



Training Solutions, Delivered!

LOCKOUT/TAGOUT FOR AFFECTED EMPLOYEES

**Leader's Guide, Fact Sheet
& Quiz**

Item Number: 3389
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This easy-to-use Leader's Guide is provided to assist in conducting a successful presentation.

PREPARING FOR THE MEETING

Here are a few suggestions for using this program:

- a) Review the contents of the Fact Sheet that immediately follows this page to familiarize yourself with the program topic and the training points discussed in the program. The Fact Sheet also includes a list of Program Objectives that details the information that participants should learn from watching the program.
- b) If required by your organization, make an attendance record to be signed by each participant to document the training to be conducted.
- c) Prepare the area and equipment to be used for the training. Make sure the watching environment is comfortable and free from outside distractions. Also, ensure that participants can see and hear the TV screen or computer monitor without obstructions.
- d) Make copies of the Review Quiz included at the end of this Leader's Guide to be completed by participants at the conclusion of the presentation. Be aware that the page containing the answers to the quiz comes before the quiz itself, which is on the final page.

CONDUCTING THE PRESENTATION

- a) Begin the meeting by welcoming the participants. Introduce yourself and give each person an opportunity to become acquainted if there are new people joining the training session.
- b) Introduce the program by its title and explain to participants what they are expected to learn as stated in the Program Objectives of the Fact Sheet.
- c) Play the program without interruption. Upon completion, lead discussions about your organization's specific policies regarding the subject matter. Make sure to note any unique hazards associated with the program's topic that participants may encounter while performing their job duties at your facility.
- d) Hand out copies of the review quiz to all of the participants and make sure each one completes it before concluding the training session.

3389 LOCKOUT/TAGOUT FOR AFFECTED EMPLOYEES FACT SHEET

LENGTH: 8 MINUTES

PROGRAM SYNOPSIS:

Serious injury and equipment damage can be caused by the failure to control hazardous energy during maintenance, repair and service work. While affected employees aren't expected to fix equipment themselves, they are an important part of the lockout/tagout process that keeps co-workers safe and equipment protected during repair. This video explains the responsibilities of an affected employee during a lockout operation.

Topics include what the term "lockout/tagout" means, roles of affected and authorized employees, types and uses of lockout devices, information conveyed by tags and what to do when encountering locks and tags.

PROGRAM OBJECTIVES:

After watching the program, the participant will be able to explain the following:

- The roles of affected and authorized employees in the lockout/tagout process;
- Types of lockout devices and how they are used;
- Information conveyed by tags used in lockout/tagout;
- What to do when encountering locks and tags in the workplace.

INSTRUCTIONAL CONTENT:

BACKGROUND

- All workplaces regularly perform maintenance, repair and service work on equipment. It may seem like "routine maintenance," but if not done correctly, service work can be dangerous to both the employees performing the maintenance and also to people who are working nearby.
- Equipment that has been shut down for service can inadvertently be restarted by a co-worker or equipment controlled by automatic processors, timers or computers can restart without warning.
- Serious injury and equipment damage can be caused by the failure to control hazardous energy during maintenance, repair and service work. That's why we use a safety procedure called lockout/tagout.
- You, as an affected employee, aren't expected to fix equipment yourself, but you are an important part of the process that keeps authorized employees safe and the equipment protected while it is being repaired.

WHAT IS LOCKOUT/TAGOUT?

- Lockout/tagout is the name for a safety procedure that does two things. It protects against the accidental restarting of equipment and it controls the unintentional release of hazardous energy while maintenance is being performed.
- Because of the hazards associated with the maintenance, servicing or repair of the equipment used in the workplace, your organization has developed a lockout/tagout program. This program defines the specific procedures to follow to protect authorized employees and the equipment while they are working on it.

