



Lockout/Tagout Procedures for Maintenance Staff

Loss Control Bulletin

Every week, against company policies, workers fail to lockout machinery or electrical circuits before working on them. Often the task to be done is expected to take just a few moments and taking pre-cautionary steps just doesn't appear to be worth the extra time and effort. Nothing could be more wrong!

Failing to properly lockout equipment before working on it can result in serious injury or death. Workers may be electrocuted, suffer amputated fingers, hands, and legs or other severe crushing injuries when machinery or electrical circuits are inadvertently turned on by others while repairs are being completed. A well-designed and enforced Lockout/Tagout program can prevent such events.

Regulatory Requirements

Federal and state safety regulations require employers to implement Lockout/Tagout Programs (also known as Control of Hazardous Energy Programs) that establish procedures to de-energize and prevent accidental re-activation of equipment while maintenance work is ongoing. Forms of energy covered by this standard include:

- Electrical pneumatic hydraulic thermal (steam)
- Stored electrical energy (battery, capacitor, solar)
- Stored mechanical energy (spring loaded, gravitational).

What employers must do:

Employers need to recognize all job tasks where lockout procedures must be followed and develop a plan that assures such tasks are always performed safely.

1. Written Lockout/Tagout procedures need to be developed and communicated to maintenance personnel and equipment operators.
2. Authorized employees who can shut down equipment or electrical circuits should be designated.
3. An authorized person should make a survey of all equipment and maintenance work responsibilities to determine if there are machines or electrical circuits that need to be locked out during maintenance.
4. Once the equipment and machinery survey has been completed, appropriate lockout devices must be purchased for use by the maintenance staff. Lockout devices can be purchased for circuit breakers, wall switches, electrical disconnects, and plugs.
5. Lockout devices need to be assigned to specific individuals.
6. It is essential to enforce the use of lockout procedures, including the use of disciplinary procedures to assure compliance by all personnel.

For most maintenance employees working at day care centers, nursing homes, adult care centers, medical clinics, and social centers, lockout procedures must be followed when working on electrical circuits, repairing light switches, light fixtures, electrical outlets, and small appliances.



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Whether it's a machine or light switch that is being locked out, basic procedures to follow include:

- Obtaining the proper lockout devices.
- Lockout devices should have the workers name on the devices or tag. Only the named employee should have a key to the device and be authorized to remove locking device and tags.
- Notify all affected employees who work with or near equipment prior to locking out any electrical circuit or equipment that the power will be turned off.
- Before starting to work on any equipment, all forms of energy source must be disconnected, disengaged, or drained from the equipment to prevent unexpected movement or contact with energized equipment. If the equipment to be worked on plugs directly into an outlet that cannot be de-energized, use of a plug lockout will prevent someone else from plugging it in without the worker's knowledge.
- Check the electrical circuit or other source of power using proper testing equipment to make certain all stored energy has been discharged.
- Attach lockout tags that indicate the reason for placing the tag, the name of the person placing the tag, how the person may be contacted, and the date and time the tag was placed.

*****VERY IMPORTANT***** Once equipment, electrical circuits or switches have been locked out, no one other than the assigned maintenance worker should attempt to remove the lockout device(s).

After repairs are made and before removing lockout devices:

- Make certain that all the work is completed.
- Tools and equipment used are removed from the area.
- Clean up all towels, rags, and work aids.
- Replace all machine guards that may have been removed and ensure that all employees are safely positioned and notified that the lockout devices are being removed.
- Remove lockout devices and tags.

Establishing an effective Lockout/Tagout program is essential to protect maintenance staff against the possibility of being seriously injured or killed while working on powered equipment.

Before setting up your company's Lockout/Tagout program, be sure to review all the regulatory requirements.

Additional information concerning lockout/tagout/block out may be obtained by contacting your Republic Indemnity Loss Control Consultant or by contacting the Division of Occupational Safety and Health.

The guidelines provided in this bulletin are only intended to provide an overview of some of the more important steps that can be taken by management to establish a safe workplace. The guidelines are not considered exhaustive of all measures and controls that can be implemented by management to address all potential loss or injury producing causes. Ultimately it is the responsibility of management to take the necessary steps to provide for employee and customer safety. It is not intended as an offer to write insurance for such conditions or exposures. The liability of Republic Indemnity Company of America and its affiliated insurers is limited to the terms, limits and conditions of the insurance policies underwritten by any of them. © 2022 Republic Indemnity of America, 4500 Park Granada, Suite 300, Calabasas, CA 91302.