



Training Solutions, Delivered!

HOSPITALITY OSHA 7: Lockout/Tagout

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

Item Number: 5080
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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.

5080 HOSPITALITY OSHA 7: Lockout/Tagout FACT SHEET

LENGTH: 8 MINUTES

PROGRAM SYNOPSIS:

Lockout/tagout procedures may be necessary for many pieces of equipment in your facility during maintenance or repair. A lack of knowledge pertaining to proper lockout/tagout procedures can have tragic results, so it is important that your workers understand and follow all your organization's policies regarding the control of hazardous energy. This program is a great tool for training affected and authorized employees in lockout/tagout procedures. This includes workers in kitchens, laundry rooms and maintenance.

Topics include authorized and affected associates, the sequence of steps in a lockout procedure, the annual inspection process, lockout hardware and the one exception to the lockout rule.

PROGRAM OBJECTIVES:

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

- What lockout/tagout is and why it is necessary;
- Which associates are considered authorized or affected;
- What the sequence of steps in a lockout procedure is;
- How the annual inspection process work;
- What the one exception to the lockout rule is.

INSTRUCTIONAL CONTENT:

DEFINITION OF 'LOCKOUT/TAGOUT'

- To put it simply, lockout/tagout is a way to protect yourself and others in the workplace. How? It's fairly basic, but just because it's simple doesn't mean it's not important. It's just the opposite.
- Lockout/tagout can prevent serious, debilitating injuries and even death. Yes, lockout/tagout is serious business.
- Lockout/tagout is about disabling machinery during maintenance or repair by using a lock to prevent the machine from being started. Just turning off the machine at the controls isn't enough.
- What would happen if an engineer had their head, arms or other parts in a machine with the start button turned off and someone walked up, not knowing he was in there and turned the machine on? Not a nice thing to think about.
- That's why it's so important to disable energy sources. All energy sources before maintenance or repair begins.
- Remember this: Lockout/tagout must be used during the servicing and/or maintenance of machines or equipment and when there is a potential for: unexpected energization or startup or release of stored energy.

AUTHORIZED & AFFECTED ASSOCIATES

- There are two different categories of associates requiring knowledge and training in lockout tagout procedures.
- The first category is authorized associates. These are maintenance personnel who actually use lockout and tagout procedures while they are repairing or maintaining equipment.
- The second category is affected associates. This describes any associates who uses or works around equipment and machinery. It's recommended that virtually all associates be in the affected associate category.

SEQUENCE OF STEPS IN A LOCKOUT PROCEDURE

- To adequately protect both authorized and affected associates, the machine's energy source or sources must be disabled before maintenance, service or repair is performed. The first thing to do is to identify all hazardous energy sources associated with the machine.
- Each machine or piece of equipment must be inspected by trained persons to determine energy sources and adequate lockout/tagout procedures. These procedures must be documented if:
 - The equipment has multiple energy sources.
 - Multiple lockouts are required.

- Two or more associates are repairing or servicing the equipment.
- The equipment has a potential to store or reaccumulate energy.
- Remember, electricity is not the only form of hazardous energy. Control of hazardous energy systems also includes mechanical, hydraulic, pneumatic, chemical, thermal and other energy sources.
- Once identified, these energy sources must be controlled by locking them out to the “off” or “safe” position. Energy is considered adequately controlled or isolated when an unplanned event, such as someone attempting to turn the machine on, will not override or bypass the lockout control.
- The name of the person who locked the equipment out must be written on the tag. This person is the only person allowed to remove the lock or tag. In some circumstances, multiple locks and/or tags are used.
- Never, under any circumstances, remove a lock or tag or attempt to start a machine that has been locked and tagged out.

ASSOCIATE NOTIFICATION & TRAINING

- Associates who are affected by lockout/tagout procedures are to be notified by the authorized associate before the lockout is applied and after the lockout is removed and when the machine or equipment is safe to use.
- Clearing jams is another area of concern. A good rule of thumb is if an associate has to remove a guard exposing themselves to hazardous energies, then lockout/tagout procedures must be used.
- You need to develop specific procedures for each machine and all authorized and affected associates must be trained in these procedures.
- Associate training must be provided to ensure everyone is educated in lockout/tagout procedures. Associates must know what lockout/tagout means and that they are not to remove tags without authorization, under any circumstances.

