



PMA Lockout/Tagout Checklist



PMA developed this checklist that either one person at a facility or a full safety committee can use to identify potential safety issues in the plant. This is not an exhaustive list. Rather, it is a list to identify basic requirements commonly encountered in industrial facilities.

For the user’s convenience, an “action notes” section is included at the bottom of the checklist so that any items that may need to be corrected or further explored can be recorded. A reference section is also included at the end of the checklist to offer additional helpful resources related to this topic.

Program	Yes	No	N/A
1. Does the company have a written lockout/tagout program?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Does the program address procedures for transferring lockout/tagout responsibilities (e.g., shift changes)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does the program address when and how to remove absent employees’ lockouts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the company inform outside contractors of its lockout/tagout procedures and is it documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Are employees informed of any prohibitions or restrictions in outside contractors’ lockout/tagout procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are authorized employees provided with an adequate supply of self-identifying and individually keyed lockout devices that are used only for employee lockout purposes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Have hazard analyses been performed for the different types of hazardous energy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Have tailored lockout/tagout procedures been developed for identical or similar machines?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. During die changes, are lockout procedures or other alternative energy-control procedures used if machine safeguards are bypassed and employees are exposed to the accidental release of hazardous energy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the company conduct a periodic inspection of the lockout/tagout program at least annually to ensure that the procedure is being followed and to correct any identified deviations or inadequacies?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the periodic inspection performed by an authorized employee other than the one(s) utilizing the energy control procedure being inspected?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does the periodic inspection include a review, between the inspector and each authorized employee, of that employee’s responsibilities under the energy control procedure being inspected?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Has the company identified all lockout points (major energy source disconnects) on each piece of equipment?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Are all equipment manual control valve handles provided with a means/device for locking out?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Does the lockout procedure require that stored hazardous energy (mechanical, hydraulic, air, etc.) be released or blocked before equipment is locked out for repairs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Are employees required to keep personal control of their key(s) while they have safety locks in use?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Does the lockout procedure address verification of isolation of hazardous energy sources to ensure no one is exposed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. If equipment or lines cannot be shut down, locked out and tagged, is a rigorous safe job procedure established and rigidly followed (example: procedure for hot tap)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Are the company's lockout/tagout policies enforced?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Training	Yes	No	N/A
20. Are "authorized," "affected," and "other" employees trained in accordance with the training requirements outlined in 29 CFR 1910.147, Control of Hazardous Energy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Are authorized employees trained on: <ul style="list-style-type: none"> • sources of hazardous energy? • types and amounts of hazardous energy in the workplace? • methods, devices and procedures used to lockout/release/block hazardous energy on all pieces of equipment? • procedures for removing lockout/tagout devices? • transferring lockout/tagout responsibilities? • group lockout/tagout procedures? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
22. Are employees retrained when exposed to new job hazards, new equipment or when new lockout/tagout procedures are developed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Is all employee training on lockout/tagout procedures documented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Are employees reviewed and observed annually on their application of the company's lockout/tagout procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lockout/Tagout Device Requirements	Yes	No	N/A
25. Do lockout/tagout devices indicate the identity of the employee applying the device(s)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Are lockout/tagout devices within the facility standardized with respect to at least either shape or size or color?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. Are the lockout/tagout devices capable of withstanding the environment to which they are exposed for the maximum period of time that exposure is expected?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Are lockout devices substantial enough to prevent inadvertent or accidental removal without the use of excessive force?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Action Notes: _____

References:

OSHA Standard:

29 CFR 1910.147 The Control of Hazardous Energy (Lockout/Tagout)
www.osha.gov

OSHA Directives:

CPL 02-00-147 - The Control of Hazardous Energy – Enforcement Policy and
Inspection Procedures - 02/11/2008
http://www.osha.gov/OshDoc/Directive_pdf/CPL_02-00-147.pdf

OSHA eTool:

Lockout-Tagout Interactive Training Program
<http://www.osha.gov/dts/osta/lototraining/index.html>

National Consensus Standard:

ANSI Z244.1 Control of Hazardous Energy – Lockout/Tagout and
Alternative Methods
www.ansi.org

Precision Metalforming Association Training Program:

Lockout for Safety, Lockout for You! (video training program)
www.pma.org

Through the OSHA and Precision Metalforming Association (PMA) alliance, PMA developed this checklist for informational purposes only. It does not necessarily reflect the official views of OSHA or the U.S. Department of Labor. November 2011.