

## Lock Out & Tag Out Policy



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Health & Safety Policies	October 15, 2019	151-2019	1	7
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Lock Out & Tag Out	27-2012		HS-14	

### Purpose

The purpose of this policy is to establish a set of general lock out practices and procedures in order to protect the health and safety of all City of Kenora workers from the unexpected or accidental energizing or start-up of machinery or equipment, or release of stored energy when working on machinery or equipment during service, repair, or maintenance.

### Scope

This standard applies to all City of Kenora workers, contract personnel and contractors performing service or maintenance on any City machinery or equipment.

### Definitions

**Affected worker:** a worker whose job requires operation or use of a machine or equipment on which servicing or maintenance is being performed under lock-out or tag-out.

**Area lock:** a safety lock designated for use when machinery or equipment must be kept locked out for extended periods.

**Authorized person:** a competent person who has successfully completed the lock out/tag out training requirements.

**Competent person:** means a person who:

- is qualified because of knowledge, training and experience to organize the work and its performance;
- is familiar with this Act and the regulations that apply to the work; and
- has knowledge of any potential or actual danger to health or safety in the workplace.

**Contract personnel:** a person with whom the City of Kenora has contracted with to supply services for monetary compensation.

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**Contractor:** any person or entity contracted or engaged to provide services to the City of Kenora.

**Employer:** the City of Kenora.

**Energy isolating device:** a mechanical device that physically prevents the transmission or release of energy, including but not limited to the following: a manually operated electrical circuit breaker; a disconnect switch; a manually operated switch by which the conductors of a circuit can be disconnected from all ungrounded supply conductors, and in addition, no pole can be operated independently; a line valve; a block and any similar device used to block or isolate energy.

**Note: Push buttons, selector switches and other control circuit type devices are not energy isolating devices.**

**Energy source** — any source of electrical, mechanical, hydraulic, pneumatic, chemical, thermal or other energy.

**Lock-out:** the placement of a lock-out device on an energy isolating device thus ensuring that the energy isolating device and the equipment being controlled cannot be operated.

**Lock-out device:** a device that utilizes a positive means such as a lock, either key or combination type, to hold an energy isolating device in a safe position and prevent the energizing of a machine or equipment.

**Servicing and/or maintenance:** workplace activities such as constructing, installing, setting up, adjusting, inspecting, modifying, maintaining and/or servicing machines or equipment. These activities include lubrication, cleaning or un-jamming of machines or equipment and making adjustments or tool changes, where the worker may be exposed to the unexpected energizing or start-up of the equipment or the release of hazardous energy.

**Tag-out:** the placement of a tag-out device on an energy isolating device, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tag-out device is removed.

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**Tag-out device:** a prominent warning device, such as a tag and a means of attachment, which can be securely fastened to an energy isolating device, to indicate that the energy isolating device and the equipment being controlled may not be operated until the tag-out device is removed.

**Worker:** a person who supplies/provides services for monetary compensation.

### **Responsibilities**

The Senior Leadership Team is responsible for ensuring all City of Kenora operations are in compliance with applicable legislation and the requirements of this policy.

Supervisors are responsible for ensuring workers have completed the appropriate lock out/tag out training, developing and maintaining specific lock out/tag out procedures for equipment and machinery, providing workers with protective equipment required to carry out lock out or tag out requirements and ensuring it remains in good condition, providing lock out and tag out devices, and ensuring workers are in compliance with this policy and all applicable legislation and regulations.

Workers are responsible for complying with this policy and specific departmental lock out/tag out procedures, reporting to their supervisor the absence of, or defect in any protective equipment or lock out/tag out device, and reporting to their supervisor, any circumstances or conditions that may limit their ability to comply with the requirements of this policy.

Contractors are responsible for enforcing and complying with this policy and ensuring that their employees are aware of these requirements.

### **General Lock Out/Tag Out Shutdown Procedure**

Lock out/Tag out procedures will only be completed by authorized persons who have completed the City of Kenora Lock Out/Tag Out training program.

Prior to performing service or maintenance on machinery or equipment, the authorized person shall:

1. Notify all affected employees of the lock out/tag out, the reason for the lock out/tag out, and the specific machinery or equipment affected.

