

Safety Lockout Discipline Checklist

Lockout-tagout done as muscle memory, not theater. Every isolation verified. Every verification logged. The ninety-second difference between going home and not.

Companion to: *Fix the System*, Chapter 8. **Legal disclaimer:** This checklist is a discipline companion, NOT a substitute for your plant's formal LOTO procedure or OSHA 29 CFR 1910.147 compliance. Your plant's formal procedure governs. This checklist is about how to hold the discipline ON TOP of the formal procedure so it actually works in practice. **Who uses it:** every person performing lockout, every time. Print, laminate, attach to every lockout kit in the plant.

Before you hang a lock

1. Read the job plan's lockout section

- ☐ Confirmed which specific energy sources require isolation (electrical, hydraulic, pneumatic, thermal, chemical, mechanical stored energy)
- ☐ Confirmed which specific isolation points are named
- ☐ Confirmed which permits are required (confined space, hot work, line-break, elevated work)

If the job plan's lockout section is incomplete or ambiguous, **STOP**. Go back to the planner. A vague lockout section is not a lockout plan.

2. Notify affected operators

- ☐ Operations lead notified of intent to isolate
 - ☐ Operator at the asset acknowledged
 - ☐ Equipment placed in a safe shutdown state per operating procedure
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Hanging the lock

3. Apply isolation

- ☐ Each named isolation point moved to isolated position
- ☐ For electrical: breaker opened; for valves: closed; for mechanical: blocked or pinned
- ☐ Each isolation point physically observed in the isolated state (not just assumed from a remote indicator)

4. Apply your personal lock

- ☐ Your personal lock hung on each isolation point where you will be working
- ☐ Your name tag attached to each lock

- ☐ If multiple crew members: each person hangs their OWN lock on every shared isolation point (group lockout procedure)
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Verification — THE DISCIPLINE MOST PLANTS SKIP

5. Verify the isolation worked

For electrical:

- ☐ Tested with a calibrated voltmeter at the equipment, confirming zero voltage
- ☐ Phase-to-phase AND phase-to-ground verified
- ☐ Meter was itself verified on a known-live source immediately before and after the test (live-dead-live)

For pressure (hydraulic, pneumatic, steam):

- ☐ Pressure gauges on the isolated side read zero
- ☐ Drain or vent valve opened to atmosphere
- ☐ Visual or audible confirmation of pressure release

For mechanical stored energy:

- ☐ Spring-loaded components secured
- ☐ Gravity-loaded components blocked or restrained
- ☐ Rotating equipment chocked

For chemical / process:

- ☐ Block valves closed
- ☐ Bleed valves open
- ☐ Slip blinds installed where applicable

6. Attempt-to-start (the ultimate verification)

For rotating equipment, AFTER verification above:

- ☐ Attempted to start the equipment from the normal operating station
- ☐ Confirmed it did NOT start
- ☐ Returned start control to normal position

This step catches the cases where the wrong breaker was opened, the wrong valve was closed, or the control logic bypassed the isolation.

7. Log the verification

- ☐ Verification logged on the work order:

- Time of verification: _____
- Name of verifier: _____
- Method used (voltmeter / pressure gauge / attempt-to-start / other): _____
- Result (isolated / NOT isolated — stop and re-lock): _____

If verification fails: STOP work. Do not re-lock blindly. Investigate which isolation failed. Contact operations. Re-isolate and re-verify before proceeding.

During the work

- ☐ Isolation points checked visually at the start of each hour of extended work
 - ☐ If any crew member leaves the area for more than 15 minutes and comes back, they re-verify their own locks before resuming
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Removing the lock

8. Before removing

- ☐ Work complete
- ☐ All tools removed from the equipment
- ☐ All crew members accounted for and clear of the equipment
- ☐ Equipment ready for return-to-service

9. Removing

- ☐ Each crew member removes their OWN lock. Never remove another person's lock.
 - ☐ Operations notified before energizing
 - ☐ Equipment returned to operating state per procedure
 - ☐ Work order close-out updated to show lockout cleared at: _____
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If you find another person's lock and can't locate them

- ☐ STOP. Do not remove the lock.
- ☐ Notify the maintenance manager
- ☐ Follow your plant's formal lock-removal procedure, which requires written authorization and documented attempts to locate the lock owner

Removing someone else's lock, even in apparent good faith, is how people get killed.

Supervisor audit (weekly, 15 minutes)

- ☐ Pull 5 random work orders from the past week that involved lockout
- ☐ Check each for verification log entry
- ☐ If any are missing a verification log, coach the crew lead privately

Target: 100% verification log rate. Below 95% means lockout is drifting toward theater.

Maintenance manager audit (monthly)

- ☐ Pull 20 random lockout-verification logs from the past month
- ☐ Walk one to the actual asset and confirm the log matches the equipment
- ☐ If any log entry cannot be verified on the asset, the verification was theater

This is the discipline that keeps lockout as muscle memory. One audit failure per quarter is acceptable and expected. Zero failures means the audit isn't probing hard enough.

From Fix the System by Ivan Getov. Companion to Chapter 8: Execute. getov.xyz/toolkit/fix-the-system/ch08/lock-out-discipline. Free. No email required.