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