**EXAMPLE 2 - INSTRUCTIONS**

**LOTO PROCEDURES & SPECIFIC INSTRUCTIONS**

**FILL-IN FORMS**

**Requirements:**

Microsoft Word

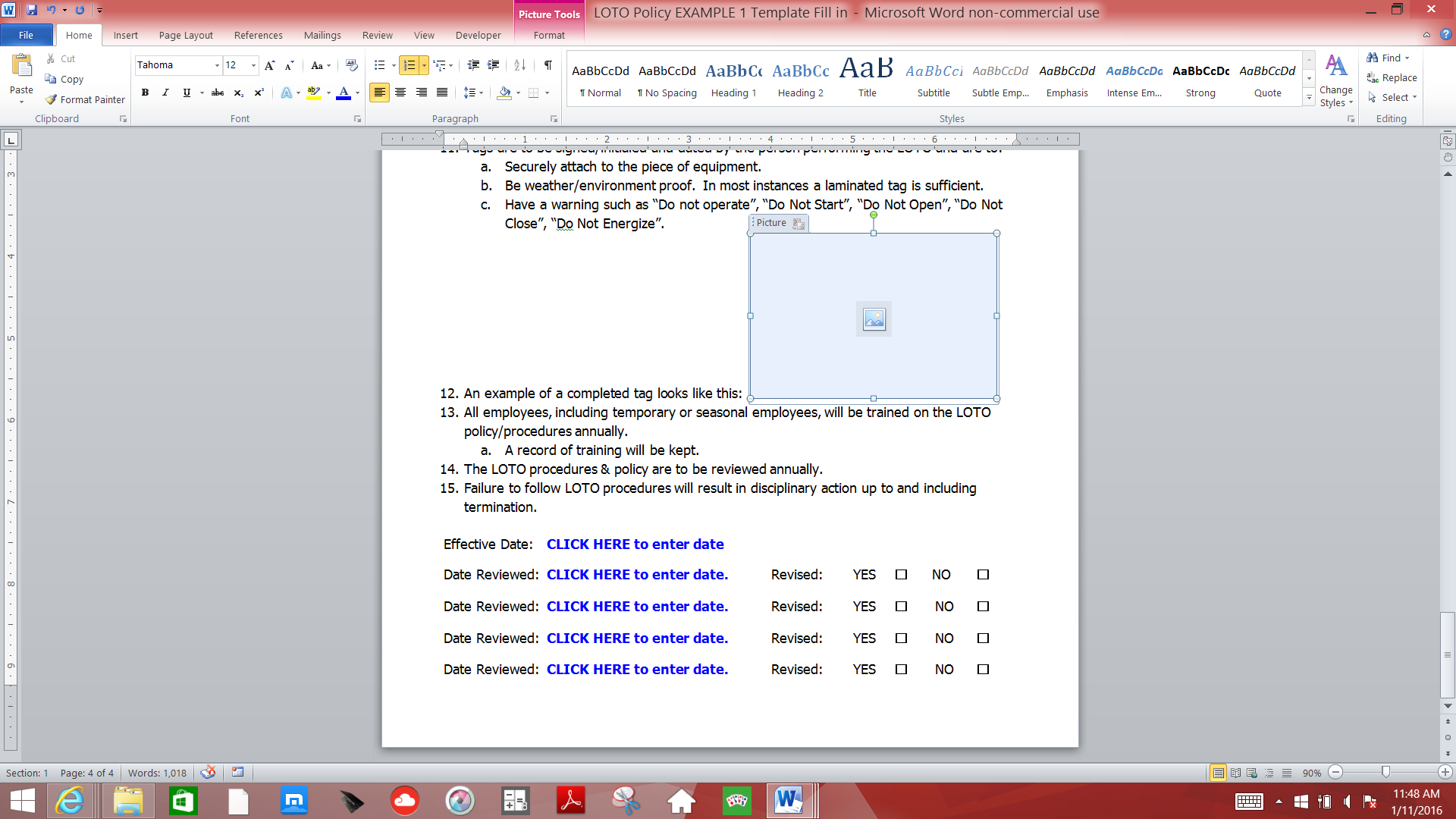
Computer Skills: low to medium

**General Information:**

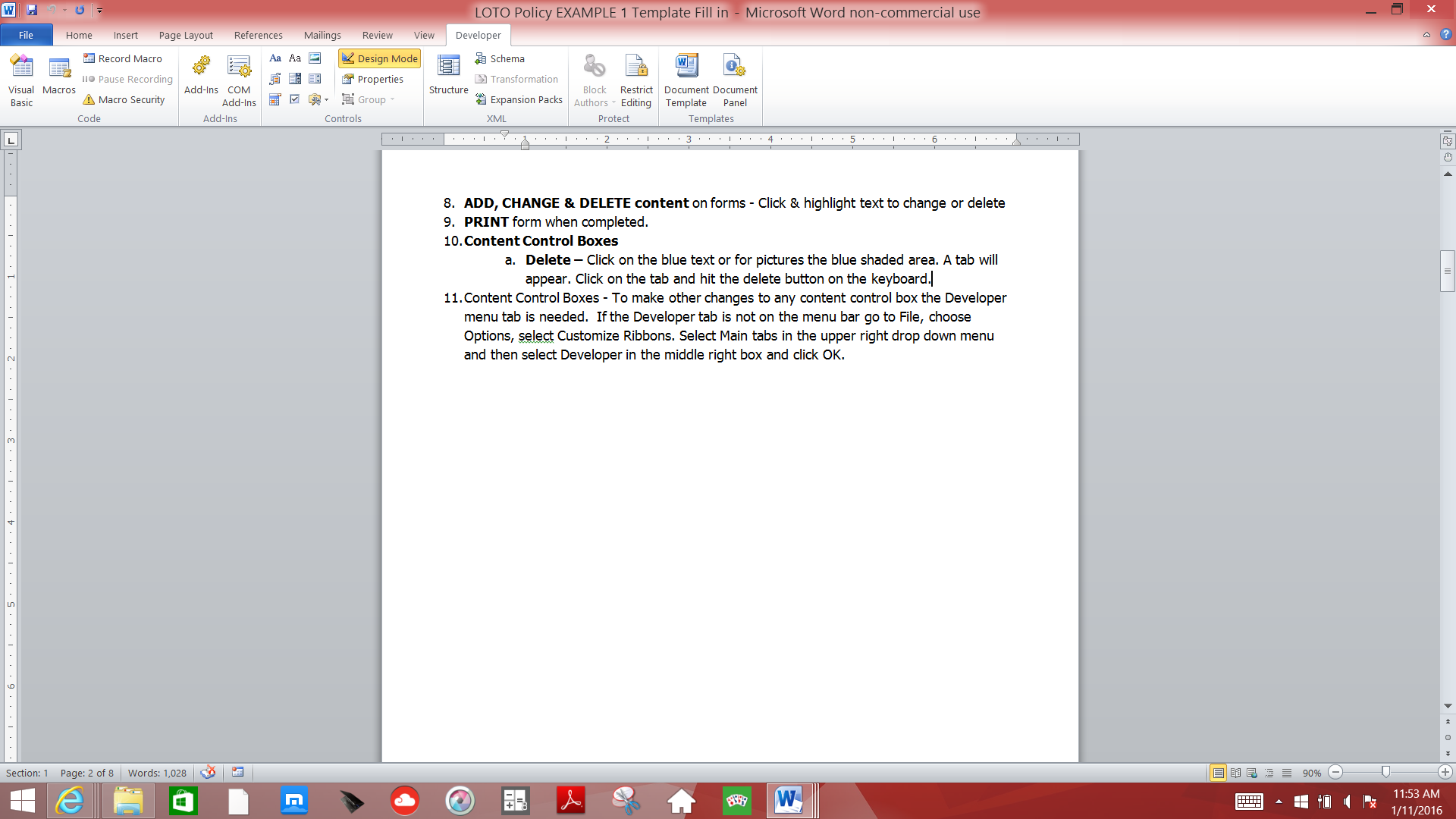
1. The *LOTO Procedures* and the *Specific LOTO Instructions* are Microsoft Word documents.
2. The contents are arranged in tables.
3. Insert company name, company logo, and pictures for lock out points (*Specific LOTO Instructions* form) easily with pre-set formatting (content control boxes).

**Instructions:**

1. Download forms from the website.
2. Save to your computer. Make sure file is saved as a Word document.
3. **ADD content** to forms – Click in the empty table cell to add text.
4. **CHANGE & DELETE content** on forms - Click & highlight text to change or delete.
5. **ADD YOUR COMPANY NAME** – Click on the **blue text** and type in the company name. ***DO NOT hit enter***. Click outside the area to save the company name.
   1. This is a content control box. It is removed when the company name is entered.
6. **ADD YOUR COMPANY LOGO** to the *LOTO Procedures* form and **ADD PICTURES** to the *Specific LOTO Instructions* form. Click on the picture in **light blue** shaded area. The picture folder will open. Select the picture desired (click on it to highlight it) and click on “Insert” at the bottom. In the document click outside the picture area to “set” the picture in place. The picture is automatically sized to fit in the space available.
   1. This is a content control box.
   2. To Change the controls on the picture size – Click in the blue shaded area and “handles” will appear. Click and drag the handles to the picture size desired.
7. **PRINT** forms when completed.
8. **Content Control Boxes** –



* 1. **Delete** - Click in the blue shaded area for pictures or on the blue text. A tab will appear with a label. Click on the tab, and hit delete on the keyboard.
  2. **Changes** - To make other changes to any content control box the Developer menu tab is needed. If the Developer tab is not on the menu bar go to File, choose Options, select Customize Ribbons. Select Main tabs in the upper right drop down menu and then select Developer in the middle right box and click OK. Making Changes to content control boxes requires a medium skill level. Use the HELP feature if unfamiliar with the Developer menu functions.



