



COUNTY OF NORTHERN LIGHTS

POLICY

LOCKOUT & TAGOUT

CREATED: 2/9/2025

REVISED:

TOTAL PAGES: 7

PURPOSE

The purpose of this program is to establish procedures for affixing appropriate lockout/tagout equipment to energy isolating devices and to otherwise disable machines or equipment to prevent unexpected energization, start up, or release of stored energy to prevent injury or incident.

SCOPE

This program covers the servicing and maintenance of machines and equipment where the unexpected energization or start-up of the machine or equipment, or the release of stored energy could cause an incident. This program establishes minimum performance requirements for the control of such hazardous energy.

When work is performed on a non-owned or operated site, the operator's program shall take precedence, however, this document covers all workers and contractors and shall be used on owned premises, or when an operator's program doesn't exist or is less stringent. Key Responsibilities

Managers and Supervisors

- Responsible to enforce this plan and to see that all their workers and contractors that are affected by lockout/tagout procedures, have the knowledge and understanding required for safe application, usage, and removal of all energy controls and devices.
- Ensure workers are competent as demonstrated by being qualified, suitably trained and with sufficient experience to safely perform work without supervision or with only a minimal degree of supervision.

Employees

- Employees who are affected by this program are required to attend training on an annual basis.
- Are required to follow the provisions of this program.

WRITTEN PROCEDURES FOR LOCKOUT TAGOUT

General

Lockout & Tagout is performed by a competent person. If work is to be done that may endanger a worker, management shall ensure that the work is done by a worker who is competent to do the work. Workers who may be required to use safety equipment shall be competent in the application, care, use, maintenance, and limitations of that equipment. Training must be completed before isolation of energy tasks is allowed.

When lockout of energy isolating devices is required, the devices must be secured in the safe position using locks in accordance with procedures that are made available to all workers who are required to work on the machinery or equipment.

Power tools may be maintained, repaired, tested, or adjusted without applying isolation control if the work doesn't put the worker at risk by isolating the energy source from the power tool, dissipating any residual energy in the power tool and the energy source remains isolated during the activity.

Energy sources must be isolated before maintenance is performed. If machinery, equipment, or powered mobile equipment is to be serviced, repaired, tested, adjusted, or inspected, Management must ensure that no worker performs such work on the machinery, equipment, or powered mobile equipment until it has come to a complete stop and all hazardous energy at the location at which the work is to be carried out is isolated by activation of an energy isolating device and the energy isolating device is secured, or the machinery, equipment, or powered mobile equipment is otherwise rendered inoperative in a manner that prevents its accidental activation and provides equal or greater protection.

Devices



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Locks

- Each site shall have the same type of lock as specified by the company.
- Are made available to all workers who are required to work on the machinery or equipment and shall be provided at the expense of the company.
- Combination locks must not be used for lockout.
- The employer must ensure each personal lock must be marked or tagged to identify the person applying it, and how the lock is identified.

Keys

The company shall:

- Issue to each worker who is required or permitted to work on a machine a lock that is operable only by that worker's key or a duplicate key,
- Designate a worker to keep the duplicate key,
- Ensure that the duplicate key is accessible only to the designated worker,
- Ensure that the lock used has a unique mark or identification tag on it that identifies the worker to whom the lock is assigned, and
- Ensure that a logbook is kept recording the use of the duplicate key and the reasons for that use each time the duplicate key is used.

Tagout Device – If an energy source cannot be locked out with a lockout device, then a tagout device shall be used. Tagout devices is a warning only level of protection and shall be weather and chemical resistant, standardized in color with clear written warning of hazardous energy, (i.e., Do Not Operate, Do Not Start, Do Not Energize, etc.) Each site shall have the same style of tags specified by management. Each tag will identify the worker who attached it.

