

LOCKOUT/TAGOUT/BLOCKOUT POLICY
(Review and sign annually)

(Insert Company Name)

My signature below indicates that I have read and approved the most recent version of the Lockout/Tagout/Blockout Policy and it is current.

Name	Title	Date	Signature
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LOCKOUT/TAGOUT OVERVIEW

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INTRODUCTION

When servicing or performing maintenance on equipment or machinery, you must be sure that the equipment cannot unexpectedly start- up or release stored energy. How is this done? The procedure for isolating the energy sources is called lockout/tagout (LO/TO). This manual presents the LO/TO procedures. It covers the recognition of hazardous energy sources, hazardous energy sources in use at the facility, and isolation and control of energy sources.

As employees who service and perform maintenance on the equipment in this facility, you need to know how to avoid the dangers involved when hazardous energy sources are not locked out and or tagged out. You must know, understand, and perform LO/TO properly. This manual provides the proper procedures for LO/TO. The information covered in this manual includes preparation for shutdown, isolation, lock and tag application, release of stored energy, verification of energy isolation, performance of work, and termination of LO/TO.

The OSHA LO/TO regulations (29 CFR 1910.147) (Title 8 CCR 3314) apply anytime you are servicing and/or performing maintenance during normal business hours requiring you to bypass a guard or safety device or place any part of your body into a point of operation or danger zone.

1. PURPOSE

The purpose of the Lockout/Tagout Policies and Procedures Manual is to prevent machines and equipment from unexpectedly starting, energizing, or otherwise moving during servicing and maintenance and thereby causing harm and injury to employees.

2. SCOPE

This procedure establishes the minimum requirements for the Lockout/Tagout of energy isolating devices whenever maintenance or servicing is done on machines or equipment. It shall be used to ensure that a machine or equipment is stopped, isolated from all potentially hazardous energy sources and locked and/or tagged out before employees perform any servicing or maintenance where the unexpected energization or start-up of the machine or equipment or release of stored energy could cause injury.

3. RESPONSIBILITY

It is the responsibility of the Chief Engineer, Assistant Chief Engineer, Operations Manager, Production Manager to verify that LO/TO is performed in accordance with this program and procedure.

It is the responsibility of the Chief Engineer, Operations Manager, or Production Manager to ensure that training is performed or bring in qualified personnel to perform the necessary training.

Policy Statement

This Lockout/Tagout (LO/TO) program has been developed to establish and clearly communicate the intentions of (insert Company Name) in regards to company lockout/tagout/blockout procedures. These procedures are established to ensure that before any employee performs any servicing or maintenance on a machine or equipment where “the unexpected energization, start-up of the machines or release of stored energy could cause injury” the machine or equipment is isolated from the energy source and rendered inoperative.

These procedures apply to the control of energy during servicing and/or maintenance of machines and equipment. Normal production operations are not covered. Servicing and/or maintenance which takes place during normal production operations will fall under these procedures if:

- An employee is required to remove or bypass a guard or other safety device.
- An employee is required to place any part of his/her body into an area on a machine, or piece of equipment where work is actually performed on the material being processed (point of operation), or where an associated danger zone exists during a machine operating cycle.

Exceptions:

- Minor tool changes and adjustments, and other minor servicing activities, which take place during normal production operations, are not covered if they are routine, repetitive and integral to the use of the equipment for production.
- FWI pad/cover and apron replacement (Appendix A & B)
- Specific exceptions authorized by the Risk, Safety and Engineering departments. (Appendix C)

These exceptions are applicable, provided that the work is performed using alternative measures that provide effective protection in accordance with company operational procedures.

This program contains specific procedural steps in accordance with applicable federal and state laws and is adopted as company policy to be followed by all employees. Only authorized employees, as defined in this policy, are permitted to participate in lockout/tagout procedures. Any employee(s) found to be in violation of this policy and associated procedures would receive disciplinary actions up to and including immediate termination.

****Only a person with a current LO/TO or Confined Space Entry Train the Trainer Certificate is allowed to train “Authorized” co-workers. Certificates are valid for only one year from date of issue*.***

This policy and the procedures attached are fully endorsed by our management and will be fully and regularly employed during applicable exposures as described above for all situations where inside work or outside contractors pose a risk to our workforce and operations. This will be considered a key point for accountability in our safety and health program. It is primary for the preservation of our most vital resource...our employees.