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2. Review the specific departmental lock out procedures that apply to the machine or equipment to be locked out, identify the energy isolating devices on the machine/equipment, and gather all required lock out/tag out devices.
  3. Put on any required personal protective equipment.
  4. Shut down the machine or equipment by its established operating procedure.
  5. Operate the disconnect switch, circuit breaker, valve or any other energy isolating devices to isolate the machine or equipment from its energy source.
  6. Apply the appropriate lock out/tag out mechanisms to each of the energy-isolating device(s). When locking out:
    - a) Lock out devices shall be attached in a manner that keeps the energy isolating devices in the "off" or safe position.
    - b) The employee who applies the lock will maintain control of the key.
    - c) Every employee working on the lock out of the machinery or equipment will apply their own lock and tag as per the group lock out situations outlined below.
    - d) If an energy isolating device is not capable of being locked out, a *tag-out device* shall be applied in lieu of a lock device as per the tag out only situations outlined below.
- Note:** *workers must never depend on someone else's lock out device*
7. Exhaust, release and dissipate all stored energy or residual energy in the machine or equipment by grounding, blocking, bleeding etc.
  8. Clear the area around the machine or equipment of tools and materials and ensure all staff are safely positioned or removed from the area. Then test all operating controls by putting them to the "on" position to ensure the energy source has been successfully disconnected and de-energized.
    - a. Electrical equipment may only be tested for a zero energy state by a competent worker using a properly rated tester. Ensure the tester has been verified before and after use.
  9. Return the operating controls to the neutral or "off" position before proceeding with services or maintenance work.
  10. Perform the service or maintenance on the machine or equipment.

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### General Restart Procedures

Upon completion of the service or maintenance work, and prior to the removal of lock-out or tag-out devices, and the re-energizing of the machinery or equipment, each authorized person shall:

1. Check the machine or equipment and the surrounding area to ensure that all tools and materials have been removed, guards and controls have been reinstalled, and that the machine or equipment is operationally intact;
2. Ensure the equipment is in the "off" or neutral position and that all employees are safely positioned or removed from the area;
3. Notify all affected employees that the servicing or maintenance is complete and that locks and tags are being removed;
4. Notify their supervisor;
5. When safe, remove lock out/tag out devices and re-energize.

### Special Situations

#### *Group Lock Out/Tag Out*

If more than one authorized person is required to lock out/tag the same machine or equipment, each individual worker will apply their own individual lock and tag either directly to the machinery or equipment, or to a multiple lock out device. Only when each individual lock has been removed can the machinery or equipment be restarted and re-energized.

#### *Using Tag Out Only*

Tag out without a lock is only allowed when machinery or equipment is incapable of being locked out and may only be implemented with prior approval from the supervisor. Specific written measures and procedures for tag-out must be developed and tag attachments must be affixed at the same point as lock out devices.

#### *Removing Lock out and Tag Out Devices*

When the authorized employee who applied the lock out or tag out device is not available to remove it, the device may be removed **only under the direction of their immediate supervisor or designate** provided that:

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- Verification has been made that the worker is not at work or otherwise available;
- Every reasonable effort has been made to contact the worker to notify them that their lock out/tag out device has been removed;
- The worker is informed before returning to work that their lock out/tag out device has been removed;

### *Area Lock Outs*

Area lock-out or tag-out devices will only be applied or removed by a supervisor where service or maintenance work is to extend past the shift it was started in. Area lock-out and tag-out devices will be colour coded differently from personal lock-out and tag-out devices.

### **Exceptions**

Exceptions to the above policy include:

- Minor tool changes and adjustments and other minor servicing activities, which take place during normal production operations if they are routine, repetitive and integral to the use of the equipment for production provided that the work is performed using appropriate measures and safeguards.
- Work on cord and plug connected electric equipment where the plug is disconnected and under the control of the worker performing the servicing or maintenance.

Written procedures are not required when the following exists:

- the machinery or equipment has a single energy source that can be readily identified and isolated;
- the isolation and locking out of that energy source will completely de-energize and isolate the machinery or equipment;
- the machinery or equipment is locked out during service or maintenance;
- a single lock-out device will achieve lock-out condition;
- the machinery or equipment has no potential for stored or residual energy after shut-down; and
- the lock-out device is under the exclusive control of the authorized person performing the service or maintenance work.

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### **Policy Violations**

Any worker who knowingly fails to comply with these requirements or their intent, or who knowingly permits a worker under their supervision to fail to comply with these requirements is in contravention of these requirements and is subject to disciplinary action up to and including termination.

### **Training**

Generic lock out/tag out training will be provided on a regular basis. Workplace specific training will be provided when a worker joins a department, when lock out procedures are changed or updated, and as often as necessary to ensure that workers remain knowledgeable in safe lock out procedures.

All training and instruction will be documented.

### **References**

Regulations for Industrial Establishments 851/90 – Section 42, 75, and 76.