OREGON DEPARTMENT OF FISH AND WILDLIFE POLICY
Human Resources Division

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<th>Title:</th>
<th>Control of Hazardous Energy - Lockout/Tagout</th>
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I. PURPOSE

To provide for the protection of employees from the unexpected energization, start-up, or release of stored energy from machines or processes during servicing and/or maintenance. This includes the lockout/tagout provisions required for individuals performing electrical work. The department Safety and Health Manager shall assist managers, supervisors and employees in implementing this policy.

II. DEFINITIONS

A. **Affected Employee**: An employee whose job requires the operation or use of a machine or piece of equipment on which servicing or maintenance is being performed under lockout or tagout, or whose job requires the employee to work in the area.

B. **Authorized Employee**: An employee who locks or implements a tagout system on machines or pieces of equipment and has been trained to do so.

C. **Energy Isolating Device**: A mechanical device that physically prevents the transmission or release of energy.

D. **Energy Source**: Any source of electrical, mechanical, hydraulic, pneumatic, chemical, thermal, or other energy.

E. **Lockout**: Placement of a lockout device on an energy isolating device ensuring that the energy isolating device and equipment being controlled cannot be operated until the lockout device is removed.

F. **Lockout Device**: A device, such as a lock, placed on an energy-isolating device to prevent the energizing of a machine or equipment.

G. **Tagout**: Placement of a tagout device on an energy isolating device indicating that the energy isolating device and equipment being controlled may not be operated until the tagout device is removed.
H. **Tagout Device:** A prominent warning device that can be securely fastened to an energy isolating device to indicate that the energy isolating device and equipment being controlled may not be operated until the tagout device is removed.

III. **POLICY**

All energy sources shall be used and maintained in a safe manner. This policy governing the lockout/tagout processes for these energy sources is mandatory and is a condition of employment for all affected individuals. Failure to comply with the provisions of this policy may result in disciplinary action.

This policy covers equipment and machines at all ODFW sites, and equipment under the control of ODFW employees regardless of location. This program does not apply to cord and plug equipment that can be unplugged and is under complete control of the person doing the work.

A. Employees shall receive training adequate to ensure that the purpose and content of the Control of Hazardous Energy Program are understood.

B. Before any employee performs any servicing or maintenance on a machine or piece of equipment, the machine or equipment shall be isolated and rendered inoperative. This procedure for the control of hazardous energy applies to the service, maintenance and repair of machines or equipment in which the unexpected energization or start-up of the machine or equipment, or the release of stored energy, could cause injury to employees.

C. Only Authorized Employees may apply and remove lockout/tagout devices. Each site will maintain a list of Authorized Employees.

D. Any non-ODFW personnel working on the site, including private contractors, utility workers, volunteers, or other public employees, must be notified of the ODFW lockout/tagout program when their responsibilities require working on any type of energized equipment that may affect ODFW employees. A copy of this procedure will be given to the contractor and a mutually agreed upon procedure will be established to fully protect the contractor and ODFW employees.

E. **Lockout-Tagout Devices** shall meet the following criteria:

1. They must be singularly identified and shall be the only devices used for controlling energy and not be used for other purposes;

2. They must be standardized in at least one of the following criteria: color, shape, or size. Additionally, when tagout devices are used they shall be standardized with respect to print and format;

3. Lockout and tagout devices shall indicate the identity of the employee applying the device; and

4. Tagout devices shall warn against specific hazardous conditions if the machine or piece of equipment is energized, and shall include language such as the following: “Do Not Start,” “Do Not Open,” “Do Not Close,” “Do Not Energize,” or “Do Not Operate.”
F. Lockout/Tagout Procedures

If an energy-isolating device is capable of being locked out, then lockout must be used. All new equipment, or equipment subject to major repair or modification must have an energy-isolating device installed that is capable of accepting a lockout device.

1. Before a machine or piece of equipment is turned off, the Authorized Employee shall know the type and magnitude of the energy, the hazards of the energy to be controlled, and the method or means to control the energy. More than one energy source may be involved.

2. All Affected Employees shall be notified that a lockout or tagout device is going to be utilized and the reason for it.

3. An orderly shutdown shall be utilized to avoid any additional hazards to employees. The machine or piece of equipment shall be shut down using the normal shutdown procedures.

4. Lockout or tagout devices shall be affixed to each energy-isolating device by the Authorized Employee. Lockout devices shall be affixed in a manner that will hold the energy-isolating device in a safe or off position.

5. Following the application of lockout or tagout devices, all potentially hazardous stored or residual energy shall be relieved, disconnected, restrained, or otherwise rendered safe.

6. Prior to starting work on machines or equipment that have been locked and tagged out, the Authorized Employee must verify that isolation and de-energization of the machine or equipment has been accomplished. This is accomplished by attempting to start the machine or piece of equipment.

7. Maintenance, service or repair operations may begin after operating controls are returned to the neutral or off position.

G. Equipment Testing While Under Lockout/Tagout

In some instances it may be necessary to operate equipment or machines during maintenance or servicing. If so, the following steps shall be taken to protect personnel:

1. Clear the equipment or machine of all tools and materials that are non-essential items;

2. Make sure all personnel are clear of the equipment or machine and notify them that the machine will be energized;

3. The Authorized Employee shall remove the lockout or tagout device; and

4. Energize the machine or equipment and proceed with testing or positioning;

5. After testing or positioning, de-energize the equipment or machine, complete all shutdown procedures, and reapply lockout or tagout devices before continuing with further maintenance or servicing.
H. Release from Lockout/Tagout

Before lockout or tagout devices are removed and energy is restored, the Authorized Employee shall ensure that nonessential items have been removed and that machine or equipment components are intact. In addition, the Authorized Employee shall ensure all other employees have been safely positioned or removed from the area.

