

EIP CHECKLISTS

GROUP LOCKOUT/TAGOUT

In the whitepaper, "Machine Safeguarding, LOTO, and Electrical Safety: Integral and Interrelated," Travis Rhoden of J.J. Keller & Associates, Inc. says some basic steps apply to every lockout procedure:

- Prepare for shutdown (review the procedure and identify the machine's energy sources)**
- Shutdown**
- Notification of affected employees**
- Equipment isolation**
- Applying LOTO devices**
- Releasing stored energy**
- Verification that the machine is isolated**

Here are some checklists for various workers' tasks during a more complicated lockout or tagout – one involving multiple employees, multiple shifts or multiple energy sources.

Lead Authorized Worker Checklist

- Review the energy isolation plan.**
- Get permission to remove equipment from service.**
- Notify affected workers before removing equipment from service.**
- Shut down equipment.**
- Apply a color-coded personal lock and color-coded master lock to the group lockbox on the equipment. The master lock is the first to be applied and the last to be removed.**
- In the case of shift or personnel changes, ensure the orderly transfer from off-going employees to on-coming employees.**
- When informed that service or repair is complete, the primary authorized worker verifies all authorized workers are signed off and all locks and tags have been removed.**

Lead Authorized Worker Checklist Continued

- After locks have been removed, check the area and machine to make sure energy can be safely restored and that machine controls are in off position before removing personal lock.
- Notify affected workers before restoring equipment to service.

Qualified Electrical Worker Checklist

- Assist lead authorized worker in isolating energy sources.
- Perform and sign off on zero voltage verification.

Authorized Worker Checklist

- Assist lead authorized worker in isolating energy sources.
- Each employee performing servicing or maintenance activities affected by the EIP must affix their own device to the group LOTO device.
- Authorized workers coming on-shift to work on equipment that has already been locked out should reaffirm that the equipment has been de-energized.
- Complete service or repair.
- When service or repair is complete, inform the primary authorized worker of their intent to lock off and remove their locks from the group lockbox or device.

Outside Personnel Checklist

- Discuss energy isolation plans with onsite employer.
- Either plan can be used as long as it meets the OSHA standard, but each employer has a responsibility to protect its employees from hazardous energy.
- All employees, contract or onsite, must abide by the rules of the energy isolation plan in use.