Lockout/Tagout Step-by-Step Checklist

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A step-by-step reference for a standard lockout/tagout procedure. Not a substitute for your workplace's written, machine-specific energy control procedures — use this alongside formal OSHA training.

Date: _____ **Operator:** _____

Preparation

- ☐ Identify all energy sources for the machine or equipment (electrical, hydraulic, pneumatic, mechanical, thermal, gravity)
- ☐ Review the machine-specific written energy control procedure
- ☐ Notify all affected employees that lockout/tagout is about to begin

Shutdown

- ☐ Shut down the machine or equipment using the normal stopping procedure
- ☐ Operate the energy isolating device(s) so the machine is isolated from all energy sources

Lockout/Tagout Application

- ☐ Apply your own lock and/or tag to each energy isolating device
- ☐ Confirm your lockout/tagout device identifies you as the employee who applied it

Stored Energy

- ☐ Relieve, disconnect, or restrain all stored or residual energy (capacitors, springs, elevated parts, air/gas/steam/water pressure)
- ☐ If stored energy could reaccumulate, monitor and verify it remains at a safe level

Verification

- ☐ Verify isolation by attempting to start the equipment using normal operating controls (then return controls to neutral/off)
- ☐ Confirm zero energy state before beginning work

Restoring to Service

- ☐ Check the work area is clear of tools and employees
- ☐ Confirm machine components are operationally intact
- ☐ Remove lockout/tagout devices — only the employee who applied the device should remove it
- ☐ Notify affected employees before re-energizing the equipment

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