

SOP: Proper Equipment Shutdown and Lockout/Tagout Procedures

This SOP details the **proper equipment shutdown and lockout/tagout procedures** to ensure the safe de-energization and isolation of machinery during maintenance or repair. It includes steps for notifying affected personnel, shutting down equipment, applying lockout/tagout devices, verifying energy isolation, and following safe startup protocols. The objective is to prevent accidental equipment startup, protect workers from hazardous energy, and maintain workplace safety throughout maintenance activities.

Scope

This procedure applies to all equipment, machines, and systems requiring lockout/tagout prior to servicing, maintenance, or repair activities.

Responsibilities

- **Employees:** Follow this procedure at all times when servicing or maintaining equipment.
- **Supervisors:** Ensure personnel are properly trained and authorized for lockout/tagout activities.
- **Authorized Personnel:** Carry out equipment shutdown and lockout/tagout steps as described herein.

Required Equipment and Materials

- Personal Lockout/Tagout devices (locks, tags, hasps)
- Written procedures and diagrams (if available)
- Personal Protective Equipment (PPE) as required by task

Procedure

1. **Notification:** Inform all affected employees and supervisors of impending shutdown and maintenance activities.
2. **Preparation:** Review equipment-specific lockout/tagout procedures. Identify all energy sources (electrical, hydraulic, pneumatic, mechanical, etc.).
3. **Shutdown:** Power down the equipment using standard shutdown procedures. Ensure all moving parts have stopped.
4. **Isolation:** Isolate the equipment from all energy sources (disconnect electrical circuits, shut valves, bleed off stored energy, etc.).
5. **Application of Lockout/Tagout Devices:**
 - Apply individually assigned personal lockout devices to each energy isolating device.
 - Attach warning tags with information including the person's name, date, and reason for lockout.
6. **Release of Stored Energy:** Ensure all stored or residual energy is relieved, disconnected, restrained, or otherwise made safe.
7. **Verification:** Verify equipment is de-energized (attempt to start, check indicators, test circuits as needed). Confirm zero energy state before beginning work.
8. **Maintenance/Service Work:** Proceed with servicing or maintenance, keeping lockout/tagout devices in place the entire time.
9. **Restoration and Startup:**
 - Inspect equipment and confirm all tools, materials, and personnel are clear.
 - Notify affected personnel of intent to restore energy and resume operation.
 - Remove lockout/tagout devices (each employee must remove their own lock and tag).
 - Restore energy sources and perform system checks as per standard startup procedures.

Documentation

All lockout/tagout activities must be documented, and logs or checklists maintained as required for internal and

regulatory compliance.

Emergency Procedures

- If an unexpected hazard or emergency arises during lockout/tagout, stop work immediately and notify supervision.
- Follow site-specific emergency response protocols.

Training & Review

- All personnel must complete lockout/tagout training prior to performing these procedures.
- This SOP should be reviewed at least annually or after any incident or procedural change.

Revision History

| Date | Revision | Description of Change | Prepared By |
|------------|----------|-------------------------------|-----------------|
| 2024-06-19 | 1.0 | Initial SOP Template Creation | Your Name/Title |