Lockout/Tagout (LOTO) Procedure Template

Machine-Specific Energy Control Procedure per OSHA 29 CFR 1910.147

Purpose:

This procedure establishes the minimum requirements for the lockout/tagout of energy isolating devices to prevent unexpected energization, startup, or release of stored energy during servicing and maintenance activities. This procedure shall be used to ensure that the equipment is isolated from all potentially hazardous energy sources and locked out before employees perform any service or maintenance activities.

Equipment Identification			
Equipment Name:		**Equipment ID/Tag:**	
Location/Area:		**Department:**	
Manufacturer:		**Model/Serial No:**	
Procedure Number:		**Revision Date:**	
Procedure Developed By:		**Approved By:**	

Scope of Work Covered:

Section 1: Energy Source Identification

Identify all energy sources that must be controlled during servicing and maintenance. Include magnitude (voltage, PSI, temperature, etc.) and specific isolation points.

#	Energy Type	Magnitude	Isolation Device	Location	Verification Method
1					
2					
3					
4					
5					
6					
7					
8					

Section 2: Required Materials and Equipment

- ☐ Lockout locks (Qty: ____)
- ☐ Tagout tags (Qty: ____)
- ☐ Valve lockouts (Qty: ____)
- ☐ Pneumatic lockouts
- ☐ Pressure gauges
- ☐ Lockout hasps (Qty: ____)
- ☐ Circuit breaker lockouts
- ☐ Plug/cord lockouts
- ☐ Voltage tester/multimeter
- ☐ Blocking/blanking devices
- ☐ Personal protective equipment (specify): _____

Section 3: Lockout Procedure (Shutdown Sequence)

Step	Lockout Steps - Perform in Order	☐	Initial
1	Notify all affected employees that a lockout is required and the reason for the lockout.	☐	
2	Identify all energy sources for this equipment using the energy source table above.	☐	
3	If the equipment is operating, shut it down using the normal stopping procedure (operating controls).	☐	
4	Operate the disconnect switch, valve, or other energy isolating device(s) to isolate the equipment from its energy source(s).	☐	
5	Dissipate or restrain any stored energy (capacitors, springs, elevated components, rotating flywheels, hydraulic/pneumatic/steam pressure).	☐	
6	Lockout the energy isolating device(s) with assigned individual lock(s) and tag(s).	☐	
7	Verify isolation by attempting to restart equipment using normal operating controls. Return controls to OFF/NEUTRAL position.	☐	
8	Test all circuits/components with appropriate testing equipment to verify de-energization.	☐	
9	The equipment is now locked out and work may begin.	☐	

Section 4: Restoration Procedure (Re-Energization Sequence)

Step	Restoration Steps - Perform in Order	☐	Initial
1	Inspect the work area to ensure all tools, equipment, and non-essential items have been removed.	☐	
2	Verify that all employees are safely positioned away from the equipment.	☐	
3	Verify that all machine guards and safety devices have been reinstalled and are functional.	☐	
4	Notify affected employees that the lockout device(s) will be removed.	☐	
5	Remove all lockout/tagout devices. Each lock shall be removed by the employee who applied it.	☐	
6	Re-energize equipment by operating energy isolating device(s) in proper sequence.	☐	
7	Verify proper operation of the equipment including all safety systems.	☐	
8	Notify affected employees that servicing is complete and equipment is ready for operation.	☐	

Section 5: Special Conditions

Shift/Personnel Change Procedure:

When lockout must extend beyond a single shift, the oncoming authorized employee shall apply their lock before the outgoing employee removes their lock. Direct communication between employees is required.

Group Lockout Procedure:

When multiple employees are involved in servicing, each authorized employee shall place their personal lock on a group lockout device (hasp). A designated authorized employee shall have primary responsibility for coordinating the lockout and ensuring continuity of protection.

Primary Authorized Employee:	
Group Lockout Device Location:	

Temporary Removal for Testing/Positioning:

- ☐ Clear equipment of tools and materials
- ☐ Remove employees from the machine/equipment area
- ☐ Remove lockout/tagout devices
- ☐ Energize and proceed with testing/positioning
- ☐ De-energize all systems and reapply lockout/tagout devices
- ☐ Continue servicing activities

Section 6: Authorized Personnel

The following employees are authorized to perform lockout/tagout on this equipment:

Name	Role	Department	Training Date	Signature

Section 7: Lockout Application Log

Date	Time On	Employee Name	Lock #	Reason	Time Off	Initial

Procedure Approval			
Prepared By:		**Date:**	
Reviewed By:		**Date:**	
Approved By:		**Date:**	
Annual Review Required:	☐ Yes ☐ No	**Next Review Date:**	

Regulatory References

OSHA 29 CFR 1910.147 - The Control of Hazardous Energy (Lockout/Tagout)
OSHA 29 CFR 1910.333 - Selection and Use of Work Practices (Electrical)
ANSI/ASSE Z244.1 - Control of Hazardous Energy
NFPA 70E - Standard for Electrical Safety in the Workplace

WARNING: Failure to follow proper lockout/tagout procedures can result in serious injury or death from unexpected equipment startup or release of stored energy. Only authorized employees who have been trained on this specific procedure may perform lockout/tagout on this equipment. This procedure must be reviewed annually and updated whenever equipment modifications occur.

This LOTO procedure template is provided as a guide for developing machine-specific lockout/tagout procedures in compliance with OSHA 29 CFR 1910.147. Users must customize this template based on their specific equipment, energy sources, and operational requirements. First Underwriters Insurance Brokers recommends developing written procedures for each piece of equipment requiring lockout/tagout and training all affected and authorized employees. Retain completed procedures as part of your energy control program documentation.