Lockout Tagout Employer's Guide Step 4: When is Lockout Tagout Required?

What You NEED To Do
Do you know when your employees need to observe lockout tagout and when they don't? Do they? The law says that lockout tagout is required when the unexpected energization or start up (or release of stored energy) of machines, equipment or prime movers could injure workers during cleaning, repairing, servicing, setting-up, adjusting and un-jamming. BACK TO START | NEXT STEP OF 9

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1. During Cleaning, Servicing, Adjusting Operations:

- Machinery or equipment capable of movement must be stopped and power source(s) de-energized or disengaged.
- Accident prevention signs or tags or both must be placed on the controls of the power source of the machinery or equipment.
- If necessary, the moveable parts must be mechanically blocked or locked out to prevent inadvertent movement, or release of stored energy.

2. Exception

- If machinery or equipment must move during these operations you must minimize the hazard by providing and requiring the worker to use *extension tools* (eg.,

extended swabs, brushes, scrapers) *or other methods, or means to protect workers from injury*. Workers must receive thorough training on the safe use and maintenance of these tools, methods or means.

3. During Repair Work and Setting-Up Operations, Machines, Equipment /Prime Movers:

- Must be locked out or positively sealed in the "off" position if they have lockable controls (or are readily adaptable to lockable controls).
- Must be de-energized or disconnected from their power source (or other actions taken to effectively prevent inadvertent movement or release of stored energy) if they do not have lockable controls
- Accident prevention signs and tags (or both) must be placed on the controls.

4. Outside Servicing Personnel

- Whenever outside servicing personnel are to be engaged in activities covered by the lockout/tagout regulation, the employer's on-site lockout or tagout procedures must be followed.

[Other Requirements]

Other Requirements

Under certain specific conditions or when working on certain types of machines and equipment, lockout/tagout is not required. Instead, other requirements apply.

During Cleaning, Servicing, Adjusting, Repair Work and Setting-Up Operations If You Are:

- Making Minor Tool Changes and Adjustments, and Other Minor Servicing Activities: that take place during normal production operations and, are routine, repetitive and

integral to the use of equipment or machinery for production and, using **alternative measures to provide effective protection**

- Using Cord and Plug Connected Electrical Equipment: which can be unplugged from the energy source and the plug is **under the exclusive control** of the employee performing the work

When Working With Repetitive Process Machines

On repetitive process machines, such as numerical control machines, which require power or current continuance to maintain indexing and where repair, adjustment, testing, or setting-up operations cannot be accomplished with the prime mover or hazardous energy source disconnected, such operations may be performed under the following conditions:

- The operating station where the machine may be activated must at all times be under the control of a qualified operator or craftsman.
- All participants must be in clear view of the operator or in positive communication with each other.
- All participants must be beyond the reach of machine elements which may move rapidly and present a hazard to them.
- Where machine configuration or size requires that the operator leave his control station to install tools, and where machine elements exist which may move rapidly if activated, such elements must be separately locked out by positive means.
- During repair procedures where mechanical components are being adjusted or replaced, the machine shall be de-energized or disconnected from its power source.

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