Hazardous Energy Control Planning

SF-LIB-06 | Equipment | Employer planning starter

Prepare equipment-specific lockout procedures and verification records.

Scope and limits

Planning aid for general-industry 1910.147 within its scope. Not a machine-specific isolation procedure; electrical and construction work require applicable separate rules.

Proposed employer workflow

1. Inventory equipment, energy sources, stored energy and all isolation points.

2. Authorized personnel prepare the specific shutdown, isolation, locking, stored-energy control and verification procedure.

3. Notify affected employees and coordinate contractors, group work and shift changes.

4. Use the approved equipment procedure; verify isolation before servicing. A stop button is not an isolating device.

5. Define controlled restoration, personnel checks and notification. Removal of another person's lock requires the employer's specific compliant procedure.

6. Provide role-specific training and periodic procedure inspections at least annually where 1910.147 applies; document deficiencies and corrections.

Stop-work trigger

Stop if isolation cannot be verified or stored energy can reaccumulate without effective control.

Adapt this resource before use. It is not OSHA-approved, a certification, a permit, or a complete site-specific safety program. The employer must determine applicable rules and approve the actual controls.

Site implementation worksheet

Hazardous Energy Control Planning

Employer / site: _____

Administrator / contact: _____

Effective date / next review: _____

Complete these topic-specific arrangements

Machine ID / energy sources / isolation points

Procedure / location / responsible person

Procedure ID / verification / stored energy

Procedure / location / responsible person

Authorized workers / group and shift arrangements

Procedure / location / responsible person

Attach the supporting plans

Identify applicable federal, State Plan and task-specific rules; attach equipment instructions, assessments, maps and any required written programs or permits. Record their document IDs below.

Supporting document / revision / owner

Employer approval / signature / date: _____

Approval of this worksheet alone does not authorize hazardous work.

Field check & follow-up

Hazardous Energy Control Planning

Task / date / reviewer: _____

Mark each item Yes / No / N/A. Explain N/A. Resolve any missing critical control before work; record who verified the correction.

Check	Y / N / N/A	Action / owner
Equipment-specific procedure available		
All energy sources identified		
Authorized personnel assigned		
Verification method defined		
Handover and restoration planned		

Crew briefing and verification

Discuss: Stop if isolation cannot be verified or stored energy can reaccumulate without effective control.

Ask each worker to explain the task controls and who to contact. Record the topic, participant names, demonstration or questions, and unresolved gaps. Attendance alone is not proof of proficiency.

Participants / evidence / gaps / corrective action

Reviewed by / date / follow-up due: _____

Official reference and use

https://www.osha.gov/laws-regs/regulations/standardnumber/1910/1910.147

Source checked Nov 3, 2026. OSHA regulations and recommended guidance have different roles. Verify changes and applicability before adoption. Procedures and forms here are original SafetyFluent planning aids. Copy and adapt for internal workplace use, retaining source and revision details.

Records: assign secure storage, access and retention based on applicable requirements; there is no universal retention period for every form. Keep medical details out of this general crew worksheet.