Requirements for Tags

If a tag is used as a means of communication, the tag:

- Shall be made of non-conducting material,
- Shall be secured to prevent its inadvertent removal,
- Shall be placed in a conspicuous location,
- Shall state the reason the switch is disconnected and locked out,
- Shall show the name of the worker who disconnected and locked out the switch, and
- Shall show the date on which the switch was disconnected and locked out.

Performing Maintenance While Equipment is in Operation

Rarely does a piece of equipment need to remain in operation for maintenance. Management will develop and implement procedures and controls that ensure the machinery, equipment, or powered mobile equipment is serviced, repaired, tested, adjusted or inspected safely if the manufacturer's specifications require the machinery, equipment or powered mobile equipment to remain operative while it is being serviced, repaired, tested, adjusted or inspected, or there are no manufacturer's specifications and it is not reasonably practicable to stop or render the machinery, equipment, or powered mobile equipment inoperative.

In all cases, management requires a written authorization to proceed from senior management due to the increased risk exposure of performing maintenance on operating equipment.



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Maintenance Procedures

- A machine must be locked out and tagged out prior to performing maintenance activities. Once all energy isolating devices have been activated to control hazardous energy management must ensure that a worker involved in work at each location requiring control of hazardous energy secures each energy isolating device with a personal lock. Management must ensure that each personal lock used has a unique mark or identification tag on it to identify it as belonging to the worker to whom it is assigned.
- A written, step-by-step isolation procedure for shutdown and start up shall be prepared for each type of machine or piece of equipment.
- This procedure shall include:
 - Equipment number if assigned.
 - Equipment location.
 - Energy Source(s) (i.e., electrical, hydraulic, gas pressure, etc.)
 - Location of isolating controls (i.e., breaker switches, valves, etc.)
 - Quantity of isolating controls
 - Quantity of locks required to isolate the equipment.
 - Other hardware required to isolate the equipment (i.e., chains, valve covers, blocks, etc.)
 - List any residual energy required to be dissipated before work begins.

Specific Sequence for Application of Energy Control

1. **Notification** - Authorized workers must notify all other affected workers of the application and removal of lockout/tagout devices. Notification shall be given before the controls are applied and before they are removed from the machine or equipment.
2. **Preparation for Shutdown** - Before an authorized or affected worker shuts down a machine or equipment, the authorized worker shall have the knowledge of the type and magnitude of the energy, the hazards of the energy to be controlled, and the method or means (locks) to control the energy sources.
3. **Machine or Equipment Shutdown** - The machine or equipment shall be shut down using the procedures established for that machine or piece of equipment. The shutdown shall be orderly to avoid any addition hazards to workers as a result of the stoppage.
4. **Machine or Equipment Isolation** - All energy isolating devices that are needed to control the energy to the machine or equipment shall be physically located and operated in such a manner as to isolate the machine or equipment from the energy source(s).
5. **Lockout/Tagout Devices and Application**
 - Each authorized worker shall have the proper number of locks and devices to be able to independently of each other perform proper lockout/tagout procedures for machines or equipment that they may be working on.
 - Lockout or tagout devices shall be affixed to each energy isolating device by authorized workers.
 - Each lockout and tagout devices shall include the name of the individual placing the device.
 - Lockout devices shall be affixed in a manner to hold the energy isolating devices in a safe or off position.
 - Tagout devices shall be affixed in a manner that will clearly indicate that the operation or movement of isolating devices to the safe or off position and prohibiting the operation of the control device.
 - Tagout devices used with energy isolating devices with the capability of being locked out shall be fastened at the same point at which the lock would have been attached. If a tag cannot be directly attached to the energy isolation device, it shall be located as close as safely as possible to the device in a position that will be immediately obvious to anyone attempting to operate the device.
 - Each energy source shall be locked out completely isolating the equipment.
 - If more than one worker is involved, the worker who disconnected and locked out the power supply shall communicate the purpose and status of the disconnecting and locking out.
 - Isolating machines or equipment shall include, but are not limited to:
 - Pumps, compressors, generators, electric distribution, storage tanks, etc.



