

Control of Hazardous Energy Sources

Self-Inspection Checklist



Optional Information

Name of School:
Date of Inspection:
Career-Technical program/course/room:
Signature of inspector:

Guidelines:

This checklist covers regulations issued by the U.S. Department of Labor, Occupational Safety and Health Administration (OSHA) as a general industry standard under 29 CFR 1910.147. Another name for control of hazardous energy sources is lockout/tagout. It covers the servicing and maintenance of machines and equipment in which the unexpected energization or startup of the machines or equipment, or release of stored energy could cause injury. The regulations cited apply only to private employers and their employees, unless adopted by a State agency and applied to other groups such as public employees. A yes answer to a question indicates that this portion of the inspection complies with the OSHA or EPA standard, or with a nonregulatory recommendation.

General Energy Control

1	Does the program require that all hazardous energy sources be isolated, locked or tagged, and otherwise disabled before anyone performs any activity where the unexpected energization, startup, or release of stored energy could occur and cause injury? [29 CFR 1910.147(c)(1)]
2	Have procedures been developed, documented, and implemented for the control of hazardous energy when working with such equipment? [29 CFR 1910.147(c)(4)]
3	Do the procedures clearly outline the scope, purpose, responsibility, authorization, rules, and techniques to be applied to the control of hazardous energy, and measures to enforce compliance? [29 CFR 1910.147(c)(4)(ii)]
4	Do procedures exist for shutting down, isolating, blocking, and securing (locks and tags) energy? [29 CFR 1910.147(c)(4)(ii)(B)]
5	Do procedures exist and is someone assigned responsibility for removing and transferring locks and tags? [29 CFR 1910.147(c)(4)(ii)(C)]
6	Do requirements exist for testing a machine or equipment to determine and verify the effectiveness of lockout/tagout and other energy control measures? [29 CFR 1910.147(c)(4)(ii)(D)]



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National Institute for
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Protective Materials and Hardware

7	Are locks, tags, chains, adapter pins, or other hardware available for securing or blocking energy sources? [29 CFR 1910.147(c)(5)(i)]
8	Are these devices durable and substantial? [29 CFR 1910.147(c)(5)(ii)(A)]
9	Are these devices standardized in either color, shape, size, or format? [29 CFR 1910.147(c)(5)(ii)(B)]
10	Do these devices have a provision for identifying the person applying the device? [29 CFR 1910.147(c)(5)(ii)(D)]
11	Do tagout devices or danger tags warn against hazardous conditions if the equipment is re-energized? [29 CFR 1910.147(c)(5)(iii)] <i>Note: Acceptable wording includes Do Not Open, Do Not Start, Do Not Close, and Do Not Energize.</i>

Inspection

12	Are inspections conducted at least annually by an authorized person (other than the ones using the energy control procedures) to ensure control procedures are being implemented? [29 CFR 1910.147(c)(6)(i)(A)]
13	Is each inspection certified by identifying the machine or equipment on which the energy control procedure was being used, the date of the inspection, the people included in the inspection, and the person performing the inspection? [29 CFR 1910.147(c)(6)(ii)]

Training and Communication

14	Is training provided and documented to ensure that (a) the purpose and function of the energy control procedures are understood, and (b) the knowledge and skills required for the safe application and removal of energy controls are acquired? [29 CFR 1910.147(c)(7)(i)]
15	Is this training repeated periodically when changes or deviations occur in the energy control procedure? [29 CFR 1910.147(c)(7)(iii)]

Energy-Isolating Devices

16	Are all energy-isolating devices operated only by authorized persons or under the direct supervision of an authorized person? [29 CFR 1910.147(c)(8)]
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Notification of Employees

17	Are all employees notified of the application and removal of lockout and tagout controls whenever such controls directly affect their work activities? [29 CFR 1910.147(c)(9)]
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Application of Control

18		<p>Does the application of energy control follow the sequence listed below? [29 CFR 1910.147(d)]</p> <ol style="list-style-type: none"> 1. Machine or equipment shutdown by authorized personnel 2. Machine or equipment isolation: all energy-isolating devices that are needed shall be located and operated in a manner that isolates the machine or equipment from the energy source(s). 3. Lockout and tagout device application: <ol style="list-style-type: none"> a. Lockout devices shall be affixed in a manner that will hold the energy-isolating device in a safe or off position. b. Tagout devices shall be affixed in a manner that clearly indicates that the operation or movement of energy isolating devices from the safe or off position is prohibited. c. If a tag cannot be affixed directly to the energy isolating device, the tag shall be located as close as safely possible to the device, in a position that will be immediately obvious to anyone operating the device. 4. Stored energy: following the application of lockout and tagout devices, all hazardous, stored, or residual energy shall be relieved, disconnected, restrained, or otherwise rendered safe. 5. Verification of isolation: before starting work on the isolated equipment or process, an authorized person must verify that isolation and de-energization of the machine or equipment has been accomplished.
19		<p>Has the work area been inspected before the removal of lockout and tagout devices? [29 CFR 1910.147(e)(1)]</p>
20		<p>Has the lockout and tagout device been removed by the person who put it on? [29 CFR 1910.147(e)(3)] <i>Note: This rule has some limited exceptions.</i></p>
21		<p>Are outside servicing personnel informed of the lockout and tagout procedures before equipment is serviced? [29 CFR 1910.147(f)(2)]</p>