energy after shut down.
- The machine or equipment has a single energy source readily identified and isolated.
- The isolation and locking out of the energy source will completely deactivate the machine or equipment.
- The machine or equipment is isolated from the energy source and locked out during maintenance.
- A single lockout device will achieve a locked-out condition.
- The lockout device is under the exclusive control of the authorized employee performing the maintenance.
- Maintenance does not create hazards for other employees.
- There have been no accidents during maintenance activities as a result of the failure to properly deactivate a machine.

## Exceptions to Lockout/Tagout

OSHA does not require a company to enforce lockout/tagout for adjustments and other minor changes that are part of the standard operation procedure. Additionally, any machine that has been determined as posing no danger to personnel during maintenance does not require lockout/tagout.

There may also be exceptions specific to your industry. You should research and be aware of all the rules, regulations and exceptions that might apply to your business.