District or General Manager

Date

LOCKOUT/TAGOUT PROGRAM CONTENTS AND PROCEDURES

This program and its procedures require specific methods for affixing appropriate lockout devices or tagout devices to energy isolating devices, and to disable machines/equipment to prevent unexpected energization, startup or release of stored energy. The elements included in (insert Company Name) Lockout/Tagout/Blockout Program are as follows:

- **Written Program:** To be reviewed and evaluated annually or when changes occur to **(29 CFR 1910.147) (Title 8 CCR 3314)** that prompt revision, or when operational changes occur. This program will be communicated to all persons affected by the risk of injury and subject to the training standards contained herein. Training and communication will be directed to both authorized and affected persons as defined in the OSHA standard
- **Lockout:** If an energy-isolating device is capable of being locked out, the energy control program will utilize lockout and will, at the same time, use an effective means of labeling the lock with a “tag” of consistent and uniform format so that everyone who encounters this tag in use will know of its intent and how to avoid danger.
- **Future Requirements:** Whenever replacement or major repair, renovation or modification of a machine or equipment is performed, and whenever new machines or equipment are installed, energy isolating devices for such machine or equipment will be designed to accept a lockout device.

Energy Control Procedures

The District/General Manager will be ultimately responsible for implementing these procedures. The procedures will clearly outline the scope, purpose, authorization, rules and techniques to be utilized for the control of hazardous energy, and the means to enforce compliance, including, but not limited to:

- A specific statement of the intended use of the procedure.
- Specific procedural steps for shutting down, isolating, blocking and securing machines or equipment to control hazardous energy (The manufacturer’s specifications for lockout/tagout will be used whenever available).
- Specific procedural steps for the placement, removal and transfer of lockout/tagout devices and the person(s) responsible for them.
- Specific requirements for testing a machine or equipment to determine and verify the effectiveness of lockout/tagout devices and other energy control measures.

Facility Evaluation: The Chief Engineer along with Plant Management will evaluate the facility, by department, to determine which machines or pieces of equipment require steps for shutting down, isolating, blocking and securing machines or equipment to control hazardous energy. A complete listing of machines and equipment is included in this policy.

Compliance Enforcement: To ensure that all personnel follow the policy and procedures as articulated herein, enforcement would consist of progressive disciplinary actions up to and including termination in accordance with (insert Company Name) Personnel Policy.

DEFINITIONS

The following definitions have been included to help clarify key words or concepts used in this lockout/tagout program.

1. Affected Employee	All employees who operate or use a machine or any equipment which is subject to lockout/tagout procedures for servicing or maintenance; or who works in an area where such procedures are used.
2. Authorized Employee	A trained employee who locks out or tags out machines or equipment in order to perform servicing or maintenance. Regional and Plant Engineers are authorized employees. Certain Affected Employees can be considered Authorized Employees when the work they perform requires Lockout/Tagout.
3. Energy Isolating Device	A mechanical device that will physically block or isolate energy or prevent its transmission. Examples may be: an electrical circuit breaker, a block, a disconnect switch, a line valve. *PUSH BUTTONS and selector switches are not energy isolating devices.
4. Energy Source	Any source of electrical, mechanical, hydraulic (this includes fluids--water, steam and oil under pressure), pneumatic, chemical, thermal, electromagnetic or other energy.
5. Lockout Device	A device that isolates energy sources, for example: a padlock, chain with lock, blocks, breaker lockouts, gate valve lockouts, valve lockouts, wall switch lockouts, fuse and plug lockouts.
6. Tagout	Placing a warning device in the form of a tag on the energy isolating device. For example: placing a warning tag on a manually operated circuit breaker, a disconnect switch or safety switch, a line valve, or on similar devices used to block or isolate energy. Tag shall be dated when applied. *THE TAG INDICATES THAT THE EQUIPMENT SHALL NOT BE OPERATED UNTIL SUCH A TIME AS AN "AUTHORIZED" EMPLOYEE REMOVES THE TAG.
7. Servicing and/or Maintenance	Work activities such as constructing, installing, adjusting, inspecting, modifying and servicing or maintaining. Activities may also include lubrication, cleaning or un-jamming machines or equipment and making adjustments, where an employee may be exposed to the unexpected energization or start-up of equipment or release of hazardous energy.

Removal Requirements:

- Lockout devices: Lockout devices must be substantial enough to prevent removal without the use of excessive force or unusual techniques, such as using bolt cutters or other metal cutting tools.
- Tagout devices: Tagout devices and ties must be substantial enough to prevent the inadvertent or accidental removal. The tagout device must be non-reusable, attachable by hand and self-locking.

Identification Requirements:

- Lockout /tagout devices must indicate the singular identity of the employee applying the device(s).
- Tagout devices will warn against hazardous conditions if the machine or equipment is energized. The tagout devices must include a sign stating “Do Not Start” or “Do Not Operate”.

