



# Lockout Tagout Procedure Template

WORK READY ESSENTIALS- Equipping Workers for Success

## LOCKOUT TAGOUT (LOTO) PROCEDURE TEMPLATE

### Controlling Hazardous Energy Sources

Equipment/System: \_\_\_\_\_ LOTO ID #: \_\_\_\_\_

Location: \_\_\_\_\_ Date Created: \_\_\_\_\_

Authorized Employee: \_\_\_\_\_ Reviewed By: \_\_\_\_\_

Department: \_\_\_\_\_ Next Review: \_\_\_\_\_

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### EQUIPMENT IDENTIFICATION

Equipment Name: \_\_\_\_\_

Manufacturer: \_\_\_\_\_ Model: \_\_\_\_\_

Serial Number: \_\_\_\_\_ Voltage: \_\_\_\_\_

Location/Building: \_\_\_\_\_ Floor/Area: \_\_\_\_\_

### ENERGY SOURCES PRESENT

- Electrical (Voltage: \_\_\_\_\_ Phase: \_\_\_\_\_ Amperage: \_\_\_\_\_)
- Pneumatic (Pressure: \_\_\_\_\_ PSI)
- Hydraulic (Pressure: \_\_\_\_\_ PSI)
- Steam (Pressure: \_\_\_\_\_ PSI, Temperature: \_\_\_\_\_ °F)
- Chemical
- Thermal
- Mechanical (springs, counterweights, etc.)
- Stored Energy
- Other: \_\_\_\_\_

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### STEP-BY-STEP LOCKOUT PROCEDURE

#### PREPARATION

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Step 1: Notify all affected employees that equipment will be shut down and locked out

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 2: Review energy sources and shutdown procedures

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 3: Gather required LOTO devices and PPE

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

## SHUTDOWN

Step 4: Shut down equipment using normal stopping procedure

Control Location: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

## ISOLATION

Step 5: Disconnect/isolate all energy sources

Energy Source 1: \_\_\_\_\_

Isolation Device: \_\_\_\_\_

Location: \_\_\_\_\_

Lock Applied:  Tag Applied:  Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Energy Source 2: \_\_\_\_\_

Isolation Device: \_\_\_\_\_

Location: \_\_\_\_\_

Lock Applied:  Tag Applied:  Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Energy Source 3: \_\_\_\_\_

Isolation Device: \_\_\_\_\_

Location: \_\_\_\_\_

Lock Applied:  Tag Applied:  Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Additional Sources: (Use separate sheet if needed)

## LOCKOUT/TAGOUT APPLICATION

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Step 6: Apply personal locks and tags to all isolation devices

Required: Each authorized employee must apply their own lock

Lock Serial Numbers: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

## STORED ENERGY CONTROL

Step 7: Release, disconnect, or restrain stored energy

Method Used: \_\_\_\_\_

Verification: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

## VERIFICATION

Step 8: Verify isolation by testing normal operating controls

Control Tested: \_\_\_\_\_

Result:  No Response  Other: \_\_\_\_\_

Return controls to OFF/SAFE position after test

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 9: Test with appropriate test equipment

Equipment Used: \_\_\_\_\_

Reading/Result: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

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## WORK AUTHORIZATION

Work to be Performed: \_\_\_\_\_

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Estimated Duration: \_\_\_\_\_

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Special Precautions: \_\_\_\_\_

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Authorized Employees:

1. \_\_\_\_\_ Signature: \_\_\_\_\_

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2. \_\_\_\_\_ Signature: \_\_\_\_\_

3. \_\_\_\_\_ Signature: \_\_\_\_\_

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## RESTORATION PROCEDURE

### PREPARATION FOR RESTART

Step 1: Ensure all work is complete and tools/materials removed

Verified by: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 2: Notify all personnel that equipment will be re-energized

Notification Method: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 3: Conduct final safety check

Items Checked: \_\_\_\_\_

Time: \_\_\_\_\_ Completed by: \_\_\_\_\_ Initials: \_\_\_\_\_

### LOCK AND TAG REMOVAL

Step 4: Remove locks and tags (ONLY by person who applied them)

Lock 1 Removed by: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Lock 2 Removed by: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Lock 3 Removed by: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

### RE-ENERGIZATION

Step 5: Restore energy sources in proper sequence

Energy Source 1: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Energy Source 2: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Energy Source 3: \_\_\_\_\_ Time: \_\_\_\_\_ Initials: \_\_\_\_\_

Step 6: Test equipment operation

Normal Operation Confirmed:  Yes  No

Time: \_\_\_\_\_ Tested by: \_\_\_\_\_ Initials: \_\_\_\_\_

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## EMERGENCY REMOVAL AUTHORIZATION

If the authorized employee is unavailable:

- Verify employee is not on premises
- Make reasonable effort to contact employee
- Ensure employee knows lock/tag was removed
- Supervisor authorization required

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_

Reason: \_\_\_\_\_

Safety Verification: \_\_\_\_\_

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## REQUIRED TRAINING & CERTIFICATION

Authorized Employees Must:

- Understand energy sources and hazards
- Know proper LOTO procedures
- Recognize lockout devices
- Understand scope and purpose of program

Training Records:

Employee: \_\_\_\_\_ Training Date: \_\_\_\_\_

Employee: \_\_\_\_\_ Training Date: \_\_\_\_\_

Employee: \_\_\_\_\_ Training Date: \_\_\_\_\_

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## ANNUAL REVIEW & INSPECTION

Last Review Date: \_\_\_\_\_ Next Review: \_\_\_\_\_

Reviewed By: \_\_\_\_\_ Title: \_\_\_\_\_

Changes Made: \_\_\_\_\_

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Inspection Findings:

- Procedure adequate and up-to-date
- Energy sources properly identified

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- Isolation methods effective
- Training records current
- Modifications needed (attach details)

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## EMERGENCY CONTACTS

Maintenance Supervisor: \_\_\_\_\_

Safety Manager: \_\_\_\_\_

Plant Manager: \_\_\_\_\_

Emergency Services: 911

Utilities Emergency: \_\_\_\_\_

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Notes/Special Instructions:

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*This procedure complies with OSHA 29 CFR 1910.147 and 29 CFR 1926.417. For additional safety resources and training materials, contact Work Ready Essentials.*