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- Each type of equipment, including isolating pipes and pipelines, to be isolated shall have specific documented procedures for isolation, i.e., for compressors: suction, discharge, power, starting, fuel, dumps shall be closed, locked, and tagged out properly.
- For pipes and pipelines see #8
- 6. **Requirements for Verification of a State of Zero Energy** - A worker will not perform work on machinery, equipment or powered mobile equipment to be serviced, repaired, tested, adjusted or inspected until energy sources are isolated, the machinery, equipment, or powered mobile equipment is tested to verify that it is inoperative, and the worker is satisfied that it is inoperative.
- 7. **Isolating Energy Sources on Piping, Pipelines or Process Systems** - If piping, a pipeline or a process system containing a harmful substance under pressure is to be serviced, repaired, tested, adjusted or inspected management must ensure that no worker performs such work on the piping, pipeline or process system until flow in the piping, pipeline or process system has been stopped or regulated to a safe level, and the location at which the work is to be carried out is isolated and secured. Consideration of automated valve mechanisms that are controlled from remote sites must be factored into the energy control method.

In order to ensure that harmful substances under pressure are not released the company will utilize the following methods (with Disconnection/Misalign as the preferred method):

- Blinding - Install full-rated blind(s).
- Disconnection/Misalign - This involves physically removing part of the equipment, or misaligning piping. Isolation devices shall then be attached as close to the energy source as possible and listed on the Energy Isolation Log.
- Double Block and Bleed - This involves three valves: two block valves and a bleed valve in between. For Energy Isolation purposes, all three valves shall be tagged with a "Danger" tag and listed on the Energy Isolation Log. In addition, the two block valves shall be locked.
- Single Block - This involves closing one block valve, then applying locks and tags. Note: this option requires the prior approval of the supervisor.

NOTE:

Control valves shall not be used for energy isolation. Remote operated valves, designed for positive pressure containment, can be used provided they are disconnected from all energy sources and manually closed.

Multiple Workers/Group Lockout

If more than one worker is working at each location requiring hazardous energy to be controlled, each worker must attach a personal lock to each energy isolating device.

- A tailgate meeting shall be conducted to review the written group lockout procedure and other information as required for safe work to continue. The written group lockout procedure must be conspicuously posted at the place where the system is in use.
- An authorized worker will isolate the equipment.
- All workers will then place their locks on the device's group lockout or tagout device after they have verified the procedure.

Release from Lockout/Tagout

When servicing or maintenance is completed or when Lockout / Tagout devices must be temporarily removed, the equipment requires testing and the machine or equipment is ready for testing or to return to normal operating conditions, the following steps shall be taken, in this order:

- Check the machine or equipment and the immediate area surrounding the machine or equipment to ensure that all nonessential items such as tools have been removed and that the machine or equipment components are operationally intact.
- Check the work area to verify that no worker is in danger before an worker removes the securing devices and the machinery, equipment, powered mobile equipment, piping, pipeline or process systems is returned to operation.



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- Remove the Lockout/Tagout device.
- Energize and proceed with testing.
- De-energize and reapply control methods including Lockout / Tagout devices.
- Document the procedure by use of the completed isolation log and provide to supervisor for filing.

Procedures that must be followed in the Event a Worker's Lock Must be Removed

A person must not remove a personal lock or other securing device unless the person is the worker who installed it. In an emergency, or if the worker who installed a lock or other securing device is not available, a worker designated by management may remove the lock or other securing device in accordance with a procedure that includes verifying that no worker will be in danger due to the removal.

Management must ensure that securing devices are not removed until each involved worker is accounted for, any personal locks placed by workers are removed, and procedures are implemented to verify that no worker is in danger before a worker removes the securing devices and the machinery, equipment, powered mobile equipment, piping, pipeline or process system is returned to operation.