Inspections:

- **Plant Management and Engineering** will conduct a periodic inspection of the energy control procedures for each machine or piece of equipment at least annually. This periodic inspection is conducted to ensure that the procedure and requirements are being followed.
- **Inspections and training:** will be conducted by a designated person who will be trained as a trainer at each location at the “authorized” level by the Corporate Safety department. This person can be the Chief Engineer, Production/Operations Manager or General Manager. They will then be responsible for conducting all required training at the “authorized” level within their location.
- **Lockout/Tagout inspections:** Where a lockout/tagout device is used for energy control, an annual inspection will be conducted. The inspection will include a review between the inspector and each authorized employee of that coworker’s responsibilities under the (insert Company Name) energy control procedures.
- **Certifications:** The District/General Manager will certify that the annual inspection has been performed. The certification will identify:
 - ❖ The machine or equipment on which the energy controls procedure was being utilized.
 - ❖ The date of the inspection.
 - ❖ The employees included in the inspection.
 - ❖ The person performing the inspection.

Formal Lockout/Tagout/Blockout Procedures

Release from Lockout/Tagout (RESTARTING EQUIPMENT)

Prior to removing lockout/tagout devices and restoring energy to the machine or equipment, the authorized employee(s) must conduct the following procedures:

- Machine or equipment: Inspect the work area to ensure that non-essential items have been removed and that the machine or equipment components are functional. Verify that any machine safeguards and devices that were removed have been properly re-installed. If safety distance was used as a primary control, and it was changed or compromised during the lockout process, it must be re-calculated and fixed at the proper position. Verify that the controls are in the “off” position.
- Employees: The work area will be checked to ensure that all employees have been safely positioned or removed. After lockout/tagout devices are removed and before a machine or equipment is started, affected employees will be notified that the lockout/tagout device(s) have been removed.
- Lockout/Tagout devices removal: Each lockout/tagout device will be removed from each energy-isolating device by the authorized employee who applied the device. When the authorized employee who applied the device is unavailable to remove it procedures set forth in Section 8 of this policy will be followed. The District/General Manager of the facility will coordinate these procedures.
- After removing the lockout/tagout device from the energy-isolating device, test the equipment to ensure that it is operationally safe to use.

Energized Testing of Equipment, Machines or Components

When the lockout/tagout device must be temporarily removed, and the machine re-energized, test or position the machine by:

- Clear the machine or equipment of tools and materials.
- Remove employees from the machinery or equipment area by verbally notifying all employees and the supervisors and then verifying exit.
- Remove the lockout or tagout device as specified as part of the individual machine procedures.
- Energize and test, reposition or activate machinery or equipment as needed.
- De-energize as previously done and reapply the lockout or tagout device. Test to ensure there is no activation and continue to service as started prior to the temporary start-up.
- Be certain to return operating controls to neutral or “off” position after verifying isolation of the equipment.
- Energizing equipment or machinery for testing purposes is considered an “attended task”, i.e. an attendant will be stationed in a safe location to ensure that no hazards are introduced from surrounding areas.

Procedure for Group Lockout/Tagout

- When more than one authorized employee is required to service or perform maintenance on machinery or equipment, each employee involved shall place his/her lock on the energy isolating device(s) by following the established policy and procedures. If the energy-isolating device cannot accept additional locks, a multiple locking device such as a HASP can be used. Each employee shall remove his/her lock when finished working on the equipment. The Chief Engineer shall coordinate the lockout procedure to ensure that each employee is afforded protection from the lockout.

Procedure for Using Tagout Instead of Lockout:

- If and only if machines or equipment are not equipped with lockable controls or readily adaptable to be locked, they will be secured with signs or tags. Signs or tags shall be of a non-reusable type, attached by hand, self-locking, and non-releasable with minimum unlocking strength of no less than 50 pounds. Each tag must also insularly identify the person who applied it.
- In all cases, signs or tags must be placed on the controls of the machines or equipment during repair work to clearly indicate that the operation or movement of energy isolating devices from the “safe” or “off” position is prohibited. Signs or tags should have the appropriate wording:

“Do not start, Do not open, Do not close, Do not operate”

Procedure When the Employee Is Not Available To Remove His Lockout Device

- When the authorized employee who applied the lockout or tagout device is not available to remove it, removal shall only be allowed by the Chief Engineer or an authorized Engineer, provided that the following procedures have been followed:
 - The authorized employee has signed a statement acknowledging that he left his lock on the equipment and that he understands that the repairs may be completed before he returns. The employee must also identify the status of the lockout relative to the completion of the repair.
 - The authorized employee shall leave the key to the lock with the statement both contained in the site LO/TO log.
 - The Chief Engineer shall verify that the employee who applied the device is no longer at the facility.
 - A reasonable effort shall be made to contact the employee to advise him/her that his/her lockout or tagout device has been removed.
 - A hazard assessment must be conducted and verified by the Chief Engineer that no hazards exist.
 - The lock shall be removed from the energy-isolating device.

- The employee shall be notified of the removal of the lock prior to returning to work at the facility. The employee shall sign a statement acknowledging that he understands his lock has been removed.
- The employee shall be issued a new lock.

