

LOCK AND TAG

Supplement to Standard Training Module

TRAINING REQUIREMENTS OVERVIEW

This standard Vivid training module provides a general overview of portions of the lockout/tagout standard but additional training **must** be provided to satisfy all of the training requirements identified in the Standard.

For the purposes of the standard, there are three types of employees:

- **Authorized Employees** - those who are charged with the responsibility for implementing the energy control procedures and performing the servicing or maintenance
- **Affected Employees** - typically the machine operators or users
- **Other Employees** – everyone else.

In addition to the general overview, employees must receive facility and work area specific training. This additional training must cover:

1. **Authorized Employees:**
 - **Recognition of applicable hazardous energy sources,**
 - **Details about the type and magnitude of the hazardous energy sources present in the workplace, and**
 - **Methods and means necessary to isolate and control those energy sources (i.e., the elements of the energy control procedures).**
2. **Affected Employees and all Other Employees:**
 - **Recognition of when the control procedure is being used,**
 - **Provide an understand that the purpose of the procedure and the importance of not attempting to start up or use the equipment that has been locked or tagged out.**
3. **All employees:**
 - **Provide an understanding that the purpose, function, and restrictions of the energy control program and that authorized employees possess the knowledge and skills necessary for the safe application, use, and removal of energy controls.**

Frequency: Training **must** be provided at the time of initial assignment. Retraining must be provided whenever:

- there is a change in job assignments,

- there is a change in machines, equipment or processes that present a new hazard, or
- there is a change in energy control procedures.
- a periodic inspection reveals, or the employer has reason to believe, that there are deviations from or inadequacies in the employee's knowledge or use of the energy control procedure.

GENERAL OVERVIEW OF THE STANDARD

LOCKOUT/TAGOUT - 1910.147

This standard covers the servicing and maintenance of machines and equipment in which the **unexpected** energization or start-up of the machines or equipment, or release of stored energy could cause injury to employees. Normal production operations are not covered by this standard (See Subpart O of this Part).

Servicing and/or maintenance which takes place during normal production operations is covered by this standard only if: An employee is required to remove or bypass a guard or other safety device; or An employee is required to place any part of his or her body into an area on a machine or piece of equipment where work is actually performed upon the material being processed (point of operation) or where an associated danger zone exists during a machine operating cycle.

Requirements include:

1. **Energy Control Program** – A written program outlining energy control procedures, employee training and periodic inspections is required.
2. **Energy Control Procedures** - Those machines meeting certain criteria are covered under a 'general' procedure (these criteria are listed in CFR 1910.147(c)(4)(i)). All other machines must have a lockout procedure specific to all its energy sources, including stored energy. Multiple machines with identical wiring, plumbing and other characteristics can share a specific procedure. The procedures shall clearly and specifically outline the scope, purpose, authorization, rules, and techniques to be utilized for the control of hazardous energy.
3. **Isolation** - Each machine's energy sources must be capable of being locked out if the machine is newer than January 2, 1990. In addition, it must be capable of being locked out if the machine has been moved, repaired (major), renovated or modified since January 2, 1990. If older

than this and not capable of being locked out, a Tagout system must be employed that is as effective as lockout.

4. **Inspections** - Documented inspections (at least annually) are required for each machine-specific lockout procedure, to ensure it remains accurate and understandable. Each authorized lockout user must be involved in the inspection process to assess that person's understanding of the procedures and assure that they follow the procedures. The inspection(s) must be performed by an authorized employee *other than* the one utilizing the procedure being inspected, and shall include a review, between the inspector and each authorized employee, of that employee's responsibilities under the energy control procedure being inspected.
5. **Lockout Devices** – All devices must be:
 - Specific to LOTO,
 - Not used for any other purpose
 - Standardized in color or shape or size
 - Durable for the conditions they will be used in, and substantial enough to prevent removal without the use of excessive force
 - Identifiable to the employee who applied the lock
6. **Training and Communication** – Training must be provided to three groups of employees:
 - Authorized employees shall 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
 - Affected employees shall be instructed in the purpose and use of the energy control procedure.
 - All other employees whose work operations are or may be in an area where energy control procedures may be utilized, shall be instructed about the procedure, and about the prohibition relating to attempts to restart or reenergize machines or equipment which are locked out or tagged out

Re-training is required when employees have a change in their job assignments, change in machines, equipment or processes that present a new hazard, or when there is a change in the energy control procedures. Re-training is also required whenever a periodic inspection reveals, or whenever the employer has reason to believe that there are deviations from or inadequacies in the employee's knowledge or use of the energy control procedures

7. **Additional Requirements** – The written program is also required to address specific lockout requirements for working with outside personnel (contractors, etc.), group lockout or tagout, and personnel or shift changes.

REFERENCE MATERIALS

[29 CFR 1910.147](#) *The Control of Hazardous Energy (lockout/tagout)*

Publications

OSHA Control of Hazardous Energy (Lockout/Tagout) Publication # 3120 can be downloaded at: <https://www.osha.gov/Publications/osha3120.pdf>