1. Each lockout or tagout device shall only be removed by the employee who applied the device. If that employee is not available, the device can be removed providing the following conditions are met:
   a. It has been verified that the employee is not at the site;
   b. A reasonable effort has been made to contact the employee to inform the employee about the removal;
   c. The employee is informed about the device removal before resuming work at the site;
   d. Standard procedures for removing a lockout/tagout device are followed and documented; and
   e. Only the supervisor of the employee who attached the device may remove it.

2. If a contractor attached the device, only the contractor's supervisor may remove the device. If the contractor's supervisor cannot be located, the ODFW site supervisor can remove the device following steps a through e above.

3. Attachment A, Removal of a Lockout or Tagout Device by a Supervisor, shall be completed each time a supervisor removes an employee's or contractor's device.

4. After the lockout or tagout devices have been removed, operate the energy-isolating device(s) to restore the equipment or machine to its normal operational condition.

I. Procedures Involving More Than One Person

"Group Lockout" is not allowed. In the preceding steps, if more than one individual is involved in the maintenance or servicing activities, each individual will place his/her own lock or tag on each applicable energy-isolating device. If the energy-isolating device cannot accept multiple locks or tags, a multiple lockout or tagout device will be used.

J. Special Rules Regarding Tags

It is very important for employees to understand the differences between locks and tags. The use of tags may give a false sense of security.

1. Tags are a warning device only. They do not provide any type of physical restraint or energy isolation.

2. When tags are applied they shall be signed and dated by the employee applying the tag, and may not be removed by anyone except that employee.
3. Tags shall never be bypassed, ignored, or otherwise defeated.

4. Tags must be legible and understandable by all employees and contractors in the area where the tags are used.

5. Tags shall be uniform in color, size, and design so as to be easily recognized.

6. Tags and their means of attachment shall be durable and made of a material able to withstand the environmental conditions encountered in the workplace.

7. Tags shall be securely attached to energy isolating devices so they cannot be inadvertently detached during use.

8. Tag attachment devices shall not be reusable. Nylon wire straps or other similar type devices will be used.

K. Training

1. Employees shall receive training to ensure that the purpose and content of this program are understood. Training will include:

   a. Recognition of applicable energy sources, the type and magnitude of the energy available in the workplace, and the methods and means necessary for energy isolation and control.

   b. The purpose and use of the lockout and tagout procedures.

   c. The prohibition of attempts to restart or reenergize machines or equipment that are locked or tagged out.

   d. An understanding of the following limitations of tags:

      1) Tags are warnings and do not physically lock energy isolating devices, thus they may evoke a false sense of security. The meaning of the tag must be understood.

      2) Tags can only be removed by the person who applied them.

      3) Tags are never to be ignored or bypassed.

      4) Tags must be legible and understandable by all employees using them as well as affected employees.

2. Training shall be provided upon initial assignment to the site. Retraining will be provided whenever there is a change in job assignments, a change in machines or equipment that present a new hazard, or when there is a change in energy control procedures. Retraining shall also be conducted whenever a periodic inspection deems it necessary, or whenever site managers have reason to believe there are deviations from the established procedures.
3. Provisions of the site's lockout/tagout program shall be the topic of at least one safety meeting each year. Any deviations from established procedures, accidents, near misses, or injuries shall be discussed.

L. Equipment-Specific Procedures

1. Attachment B, Equipment Specific Lockout/Tagout Procedures, shall be completed for each individual machine or piece of equipment that must be locked or tagged out if the equipment or machine:
   
a. Has the potential for stored or residual energy after shutdown;
   
b. Has the potential for re-accumulation of stored energy after shutdown;
   
c. Can be energized from more than one source;
   
d. Cannot be completely de-energized and deactivated by one energy source;
   
e. Needs more than one lockout device to lockout the equipment;
   
f. Has a lockout device that is not under the exclusive control of the Authorized Employee performing the maintenance; and/or
   
g. Requires maintenance activities that may create hazards for other employees, even though the equipment is locked out.

2. The procedure can be maintained in any other written format as long as the information in Attachment B is covered.

M. Periodic Assessments

1. Periodic assessments shall be conducted at least annually by site supervisors or their designee. The responsibilities of employees using lockouts or tagouts shall be reviewed during the assessments. Assessment records shall include:
   
a. The identity of the machine or piece of equipment on which the lockout or tagout procedures were utilized;
   
b. The date of the assessment;
   
c. Names of employees who were included in the assessment; and
   
d. Person performing the assessment.

2. Attachment C, Periodic Lockout/Tagout Assessment Form, shall be used to document the assessments.

N. Responsibilities

1. Employees have the following basic responsibilities:
   
a. To comply with the restrictions and limitations imposed upon them during the use of lockout/tagout;
b. To perform the lockout/tagout in accordance with this procedure; and

c. To not attempt to start, energize or use any machine or piece of equipment upon observing that it is locked out or tagged out for servicing or maintenance.

2. Supervisors primary responsibilities are:

   a. To implement the ODFW lockout/tagout program at their facility;

   b. To ensure the establishment of equipment specific procedures where applicable;

   c. To ensure that personnel are trained on the elements of the ODFW lockout/tagout program; and

   d. To consult with contractors regarding lockout/tagout procedures.

3. The Safety and Health Manager has the following responsibilities:

   a. To assist sites in developing specific lockout/tagout procedures, and

   b. To assist sites in lockout/tagout training.

Attachment A  Removal of a Lockout or Tagout Device by a Supervisor
Attachment B  Equipment Specific Lockout/Tagout Procedures
Attachment C  Periodic Lockout/Tagout Assessment Form