

Lockout and Tagout Written Instruction Form

[See which procedures use this document](#)

Lockout and Tagout (LOTO) Written Instruction Form	Lockbox/Controlling Organization (CO) Tag Number (if applicable):	COPY <input type="checkbox"/>
Facility/Workspace:	Work Document:	Page 1 of 7
Specific Isolated Component/System:		
Isolation Boundary Determined By: <input type="checkbox"/> Walkdown <input type="checkbox"/> Use of controlled as-built drawings/databases (list): <div style="margin-left: 150px;"><input type="checkbox"/> Other (standard operating procedure, technical instructions, etc.):</div>		
Potential Hazardous Energy Types and Magnitude: <input type="checkbox"/> Electrical (Needs to include an Electrical Work Permit or Electrical Work assessment): <input type="checkbox"/> Pressure: <input type="checkbox"/> Thermal: <input type="checkbox"/> Potential/Mechanical: <input type="checkbox"/> Chemical: <input type="checkbox"/> Other:		
LOTO Type: <input type="checkbox"/> Authorized Worker (AW) with Written Instructions <input type="checkbox"/> Controlling Organization with Written Instructions		
Special instructions/comments: <input type="checkbox"/> Safe-to-Work Check by AW Rep. <input type="checkbox"/> Temporary Lift (use the Lockout and Tagout Temporary Lift form) <div style="margin-left: 100px;"><input type="checkbox"/> Temporary Protective Grounding <input type="checkbox"/> Tagout Plus <input type="checkbox"/> Other (describe):</div> (If performing Tagout Plus, document the additional measures here.)		
Method to perform system isolation check: (Identify a system isolation check for each energy type identified above. If the system isolation check involves the use of a contact meter to test for the absence of voltage on potentially energized components, follow the Electrical Hazard Assessment or Electrical Work Permit.)		

Send completed forms to [Worker Safety and Health Records](#).

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The following isolation steps are required to be performed in sequence: <input type="checkbox"/> Yes <input type="checkbox"/> No				Page 2 of 7	
SECTION B			SECTION C		SECTION D
Energy Isolating Device Component ID and Description	Component Location	Required Component Position	Installed	Verified	Removed
1.					<input type="checkbox"/>
2.					<input type="checkbox"/>
3.					<input type="checkbox"/>
4.					<input type="checkbox"/>
5.					<input type="checkbox"/>
6.					<input type="checkbox"/>
7.					<input type="checkbox"/>
8.					<input type="checkbox"/>
SECTION E	Preparer (Sections A and B):				
	Print		Sign		Date
	Technical Reviewer:				
	Print		Sign		Date
Installation Authorized by CO (Section C):			Installation and System Isolation Check Complete:		
Print		Sign	Print		Sign
Date			Date		
Per Telecon <input type="checkbox"/>					
Removal Authorized by CO (Section D):			Removal Complete:		
Print		Sign	Print		Sign
Date			Date		
Per Telecon <input type="checkbox"/>					

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Lockout and Tagout Written Instruction Form Continuation Sheet					
Facility/Workspace:		Work Document:		Page 3 of 7	
Isolated Component/System:					
SECTION B			SECTION C		SECTION D
Energy Isolating Device Component ID and Description	Component Location	Required Component Position	Installed	Verified	Removed
					<input type="checkbox"/>
					<input type="checkbox"/>
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					<input type="checkbox"/>
					<input type="checkbox"/>
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Lockout and Tagout Written Instruction Form

Lockout and Tagout Written Instruction Form Review Continuation Sheet		
Facility/Workspace:	Work Document:	Page 4 of 7
Isolated Component/System:		
Authorized Worker Written Instruction Review		
<i>I have received a pre-job brief, read these written instructions, and understand the hazardous energy sources involved. I agree that the isolation of the hazardous energy sources is (are) adequate to perform the work scope. I will stop work and request a reevaluation of these written instructions if there are any changes to the hazards or work scope, or if the controls appear to be inadequate.</i>		
Print Name	Signature	Date

