

Lockout / Tagout (LOTO)

Professional downloadable safety training

TRAINING OUTCOME

Recognize hazardous energy sources and when LOTO applies

AUDIENCE

Authorized & affected employees

TIME

35-45 min

REFERENCE

29 CFR 1910.147

USE NOTE

General/formal instruction. Employer- and machine-specific energy-control procedures are still required.

Start with the hazard. Build the safe decision.

Use this slide to connect the topic to what employees actually see, touch, drive or do.

When LOTO applies

Servicing or maintenance can expose workers to unexpected startup, movement, pressure, gravity, heat or stored energy.

Roles and responsibilities

Authorized employees apply and control locks/tags for servicing work.

The energy-control sequence

Prepare for shutdown and identify every energy source.

ASK THE ROOM

01

Where could this go wrong here?

02

What control keeps us safe?

03

What should make us stop?

What employees should be able to do

Keep the session practical: recognize the hazard, choose the control, know when to stop.

01

Recognize hazardous energy sources and when LOTO applies

02

Explain authorized, affected and other employee roles

03

Follow the basic sequence for shutdown, isolation, lock/tag, stored-energy control and verification

04

Recognize group, shift-change and contractor situations that need special control

When LOTO applies

Start with what the employee is exposed to.

- Servicing or maintenance can expose workers to unexpected startup, movement, pressure, gravity, heat or stored energy.
- A normal stop button is not an energy-isolating device.
- Production work can become covered when guards are bypassed or a body part enters a danger zone.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Roles and responsibilities

Tie every point to a visible action or decision.

- Authorized employees apply and control locks/tags for servicing work.
- Affected employees operate/use the equipment or work in the area and must understand the purpose of the procedure.
- Other employees must know not to restart or interfere with locked/tagged equipment.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

The energy-control sequence

Tie every point to a visible action or decision.

- Prepare for shutdown and identify every energy source.
- Notify affected employees, stop the machine, isolate energy sources and apply locks/tags.
- Release, block or restrain stored energy.
- Verify isolation before work begins.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Verification is a step, not a feeling

Tie every point to a visible action or decision.

- Try-start or other approved verification must confirm the isolation is effective.
- Testing must be performed using the employer procedure and appropriate instruments where needed.
- Re-verify when conditions change or energy could reaccumulate.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

Group work and shift changes

Tie every point to a visible action or decision.

- Each exposed authorized employee needs equivalent personal protection.
- Shift changes must maintain continuity of protection.
- Contractors and host employers must exchange LOTO procedure information.

FIELD DECISION

01

Where could this fail?

02

What control do we use?

03

What makes us stop?

Safe return to service

Tie every point to a visible action or decision.

- Inspect the work area, replace guards and remove tools.
- Confirm employees are clear and account for personnel.
- Locks/tags are normally removed by the employee who applied them, except under a documented employer procedure.
- Notify affected employees before returning equipment to service.

FIELD DECISION

01

What changes the risk?

02

What must the employee do?

03

Who needs to know?

These are the moments to slow down and regain control.

01

Someone says “it is off” but cannot identify all energy sources

02

A lock is missing a name/identity

03

Stored pressure, gravity or heat has not been controlled

04

Someone wants to remove another employee’s lock without the employer procedure

What would you do next?

Give the group 30-60 seconds before revealing the recommended response.

A mechanic locks out electrical power to a conveyor but does not block the raised pneumatic gate. The gate can fall if pressure bleeds off. What is missing?

RECOMMENDED RESPONSE

Stored energy must be relieved, restrained or otherwise rendered safe before work begins.

DISCUSS

01

What is the hazard?

02

What control is missing?

03

What is the safest next action?

04

What is our site rule?

This is where generic training becomes your program.

Replace examples with your actual equipment, procedures, hazards and expectations.



Show the written energy-control program and machine-specific procedures



Identify actual isolation points and stored-energy hazards



Demonstrate employer locks/tags and verification method



Explain group LOTO, contractor coordination, shift change and emergency lock-removal rules

BEFORE WORK

01

Show the actual procedure

02

Show the actual equipment/task

03

Confirm questions are answered

04

Complete required evaluation

Can the employee apply it?

Written knowledge matters. Safe performance in the real workplace matters more.

☐ Identifies all energy sources before shutdown

☐ Selects correct isolation devices

☐ Applies personal lock/tag correctly

☐ Controls stored or residual energy

☐ Performs approved verification step

☐ Restores equipment using the employer sequence

Use the included evaluation form when hands-on demonstration or workplace verification is appropriate or required.

Knowledge check 1-5

Use the printable test in the course package for employee responses.

1 The main purpose of LOTO is to:

2 Before servicing begins, the authorized employee must verify:

3 Who normally applies personal lockout devices for covered servicing?

4 Stored energy such as pressure or gravity must be:

5 A stop button is:

Knowledge check 6-10

Use the printable test in the course package for employee responses.

6

Affected employees should be notified:

7

If conditions allow energy to reaccumulate, workers should:

8

Group LOTO should provide each authorized employee:

9

This downloadable course alone authorizes an employee to perform LOTO on any machine.

10

When outside servicing personnel perform covered work, host and contractor employers should:

Know the hazard. Use the control. Stop when it is not right.

- 01 Recognize hazardous energy sources and when LOTO applies
- 02 Someone says “it is off” but cannot identify all energy sources
- 03 Show the written energy-control program and machine-specific procedures

NEXT STEPS

- 01 Answer questions
- 02 Complete site-specific training
- 03 Complete required hands-on evaluation
- 04 Document attendance/completion

Use this package as a strong training foundation.

Always align the material to current requirements, manufacturer instructions and your own procedures.

Primary reference

29 CFR 1910.147

Training use note

General/formal instruction. Employer- and machine-specific energy-control procedures are still required.

BEFORE YOU DELIVER

- ✓ Confirm current OSHA/state-plan requirements
- ✓ Insert your procedures and equipment information
- ✓ Use qualified/competent trainers where required
- ✓ Complete practical/workplace evaluation where required
- ✓ Keep training and authorization records

<https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.147>