

Lockout Tagout Procedure

Use this template to control hazardous energy isolation for oilfield equipment, pipelines, skids, and utilities.

Template Metadata

| Field | Details |
|----------------|--|
| Category | Oil & Gas |
| Owner | [Team or owner] |
| Version | [Version number] |
| Effective Date | [Date] |
| Review Cycle | [Monthly / Quarterly / Annual / Event-based] |
| Status | [Draft / In Review / Approved] |

Scope

Identify facility, equipment tag, job scope, affected systems, and boundaries.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Energy Sources

List electrical, hydraulic, pneumatic, pressure, chemical, thermal, gravity, and stored energy hazards.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Isolation Points

Table valves, breakers, blinds, drains, vents, locks, tags, and responsible authority.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Lockout Steps

Provide numbered shutdown, isolation, depressurization, draining, locking, tagging, and communication steps.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Zero-Energy Verification

Define try-start, pressure checks, voltage testing, gas testing, and verification records.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Shift Handover

State personal lock transfer, group lock box, permit continuity, and supervisor checks.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Restoration

Describe tool removal, reinstatement, leak test, notification, and controlled start-up. Use precise tag numbers and verification criteria.

| Item | Details | Owner | Status |
|-----------------------|---|---------|-------------------|
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |
| [Item or requirement] | [Describe the relevant detail, evidence, or decision] | [Owner] | [Open / Complete] |

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Review and Signoff

Document review conclusions, approvals, unresolved items, and next review date.

| Role | Name | Date | Notes |
|----------|--------|--------|---------|
| Preparer | [Name] | [Date] | [Notes] |
| Reviewer | [Name] | [Date] | [Notes] |
| Approver | [Name] | [Date] | [Notes] |