AUTHORIZED & AFFECTED EMPLOYEES

- Lockout/tagout involves two different categories of personnel: authorized employees and affected employees.
- A part of some employees' jobs is to perform maintenance work on equipment. In terms of lockout/tagout, such an employee is called an "authorized employee."
- An authorized employee is anyone who is authorized to shut down, lockout and tagout equipment in order to perform service or maintenance.
- An "affected employee" is anyone who either operates or who works near the equipment being serviced or maintained, but does not actually do the service work.
- Since your work may be affected by what an authorized employee has to do on the equipment, you need to be involved in the process.
- An important part of lockout/tagout involves letting affected employees know what's going on. When equipment is

about to be shut down for service, maintenance or repair, you can expect a visit from an authorized employee to let you know that equipment will be shut down and how long it will be shut down.

- Safety means working as a team and understanding everyone's role in the lockout/tagout process.

TYPES & USES OF LOCKOUT DEVICES

- Locks and tags are examples of lockout devices. Placing a lock on a disconnect switch or valve physically prevents anyone from restarting or reenergizing the equipment during servicing or maintenance.
- Since the equipment to be serviced may have multiple energy sources, several types of lockout devices may be needed.
- There are different types of lockout devices for control panel switches, valves, circuit breakers and gas line handles.
- On some equipment, it is also necessary to use chains or blocks to keep parts of the equipment from moving.
- Some lockout devices accept multiple locks. If several people are working on the equipment, each person has to have a place to put their lock; you might see several of them daisy chained together.
- Each employee involved in the maintenance procedure is provided with his or her own lock and matching key.
- Locks and keys are never shared or exchanged: one lock, one key. That is how those working on equipment stay safe on the job.

INFORMATION CONVEYED BY TAGS

- A lock and a lockout device don't tell the whole story. To help communicate what's going on, tags are used in the lockout/tagout procedures.
- The tag tells who placed the lock and serves as a visible reminder the equipment is shut down. Everybody on the floor needs to be familiar with the tags in your operation and what they mean.

WHAT TO DO WHEN ENCOUNTERING LOCKS & TAGS

- When you see lockout devices and tags on equipment, the general rule is to stay clear of the area unless you're the authorized personnel servicing the equipment. Don't try to start the equipment, even if it looks like the work is complete and no one's around.
- If the lockout/tagout procedure is interfering with your ability to do your job, you need to talk with your supervisor or manager.
- Whatever you do, don't get creative and try to find a workaround to get the equipment running. If it's shut off, locked and tagged, it's not done to make your job more difficult; it's done to protect the safety of personnel performing maintenance and the safety of the equipment itself.
- Once the maintenance work has been completed, the employees authorized to lockout and tagout will let you know when equipment will be ready for use. Until that time, keep clear of the equipment.

LOCKOUT/TAGOUT FOR AFFECTED EMPLOYEES

ANSWERS TO THE REVIEW QUIZ

1. e

2. a

3. b

4. a

5. c

LOCKOUT/TAGOUT FOR AFFECTED EMPLOYEES
REVIEW QUIZ

The following questions are provided to determine how well you understand the information presented in this program.

Name _____ Date _____

1. What is the lockout/tagout procedure designed to do?
 - a. Protect against the accidental restarting of equipment during service
 - b. Allow affected employees to service or repair equipment
 - c. Control the unintentional release of hazardous energy during equipment service
 - d. Both answers a and b
 - e. Both answers a and c

2. Even employees who just work near equipment being serviced are considered "affected employees."
 - a. True
 - b. False

3. Locks and keys used in the lockout process can only be shared by authorized employees working on the same equipment.
 - a. True
 - b. False

4. You should never try to start equipment that is locked and tagged, even if it looks like the work is complete.
 - a. True
 - b. False

5. What should you do if a lockout/tagout procedure is interfering with your ability to do your job?
 - a. Find a way to get around the procedure to get the equipment running
 - b. Ask an authorized employee to reverse the procedure
 - c. Talk to your manager or supervisor