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Instructions

Order of Signatures

1. The individual who authored the written instructions (Sections A and B) signs and dates Section E.
 2. The individual who performed the technical review of the written instruction's (this needs to be a different person than the author) signs and dates Section E.
 3. The CO signs and dates the "Installation Authorized" field in Section E to authorize the locks or tags to be hung based on the written instructions.
 4. The individual who hangs the locks or tags based on the written instructions checks the box(es) in Section C associated with each isolation point after isolating each point.
 5. The individual who conducted the verification places their initials in the cell(s) in Section C associated with each isolation point.
 6. The individual who hung the locks or tags based on the written instructions performs the system isolation check(s) and signs and dates the "Installation and System Isolation Check Complete" box in Section E.
- Note:** Steps 5 and 6 may be performed concurrently or sequentially.
7. Authorized workers may be authorized to begin work. The authorized workers sign the "Authorized Worker Written Instruction Review" section after attending the pre-job brief and reviewing the written instructions.
 8. Once work is complete, the CO signs and dates the "Removal Authorized" box in Section E to authorize the removal of locks or tags.
 9. The individual who removed the locks and tags checks the box(es) in Section D associated with each isolation point.
 10. The individual who removed the locks and tags signs and dates the "Removal Complete" box in Section E.

Section A

- Facility/Workspace: Enter the location that the Lockout and Tagout Written Instruction Form will be used (325 Radiochemical Processing Laboratory [RPL], 3020 Environmental Molecular Sciences Laboratory [EMSL], etc.); may include the room number if the LOTO points are in a single space.
- Work Document: The number/title of the document controlling the work (standard operating procedure [SOP], service request, test instruction).
- Lockbox/CO Tag Numbers: Enter the number of the lockbox or CO tags used for controlling organization LOTO.
- Isolated Component/System: The specific component or general system that will be serviced or maintained (Fire Suppression System, distillation column #1).
- Isolation Boundary Determined by: Methods and documents used to determine what boundaries are to be used.

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- LOTO Type: Authorized worker or controlling organization.
- Potential Hazardous Energy Types and Magnitude: The specific types of energy that the LOTO is isolating and the amount of hazardous energy present; this information must be communicated to the workers.
- Special Instructions: Amplifying instructions that apply to these written instructions, including any necessary re-energization steps. When applicable, add instructions regarding coordination with other jobs or tasks in progress and include the staff member responsible for coordination. If applicable, include any necessary re-energization steps that may be necessary. When performing Tagout Plus, identify the additional specific control that will be used to prevent inadvertent energization.
- Method to Perform System Isolation Check: The specific way each hazardous energy types is verified isolated (use of a meter, system indications, attempt to start). If the system isolation check involves the use of a contact meter to test for the absence of voltage on potentially energized components, follow the Electrical Hazard Assessment or Electrical Work Permit.

Section B

- Energy Isolating Device, Component ID, and Description: The specific equipment/component identification (HPS-VLV-101) and description (Heat exchanger #1 inlet) of the component having the LOTO applied.
- Component Location: Location specific enough to be located by someone familiar with the facility.
- Required Position: The position of the component in order to isolate the source of hazardous energy (CLOSED, OPEN, BLOCKED, INSTALLED).

Section C

- Installed: Initial box when lock and tag is installed on the energy isolating device.
- Verified: Verifier initials in the box next to each installed energy isolating device after validating it has been installed correctly.

Section D

- Removed: Check box when lock and tag is removed from the energy isolating device. Conduct appropriate tests and visual inspections before removing the isolating device. Inspect the area and equipment to verify that nonessential items are removed, and the system is safe to be returned to service.

Section E

- Signed by the LOTO trained worker who completed the technical review (sections A and B) of the Written Instruction Form.
- Installation Authorized by Person in Charge: Signed by the controlling organization authorizing installation of the locks and tags on the component/system. If installation authorization is obtained via telecom, check Per Telecom box.

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- Installation and System Isolation Check Complete: Signed by the controlling organization representative or authorized worker who installed the locks and tags and completed the system isolation check.
- Removal Authorized: Signed by the controlling organization authorizing removal of the locks and tags from the component/system. If removal authorization is obtained via telecom, check Per Telecom box.
- Removal Complete: Signed by the controlling organization representative or authorized worker who removed the locks and tags.