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**Click here & Type Company Name.**

**LOCK OUT/TAG OUT PROCEDURES**

Lock out/Tag Out procedures are to be completed before any service or maintenance work on equipment or machinery, and/or before entry into any grain bin or other area where operating equipment poses a hazard to the entrant. Failure to follow proper lockout-tag out procedures may result in disciplinary action up to and including termination.

1. Each LOTO will follow the general process listed below.
2. LOTO will follow the specific instructions for each piece of equipment/machinery to identify, disconnect, isolate, lock out and verify the lock out of the appropriate energy sources.
3. Ending LOTO – follow the general LOTO Release process listed below, using the specific instructions for the equipment to activate energy sources.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **General Lockout Steps** | | | | |
| **#** | **Step** | **Instruction** | **Additional Information** |
| 1 | Notify Employees | Notify all affected employees what machine/equipment will be shut down and locked out. |  |
| 2 | Review Procedures | Ensure each person performing LOTO (authorized employee) understands the type and magnitude of the energy present, the associated hazards and the proper methods of control. |  |
| 3 | Shutdown Equipment | If the machine or equipment is operating, shut it down by the normal stopping procedure. |  |
| 4 | Disconnect & Isolate the Energy Source | Disconnect/de-activate the energy isolating devices(s) so the machine or equipment is isolated from the energy source(s). |  |
| 5 | Lockout Controls | Lockout and tag out the energy isolating device(s) as indicated in the specific instructions |  |
| 6 | Release Energy | Release and/or dissipate any stored or residual energy as indicated in the specific instructions. |  |
| 7 | Try out | Verify the energy source has been isolated as indicated in specific instructions. |  |
| **Lockout Release Steps** | | | | |
| **#** | **Step** | **Instruction** | **Additional Information** | |
| 1 | Inspect Equipment | Check the equipment to ensure the components are operational. |  | |
| 2 | Check Area | Check the immediate area to ensure all employees have been safely positioned, and tools and any nonessential items have been removed. |  | |
| 3 | Check Controls | Verify that operating controls are off (not on). |  | |
| 4 | Re-energize | Remove the lockout device(s) and activate the energy isolating device(s) to re-energize the equipment. |  | |
| 5 | Notify Employees | Notify affected employees the servicing or maintenance is completed and the equipment is ready for use. |  | |
| 6 | Startup Equipment | Startup equipment and monitor for several operating cycles to ensure it is functioning properly. |  | |

**Click here & type Company Name.**

**SPECIFIC LOTO INSTRUCTIONS**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Equipment ID:** | | | |  | | | | **Date Created:** | |  |
| **Description:** | | | |  | | | | **Person:** | |  |
| **Facility:** | | | |  | | | | **Date Revised:** | |  |
| **Location:** | | | |  | | | | **Person:** | |  |
|  | | | |  | | | |  | |  |
| **# 1** | | **Lockout Points** | | | | | Identify where the lock out points are located. | | | |
|  | | | | | |  | | | | |
| **# 2** | | **Lockout Instructions** | | | | | Follow the lock out instructions below. | | | |
| *Any machine modifications must be shown in this procedure. Contact facility manager to update this procedure.*  *Always perform a machine stop before locking out disconnects.* | | | | | | | | | | |
| **Energy Source** | | | **Device used to**  **De-energize** | | **Location** | | **Method** | | **Try Out**  Check to Verify Equipment is De-energized | |
|  | | |  | |  | |  | |  | |
| **#** | **SPECIAL INSTRUCTIONS** | | | | | | | | | |
| **1.** |  | | | | | | | | | |
| **2.** |  | | | | | | | | | |
| **3.** |  | | | | | | | | | |
|  |  | | | | | | | | | |
|  |  | | | | | | | | | |
|  |  | | | | | | | | | |
|  |  | | | | | | | | | |
| **Reference:** Typical minimal lockout procedure – 29 CFR 1910.147 App. A  **Enforcement:** Failure to follow proper lockout-tag out procedures may result in disciplinary action up to and including termination. | | | | | | | | | | |

**SAFETY IS EVERYONE’S RESPONSIBILITY – LOCK IT OUT!**