

STEP 1: Machine/Equipment Inventory & Energy Audit

Directions: Complete one form for each machine/equipment in your facility. Use the information in Step 1 to develop Machine-Specific LOTO Procedures (see Step 2).

1. Describe the machine/equipment

SHORT NAME, MANUFACTURER, MODEL
SERIAL NUMBER(S)
DEPARTMENT/LOCATION

2. What kinds of energy power the machine/equipment?

Electrical Energy	Volts	Phase	AC or DC	Potential Energy	Stored/Residual?	Dissipation time
Source 1				Pneumatic		
Source 2				Hydraulic		
Source 3				Gravity		
Source 4				Mechanical		
Source 5				Thermal Energy		
				Hot		
				Cold		

Note: Examples of stored energy include electricity in capacitors, air pressure in lines, coiled springs, elevated parts that could fall, and hot or cold pipes that take time to cool down or warm up

Other energy sources: _____

△ Identify Potential Hazards (check applicable)

- | | | |
|--|---|--|
| <input type="checkbox"/> Crushing injury | <input type="checkbox"/> "Caught in" injury | <input type="checkbox"/> Other (describe): |
| <input type="checkbox"/> Electrical shock | <input type="checkbox"/> Hot or cold burn | |
| <input type="checkbox"/> Eye contamination | <input type="checkbox"/> Hearing injury | |

4. Identify all Energy Isolating Devices

/ / / / /	TYPE	LOCATION	OPERATION	Lockout Capable?
DEVICE 1				
DEVICE 2				
DEVICE 3				
DEVICE 4				
DEVICE 5				

Note: Examples of Energy Isolating Devices include disconnect switches, circuit breakers, line or ball valves, etc. "Lockout Capable" means the device has a hasp or other means through which a lock can be attached

STEP 2: Machine-Specific Lockout/Tagout Procedures

A. SHUTDOWN PROCEDURES -- Establishing Lockout/Tagout

1. **NOTIFY** all affected employees that the machine or equipment will be shut down and locked/tagged out for servicing. Name who and how they will be notified:

2. **SHUTDOWN** the machine or equipment. List the steps, including type and location of operating controls:

3. **ISOLATE** the machine/equipment from its energy sources. List types, locations, and operation procedures for all Energy Isolating Devices.

Type	Location	Operation
Device 1		
Device 2		
Device 3		
Device 4		

4. **APPLY** lockout/tagout devices to the Energy Isolating Devices. List the type of lockout device that will be used on each Energy Isolating Device.

Energy Isolating Device	Lockout Device Description
Device 1	
Device 2	
Device 3	
Device 4	

5. **CONTROL** all stored/residual hazardous energy. List the types of stored energy and how to dissipate or restrain.

Energy Type	Method to Dissipate or Restrain

6. **VERIFY** that the machine/equipment has been isolated by attempting to restart it. Describe how to attempt to restart the machine/equipment:

B. RESTART PROCEDURES – Removal of Locks and Tags

1. **CHECK** equipment and surrounding area to ensure all tools, etc. have been removed and equipment is operationally intact.
2. **VERIFY** that all employees are in a safe area, and controls are in a neutral position.
3. **REMOVE LOCKS and TAGS** in the reverse order they were applied. Reenergize.
4. **NOTIFY** affected employees when servicing is complete and equipment is ready for use.
5. List any additional steps: