Lockout/Tagout: Performance Evaluation Checklist

Name: ___________________________ Date: ___________________________

Directions: Place a check in the box to indicate whether each task has been performed with 100% accuracy.

1. Preparation
   - Go to Maintenance Department
   - Locate blue “Lockout/Tagout” binder
   - Refer to inventory sheets in binder
   - Locate and identify all energy-isolating devices

2. Notification
   - Verbally inform all affected employees of lockout
   - Advise when procedure is beginning and why

3. Shutdown
   - Use operating controls to shut machine down
   - Follow right procedure for equipment
   - Make sure no one is endangered by shutdown

4. Isolation
   - Try all energy-isolating devices
   - Verify equipment is isolated from energy sources
   - Do not pull an electrical switch while under load
   - Do not remove a fuse instead of disconnecting

5. Apply Lockout/Tagout Devices
   - Use both a padlock and “danger” tag
   - Exceptions: Where maintenance is being performed and power is necessary to check operation; where no provision or means of “locking out”
   - Sign and date tag
   - Use safety lockout if padlock cannot be placed directly on the energy control
   - Use 3/8” lockable chains or looped cables to lockout valves or levers
   - Attach a “danger” tag to chain or cable
   - Test disconnect after applying device to make sure it cannot be moved to “on” position
   - At end of shift do not remove padlock until oncoming employee applies his padlock

6. Release Residual or Stored Energy
   - Relieve trapped pressure
   - Release tension on springs
   - Block movement of spring-driven parts
   - Block or brace parts that could fall because of gravity
   - Block parts that could move because of loss of pressure

Our safety evaluations, reports and recommendations are made solely to assist your organization in reducing hazards and the potential of hazards and accidents. These recommendations were developed from conditions observed and information provided at the time of our visit. They do not attempt to identify every possible loss potential, hazard or risk, nor do they guarantee that workplace accidents will be prevented. These safety evaluations, reports and recommendations are not a substitute for ongoing, well-researched internal safety and risk management programs. This report does not warrant that the property inspected and its operations are compliant with any law, rule or regulation.

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