

Lockout/Tagout (LOTO) Procedure

SOP · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

A lockout/tagout (LOTO) procedure is the written energy control procedure that keeps machines dead while people work on them: isolating every energy source, locking the isolation in place, releasing stored energy, and verifying zero energy before anyone puts hands in — then reversing it all safely when the work is done. It exists because the most dangerous machine in the building is the one somebody thinks is off.

The injuries LOTO prevents are among the worst in industry: crushing, amputation, electrocution, and burns from machines that started while someone was inside them — a breaker flipped by someone who did not know, a valve that leaked pressure back, a spring with one cycle left in it. Every step in the sequence below closes a path by which "off" turns out to be a rumor.

This template gives you the energy control program structure OSHA requires: authorized and affected employee roles, machine-specific procedures, the application and release sequences, the rules for shift change, group lockout, and contractors, and the annual inspection that keeps the paper honest.

Purpose and scope

This procedure sets out the energy control program at [Your company], [site], per OSHA 1910.147. It applies to all servicing and maintenance of machines and equipment where unexpected energization, startup, or release of stored energy could injure someone — including clearing jams, cleaning, adjusting, and tool changes that expose people to danger zones.

It does not replace the machine-specific energy control procedures at [location/system] — it is the frame they hang on. Normal production operations are covered by machine guarding; where a task needs no guard removed and no body part in a danger zone, LOTO may not be required — [name/role] makes that call in writing, not the person holding the wrench.

Roles: authorized, affected, and other employees

- Authorized employees: the people trained and designated to lock out equipment and perform the servicing — only they apply and remove lockout devices. The current roster is at [location/system].
- Affected employees: operators and others who work on or around equipment that gets locked out — they are notified before lockout is applied and after it is removed, and they never attempt to restart locked-out equipment.
- Other employees: everyone else in the area — trained to recognize lockout devices and to leave them alone. A lock on an energy source is another person's life; removing one is a termination-level offense at [Your company].
- Program owner ([name/role]): maintains the machine-specific procedures, the device stock, the training records, and the periodic inspection schedule.

Machine-specific procedures and devices

Each machine or equipment type has a written energy control procedure at [location/system] identifying every energy source — electrical, pneumatic, hydraulic, mechanical, thermal, chemical, gravity — with the isolation point, the device that fits it, and the stored-energy release and verification steps for that machine. No authorized employee locks out a machine that lacks one — stop and escalate to [name/role].

- Lockout devices are standardized, durable, and used for nothing else: each authorized employee has personally assigned locks, identifying them by name, with the only key in their pocket.
- Lockout is the default wherever the equipment will accept a lock; tags alone are used only where the standard permits and with the additional measures it requires — a tag is a warning, not a restraint.
- Hasps, valve covers, breaker blocks, and group lock boxes are stocked at [locations]; missing or damaged devices are replaced before the job, not worked around.

Applying lockout — the sequence

1. Prepare: review the machine-specific procedure, identify every energy source and isolation point, and gather the devices you need.
2. Notify all affected employees that the equipment is coming down for servicing and lockout is being applied.
3. Shut down the equipment using its normal stopping procedure — controls to off, cycle completed, nothing left mid-stroke.
4. Isolate every energy source at the points the procedure lists: open the disconnect, close and lock the valves, block the lines — the machine's stop button and control-panel switches isolate nothing.
5. Apply your personal lock (and tag) to each isolation point or to the group lock box, per the procedure. Every authorized employee working on the equipment applies their own lock — no one is protected by somebody else's.
6. Release or restrain stored energy per the machine-specific steps: bleed pressure from hydraulic and pneumatic lines, discharge capacitors, block or lower suspended and spring-loaded parts, and let hot components cool.
7. Verify zero energy: with everyone clear, attempt to start the equipment using its normal controls, then return the controls to off; test or observe per the procedure that pressure gauges read zero and parts cannot move. This try-out step is the whole point — do not skip it because the disconnect "is definitely open."
8. Begin the servicing work. If the job passes to another crew mid-task, follow the shift-change transfer steps below before any lock comes off.

Release from lockout — returning to service

1. Inspect the work area: tools and materials removed, guards reinstalled, components intact, the machine ready to run.
2. Check that all personnel are clear of the equipment and the danger zone — physically look; do not take a shouted "clear" through a wall.
3. Notify affected employees that lockout is being removed and the equipment is returning to service.

4. Each authorized employee removes their own lock and tag — never anyone else's. If someone has left site with their lock still on, only [name/role] may remove it, under the written lock-removal procedure the standard requires.
5. Re-energize in the order the machine-specific procedure sets, and confirm normal operation before handing the equipment back to production.

Special situations

- Group lockout: for crews, a group lockout device or lock box is used per the standard — each member applies a personal lock to the group device, and a designated authorized employee holds overall responsibility. The job is not done until the last personal lock is off.
- Shift change: continuity of protection is the rule — the oncoming authorized employee applies their lock before the off-going employee removes theirs. Equipment never sits mid-servicing with nobody's lock on it.
- Contractors: outside servicing personnel and [Your company] inform each other of their respective lockout procedures before work starts, per the standard; [name/role] coordinates, and our affected employees are briefed on the contractor's devices.
- Cord-and-plug equipment: where unplugging removes all hazardous energy and the plug stays under the exclusive control of the person doing the work, the standard's exception applies — the plug stays at hand or is fitted with a plug lock.

Training and periodic inspection

Authorized employees are trained on energy types, isolation methods, and this procedure before their first lockout, with retraining whenever machines, procedures, or job assignments change and whenever an inspection or incident shows a gap. Affected and other employees are trained on what lockout means and the absolute rule against touching devices or restarting locked-out equipment.

Per OSHA 1910.147, each energy control procedure is inspected at least annually by an authorized employee not using the procedure under inspection: watching a lockout performed, correcting deviations on the spot, reviewing responsibilities with the employees involved, and certifying the inspection — equipment, date, employees, and inspector — at [system/location].

Records and review

Machine-specific procedures, training sign-offs, periodic inspection certifications, lock assignment records, and any lock-removal reports are kept at [system/location] for [period]. They are the first documents an OSHA inspector asks for after a machine injury.

This procedure is reviewed [frequency, e.g. annually], after any near miss or incident involving hazardous energy, and whenever new equipment arrives — no machine enters service without its energy control procedure written first. Owner: [name/role]. Next review due: [date].

How to use this template

1.

Inventory every machine and every energy source it holds — electrical, pneumatic, hydraulic, mechanical, thermal, gravity — before writing anything; the missed second energy source is the classic LOTO failure.

2. Write the machine-specific procedures at the machines, with the people who service them, and photograph each isolation point for the procedure sheet.
3. Issue personally assigned locks to every authorized employee and purge the shared-padlock drawer — one person, one lock, one key.
4. Train authorized employees hands-on with a supervised lockout on real equipment, and brief every operator on what a lock means and the rule against touching it.
5. Schedule the annual inspections now, one per procedure, each observed by an authorized employee who does not use that procedure — then walk the floor a month after launch and count locks during servicing tasks.

Official guidance

- › [OSHA — Control of hazardous energy \(lockout/tagout\)](#)
- › [OSHA — 29 CFR 1910.147, The control of hazardous energy](#)
- › [OSHA — Machine guarding](#)

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