

Lockout/Tagout Checklist

A LOTO hazardous-energy control check covering shutdown, isolation, locking and verification.

Preparation and Identification

- ☐ Confirm the equipment has a documented energy control procedure.
- ☐ Identify all energy sources: electrical, mechanical, hydraulic, pneumatic, thermal and chemical.
- ☐ Locate every energy-isolating device for the equipment.
Stored energy such as springs and capacitors must also be identified.
- ☐ Verify the authorized employee is trained for this equipment.
- ☐ Notify all affected employees before shutting the equipment down.

Shutdown and Isolation

- ☐ Shut down the equipment using its normal stopping procedure.
- ☐ Operate each energy-isolating device to isolate the equipment.
- ☐ Confirm valves, breakers and disconnects are in the safe position.
- ☐ Block or restrain any parts that could move under stored energy.
Do not rely on control switches alone to isolate energy.
- ☐ Isolate connected lines carrying gas, steam or fluids.

Locking and Tagging

- ☐ Apply a personal lock to each energy-isolating device.
- ☐ Attach a tag identifying the worker, date and reason for lockout.
- ☐ Confirm each authorized worker applies their own lock for group work.
- ☐ Use a lockout hasp or group lockbox when multiple locks are needed.
Each worker must control their own lock and key.
- ☐ Verify locks and tags are durable, standardized and clearly marked.

Release Stored Energy and Verify

- ☐ Release or restrain residual and stored energy safely.
- ☐ Bleed pressure, discharge capacitors and dissipate thermal energy.
- ☐ Attempt to start the equipment with controls to confirm isolation.
- ☐ Return controls to off after the test.
Verify zero energy with the appropriate instrument before contact.
- ☐ Confirm a zero-energy state before any work begins.

Servicing and Restoration

- ☐ Perform the maintenance with locks and tags in place.
- ☐ Confirm the work area is clear of tools and personnel before restart.
- ☐ Verify guards and safety devices are reinstalled.
- ☐ Remove each lock only by the worker who applied it.
- ☐ Notify affected employees before re-energizing the equipment.
- ☐ Re-energize and test the equipment for safe operation.

Program and Records

- ☐ Confirm machine-specific procedures are written and accessible.
- ☐ Verify authorized and affected employees are trained and retrained as needed.

- ☐ Check that periodic inspections of the LOTO program are documented.
- ☐ Confirm contractors follow a coordinated energy control procedure.
- ☐ Important: this is general guidance only and does not replace OSHA regulations, formal training or your employer's energy control procedures; confirm requirements with a qualified person.