

What is “Lockout”?: The placement of a locking device on an energy isolating device, in accordance with an established procedure, ensuring that the energy isolating device and the equipment being controlled cannot be operated until the lockout device is removed.

What is “Tagout”?: The placement of a “tag” or “marker” on an energy isolating device, in accordance with an established procedure, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tag and Lockout are removed.

Train employees to Lockout thermal, gravity, electrical, hydraulic, pneumatic, chemical, and mechanical power or energy sources.

Each machine must have written procedures to identify and properly place all power sources that must be locked out to place the equipment in a “Zero Energy” state. Procedures must include each power or energy source, identify the location of disconnects, switches, or valves, and procedures must explain how to correctly Lockout each power source. Taking the extra minute to properly shut down and Lockout the power sources is the only way to insure people will not get injured.

Lockout/Tagout procedures apply to operations where a worker is required to adjust, service, repair or clean machinery or equipment in such a method where the unexpected startup, energization, or release of stored energy could cause injury. Even though a piece of equipment may be “turned off” or “powered down,” many times energy remains stored in the machine which could seriously injure or kill if it were released. Lockout/Tagout procedures are designed to protect you from the unexpected. A Lockout/Tagout procedure should be in place for all types of energy sources including: mechanical, electrical, hydraulic, pneumatic, chemical and thermal energy. Here are the minimum precautions you should take:

- Equipment and machinery must be turned off and locked out before any servicing, adjusting or repair operations begin.
- If the main power sources are physically capable of being locked, they must be locked out at the “energy isolating device” to ensure that the machine cannot accidentally start. This means the main circuit conductors must be disconnected. (The term “energy isolating device” does not imply push buttons, selector switches or other control circuit devices.)

Notes: _____

- Stored energy such as steam, electrical, hydraulic, gas, water, air or any source capable of conveying potentially hazardous energy must be released. Sources feeding the equipment or machinery being serviced must be blocked off and/or blinded. (This can include grounding capacitors, relieving tension on springs, elevating and blocking up machine parts, restraining flywheels or blinding and bleeding feed lines.)
- Lines that have been bled off and/or disconnected must be tagged to let everyone know who is performing the work. The tag should identify the person who locked the system out, the company or department, the date and time the equipment was disconnected and the reason for disconnecting it. This applies to equipment, machines or pipeline systems.
- If the equipment cannot be locked out to isolate the energy, a tag must be installed in place of a lock. If a Tagout only procedure is used, the procedure must provide an equivalent level of safety equal to that achieved by a Lockout procedure. The Tagout only policy must be communicated to all employees authorized to perform Lockout/Tagout operations.
- Prior to servicing, the equipment or machine must be tested to ensure that it has been adequately isolated. This means actually attempting to start the machine or equipment by normal operating methods to prove it cannot start. This procedure should require testing all systems that are capable of conveying any form of energy to the area where operations will be conducted.
- After servicing is completed, all guards and safety devices that have been removed must be replaced, making sure that the operation controls are in neutral. Individuals should remove only their own individual lock or tag from isolated energy sources. No energy source should be reconnected until all employee tags or locks have been removed, all employees are accounted for, and the area is inspected to verify everyone is clear.
- Once all employees have been accounted for, restore all power and feed sources and test the equipment that was being serviced. Finally, inform all necessary parties that the work has been completed.

IMPORTANT: Know your procedures well and your equipment's requirements.

Notes: _____



Company: _____

Location / Dept.: _____

Leader: _____

Date: _____

Comment: _____

Topic:

Participant Information

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Additional Comment: _____

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 for 10 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.