Lockout tagout (LOTO) procedure: energy control for one machine or system

Yellow cells are for you to fill in. Free template from Deskely · deskely.com/resources/lockout-tagout

Equipment / system	Tag or ID	Location

Procedure number	Revision	Date

Prepared by	Approved by	Next review

1. ENERGY SOURCES AND ISOLATION POINTS

List every energy source, including stored energy. Each line is one isolation point that gets its own lock and tag.

No.	Isolation point (device, tag and location)	Energy type	Method	Magnitude	Zero energy check
1					
2					
3					
4					
5					
6					
7					
8					

2. SHUTDOWN AND LOCKOUT STEPS

Progress

Done: 0 Open: 0 N/A: 0 of 10 checks

No.	Step	Status	Note	By	Time
PREPARE					
1	Read this procedure; identify every energy source in section 1				
2	Have locks, tags, a test instrument and any blinds ready				
NOTIFY					
3	Tell the operators and everyone affected that the equipment will be shut down and locked out				
SHUT DOWN					
4	Stop the equipment by the normal stopping procedure				
ISOLATE					
5	Operate every isolation device in section 1 to isolate the equipment from its energy sources				
LOCK AND TAG					
6	Apply a personal lock and a tag to each isolation point; log them in the register				
7	Group lockout: lockbox in use and each worker's lock on it				
RELEASE STORED ENERGY					
8	Bleed, vent, drain, discharge, block or restrain stored and residual energy				
VERIFY					
9	Check that no one is exposed, then try the normal start controls				
10	Test for absence of voltage and zero pressure; return the controls to off				

3. RESTORING ENERGY

No.	Step	Status	Note	By	Time
BEFORE REMOVING LOCKS					
1	Work complete; tools, materials and blinds removed; guards refitted				
2	Everyone clear of the equipment and told it will be re-energised				
REMOVAL					
3	Each lock removed by the person who applied it, and logged in the register				
4	Equipment restarted and handed back to the operator				

Sign-off	Name	Company	Signature	Date
Authorised person				
Area authority / operations				

Lock and tag register

One row per lock. A lock is removed only by the person who applied it, or under the written removal procedure.

No.	Lock no.	Tag no.	Isolation point	Energy	Applied by	Company	On (date, time)	Verified by	Removed by	Off (date, time)	Status
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
19											
20											
21											
22											
23											
24											
25											
26											
27											
28											
29											
30											