Shift Changes During Lockout:

- When a shift change occurs before servicing or maintenance requiring lockout or tagout procedures is completed, enough time shall be allotted for the outgoing Engineer(s) to completely inform the incoming Engineer(s) on the progress of all activity taking place; and to provide for the orderly transfer of lockout or tagout devices.
- The Chief Engineer shall supervise the transfer of lockout devices.

Outside Contractors

- Whenever outside servicing personnel are contracted to perform activities covered by this policy the Plant Engineer/Regional Engineer and the outside contractor will inform each other of the respective lockout/tagout procedures.
- The Chief Engineer will ensure that (insert Company Name) employees understand and comply with the outside employer's energy control program.
- A copy of the contractor's plan will be compared with the (insert Company Name) plan. The contracting company's official will be required to sign a Contractor's agreement (page 31 of this program) stating that they will follow all (insert Company Name) policies, which are unique to our equipment and operations. This agreement will be maintained with the contractor file and retained after completion of the job.
- The District/General Manager will inspect the work of the contractor to assure that the agreement is being upheld. Any problem or lack of follow-through with the lockout procedure, as identified in the agreement will be grounds for work to be temporarily halted and re-evaluated. Disregard for the policy and procedure in this plan will be grounds for actions as stipulated in the contract.

Training

- **Initial Training:** (insert Company Name) Safety or Human Resources Director will facilitate/coordinate, or provide training to ensure that the purpose and function of the Lockout/Tagout energy control program is understood by all employees, and that the knowledge and skills required for the safe application, usage and removal of the energy controls is acquired by employees.
 - Each authorized employee will receive training in the recognition of applicable hazardous energy sources, the type and magnitude of the energy available in the workplace, and the methods and means

necessary for energy isolation and control. Additionally, authorized employees must learn the reasons various forms of energy must be controlled.

- Each affected employee will be instructed in the purpose and use of the energy control procedure. Affected employees must understand what a lockout/tagout means and what procedures must be followed to restart equipment or machinery.
- All other employees whose work operations are or may be in an area where energy control procedures may be utilized, will be instructed about the procedure, and about the prohibition relating to attempts to re-start or re-energize machines or equipment which are locked or tagged out.
- Documentation of training on the Lockout/Tagout program is required for all authorized employees. Authorized employees must be knowledgeable of the safety procedures. A quiz on lockout/tagout policies and procedures is included in the appendix. It should be taken after training to verify comprehension.
- Each authorized employee must sign the annual certification of the program to acknowledge training.

Training for Tagout

- When using a tag instead of a locking device, authorized employees must be informed of the following:
 - Tags are essentially written warning devices and DO NOT provide the same restraint on devices that a lock does.
 - When a tag is attached to machinery or equipment, or an energy isolating device, it cannot be removed without authorization from the person responsible for it. The tag must be attached so that it cannot become accidentally detached.
 - All tags must be legible and understandable by the authorized employee and all other employees whose work can or may be in the area.
 - Tags and their means of attachment must be made to withstand the work area conditions such as wet, humid, oily or chemical environments.

Refresher Training (RETRAINING)

- Training will be provided for authorized employees at the following times:
 - Annually.
 - Whenever there is a change in their job assignments; a change in machines, equipment or processes that presents a new hazard; or when there is a change in the lockout/tagout procedure in the OSHA standard.

- When a periodic inspections reveals, or the District/General Manager or an Engineer feels that there are deviations from or inadequacies in the employee's knowledge or use of the energy control procedures. The retraining will re-establish employee proficiency and introduce new or revised control methods and procedures as necessary.

Format of Training

- Training will be conducted using the "Lockout/Tagout" video.
- Training will be conducted in a small group format including the "Authorized Employees" (plant maintenance personnel), "Affected Employees" including, but not limited to the Production Manager and Production Supervisors.
- All procedures specific to (insert Company Name) will be reviewed at the training.
- All authorized employees will be trained in conducting risk assessment for, at least, one piece of equipment.
- All authorized employees will sign off on the Lockout/Tag out Training document for the site stating that they have received training in the Lockout/Tagout program.

Training for "Affected and Other" workers

- Affected personnel (Those who operate the equipment)-shall be instructed in the purpose and use of the energy control procedures.
 - The purpose for LO/TO is to protect them and others from injury by preventing the operation of the equipment while it is being repaired or serviced.
 - Energy control procedures will be used any time a piece of equipment is being repaired or serviced.
 - "Authorized" personnel, only, shall use energy control procedures for removing jams from equipment.
 - Demonstrate a lockout/tagout device for all affected personnel so that they are able to recognize when LO/TO is in effect.
 - Affected personnel shall be instructed about the prohibition relating to attempts to restart or reenergize machines that are locked out.
 - Personnel shall be instructed that failure to observe LO/TO will result in disciplinary action up to and including termination.
- Other personnel: (Those who may be in the area, but do not operate equipment, e.g. Service Department personnel)
 - Shall be instructed on the purpose of LO/TO.
 - Shall be instructed in the appearance of a lockout/tagout.
 - Shall be instructed about the prohibition relating to attempts to restart or reenergize machines that are locked out.
 - Shall be instructed that failure to observe LO/TO will result in disciplinary action, up to and including termination.