THE ANNUAL INSPECTION PROCESS

- The next part of an effective lockout tagout program is an annual inspection process. Inspections ensure associates are trained and knowledgeable on lockout/tagout policies and procedures and that these procedures are being properly used when required. Documentation of the annual inspections is required.
- The person conducting the inspection should be an authorized employee, but one who does not utilize the lockout/tagout energy control procedure being inspected.
- In other words, maintenance people who perform lockout tagout procedures on the machine or equipment being inspected cannot conduct the inspection.

LOCKOUT/TAGOUT HARDWARE

- Lockout and tagout hardware such as locks, tags and hasps are provided by your property.
- Lockout/tagout hardware may only be used for lockout tagout purposes and cannot be used for any other job tasks. This pertains especially to the tags because lockout tags used for other purposes may dilute the meaning of the tag.

INDIVIDUAL RESPONSIBILITY

- Each individual must accept the responsibility of being aware of the rules and following your organization’s policies and procedures exactly.
- The purpose of lockout and tagout is accident prevention, safeguarding the machine operators and the maintenance associates servicing the equipment. Safety has always been a team effort and lockout/tagout is no different.

ONE EXCEPTION TO THE LOCKOUT RULE

- There is one exception to the lockout rule and that’s equipment connected only by an electrical cord and plug. You do not have to lockout cord and plug equipment if there are no other hazardous energy sources.
- The major requirement for cord and plug equipment is that the person performing the work must have control over the plug, thus preventing someone else from plugging in the cord and energizing the equipment. If plug control cannot be maintained, then the plug needs to be lockout.

SUMMARY

- Failure to lock out and tag machinery before working on it is a major cause of injury.
- There is a big difference between turning off a machine and actually disabling a piece of equipment.
- Electricity is not the only form of hazardous energy.

- All equipment being serviced or repaired that poses a hazard must be locked out and tagged before the service or maintenance is performed.
- Never remove a lock or tag or attempt to start a machine that has been locked and tagged out.
- Lockout/tagout hardware may only be used for lockout tagout and cannot be used for any other purpose.
- Lockout/Tagout is a vital part of injury prevention, so if you're not sure about a particular procedure, ask your supervisor. Don't take chances because failure to properly lockout and tagout when necessary can lead to potentially serious injury.

HOSPITALITY OSHA 7: Lockout/Tagout

ANSWERS TO THE REVIEW QUIZ

1. b
2. d
3. b
4. b
5. c
6. a
7. b
8. a
9. b
10. a

HOSPITALITY OSHA 7: Lockout/Tagout
REVIEW QUIZ

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

Name _____ **Date** _____

1. Lockout/tagout is a process designed to _____.
 - a. Increase productivity
 - b. Protect employees
 - c. Protect against fires
 - d. Prevent overheating

2. If you are unsure about a part of your company's lockout/tagout program, who should you contact?
 - a. OSHA
 - b. Security
 - c. Human Resources
 - d. Supervisor

3. Hitting the Stop Button on a machine disables the power to the machine the same way as lockout/tagout procedures.
 - a. True
 - b. False

4. Authorized Employees and Affected Employees mean the same thing.
 - a. True
 - b. False

5. Affected Employees are people who work _____.
 - a. With equipment
 - b. With powered equipment
 - c. Anywhere in the facility
 - d. Both answers a and b

6. Devices connected only by a cord and plug do not need to be locked out.
 - a. True
 - b. False

7. When a machine is locked out, it should still be able to be powered on by Authorized Personnel.
 - a. True
 - b. False

8. If machine guarding is removed, then lockout/tagout is required.
 - a. True
 - b. False

9. Inspections of lockout/tagout procedures and equipment must be performed by OSHA personnel.
 - a. True
 - b. False

10. Only Authorized Personnel are allowed to remove locks or tags.
 - a. True
 - b. False