



# SUPERVISOR & EMPLOYEE LOCKOUT/TAGOUT ANNUAL EVALUATION FORM

Supervisor's Name \_\_\_\_\_ Employee's name \_\_\_\_\_

Signature \_\_\_\_\_ Signature \_\_\_\_\_

Evaluation Date \_\_\_\_/\_\_\_\_/\_\_\_\_ Work Order # \_\_\_\_\_ Location \_\_\_\_\_

Equipment or system being worked on:

- Process being evaluated:
- Lockout/tagout (Go to **Lockout/Tagout** below)
  - Tagout only (Go to **Tagout** below)
  - Energized work (Go to **Energized Work** below)

## A. Lockout/Tagout

- A1. Yes  No  Were all the energy sources locked out?
- A2. Yes  No  The employee has his/her own lock(s) on.
- A3. Yes  No  Key on the employee?
- A4. Yes  No  Using the assigned lock?
- A5. Yes  No  Tag properly filled out and in place?
- A6. Yes  No  N/A
- Was the procedure form properly filled out?
- Attach copy of written lockout procedure if required. (See details on other side.)
- A7. Yes  No  Did the employee(s) follow the procedure?

## B. Tagout – (Use a tag without locks only if it is impossible to install a lock.)

- B1. Yes  No  Was a tag on the control?
- B2. Yes  No  Was there something supplementing the tag to prevent energizing?
- B3. Yes  No  Was a work order put in to change the controls so they can be locked out?

## Energized Work including Electrical (May only be used if the work cannot be done with the energy sources locked out.)

- C1. Yes  No  Were unnecessary energy sources locked out?
- C2. Yes  No  Were the energy levels as low as possible?
- C3. Yes  No  Were tools or personal protective equipment used to keep employee safe?
- C4. Yes  No  Was a qualified person at the control of the energized source?

- Yes  No  Was the overall procedure correct? (All applicable questions must be answered yes) If no, list the areas in need of improvement

Actions taken

**Written lockout procedure required if:**

- equipment stores energy or can accumulate energy after shut down; or
- equipment has more than one energy source; or
- equipment has an energy source(s) that is not obvious; or
- more than one device is required to lock out the equipment; or
- the lockout device is not under the sole control of the employee working on the equipment; or
- the work creates a hazard to other employees; or
- there has been an accident involving unexpected activation of the equipment