Cords and Plugs

- Work on cord and plug connected electrical equipment requires that both of the following conditions are met:
 - Power to the equipment is completely removed by unplugging.
 - A plug canister lockout device is applied to the end of the plug before any/all work is performed on the equipment being repaired.

Exceptions to Lockout/Tagout

- Minor tool changes and adjustments, and other minor servicing activities which take place during normal operations are not covered if the following conditions apply:
 - They are routine, repetitive, and integral to the use of the equipment or machinery for production.
 - Alternative measures that provide effective protection are provided.
- For FWI pad/cover and apron replacement, procedures outlined in Appendix A and B will be followed.
- For specific, corporate approved exceptions to the “Zero Energy” rule, procedures outlined in Appendix C will be followed.
- Cord and plug exception has been removed. Cord and plug lockouts are to use canister lockout device.

Lockout/Tagout Procedures for New Equipment

- Whenever new equipment or machinery is received at the facility a hazard (risk) assessment must be conducted **prior to start up** to determine each of the energy sources, the energy isolating devices and the means necessary to control the energy. The assessment must further confirm that there is lockout capability for the equipment.
 - The assessment is to be conducted by the Safety Director, Shop Manager or the Regional Engineer responsible for installation of the machinery.
 - An individual machinery risk assessment for Lockout/tagout is to be completed and inserted into Lockout/tagout policy/program file.
 - Each energy-isolating device will be disabled as it is installed until such a time as the entire machine is installed and is ready for testing.
 - Once the machinery or equipment is deemed ready for testing, the procedure established in Section 5 (Energized Testing) must be followed for the test.
 - After verification that the machinery or equipment is ready for operation, the procedure established in Section 4 (Releasing from Lockout) must be followed.

Lockout/Tagout Procedures to Remove Equipment

- Whenever equipment is being removed from the facility the following procedures must be followed:

- Lockout/Tagout devices must be applied to all energy isolating devices.
- Lockout/Tagout devices must be applied on the energy sources to prevent leak-through to the machinery or equipment.
- Verification must be confirmed that all mechanical and stored energy has been released or bled off.
- Lockout/Tagout devices may be removed when all energy-isolating devices are separated from the equipment or machinery.

Log of Lockout/Tagout Performed

- Each time a lockout/tagout is performed the event will be recorded on the lockout tagout log. (See page 27) Retention on the logs will be a minimum of three (3) years.
- Each lockout/tagout will identify the person locking out the equipment
- Each lockout/tagout will identify the equipment/machinery being locked out.
- Each lockout/tagout will identify the date of the lockout/tagout being installed.
- Each lockout/tagout will identify the date of the lockout/tagout being removed.
- Each lockout/tagout will identify the person removing the lockout/tagout device.

“Authorized Employees”

- The following employees are considered the authorized employees at (insert Company name):
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____
 - _____

Risk Assessments

- Risk assessments shall be conducted for each piece of equipment in the site.
- The assessment shall consist of:
 - Energy source
 - Magnitude of the energy
 - Appropriate Lockout Device
 - Sequence for locking and tagging out equipment
 - Sequence for restarting.

- The assessment shall follow the form included in this program.
- Risk assessments shall be laminated and mounted at the equipment placement site.

Providing energy to test equipment while removed from the system

- When testing energy isolating devices (valves) by applying energy of any sort while removed from the operating system, the device shall be secured in a vise or held mechanically.
- Under no circumstance shall a worker apply energy to a device while holding the device in his/her hand.

Appendix A

LO/TO FWI Pad & Cover Replacement Procedure

- Lock out folder per Risk Assessment for that particular machine.
- Lockout steam per FWI Risk Assessment. If FWI is hot, let cool until at a safe temperature.
- Verify that all controls and emergency stops on the FWI are fully operational.
- Jog FWI until old cover is in desired position for replacement.
- Lockout & verify FWI electrical disconnect per Risk Assessment.
- Remove guide tapes by cutting and pulling free from rolls.
- Remove old cover(s) and/or pad(s).
- Attach new cover to roll and position pad.
- Remove FWI lockout.
- With a person(s) stationed at the roll and one person at the controls, slowly jog the FWI while guiding the new cover and pad in. Take care not to break the plane defined by the top of the rolls to avoid injury by the rolls. Jog speed is not to exceed 10 feet per minute. Visual and audio contact is to be maintained between all parties at all times.
- When the new cover is all the way around the roll, stop the FWI and once again lockout & verify the electrical disconnect.
- Apply springs to new cover.
- Repeat the process for additional rolls. It may be possible to recover several rolls at once. The process is the same.
- When finished, ensure that area is clear of tools and personnel prior to removing lockouts.

