

Title: Equipment Lock-Out, Tagging and Test Procedure

Adopted: January 18, 1994

Effective: January 18, 1994

Amended/Reviewed: March 3, 2026

1.0 RATIONALE

This procedure must be interpreted, applied, and implemented in ways that uphold Indigenous and human rights and responsibilities, promote accessibility, and prevent and address (and do not reinforce) discrimination/discriminatory barriers.

2.0 OBJECTIVE

This Procedure provides a step-by-step process to prevent the inadvertent operation or energization of machinery or equipment, in order to protect the health and safety of workers and students.

It is the practice of the Durham District School Board that power supply to electrical equipment be disconnected before work begins. This Procedure outlines the methods to provide a zero-energy state.

This Procedure complies with applicable Legislation and Standards, including:

- Ontario Occupational Health and Safety Act, Industrial Establishments Regulation outlines several provisions related to electrical lockout (Sections 36, 42, 75 and 76)
- CSA Z460-20: Control of Hazardous Energy – Lockout and Other Methods

3.0 DEFINITIONS

3.1 Control Switches: The reference to “control switches” in Section 76 of Regulation 851, as it applies to electrical controls will be understood to mean the main power source or disconnect switch

3.2 Electrical Disconnect Switch: A pull type switch or circuit breaker which physically opens to disconnect the circuit

3.3 Start or Stop Switch: A toggle or push button switch usually mounted near the machine

3.4 Machine: Includes transmission machinery, device or thing which must be isolated to safely carry out the work (for example, boilers, vessels, chest, steam or air driven machinery, pipelines)

3.5 Work: The reference “work” means other than the normal operation of the machine

(e.g. inspection, adjustment, cleaning, maintenance, etc. for which is stopped)

3.6 Worker: Staff or contactor performing work on the machine

4.0 RESPONSIBILITY

4.1 Health and Safety

The Health and Safety Department is responsible for the review, update and monitoring of this Procedure to ensure it meets the minimum standards and legislative requirements. The Health and Safety Department will communicate any updates and revisions.

The Health and Safety Department is responsible for the development and maintenance of the Equipment Lock-Out, Tagging and Test training program delivered to applicable Facilities Services and technological curriculum employees.

4.2 Facilities Services

The Senior Managers of Facilities Services are responsible for ensuring the requirements of this Procedure are communicated to the Facilities Services Managers and Supervisors under their respective portfolios.

The Facilities Services Supervisors are responsible for identifying Facilities Services employees that require training and regular review of the Equipment Lock-Out, Tagging and Test Procedure.

All Facilities Services employees who are required to lock out a piece of equipment must complete training and regular review of the Equipment Lock-Out, Tagging and Test Procedure. The training program will be provided by the Health and Safety Department.

The Facilities Services Supervisors are responsible for communicating the requirements of this Procedure to contractors assigned to perform work.

4.3 School Administrators and Technological Teachers

Teachers who are assigned to technological classrooms and are required to lock out a piece of equipment must complete training and regular review of the Equipment Lock-Out, Tagging and Test Procedure. School Administrators are responsible for ensuring this training is completed. The training program will be provided by the Health and Safety Department.

5.0 APPLICATION AND SCOPE

The Equipment Lock-out, Tagging and Test Procedure will be followed by all Durham District School Board employees, contractors and qualified electricians. This also includes educators assigned to technological classrooms. Only staff trained in the Equipment Lock-Out, Tagging and Test Procedure can perform a lockout.

6.0 PROCEDURES

6.1 General Lockout/Tagging and Test Procedure

6.1.1 Preparing for Shutdown

Identify all equipment, machinery, and workers involved. Identify all energy sources, hazards, and parts that need to be isolated. Notify all affected workers that a lockout is required and the reason for the lockout.

