

## MECKLENBURG EMS AGENCY

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# Policy and Procedures for Lock Out Tag Out (LOTO)

### Purpose

The purpose of this policy is to establish the minimum requirements for the lockout of energy control devices whenever maintenance or servicing is performed on machines or equipment. It shall be used to ensure that the machine or equipment is de-energized, isolated from all potentially hazardous energy sources and locked out before employees perform any servicing or maintenance where the unexpected energizing or start-up of the machine or equipment or release of stored energy could cause injury.

### Definitions

**Affected Employee-** An employee who performs the duties of his or her job on equipment or in an area in which the energy control procedure is implemented and servicing or maintenance operations are performed

**Authorized Employee-** An employee who has the authority to lockout or tag out machines or energy sources while maintenance or servicing is done on the equipment; the same employee is the only one who can remove the lock or tag

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

**Energy isolated device-** A mechanical device that physically prevents the transmission or release of energy, including but not limited to the following: A manually operated electrical circuit breaker; a disconnect switch; a manually operated switch by which the conductors of a circuit can be disconnected from all ungrounded supply conductors, and, in addition, no pole can be operated independently.

**Energized source-** Any piece of equipment or apparatus that has a potentially hazardous energy that may cause harm to someone (electrical, mechanical, hydraulic, pneumatic, chemical, thermal, or other energy)

**Lockout-** The placement of a lockout device on an energy isolating device, in accordance with an established procedure, ensuring that the energy isolating device and the equipment being controlled cannot be operated until the lockout device is removed.

**Lockout device-** A device that utilizes a positive means such as a lock, either key or combination type, to hold an energy isolating device in the safe position and prevent the energizing of a machine or equipment. Included are blank flanges and bolted slip blinds.

**Tagout-** The placement of a tagout device on an energy isolating device, in accordance with an established procedure, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tagout device is removed.



**Tagout device-** A prominent warning device, such as a tag and a means of attachment, which can be securely fastened to an energy isolating device in accordance with an established procedure, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tagout device is removed.

### Compliance

All employees are required to comply with the restrictions and limitations imposed upon them during the use of lockout. Employees authorized to lockout machines/equipment are required to perform the lockout in accordance with this policy. All employees upon observing a machine or piece of equipment which is locked out to perform servicing or maintenance shall not attempt to start, energize, or use that machine or equipment.

### Requirements

All equipment will be locked out and/or tagged out to protect against any inadvertent or accidental operation while maintenance or servicing is being done. No attempt will be made to operate any switch, control panel, or valve, while it is locked out or tagged out. Only authorized employees will be allowed to lockout/tag out energized sources. Once all maintenance of service has been completed, only the Authorized Employee will be allowed to remove the lock or tag.

While lockout is always the preferred method of isolating energized sources, it is neither reasonable nor practical to feel that this will always be the best method. In these cases, a tag out is acceptable practice. The tags will be nylon/plastic straps with a locking mechanism on them. Once they have been used they will be disposed of.

### Responsible Parties

**Building/Facilities Maintenance-** Building/Facilities maintenance will be the only authorized employees. They will be in charge of all physical lockout/tag out procedures. They will be fully trained and aware of the lockout/tag out policy. They will be the only employees allowed to apply a lock or tag and will be the only employees allowed to remove a lock or tag. Building/Facilities Maintenance will contact Risk and Safety if they witness non-compliance.

**Risk and Safety-** Risk and safety will be in charge of setting forth policies. They will be in charge of educating affected employees and all employees on the lockout/tag out policy. Risk and Safety will continuously monitor the policy and will adapt to changes within the company.

**Contractors-** At times there will be contractors conducting service or maintenance within the premises. If they are working on equipment that has a hazardous energy source, then Building Maintenance will lockout and tag out the hazardous energy source. Once the service or maintenance has been completed, Building Maintenance staff will remove the lock or tag.

## Procedure

### **Preparation**

- Prior to locking out and tagging out, the Authorized Employee will survey the entire work area. They will identify all potential hazardous energy sources. They will identify which energy sources need to be locked up based on OSHA 1910.147 guidelines. If there are multiple energy sources then proper preparation will be done. Arc Flash protection must be observed until zero energy is confirmed.

### **Sequence**

- Authorized Employees
  - Prior to placing the lock or the tag, the Authorized Employee will alert all of the Affected Employees that the lock or tag will be placed
  - The Authorized Employee will cut off the hazardous energy source and lock or tag it
  - Once the energy source has been terminated, the Authorized Employee will verify that the energy has been terminated prior to servicing.
  - The Authorized Employee will then notify whoever maybe be servicing or doing maintenance on the equipment, that all energy has been terminated to the equipment
  - Once all work on the set equipment has been completed, the Authorized Employee will be made aware that energy may be placed back on to the equipment
  - Authorized Employee will ensure that area around the equipment is cleared during initial power up post maintenance or servicing. This done for safety from possible power surges, explosions, etc.
  - The Authorized Employee will remove the lock or tag from the hazardous energy source and return power
  - Once the energy source has been placed back on, the Authorized Employee will inspect the equipment for any safety issues. If any are found the energy will be immediately cut off and locked and/or tagged out. If no issues are found then normal duties will continue
- Affected Employees
  - When it is noted that servicing or maintenance is needed on a piece of equipment, the Affected Employees will alert the Authorized Employee that this is needed to be done
  - They will then wait for the Authorized Employee to lock out or tag out the energy supply to the equipment
  - Once the Affected Employees have been made aware that the energy supply has been cut off and locked out or tagged out, they will proceed with what maintenance or servicing needs to be done on the equipment
  - The Affected Employees will not tamper with the lock out or tag out devices
  - Once all maintenance or servicing has been completed, the Affected Employees will notify the Authorized Employee



### **Locks and Keys**

Only Building/Facilities Maintenance will have access to Lockout/ Tag out materials. There will not be a master key for the lock, only Building Maintenance will have this key.

### **Training**

Training will be conducting annually during the yearly corporate compliance training. Authorized Employees will stay up to date on changes in policy and procedure. All other employees will be made aware of what to look for and that they are not to handle or tamper with the locks or tags.