Note: This is considered a group lockout situation.

Appendix B

FWI Apron Replacement Procedure

- Lock out folder per Risk Assessment for that particular machine.
- Verify that all controls and emergency stops on the FWI are fully operational.
- With the FWI harps approximately ½ of the way down, jog FWI until lacing is in desired position.
- Lockout & verify FWI electrical disconnect per Risk Assessment.
- Lace new apron to old apron and rest new apron on FWI harps with a long piece of pipe.
- Remove FWI lockout.
- With a person stationed at each end of the apron and one at the controls, slowly jog the FWI while pulling the old apron out and guiding the new apron in. Jog speed is not to exceed 10 feet per minute. Visual and audio contact is to be maintained between all three parties at all times.
- When the new apron is all the way through and in position for lacing, stop the FWI and once again lockout & verify the electrical disconnect.
- Apply lacing to new apron.
- After ensuring that area is clear of tools and personnel remove lockout and start FWI to adjust apron.

Note: This is considered a group lockout situation.

Appendix C

Clearing Jams from Large Piece Folders/Cross Folders

Background: Clearing jams from large Piece Folders and Cross Folders has been treated as exceptions under (insert Company Name) Lockout/Tagout Program. In the past, illuminated stop buttons had been installed and utilized to interrupt power to the machine. This condition is not consistent with the lockout/tagout program and is revised as follows:

1. Install electrical disconnects or keyed emergency stop buttons that can be physically locked out.
2. Clearing a jam from folders and cross folders shall be considered a lockout condition; therefore either the electrical disconnect shall be used with a lock in order to isolate the energy or the keyed emergency stop button used.
3. Folders that have been equipped with a key locking emergency stop button also meet the standards of (insert Company Name) Lockout/Tagout Program. The key must be removed and retained by the same employee. The employee must be properly trained in LO/TO procedures.
4. Once the jam is cleared, the lockout shall be logged in the site's lockout/tagout log.

Lockout/Tagout Quiz

Name: _____

Date: _____

1. The term “zero energy” refers to the following:
 - a. Worker is very tired this morning
 - b. All electrical supply to the equipment is turned off
 - c. All energy sources have been turned off, locked/tagged out and residual energy bled off.
2. The term “authorized employee” refers to which of the following (insert Company Name) personnel:
 - a. Any (insert Company Name) Coworker
 - b. Maintenance Personnel trained in (insert Company Name) Lockout/Tagout Program
 - c. Electric Utility workman performing maintenance at (insert Company Name) location
3. Maintaining a record of equipment that has been locked out is optional under the Company Lockout/Tagout Program
 - a. True
 - b. False
4. If a coworker leaves a machine locked out when leaving his shift, the chief maintenance technician may remove the lock:
 - a. When the Production Manager tells him/her he needs the equipment
 - b. After a risk assessment has been conducted and equipment is confirmed to be operational
 - c. When the General Manager is making his rounds and sees the lock on the equipment.
5. If you can see the control switches from where you are working, it is not necessary to lock out the equipment.
 - a. True
 - b. False
6. It is acceptable to use one lock when two or more persons are working on a piece of equipment as long as the equipment is locked out.
 - a. True
 - b. False
7. When installing a tag on equipment, the tag must be able to withstand a pressure of:
 - a. 25 psi
 - b. 50 psi
 - c. 75 psi
 - d. Must cut the tag off
8. When removing a piece of equipment, it is not necessary to lock it out, since it is not operational.
 - a. True

- b. False
-
- 9. The first step in conducting a lockout/tagout is:
 - a. Installing the lockout/tagout
 - b. Notifying all affected personnel that the equipment is being locked out.
 - c. Reviewing the risk assessment for that piece of equipment to ensure that all energy sources are considered for lockout/tagout.
 - 10. When there is a shift change while a lockout/tagout is in effect, the sequence of changing locks is not important as long as the equipment remains locked out.
 - a. True
 - b. False
 - 11. Engineering safety features, such as guards, are foolproof means of protecting coworkers from hazardous energy.
 - a. True
 - b. False
 - 12. The term “Singularly identifiable” lockout devices refers to the following:
 - a. The brand name of the lock is clearly visible
 - b. The lock is assigned to one individual only, is color coded or personalized.
 - 13. Only maintenance personnel must have knowledge of the LO/TO program in effect at your location
 - a. True
 - b. False
 - 14. After having conducted the lockout/tagout procedure and prior to working on the equipment, the following must be performed:
 - a. All maintenance personnel involved in the procedure shall discuss the work to be performed
 - b. The machine controls shall be functioned to confirm that all energy is isolated and locked.
 - c. All “other” personnel in the location shall be notified.
 - 15. When a worker’s lockout device is removed in his absence, the following must occur prior to his return to work:
 - a. Replace the lockout
 - b. Notify the worker that the lockout has been removed
 - c. Issue a counseling report for failure to remove the lock prior to leaving.
 - 16. A “block” is considered a lockout device
 - a. When used in conjunction with lockout device(s) isolating all other types of energy
 - b. When it is required to elevate a cylinder or tub
 - c. When used as a portion of a “block and tackle” unit
 - 17. Electricity is the only kind of energy source that should be addressed with lockout/tagout
 - a. True
 - b. False

