

# Lockout Policy



[insert company name] recognizes that during servicing and/or maintenance of equipment, our workers could become involved in a serious or fatal incident caused by the unexpected start-up of equipment or the release of stored energy. This policy has been developed to establish Company procedures for the control of hazardous energy, hereafter called **Lockout**. This policy is intended to comply with the requirements of [insert applicable sections of OHS regulations and any voluntary standards].

## ***Important Definitions:***

**Energy source.** Any source of electrical, mechanical, hydraulic, pneumatic, chemical, thermal or other energy.

**Energized.** Connected to an energy source or containing residual or stored energy.

**Energy isolating device.** A mechanical device that physically prevents the transmission or release of energy, which includes locks, hairpins, tongs, lockable valves, clam shell devices for valves, blank flanges for piping systems, restraining devices to prevent movement of parts, etc.

**Lockout device.** A device that utilizes a positive means, such as a lock, to hold an energy isolating device in the safe position and prevent the energizing of a machine or equipment.

**Lockout.** The placement of a lock on an energy isolating device, in accordance with an established procedure, ensuring that the energy isolating device and the equipment being

controlled can't be operated until the device is removed.

**Normal production operations.** The utilization of a machine or equipment to perform its intended production function.

**Servicing and/or maintenance.** Workplace activities such as constructing, installing, setting up, adjusting, inspecting, modifying, and maintaining and/or servicing machines or equipment. These activities include lubrication, cleaning or un-jamming of machines or equipment and adjusting or tool changes where workers may be exposed to the unexpected energization or start-up of the equipment or release of hazardous energy.

**Cord and Plug Connected Equipment.** Equipment where the only energy source is electrical power provided by a plug in connection.

## **APPLICABILITY**

An operation is regulated by the lockout policy when:

1. Any worker (or contractor) is required to remove or bypass a guard or other safety device.
2. Any worker (or contractor) is required to place any part of his body into the mechanism of a piece of equipment or path of hazardous energy unless:
  1. the activity is routine, repetitive and integral to the use of the equipment; and
  2. the operator has been properly trained in the precautionary steps necessary to perform the activity safely or is provided other protection (guarding).

## **TRAINING**

Each worker (or contractor) involved in or affected by lockout will be trained in the following areas before being allowed to work in the area:

1. The recognition of hazardous energy sources (see attached list of energy sources)
2. The type and magnitude of the energy located in the workplace
3. The procedures for energy isolation and control including specific procedures developed for equipment and systems
4. The purpose and use of the energy control/lockout procedure
5. The prohibition and penalties for attempts to restart or re-energize equipment which has been locked out or to work on equipment without following the lockout procedures.

Affected workers are those personnel working around equipment or systems that are subject to lockout but aren't directly involved with them. These personnel aren't required to be familiar with specific procedures for equipment and systems.

Retraining or refresher training will be conducted whenever one of the following exists:

1. The worker has a change in job assignment
2. There has been a change in the equipment or process
3. There has been a change in the energy control procedure
4. Any time an inspection reveals deviations from the standard procedures; inadequacies in the worker's knowledge or use of the lockout procedure; or an accident as a result of unexpected energy release.

All worker training and retraining will be documented and verified by the signing and dating of the Annual Lockout Program Audit Report form. These records are to be maintained with the written lockout procedures and updated annually.