



University of Illinois at Urbana-Champaign
Control of Hazardous Energy Program
(Lockout/Tagout)

APPENDIX C – EXAMPLE EQUIPMENT-SPECIFIC ENERGY CONTROL PROCEDURE FORM

Section I	Equipment Description:			Date Created:	
	Building/Room:			Date Modified:	
	Specific Location:			Revision:	
	Originator:	Phone #:	Campus Unit:		
	Purpose: This procedure establishes the minimum requirements for the lockout of energy isolating devices whenever maintenance/ servicing is completed on the above listed equipment. It shall be used to ensure that the equipment is stopped, isolated from all potentially hazardous energy sources and locked out before employees perform any servicing/maintenance where the unexpected energization or start-up of the machine/equipment or release of stored energy could cause injury.				
Section II	Hazardous Energy Sources	Control Type	Control Location	LOTO Device	Verification Method
Section III	Stored Hazardous Energy Sources	Means of Dissipation/Elimination		Verification Method	
Section IV	Steps for Normal Shutdown:				
Section V	Steps for Normal Startup:				

Instructions for Equipment-Specific Energy Control Procedures

Step 1: Identify all hazardous energy sources – List the sources of hazardous energy in the first column of Section II. Identify and list the control type (e.g., valve, breaker, etc.) and control location(s) of each source of hazardous energy and the LOTO device necessary to control it. Identify and list the verification method used to confirm the control of each hazardous energy source (e.g., attempted to turn on at local control switch, pressure gauge reading, tested with voltmeter, etc.).

Identify all sources of hazardous stored energy and the means to dissipate/eliminate it (e.g., hydraulic: opened bleeder valve, electrical capacitor: certified electrician dissipated). Identify the verification method used to confirm the dissipation/elimination of hazardous stored energy (e.g., removed spring, tested with voltmeter, etc.). Input this information in Section III.

Note: Sources of hazardous and/or stored hazardous energy include, but are not limited to, electrical, mechanical, pneumatic, hydraulic, thermal, chemical, gravity, capacitors, springs, flywheels, radiation, and steam.

Step 2: Notify all affected and other employees of the intent to shut down and LOTO equipment.

Step 3: Shut down equipment according to the sequence of steps listed in Section IV.

Step 4: Isolate equipment – Using the information listed in Section II, isolate/control all hazardous energy sources at their listed control locations.

Step 5: LOTO equipment – Using the information listed in Section II, place the energy control devices in the control locations, securing them with a lock and tag.

Step 6: Release stored energy – Using the information listed in Section III, dissipate/eliminate all sources of hazardous stored energy.

Step 7: Verify Isolation – Using the information listed in Sections II and III, verify that all sources of hazardous energy, including stored sources of hazardous energy, are at a zero energy state.

Step 8: Perform service/maintenance work.

Step 9: Release from LOTO – Perform the following steps:

- All locks, tags, and lockout devices shall be removed by the person that applied them;
- Remove all tools and supplies from the equipment area;
- Replace all machine guards;
- Verbally notify all affected and other employees that the LOTO is complete;
- Ensure the area is clean of equipment, supplies, tools, and personnel; and
- Restart the equipment in accordance with the steps listed in Section V.

Enforcement: Failure to comply with these procedures can result in amputation, electrical shock, or death.