18. The LO/TO program should be reviewed and training conducted:
 - a. Annually
 - b. Whenever there is a change in the OSHA standard.
 - c. Whenever new equipment is installed in the location
 - d. All of the above

19. A worker may use any lock to conduct LO/TO as long as the lock is sturdy.
 - a. True
 - b. False

20. The consequence for failing to use LO/TO when bypassing a guard to work on equipment could be termination.
 - a. True
 - b. False

21. Cleaning the starch from the rolls of a flat work ironer is considered maintenance, and thus subject to LO/TO.
 - a. True
 - b. False

22. An example of an “affected” employee becoming an “authorized” employee for specific purposes is:
 - a. An office manager repairing her calculator
 - b. A janitor who is cleaning lint from under a tumbler.
 - c. An Area Manager who is checking the braking operations of a walk in van.

23. The sequence for locking out equipment to zero energy is not important as long as the equipment is ultimately locked out.
 - a. True
 - b. False

24. When restarting a piece of equipment, it is necessary to:
 - a. Ensure the area is clear of all tools and towels
 - b. Ensure the area is clear of all personnel
 - c. Ensure that controls are functional
 - d. Each person shall remove his own lock
 - e. All of the above

25. Once the lockout device has been installed you can be sure there is no other energy to be released
 - a. True
 - b. False

LOCKOUT/TAGOUT QUIZ ANSWERS

1.	c	
2.	b	
3.	FALSE	<u>A record must be kept of all equipment locked out to satisfy OSHA standard</u>
4.	b	
5.	FALSE	It is always necessary to lockout equipment even if you can see the control switches.
6.	FALSE	There should be one lock used for each person working on the equipment, placed on the energy isolating device by the individual to whom the lock belongs.
7.	b	
8.	FALSE	A piece of equipment being removed must have all energy isolating devices locked out until disconnected from the energy source.
9.	c	Risk assessments should be consulted to ensure proper sequence is followed.
10.	FALSE	The Chief Engineer must facilitate the change over of locks ensuring that oncoming locks are installed before off going shift removes locks.
11.	FALSE	Guards are never considered fool-proof and should never replace LO/TO
12.	b	.
13.	False	All coworkers in the location must have knowledge of the LO/TO program in effect at the location
14.	b	Controls should be cycled to confirm that equipment is not energized
15.	b	A worker returning to the job site must be informed that his lock has been removed from the equipment on which it was left.
16.	a	
17.	False	Other types of energy that are addressed are hydraulic, gravity, mechanical, thermal, pneumatic, chemical or other energy.
18.	d	
19.	False	A lock used for lockout tagout must be singularly identifiable and incapable of being removed short of cutting it off.
20.	True	
21.	True	
22.	b	
23.	False	The sequence as outlined in the equipment risk assessment must be followed.
24.	e	
25.	False	There is potential residual or pent up energy that must be bled off to ensure that all energy is present.

Lockout/Tagout Training

Maintenance/Authorized Personnel

Review of (insert Company Name) Lockout /Tag-out/Block-out program.
Training conducted using the “Lockout/Tagout” video.
Determining energy sources, magnitude.
Performing risk assessments on specific equipment.
Authorized electrical work.

Name	Signature	Date

Plant _____/Location _____

Trainer:

I certify that the above named individuals have been trained in the (insert Company Name) Energy Control Program. Further, the above trained individuals have demonstrated an ability to perform lockout/tagout

Signature: _____ Date: _____

Lockout/Tagout Program Training

“Affected” or “Other” Personnel

- Purpose of the energy control program
- Recognition of lockout/tagout
- Use of Energy Control Program
- Discipline for failure to observe lockout/tagout.

Print Name	Signature	Date

Trainer: _____

I certify that the above named individuals have been trained in the most recent version of the (insert Company Name) Lockout/Tagout Program.

Signature: _____ **Date:** _____

Authorization and Acknowledgement to Remove Lock

Use this form if equipment/machinery subject to lockout/tagout is left with a lock(s) applied at the end of shift: (if unable to transfer locks with incoming shift)

(Top Portion of Form to be completed by authorized worker leaving equipment locked out)

I understand that I am leaving my shift with the lock assigned to me for lockout/tagout purposes applied on an energy-isolating device. I further understand that should the equipment repair be completed in my absence, my lock will be removed and returned to me. The key to the Lockout device is attached to this acknowledgement.

