

TOOL TYPE **CHECKLIST**

LAST REVIEWED **010/3/13**

GEOGRAPHY **US**

SOURCE:  
**SANDIA LABS**

## **LOCKOUT TAGOUT CHECKLIST**

**THE PROBLEM:** The OSHA Lockout Tagout Standard ([Sec. 1910.147](#)) requires you to establish a LOTO procedure to deenergize machinery and equipment and lock out or isolate the energization source so that it doesn't inadvertently start up while it's being serviced or repaired. Although procedures vary depending on the kinds of machinery, equipment and operations involved, there's a specific sequence you must follow to shut down, service and re-start the machinery or equipment.

**HOW TOOL HELPS SOLVE THE PROBLEM:** Here's a Checklist you can adapt and use to evaluate whether your LOTO procedure follows the sequence required by the OSHA standard.

# LOCKOUT TAGOUT CHECKLIST

**INSTRUCTIONS:** *You should be able to answer YES to each listed measure. For any item to which you answer NO, attach an explanation and a description of any corrective action taken to address the situation.*

Lockout/Tagout (LOTO) Procedure Checklist		
Steps to Apply LOTO		
Step		Action
1.	<input type="checkbox"/>	Prepare for shutdown. <input type="checkbox"/> Notify affected workers. <input type="checkbox"/> Review procedures. <input type="checkbox"/> Identify all energy sources. <input type="checkbox"/> Ensure all isolating devices will accept lockout/tagout devices. <input type="checkbox"/> Gather necessary tools, equipment. <input type="checkbox"/> Identify any supporting equipment or systems that must also be shutdown.
2.	<input type="checkbox"/>	Shutdown equipment by normal methods <b>Note:</b> Use an orderly shutdown to avoid additional hazards.
3.	<input type="checkbox"/>	Isolate or block all energy sources for the equipment.
4.	<input type="checkbox"/>	Apply lockout locks and tags.
	<input type="checkbox"/>	Affix devices, tags, and locks to each energy-isolating device in a safe or off configuration.
5.	<input type="checkbox"/>	Release all stored energy.

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	<input type="checkbox"/>	Release, restrain, block, disconnect, or otherwise render residual or stored energy safe.
	<input type="checkbox"/>	Use energy drains (drain pressurized lines, free-wheeling shafts, active ground) whenever possible.
	<input type="checkbox"/>	If energy can re-accumulate during shutdown, continually verify a safe energy level until lockout/tagout is removed.
6.	<input type="checkbox"/>	Physically verify energy isolation by operating controls or measuring the energy state (use a meter to verify zero energy per NFPA 70E Article 120, operate the startup controls).  <b>Note:</b> If the worksite has been left unattended, repeat Step 6 and verify the integrity of locks and tags (against tampering) before continuing work.
7.	<input type="checkbox"/>	Perform Work
<b>Steps to remove LOTO</b>		
1.	<input type="checkbox"/>	Inspect the work area to ensure that nonessential items have been removed and the work has been completed.
2.	<input type="checkbox"/>	Ensure that the work area is clear of personnel.
3.	<input type="checkbox"/>	Remove LOTO devices
4.	<input type="checkbox"/>	Inform affected employees that the work has been completed and that locks and tags have been removed.
5.	<input type="checkbox"/>	Restore Equipment to service.

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