Oversight Checklist for CAMs and PMs- LOTO (ENERGY ISOLATION)

1. Energy Isolation

Pre-Work Preparation

- **Identify Circuit/System/Equipment**: Confirm the circuit, system, and/or equipment to be worked on is identified in the isolation plan or drawing.
- **Identify Hazardous Energy Sources**: Ensure all hazardous energy sources have been identified.
- **Identify Isolation Points**: Verify isolation points are identified per the isolation plan and/or drawing.
- **Set Isolation Devices**: Ensure isolation devices are set in the identified position per the isolation plan or drawing.
- **Install Locks and Tags**: Confirm locks and tags are installed on the equipment/devices as per the isolation plan.

Verification

- **Zero Energy State**: Verify, prove, and demonstrate a zero-energy state.
- **Tagging and Marking**: Ensure tags or markings identify the circuit, system, and/or equipment indicated by the isolation plan or drawing.
- **Isolation Points**: Confirm all isolation points are in place and tagged or marked using an isolation diagram, equipment isolation procedure, P&IDs, or process flow diagram.
- **System Preparation**: Ensure valves are open or closed as per the diagram and/or plan.
- **Install Blinds, Spades, and Skillets**: Confirm they are stamped or certified for the pressure rating of the equipment and installed per the diagram and/or plan.
- **Electrical Isolation**: Ensure electrical isolation points are open/switched off or disconnected from the power source.

Lockout/Tagout

- **Lockout/Tagout Devices**: Place lockout/tagout devices on isolation points and keep keys in a designated secure location.
- **Equipment Start Prevention**: Demonstrate that powered equipment cannot be started.
- **Residual Energy Check**: Test systems (lines, gauges, etc.) for residual or stored energy by checking bleed and vent points, gauges, measurements, and volt meters.

2. De-Isolation & Re-Energizing

Identification and Notification

- **Identify Circuit/System/Equipment**: Confirm the circuit, system, and/or equipment to be de-isolated/re-energized is the one identified in the isolation plan or drawing.
- **Notify Personnel**: Notify any personnel affected by the re-energizing activity.

Inspection and Readiness

- **Work Area Inspection**: Physically inspect the work area to confirm all mechanical, process, and electrical isolations were removed as per the plan.
- **Bleed and Vent Points**: Confirm bleed and vent points are closed/open as per the plan or procedure.

Personnel Safety

- **Awareness**: Ensure personnel in/near the work area or affected by the re-energizing of the circuit, system, and/or equipment are aware it is ready to be put back in service.
- **Line of Fire**: Ensure personnel are not in the line of fire of re-energized potential hazardous energy sources (e.g., electrical, pressure, hydraulic, mechanical, etc.).

Re-Energizing

- **Readiness Confirmation**: Confirm the circuit, system, and/or equipment is ready to be re-energized as per the isolation plan or system/equipment operating procedure.