Employee Signature

Date

Equipment/Machinery subject to lockout/tagout at the end of my shift:

Status of the lockout: Energy isolating device applied to:

(Identify the energy-isolating device)

Status of the repair: What repair, if known, must be completed prior to removing the lockout/tagout _____

.....
(Bottom portion of form to be completed by Chief Engineer and authorized worker)

The hazard assessment to ensure safety was conducted and Lockout/Tagout device removed by:

(Chief Engineer: name and signature)

Date Lockout/tagout device removed: _____

I acknowledge at the start of my shift that I have received the lock assigned to me for lockout/tagout purposes that has been removed from

_____ in my absence.
(Identify equipment)

I have received my lock or have been issued a new lock to replace the lock that has been cut off.

(Employee Signature)

(Date)

EQUIPMENT LOCKOUT/TAGOUT LOG

Plant #:

LO/TO Installed By	Date LO/TO Installed	Time LO/TO Installed	Machine/ Equipment	Energy Type	Energy Isolating Device	Means of LO/TO	Date LO/TO Removed	LO/TO Removed By:
Nombre	La Fecha Inastalo LO/TO	Hora Inastalo LO/TO	Maquina	El Tipo De Energia	La Energia Que Aisla Dispositivo	Los Medias De LO/TO	La Fecha Quito LO/TO	Nombre

Lockout/Tagout Equipment Listing

Plant/Location: _____

Equipment/Machinery	Energy Sources	Lockout Capable

Equipment/Machinery Risk Assessment

Equipment/Machinery:

<u>Energy Source</u>	Magnitude	Lockout Device

Lockout/Tagout/Blockout Procedures

Notify Affected Personnel that machine is to be locked and tagged out.

- 1. Electricity:**
- 2. Steam:**
- 3. Air:**
- 4. Water:**
- 5. Hydraulics:**
- 6. Suspended Load:**
- 7. (Other energy source, if applicable)**
- 8. Verify isolation of energy sources by attempting to activate controls. Return to “off” position after verification of isolation.**

Restarting: Remove lock out devices in reverse order of application.

Special Notes: Contact the manufacturer for any built in controls to lockout/tagout.

Contractor Agreement

Provision of/compliance with the following items is required of any contractor performing work at any (insert Company Name) location:

- Certificate of Insurance—Naming (insert Company Name) as additional insured, including Workers Compensation, General Liability and Auto Liability with limits of \$1m for each line.
- Lockout/Tagout program to be reviewed with (insert Company Name) personnel. Company personnel shall provide (insert Company Name) LO/TO program to the contractor.
 - Contractor shall comply with (insert Company Name) LO/TO program or shall be unable to perform work on (insert Company Name) premises.
- Confined Space Program to be reviewed with (insert Company Name) personnel. Company personnel shall provide the Confined Space Entry program to the contractor.
 - Contractor shall comply with (insert Company Name) Confined Space Entry Program or will be prevented from performing work on company premises.
- Contractor's employees shall comply with all (insert Company Name) behavior requirements, including, but not limited to the following:
 - No smoking within 20 feet of the building.
 - No profane language to be used on the site.
 - Contractor's employees must read and understand (insert Company Name) policy regarding:
 - Harassment Free Workplace
 - Violence in the Workplace
 - Use of PPE (Personal Protective Equipment) as appropriate for the area of the plant in which work is being performed or for work being performed.
- All Contractors' employees shall sign the visitor log upon entering the plant and shall sign out at the end of day.
- All Contractors' employees shall understand (insert Company Name) Hazard communication. Contractor's employees shall be familiar with location of SDS sheets, eyewash stations, and chemical showers.
- Contractor employees shall understand the (insert Company Name) Emergency Action Plan pertaining to Egress, Potential Fire exposures and location of emergency gathering location.

Contractor Signature

Date

Company Representative

Date

Annual Lockout/Tagout Inspection

Employee Performing LO/TO: _____ Date of Inspection: _____

Machine or Equipment: _____

Inspection Performed by: _____

Y N

Has the Equipment Risk Assessment been reviewed and all affected employees notified?

Was the machinery or equipment tuned off/shut down using the established procedures per the Risk Assessment?

Have all energy isolating devices been operated in order to isolate the energy sources from the machinery?

Has a device and/or lock been applied to all energy isolating devices, securing them in the safe position?

Has a tag been applied to at least one of the energy isolating devices stating the employees name and the date the LO/TO took place?

Was all stored energy released?

Did the employee verify that isolation and de-energization was accomplished before performing work on the machine or equipment?

Were all procedures for releasing the LO/TO and restarting the equipment followed before restarting the equipment and the LO/TO log completed?

I certify the Annual inspection has been performed and reviewed with all authorized employees conducting the Lockout/Tagout.

Employee signature

Inspector signature

GM/DM signature