

# 7 THINGS TO AVOID

## When Creating Lockout Procedures

In a world full of best practice recommendations and compliance requirements, it can be confusing to understand what items to include in your lockout procedures and how to implement them.

Our team of dedicated field engineers authors over 26,000 procedures each year, and used their expertise to compile a list of the 7 things to avoid when creating visual lockout procedures:



1.

### MISUSE OF GENERIC PROCEDURES

While OSHA allows the use of generic procedures for machines that are similar, a common error is failing to meet the specific OSHA requirements for these generic procedures. Keep in mind that similar machinery may have different magnitudes of energy sources and have disconnects located in different places, requiring the need for unique, machine-specific procedures.



2.

### OUTDATED PROCEDURES

If procedures are not annually reviewed and updated for accuracy, there is a good chance that they are out of date. When a machine is moved to a different location or has had any modifications that could affect the lockout tagout process, the procedure must be updated to reflect these changes.



3.

### OMITTING SOURCES OF HAZARDOUS ENERGY

Often times certain stored or residual energy - and how to control or dissipate that energy - is overlooked on a procedure. This includes sources of hazardous energy from capacitors, gravity, springs, hydraulic systems, pneumatic, gas, steam, thermal or water pressure.



4.

### LACK OF VERIFICATION STEPS

In addition to identifying the steps needed to successfully de-energize and lockout equipment, it is critical that procedures also include instructions on how to verify if the energy was successfully isolated to a zero energy state.



5.

### OVERLY COMPLICATED PROCEDURES

How easy procedures are to understand is reflected in how often they are effectively used by employees. Procedures that include lengthy, complicated explanations and lack visuals are difficult to follow and leave room for errors and misinterpretation.



6.

### NOT LISTING THE DEVICES NEEDED TO CONTROL ENERGY

Procedures should provide guidance on what devices should be used to effectively lockout equipment. Without this instruction, employees may be using improper devices that will not successfully control the hazardous energy.



7.

### USING PROCEDURES AS A LOCKOUT PROGRAM

Machine-specific lockout procedures are just one part of the bigger picture when it comes to lockout tagout. An effective safety program should be a sustainable, continuously improving program focused on behavioral changes, and aligning with the needs of your facility, equipment and employees.

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