Manager/Supervisor Risk Management
#139– 4/2/13
A twice weekly e-mail training for YCPARMIA members

TOPIC: SAFETY – LOCKOUT/ TAGOUT

The employer has an obligation to protect its workers from an unexpected release of stored energy –the unexpected startup or movement -- while machinery is being cleaned, repaired, serviced, started, set up or adjusted. The program, commonly referred to as "Lockout/Tagout" is a written plan required as a supplement to the entity's IIPP if the employer has equipment that threatens its employee's safety. The "Lockout" portion is the process to stop the flow of energy into the machinery by disconnecting power, and using locks, blocks or chains on the machinery's controls. The "Tagout" is the simple act of placing a tag on the disconnected power source that acts as a warning not to operate the equipment, and can only be removed by the authorized employee.

Cal/OSHA requires that the program have four elements:

- Materials and hardware – the employer must supply the means to secure the machinery like locks, blocks, chains, and tags, and provide equipment that is capable of being disconnected.
- Hazardous energy control procedures – instructions/procedures for each piece of equipment (written if multiple energy sources) to shut it down, secure it, and testing that it is actually secured.
- Periodic inspections – at least annually, conducted by someone other than the involved workers to ensure that the procedures are effective and up to date; there is also a required written record of the inspections.
- Worker training – of "authorized employees" who actually work with the equipment, and "affected employees" who work in the area of the equipment, triggered by changes in staffing, machinery, or events.

Obviously there will be certain members that will not need a Lockout/Tagout plan – they don't have the machinery and equipment that would trigger the requirement. Additionally the standard does not apply to equipment that works off of a power cord that is under the exclusive control of the involved employee, and can be simply unplugged. Common energy sources that do require lockout/Tagout include electrical, mechanical, pneumatic, hydraulic, chemical, thermal, steam, gravity, and stored energy, and some equipment has multiple energy sources that have to be addressed.

YCPARMIA members have seen a few injuries arising out of Lockout/Tagout failures – one particularly gruesome injury occurring at a waste treatment plant. There is a common pattern; employees short circuit the process generally because the procedures are inconvenient, or are perceived as taking too much time. Sometimes, in our investigation following an injury, we confirm that the workers knew the procedures, but that it had become a common practice to take shortcuts. Supervisors, possibly concerned with getting the job done with diminished staff, might turn a blind eye, or place too much trust in the experience or judgment of their workers. The bottom line is that workers don't get injured when they follow the lockout/tagout procedures; the injuries come when they bypass them.

Next Topic: Safety – Confined Space