Simple Safety Meetings® from SafetyBanners.ORG

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Topic: 8 Steps of Lockout/Tagout

The primary responsibility for lockout of equipment and machinery belongs to the authorized employee. However, this does not alleviate other employees and supervisors from insuring that proper Lockout/Tagout (LOTO) procedures are followed at all times.

1.) Think, Plan and Check

Think through the entire procedure. Identify all parts of your systems that need to be shut down. Determine what switches, equipment and people will be involved. Carefully plan to ensure safe maintenance operations.

2.) Communicate

Notify all those who need to know that a Lockout/Tagout procedure is taking place.

3.) Identify the Energy Source(s)

Ensure all employees involved know the energy sources associated with the machine. Include electrical circuits, hydraulic and pneumatic systems, spring energy, gravity systems, or any other energy systems.

4.) Neutralize all Energy Source(s)

Disconnect electricity. Block movable parts. Release or block spring energy. Drain or bleed hydraulic and pneumatic lines. Lower suspended parts to rest positions.

5.) Lockout Devices

Use only locks, hasps, and covers identified for lockout purposes. Each authorized worker must have a singularly identified lock.

6.) Tagout Power Sources

Tag machine controls, pressure lines, starter switches and suspended parts. Tags should include your name, department, how to reach you, the date and time of tagging and the reason for the lockout.

7.) Verify Equipment Isolation

Check that all workers are clear. Ensure locking devices are securely placed. Attempt normal start-up procedures. Return controls to the off or neutral position.

8.) Releasing Machinery from LOTO (Lockout/Tagout)

Inspect the area and equipment. Replace machine guards. Account for all tools and place them back into toolbox. Inform affected employees of machine start-up. Restore system connections. Remove tags and locks. Restore machinery to original configuration. Conduct normal start-up.

Notes: ____

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Company: ______________________________

Location / Dept.: ______________________________

Leader: ______________________________

Date: ______________________________

Comment: ______________________________

Topic:

Participant Information

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Additional Comment: ____

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Simple Safety Meetings® Leader Guide

Procedural recommendation for a Simple Safety Meeting® Leader:

A. Prior to the meeting read the topic content to be sure you understand it.
B. Make notes regarding specific company issues, policies or items for extra emphasis.
C. Have each participant "sign in" on the participant information sheet prior to starting the meeting and the meeting clock.
D. Hand out the "Topic Content" meeting sheet when the participant "signs in" making sure each participant has a pencil or pen for note taking.
E. Instruct the participants to take their time and read through the content, taking their time to understand it and make notes about questions or suggestions they may have.
F. Wait until everyone is done reading, asking the early finishers to please be quiet while everyone else finishes. (During this time it is a good idea for the leader to re-read the content so as not to appear to be paying attention to who are slow readers and fast readers. Do not embarrass slow readers, but encourage them to take their time to finish so they completely understand and can ask questions.)
G. After everyone has completed reading and making notes, use a few moments to emphasize, clarify or restate any of the most relevant topic points.
H. Ask the participants if they have any questions, suggestions or need any clarification.
I. When the 10-minute bell goes off, the leader must be totally done, except answering questions from the participants.
J. If another meeting is scheduled, remind everyone of the next meeting date and time.
K. End the meeting by thanking the participants for their attention and questions.
L. Remind the participants that working safely is a choice, and you (the leader) and the company wants them to make a conscious effort to choose to work safely

Our content is such that it can be passed out to the participants for them to read during the meeting. The leader's function is to merely emphasize company specific points, ask if everyone understands the topic points and ask for comments and suggestions.

Our theory is that many shift level safety meeting leaders are not presenters and can feel uncomfortable making any sort of presentation in front of a group of people. However, shift level safety meeting leaders are typically knowledgeable in their area and can handle participant questions and suggestions quite well. The goal of any safety meeting is to communicate the information and make sure the participants understand the safety issues, procedures and policies at hand for your specific company.

Our approach is a simple one. Short, to the point meetings that last no longer than 10 minutes. In fact, we suggest having a standard kitchen timer at the meeting. As soon as the meeting starts, set the timer for10 minutes. When the bell goes off, the leader's portion MUST be concluded and the ONLY allowable discussion is participant questions, suggestions and comments.

Ideally, the topic content should be covered within 10 minutes, not including employee questions. After 10 minutes of presentation, employee's minds begin to wander, thinking about the workday ahead, future plans in their personal life or just daydreaming.