

SIX-STEP LOCKOUT/TAGOUT PROCEDURE

Quick Reference Card — Keep with your LOTO equipment

1 NOTIFICATION

- Notify all affected employees
- Identify who operates/works near equipment
- Explain what will be locked out and duration
- Document notification in LOTO log

BESS: May require grid operator notification

2 PREPARATION

- Review equipment documentation
- Identify ALL energy sources
- Locate all energy isolating devices
- Gather lock, tags, meter, and PPE

BESS: Check both DC and AC isolation points

3 SHUTDOWN

- Use normal operating controls
- Follow manufacturer procedures
- Allow equipment to stabilize
- Verify shutdown is complete

BESS: Coordinate with BMS; get System Owner approval

4 ISOLATION

- Operate each isolating device to "safe" position
- Open breakers, disconnects, and valves
- Verify each device is open/off
- Follow proper sequence if multiple points

BESS: Opening disconnects does NOT de-energize batteries!

5 LOCKOUT/TAGOUT

- Apply YOUR lock to each isolating device
- Attach YOUR tag (name, date, reason)
- Test that lock prevents operation
- Use hasp for multiple workers
- Document each lock in LOTO log

6 VERIFICATION

- Identify all stored/residual energy
- Release or restrain stored energy
- Test for zero energy with proper meter
- Verify at YOUR work location
- Re-test during extended work

BESS: Verify at work point—batteries retain voltage!

⚠ NEVER DO THESE

✗ Skip steps—every one matters

✗ Assume equipment is de-energized

✗ Work under someone else's lock

✗ Remove lock before work is done

✓ "CAN I START?" CHECKLIST

- Notified affected employees?
- Identified all energy sources?
- Equipment properly shut down?
- All isolation points secured?
- My lock and tag applied?
- Zero energy verified at work point?

All YES? → Proceed with work

⚡ BESS CRITICAL REMINDER

Batteries are ALWAYS energized.

- Opening disconnects isolates the circuit
- It does NOT eliminate battery voltage
- Stranded energy remains at cell level
- Always verify at YOUR work point

When in doubt, STOP and verify again!