

FREE WORKPLACE ACTION PACK**MACHINERY ISOLATION & LOCKOUT/TAGOUT****South Africa Employer Planning, Verification & Training Pack**

Seven practical employer worksheets for controlling unexpected energisation and hazardous stored energy during maintenance, cleaning, clearing jams, inspections and repairs.

WHAT IS INSIDE	WHY IT MATTERS
01 / Equipment and energy-source register	Record the machinery, energy types, owners and nominated authorised people.
02 / Pre-job isolation planning	Confirm task scope, affected people and equipment-specific instructions.
03 / Isolation verification record	Record verification responsibilities and evidence—without assuming a machine is safe.
04 / Restoration and handover log	Document personnel clearance, authorisation and return-to-service controls.
05 / Competence and training matrix	Identify the workforce safety-awareness and role-specific training gaps.
06 / Supervisor audit checklist	Review programme governance, contractor coordination and corrective actions.
07 / Employer training enquiry brief	Prepare a useful quotation request for SSA training services.

IMPORTANT: This is a planning aid, not a lockout permit, formal safe work procedure, or an instruction authorising a person to operate or isolate hazardous machinery. Machine-specific controls must be prepared and verified by suitably competent personnel.

01 EQUIPMENT & ENERGY-SOURCE REGISTER

Use a separate register for each machine or interconnected system. Identify all energy types; electrical shutdown alone may not address hydraulic pressure, gravity, trapped product, heat or stored mechanical force.

EQUIPMENT / LOCATION	ENERGY SOURCE / HAZARD	DOCUMENT OR RESPONSIBLE PERSON
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Assessment prompts

- ☐ Are there alternate feeds, batteries, automatic restart devices or backfeeds?
- ☐ Are valves, rams, springs, raised loads or pressurised lines involved?
- ☐ Which workers, contractors, shifts and adjacent processes could be affected?
- ☐ Has the machine-specific procedure been approved by the responsible competent person?

Assigned assessor / review date: _____

02 PRE-JOB ISOLATION PLANNING

Before work, the employer's responsible persons should confirm the scope and communicate an authorised isolation plan. This worksheet is a planning and approval check, not an operational step-by-step lockout instruction.

- ☐ Work order and task scope documented
- ☐ Machine/equipment identification positively verified
- ☐ Applicable machine-specific safe work procedure located and reviewed
- ☐ All hazardous-energy sources identified and assigned to responsible persons
- ☐ Affected workers and contractors informed
- ☐ Appropriate isolation and personal lock/tag arrangements verified for the task
- ☐ Stored energy, movement and residual hazards considered
- ☐ Competent person and responsible supervisor assigned
- ☐ Workplace emergency and escalation procedure available
- ☐ Shift handover / multi-person lockout arrangements addressed

Task reference / plant: _____

Authorised person(s): _____

Supervisor / contractor coordination notes:

03 ISOLATION VERIFICATION & HOLD POINTS

Isolation must not be treated as proved merely because a motor has stopped or an emergency-stop has been pressed. The responsible authorised person must use the machine-specific approved verification method.

HOLD POINT	VERIFIED BY / TIME	EVIDENCE REFERENCE
Equipment identity and task scope checked	_____	_____
Isolation points matched to approved procedure	_____	_____
Stored-energy controls reviewed	_____	_____
Approved absence-of-energy verification recorded	_____	_____
Affected personnel advised work may commence	_____	_____

NO-GO CONDITIONS

- ☐ The machine or its energy sources cannot be identified with confidence.
- ☐ A lock or tag is missing, disputed or belongs to another worker.
- ☐ A competent worker cannot verify a zero-energy or otherwise safe condition using the approved procedure.
- ☐ A second worker, contractor or shift is not covered by the agreed control arrangement.

If any no-go condition applies: stop, make the area safe and escalate under the employer's approved procedure.

04 RESTORATION & HANDOVER RECORD

Restoration is a distinct controlled phase, not simply the reverse of isolation. Use this record alongside the employer's equipment-specific approved procedure.

- ☐ Work completion and inspection confirmed
- ☐ Tools, loose components and temporary materials accounted for
- ☐ Guards and protective devices reinstated as applicable
- ☐ All affected workers, contractors and shifts accounted for
- ☐ Each personal lock/tag addressed by the authorised ownership/removal process
- ☐ Area and equipment conditions checked by responsible person
- ☐ Restart authority and communications confirmed
- ☐ Outstanding defects recorded and escalated before return to service

Equipment / work order: _____

Person authorising return to service: _____

Date and time / restrictions: _____

Handover and outstanding corrective actions:

05 ROLE & TRAINING-NEEDS MATRIX

A general workplace safety course is not automatically a dedicated, competency-assessed lockout/tagout qualification. Match the precise training or assessment need to the actual role.

ROLE / TEAM	NEED OR COMPETENCE GAP	ACTION / OWNER
Operators / production	Recognising unsafe conditions and reporting energy hazards	_____
Supervisors / SHE personnel	Site procedures, hazard identification, inspections and follow-up	_____
Maintenance / engineering	Plant-specific isolation competence and technical authorisation	_____
Contractors	Site induction, interface controls and group work arrangements	_____
Managers / responsible persons	Governance, audit trail, risk assessment and review	_____

SSA training pathways (not LOTO certification):

OHS / SHE Compliance Training — supervisors and safety teams

Basic Health & Safety Training — foundational workforce safety awareness

Plant-specific lockout competence must be assessed separately by appropriately qualified and authorised persons.

06 SUPERVISOR READINESS AUDIT

- ☐ Equipment-specific energy isolation procedures are current and accessible
- ☐ Isolation points and labels are identifiable on actual plant
- ☐ Personal lock/tag ownership rules are documented
- ☐ Stored-energy hazards and multiple energy sources are addressed
- ☐ Controls for shift changes and multiple workers are documented
- ☐ Maintenance/operations interfaces are defined
- ☐ Contractor onboarding explains site-specific isolation responsibilities
- ☐ Supervisors can explain the hold points and stop-work triggers
- ☐ Audits identify recurring gaps and record follow-up actions
- ☐ Competence, training and authorisation evidence is current

Three priority findings:

1. Finding / person responsible / completion date:

2. Finding / person responsible / completion date:

3. Finding / person responsible / completion date:

Reminder: a completed checklist is neither legal certification nor proof that a specific machine is safe.

07 EMPLOYER TRAINING REQUEST BRIEF

Use this worksheet to describe your company's legitimate training needs before enquiring. SSA can advise on relevant existing courses; it must not be represented as automatically certifying plant-specific lockout competency.

Company / industry

Site / town

Contact person

Contact email / number

Approximate learner or team size

Roles: operators / supervisors / SHE / maintenance

Relevant existing course or skills gaps

Preferred timing / on-site delivery requirements

[REQUEST A COMPANY SAFETY-TRAINING QUOTE >](#)

[EXPLORE OHSA / SHE COMPLIANCE TRAINING >](#)

[READ THE FULL LOTO SOUTH AFRICA EMPLOYER GUIDE >](#)

OFFICIAL REFERENCE POINTS

Occupational Health and Safety Act 85 of 1993 | General Machinery Regulations 1988, regulation 6 | Electrical Machinery Regulations 2011, regulation 7

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Legal/source review: 24 October 2026. Verify current regulation status and plant-specific requirements before use.