



Training Solutions, Delivered!

# AN OVERVIEW OF LOCKOUT/TAGOUT

Leader's Guide, Fact Sheet  
& Quiz

Item Number: 5154  
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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.

## **5154 AN OVERVIEW OF LOCKOUT/TAGOUT FACT SHEET**

**LENGTH: 2:39 MINUTES**

### **PROGRAM SYNOPSIS:**

Lockout/tagout is a system of energy control procedures that must be used anytime machine guards are opened or removed, electrical doors or covers are opened or anytime a person is potentially exposed to injury from the unexpected start up or energization of equipment. To help prevent injuries during lockout/tagout operations, your organization has developed a written energy control program in accordance with OSHA's Control of Hazardous Energy Standard. This plan must provide training to ensure employees understand its purpose and function. As part of such training, this program provides an overview of lockout/tagout and how the system works to ensure the safety of all employees involved in lockout operations.

Topics include lockout devices, "trying" a lockout, the written energy control plan and the three employee designations related to lockout/tagout procedures.

### **PROGRAM OBJECTIVES:**

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

- What lockout/tagout is;
- What the requirements of locks and tags used in lockout operations are;
- What the components of the written energy control plan are;
- What the three employee designations related to lockout procedures are.

### **INSTRUCTIONAL CONTENT:**

#### **AN OVERVIEW OF LOCKOUT/TAGOUT**

- Lockout/tagout is a system of energy control procedures that must be used anytime machine guards are opened or removed, electrical doors or covers are opened or anytime a person is potentially exposed to injury from the unexpected start up or energization of equipment. This most often occurs during maintenance operations when machines or equipment are being serviced or adjusted.
- During a lockout operation, all energy sources to a machine or piece of equipment are disconnected, blocked or opened, and then locked in the disconnected position and marked with a tag to indicate that the equipment must not be re-energized.
- The lockout devices, locks and tags used for this purpose, must be authorized by the company and used for no other purpose. They must be constructed in a sturdy manner so they cannot be easily removed and must be able to withstand the environment in which they are used.
- Each person involved in a lockout operation must place their own lock on the energy control device and keep control of the key.
- Once all energy sources have been locked and tagged, the lockout must be "tried" to ensure that the equipment will not start. To try a lockout, the normal on/off controls must be used to verify that the machine will not start. Any exposed electrical parts must also be verified as being de-energized.
- Once the work is completed, all tools removed, and all safety devices put back into place, each worker must remove their own lock and tag from the energy control device. This ensures that all workers are safely clear of the equipment before it is restarted.
- Your organization has developed a written energy control plan that consists of energy control procedures that clearly outline the specific methods to be used to isolate and control hazardous energy.
- The written plan and its procedures must consider various types of energy sources including electricity, compressed air, hydraulic systems, stored energy and even the force of gravity.

- There are different employee designations related to lockout/tagout procedures: authorized employees, affected employees and other employees.
- Authorized employees are the only ones permitted to perform lockout/tagout procedures.
- All workers must be able to recognize when a lockout operation is in progress and understand that they are prohibited from removing a lock or tag and must never apply power to locked and tagged equipment. During a lockout/tagout operation, someone's life depends on the equipment remaining deenergized.

**AN OVERVIEW OF LOCKOUT/TAGOUT**

**ANSWERS TO THE REVIEW QUIZ**

1. a

2. b

3. c

4. a

**AN OVERVIEW OF LOCKOUT/TAGOUT  
REVIEW QUIZ**

Name \_\_\_\_\_ Date \_\_\_\_\_

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

1. Locks and tags used in lockout/tagout operations must be authorized by the company and used for no other purpose.
  - a. True
  - b. False
  
2. The authorized employee in charge of a lockout operation is the only person who should place a lock on the energy control device and keep control of the key.
  - a. True
  - b. False
  
3. Which of the following is NOT an employee designation related to lockout/tagout procedures?
  - a. Authorized employees
  - b. Affected employees
  - c. Assisted employees
  - d. Other employees
  
4. All workers must be able to recognize when a lockout operation is in progress and understand that they are prohibited from removing a lock or tag and must never apply power to locked and tagged equipment.
  - a. True
  - b. False