

TRAVISTILLEY.COM / TRAINING CENTER

Lockout / Tagout (LOTO)

INSTRUCTOR + PRINT PACKET

AUDIENCE	EST. TIME	REFERENCE
Authorized & affected employees	35-45 min	29 CFR 1910.147

IMPORTANT USE NOTE

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

What is inside this packet

- Instructor quick-start and site-specific preparation checklist
- Slide-by-slide trainer guide with discussion prompts
- Employee handout / key takeaways
- Printable 10-question knowledge check
- Separate answer key and coaching notes
- Attendance record
- Practical / workplace evaluation checklist
- Certificate wording and completion record
- Primary regulatory/source reference

Run a strong session without overcomplicating it.

1. PREPARE	Review the deck and packet. Insert your procedures, equipment, routes, photos, emergency contacts and site rules.
2. PRESENT	Use the PowerPoint/PDF on a screen. Pause for discussion rather than reading every bullet.
3. CHECK	Give the knowledge check. Review missed items and coach to the expected decision.
4. VERIFY	Complete required hands-on or workplace-specific practice/evaluation with an appropriate trainer/evaluator.
5. DOCUMENT	Use the attendance record, evaluation and certificate only after required training elements are complete.

BEFORE EMPLOYEES WORK

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

Learning objectives

- Recognize hazardous energy sources and when LOTO applies
- Explain authorized, affected and other employee roles
- Follow the basic sequence for shutdown, isolation, lock/tag, stored-energy control and verification
- Recognize group, shift-change and contractor situations that need special control

1. When LOTO applies

- 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.

DISCUSSION PROMPT

Where could this fail here?

2. Roles and responsibilities

- 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.

DISCUSSION PROMPT

What control do we use?

3. The energy-control sequence

- 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.

DISCUSSION PROMPT

What would make you stop?

4. Verification is a step, not a feeling

- 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.

DISCUSSION PROMPT

Where could this fail here?

5. Group work and shift changes

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

DISCUSSION PROMPT

What control do we use?

6. Safe return to service

- 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.

DISCUSSION PROMPT

What would make you stop?

Stop-work / red-flag conditions

- Someone says “it is off” but cannot identify all energy sources
- A lock is missing a name/identity
- Stored pressure, gravity or heat has not been controlled
- Someone wants to remove another employee’s lock without the employer procedure

SCENARIO

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.

Make it site-specific

- 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

Lockout / Tagout (LOTO)

KEEP THIS PAGE

Key decisions to remember

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.

Verification is a step, not a feeling: Try-start or other approved verification must confirm the isolation is effective.

Group work and shift changes: Each exposed authorized employee needs equivalent personal protection.

Safe return to service: Inspect the work area, replace guards and remove tools.

Stop and get help when...

- Someone says “it is off” but cannot identify all energy sources
- A lock is missing a name/identity
- Stored pressure, gravity or heat has not been controlled
- Someone wants to remove another employee’s lock without the employer procedure

Our site-specific information

- ☐ 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

Employee notes:

Lockout / Tagout (LOTO) - Knowledge Check

Employee: _____ Date: _____

1. The main purpose of LOTO is to:

- ☐ A. Prevent unexpected energization or release of hazardous energy
- ☐ B. Replace machine guarding
- ☐ C. Speed up maintenance
- ☐ D. Track attendance

2. Before servicing begins, the authorized employee must verify:

- ☐ A. The machine is isolated and de-energized
- ☐ B. The supervisor is nearby
- ☐ C. The production schedule is clear
- ☐ D. A warning sign is posted

3. Who normally applies personal lockout devices for covered servicing?

- ☐ A. Authorized employees performing the servicing
- ☐ B. Any employee in the area
- ☐ C. Only security personnel
- ☐ D. The equipment manufacturer

4. Stored energy such as pressure or gravity must be:

- ☐ A. Relieved, restrained or otherwise rendered safe
- ☐ B. Ignored after electrical power is off
- ☐ C. Documented only
- ☐ D. Handled after the work

5. A stop button is:

- ☐ A. Not a substitute for energy isolation
- ☐ B. Always an energy isolating device
- ☐ C. Enough if the machine stops moving
- ☐ D. Equivalent to a personal lock

Score: _____ / 10 Passing requirement / retraining criteria:

6. Affected employees should be notified:

- ☐ A. Before controls are applied and after they are removed
- ☐ B. Only after the job is finished
- ☐ C. Only if they ask
- ☐ D. Only during annual training

7. If conditions allow energy to reaccumulate, workers should:

- ☐ A. Continue monitoring and take steps to maintain isolation
- ☐ B. Ignore it once the lock is applied
- ☐ C. Remove the lock to test it
- ☐ D. Ask an affected employee to watch

8. Group LOTO should provide each authorized employee:

- ☐ A. A level of protection equivalent to personal lockout
- ☐ B. One shared key controlled by production
- ☐ C. No personal accountability
- ☐ D. Only a warning tag

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

- ☐ A. False
- ☐ B. True

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

- ☐ A. Inform each other of their LOTO procedures
- ☐ B. Use only the contractor procedure without discussion
- ☐ C. Skip notification if both are experienced
- ☐ D. Remove all employer locks

Employee signature: _____

Answer key + coaching notes

- 1. A - Prevent unexpected energization or release of hazardous energy** | The main purpose of LOTO is to:
- 2. A - The machine is isolated and de-energized** | Before servicing begins, the authorized employee must verify:
- 3. A - Authorized employees performing the servicing** | Who normally applies personal lockout devices for covered servicing?
- 4. A - Relieved, restrained or otherwise rendered safe** | Stored energy such as pressure or gravity must be:
- 5. A - Not a substitute for energy isolation** | A stop button is:
- 6. A - Before controls are applied and after they are removed** | Affected employees should be notified:
- 7. A - Continue monitoring and take steps to maintain isolation** | If conditions allow energy to reaccumulate, workers should:
- 8. A - A level of protection equivalent to personal lockout** | Group LOTO should provide each authorized employee:
- 9. A - False** | This downloadable course alone authorizes an employee to perform LOTO on any machine.
- 10. A - Inform each other of their LOTO procedures** | When outside servicing personnel perform covered work, host and contractor employers should:

COACHING RULE

Do not treat a passing written score as proof of hands-on competency. Retrain missed critical concepts and complete workplace-specific verification where required.

Attendance + completion record

Course: Lockout / Tagout (LOTO)

Date: _____ Instructor: _____ Department / Location:

Employee Printed Name	Employee Signature	Job / Department	Date

Site-specific topics / notes:

Can the employee apply it?

Employee: _____ Evaluator: _____ Date: _____

Evaluation Item	Meets	Coach	N/A
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	☐	☐	☐

Comments / coaching:

Result: ☐ Competent for evaluated task (subject to employer authorization) ☐ More training/practice needed

Evaluator signature: _____ Employee signature: _____

CERTIFICATE OF TRAINING

This certifies that

completed the formal / awareness training portion of
Lockout / Tagout (LOTO)

Date: _____ Instructor: _____
Employer / Location: _____

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

Regulatory / source reference

Primary reference: 29 CFR 1910.147

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

Before delivery

- Confirm current OSHA and applicable state-plan requirements
- Confirm manufacturer instructions and employer procedures
- Insert workplace-specific hazards, controls, emergency contacts and rules
- Use competent/qualified trainers or evaluators where required
- Complete practical/workplace training and authorization requirements where applicable
- Retain training records according to employer and regulatory requirements

FINAL REMINDER

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