The following procedures shall be followed to allow for the emergency removal of a lock that another person has applied:

- If the key(s) cannot be made available, the worker who requests removal of the lock shall contact their supervisor.
- Every reasonable effort shall be made by the manager or supervisor to contact the authorized worker who applied the lock to obtain the key(s).
- The manager or supervisor shall ensure that the machinery or equipment can be operated safely before removing the lock and no workers will be in danger if it is removed.
- The competent person removing the lock shall document the lock(s) were removed with permission by manager or supervisor.
- All reasonable efforts will be made by supervisor to notify that worker their lock has been removed and ensuring that the authorized worker is notified at the start of his or her next shift if the worker's personal lock(s) have been removed since the worker's previous shift.
- If the equipment is client owned, the supervisor or worker requesting to remove the lock(s) shall contact the client to get the lock removed. Clients must remove their lock(s).

NOTE:

Company workers shall not remove any client locks.

Shift or Personnel Changes

In the event shift or personnel changes occur during maintenance and/or repair activities, the designated worker in charge shall take the necessary steps to maintain the continuity of the lockout/tagout protection. This includes maintaining that all provisions in this procedure are adhered to and the transfer of lockout/tagout devices between authorized workers is accomplished in an orderly manner.

Procedures must be implemented for shift or personnel changes, including the orderly transfer of control of locked out energy isolating devices between outgoing and incoming workers.

Contractors

Contractors performing lockout procedures on company property shall comply with this procedure. Contractors shall supply their own locks. Management shall initially lockout company machines and equipment before the contractor will be allowed to apply their own lock in addition to the one assigned to the company.

Annual Audits



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Each year the manager or supervisor, or his representative, will perform an inspection of the Lockout Tagout Program in their respective areas to verify the effectiveness of the program. An authorized worker other than the one(s) utilizing the energy control procedure being inspected shall perform the audit and shall verify that:

- Each authorized and/or affected worker has been trained as required.
- Any new equipment added has specific lockout procedures developed and documented.
- Current procedures are adequate for performing complete isolation of equipment and resulting in a zero-energy state.
- The annual audit will be certified in writing and a copy of the audit maintained on file at the managers/supervisor's office.

TRAINING

Employees are provided Lockout Tagout training. Management shall ensure that a worker who may have to lock out a machine has been adequately trained to lock out the machine. The training shall include the following:

- The recognition of applicable hazardous energy (lockout/tagout) sources, the type and magnitude of the energy available in the workplace, and the methods and means necessary for energy isolation and control.
- The purpose and use of energy control procedures.
- When tagout systems are used, workers shall also be trained in the following limitations of tags:
 - Tags are essentially warning devices affixed to energy isolating devices, and do not provide the physical restraint on those devices that is provided by a lock.
 - When a tag is attached to an energy isolating means, it is not to be removed without authorization of the authorized person responsible for it, and it is never to be bypassed, ignored, or otherwise defeated.
 - Tags must be legible and understandable by all authorized workers, affected workers, and all other workers whose work operations are or may be in the area, in order to be effective.
 - Tags and their means of attachment must be made of materials which will withstand the environmental conditions encountered in the workplace.
 - Tags must be securely attached to energy isolating devices so that they cannot be inadvertently or accidentally detached during use.
 - Tags may evoke a false sense of security, and their meaning needs to be understood as part of the overall energy control program.

All other workers whose work operations are or may be in an area where energy control procedures may be utilized, shall be instructed about the procedure, and about the prohibition relating to attempts to restart or reenergize machines or equipment which are locked out or tagged out.

Retraining

Retraining shall be conducted whenever a periodic inspection reveals, or whenever Management has reason to believe that there are deviations from or inadequacies in the worker's knowledge or use of the energy control procedures. The retraining shall re-establish worker proficiency and introduce new or revised control methods and procedures, as necessary.

COMMUNICATION

As per the company's Safety Management System Manual, and corporate communication policy, all applicable policies and procedures are reviewed with all new employees prior to engaging in any work activities (during orientation) and annually with seasonal/returning employees (refresher training).

Chief Elected Official

Chief Administrative Officer