



Training Solutions, Delivered!

# THE SEQUENCE OF A LOCKOUT PROCEDURE

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

**Item Number: 5159**  
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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.

## **5159 THE SEQUENCE OF A LOCKOUT PROCEDURE FACT SHEET**

**LENGTH: 1:24 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 reviews the sequence of steps that authorized workers must follow when performing a lockout/tagout procedure.

### **PROGRAM OBJECTIVES:**

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

- What the sequence of steps is that authorized workers must follow when performing a lockout procedure;
- What the most important step in the sequence is.

### **INSTRUCTIONAL CONTENT:**

#### **THE SEQUENCE OF A LOCKOUT PROCEDURE**

- Authorized workers must follow a sequence of steps when performing a lockout/tagout procedure.
- First, they familiarize themselves with the specific lockout procedure for the equipment involved and identify all sources of hazardous energy related to the equipment.
- Then they notify all affected workers that the equipment or process is being removed from service and why.
- Next, the equipment is shut down using its normal on/off control functions.
- After the equipment is properly shut down, all energy sources are isolated by opening switches, closing valves or other methods.
- Then, each energy isolating device is locked with an approved lockout device and tagged with an appropriate tagout device.
- Any stored or residual energy must then be controlled. This could include capacitors being discharged, objects affected by gravity being secured and other stored energy released.
- Finally, and most importantly, the equipment is tested to ensure the lockout procedure was done properly and that the equipment is in fact de-energized.
- Only after the lockout has been properly tested and verified successful may the required repair or service be performed.

## **THE SEQUENCE OF A LOCKOUT PROCEDURE**

### **ANSWERS TO THE REVIEW QUIZ**

1. b

2. b

3. a

**THE SEQUENCE OF A LOCKOUT PROCEDURE**  
**REVIEW QUIZ**

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

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

1. The first step in the lockout/tagout procedure sequence is for an authorized worker to notify all affected workers that the equipment is being removed from service.
  - a. True
  - b. False
  
2. What is the most important step in the lockout sequence?
  - a. Locking and tagging each energy isolating device
  - b. Testing the equipment to ensure it is de-energized
  - c. Controlling any stored or residual energy
  
3. Only after a lockout has been properly tested and verified successful may the required repair or service be performed.
  - a. True
  - b. False