6.1.2 Machine or Equipment Shutdown (De-Energization) and Isolation

If the equipment is operating, shut it down in the normal manner (depress stop button, open toggle switch, etc.). Operate the energy-isolating device(s) so that all energy sources (electrical, mechanical, hydraulic, etc.) are disconnected and isolated from the equipment. Lock off air, gas, steam or other valves at the source of power and open others to bleed off residual pressure.

Note 1: Refer to Appendix A: Energy Forms, Energy Source and General Lockout Guidelines

Note 2: For Technological Classrooms, follow the equipment specific lockout procedures that have been provided

6.1.3 Application of Lockout Devices

Apply locks to each power source/isolation device. Tags must be attached to each lockout device stating the worker's name, contact number, date, and reason for lockout.

Multiple Personnel Protection

If more than one worker is working on the same piece of equipment/machine, each is responsible for attaching their own lock to the group lockout device (i.e., multi-lock hasp) and keeping the key, without exception.

Extended Lockout/Shift Change

Should the worker leave at the end of the workday, before the equipment/machine can be restored to service, the lock and tag must remain. If the task is re-assigned to another worker, the assigned worker(s) must apply their lock and tag before the previous worker can remove their lock and tag.

6.1.4 Confirm Zero Energy State

Prior to working on a machine that has been locked out, a test shall be done to ensure that all sources of power are properly shut down and locked out. Operate the push button or other normal controls to verify that all energy sources have been disconnected. Interlocking or dependent systems which could electrically or mechanically feed into the system being isolated must also be tested.

IMPORTANT: Return all the controls to the neutral or off position after the test

is complete.

6.1.5 Proceed with Work

6.1.6 Release from Lockout

Before locks and tags are removed and energy is restored, perform an assessment of the work area to determine that:

- a) Machine/equipment is operationally intact
- b) The necessary guards are in place
- c) All tools and materials used during the repair/maintenance activities have been removed
- d) All locks and tags have been removed by those who placed them
- e) All other affected workers have been informed that energy is about to be restored
- f) Ensure all other persons are at a safe distance from the equipment prior to re-energizing the equipment/machine.

6.2 Lockout/Tagout and Test Procedure for Electrical Plug-Type Equipment

The following steps must be taken when performing work on plug-in type equipment. Examples include but are not limited to power bench tools such as disc sanders and kitchen stand mixers.

- a) Disconnect the electrical equipment from the power supply (wall socket)
- b) Attach the tag, plug cover and lock to the end of the power cord
- c) Test equipment to ensure power has been removed by pressing the “start” or “on” switch
- d) Perform required work
- e) Replace all required guards
- f) Remove lock, plug cover and tag
- g) Ensure all other persons are at a safe distance from the equipment prior to re-energizing the equipment/machine.

6.3 Use and Control of Padlocks and Tags

Only Durham District School Board approved locks and tags are to be utilized by Board employees. Additional locks and tags are available through the Health and Safety Department.

Combination locks or locks with multiple or master key are not to be used.

Contractors are responsible for the provision of their own locks and tags. Board locks and tags shall not be used by contractors.

6.4 Emergency Removal of Locks and Tags

The Supervisor is responsible for arranging the removal of a lock in an emergency.

The emergency removal of a lock is only permitted when the authorized employee is not on site and cannot be reached. Under an emergency circumstance, the supervisor must make reasonable and documented attempts to contact the employee and must be confirmed to be unavailable (e.g., left the workplace, medical emergency, etc.).

Prior to removing a lock, the supervisor must verify that the equipment is safe to re-energize.

- a) All work has been completed
- b) All tools, parts, and materials have been removed
- c) Guards, covers, and safety devices are reinstalled
- d) The equipment has been inspected by a qualified person and deemed safe.

7.0 APPENDICES

Appendix A – Energy Forms, Energy Sources, and General Lockout Guidelines

8.0 REFERENCE DOCUMENTS

- Ontario Occupational Health and Safety Act, Industrial Establishments Regulation
- Canadian Standards Association, CSA Z460-20: Control of Hazardous Energy – Lockout and Other Methods