SKILLSIGNAL™
Construction Safety & Compliance

TOOLBOX TALK

Testing and Repositioning: The Only Legal Way to Run a Locked-Out Machine

TOPIC NO.	DURATION	AUDIENCE
LO-08	10 to 15 min	All Crew

OSHA REFERENCE 29 CFR 1910.147(f)(1) · 29 CFR 1910.147(e) · 29 CFR 1910.147(d)

PROJECT / JOBSITE	DATE	PRESENTED BY

01 THE HOOK

START HERE

You replaced the drive belt. Now you need to bump the motor to check the tracking. Or you need to jog the conveyor six inches to line up the next roller. Or you need to raise the boom to get at the next fitting. The machine is locked out and the work is not done, but you need it to move. This is the moment lockout programs fall apart, because the easy answer is "pull the lock, hit the button, put the lock back." The standard allows exactly that, in five steps, in order. Skip a step and you are standing next to a running machine with tools on the belt and a coworker you forgot about in the pit.

02 THE FIVE STEPS OF 1910.147(f)(1)

29 CFR 1910.147(f)(1) says that when lockout devices must be **temporarily removed** to test or position the machine, the following sequence **"shall be followed"**:

STEP 1

CLEAR THE MACHINE OF TOOLS AND MATERIALS

(f)(1)(i): “Clear the machine or equipment of tools and materials.” Every wrench on the frame, every roller leaning on the belt, every rag in the drum. A tool left on a moving part becomes a projectile when the machine starts. Walk the whole machine, not just where you were working.

STEP 2

REMOVE EMPLOYEES FROM THE AREA

(f)(1)(ii): “Remove employees from the machine or equipment area.” Not “tell them to stand back.” Remove. Especially the people you cannot see: under it, behind it, in the pit, inside the guard. If it is a group lockout, every person with a lock on the box comes out and accounts for themselves.

STEP 3

REMOVE THE LOCKOUT DEVICES

(f)(1)(iii): “Remove the lockout or tagout devices as specified in paragraph (e).” That means the full release procedure: inspect the area, position and notify affected employees, and each person removes **their own** lock (LO-09). The locks come off in the same order they are supposed to come off for a final restart.

STEP 4

ENERGIZE AND TEST OR POSITION

(f)(1)(iv): “Energize and proceed with testing or positioning.” With the guards back on where possible, everyone at a safe distance, and one person at the controls who knows what the test is. The machine runs for the test and nothing else. Nobody reaches in to “adjust it while it is going.”

STEP 5

DE-ENERGIZE AND LOCK OUT AGAIN

(f)(1)(v): “De-energize all systems and reapply energy control measures in accordance with paragraph (d).” The whole six-step lockout, again: shutdown, isolate, lock, release stored energy, **verify zero**. The test may have re-charged an accumulator or re-pressurized a line. Verify, do not assume.

03 WHERE IT GOES WRONG

✓ DONE RIGHT	✗ DONE THE USUAL WAY
TOOLS **Walked the whole machine. Nothing on it.**	TOOLS **Grabbed the wrench you could see. The pry bar on the far side is still there.**
PEOPLE Everyone with a lock on the box is out and standing where you can see them.	PEOPLE “Hey, I’m bumping it.” The guy in the pit had earplugs in.
LOCKS Each person removes their own lock after the area check and notification.	LOCKS Lead pulls all the locks, or the hasp, because it is faster.
THE TEST Guards on, one person at the controls, machine runs only long enough to test.	THE TEST Guard off so you can see, a hand on the belt to feel the tracking.
AFTERWARD Full lockout again, including re-verifying zero energy.	AFTERWARD Lock back on the disconnect, straight back into the machine. The line is at 120 psi again.

04 TWO THINGS TO REMEMBER

THE PRINCIPLE **THE MACHINE IS EITHER LOCKED OUT OR IT IS RUNNING**

There is no third state.

✗ **DON’T WORK ON A MACHINE THAT IS “JUST OFF”**

After a test, the locks are off and the machine is off. That is not locked out. Reaching in to make “one more adjustment” before re-locking is working on an energized machine with no protection. It is the exact situation lockout exists to prevent, and it is where the amputations happen.

✓ **TEST, THEN LOCK, THEN TOUCH**

Treat every test as a restart. When it is over, the machine goes back through all of (d) before anyone touches it. If you expect to test several times, plan for it: the procedure should say how many cycles, who is at the controls, and where everyone stands.

⚠ **CLEANING UP COUNTS AS BEING IN THE MACHINE**

The laborer sweeping under the conveyor or wiping down the mixer drum while it is locked out is exposed to the same hazard as the mechanic. If anyone's body is where the machine moves, they are an authorized employee for that task and need their own lock on the device. "I was just cleaning" has been the last sentence in too many reports.

05 WHY IT MATTERS

[JOBSITE]

FOR THE CREW

Testing and repositioning is where most real-world lockout work happens: belts, alignment, calibration, bleeding lines. A crew that runs the five steps every time has a procedure for the most dangerous moment of the job instead of a habit.

[INDIVIDUAL]

FOR YOU

Every bump test is a restart with you standing closer to the machine than any operator ever stands. Clear it, clear the people, and verify zero after. The test is not over until the lock is back on and the gauge reads zero.

[HOME]

FOR LIFE OFF-SITE

Testing the garage door opener after adjusting the spring, bumping the mower to check the blade. Same thing. Hands out, everyone back, then shut it down and unplug it again before you touch it.

06 TODAY'S DRILL

TODAY'S DRILL **WALK THE FIVE STEPS BEFORE THE NEXT BUMP TEST**

The next time a locked-out machine on this site needs to be tested or jogged, the authorized employee calls the five steps out loud before touching a lock: tools clear, people clear and counted, locks off per (e), test with guards on, full lockout and re-verify after. The foreman watches the first one. If the crew has been doing it a different way, this is where it changes.

07 CREW DISCUSSION

Take 2 minutes. Pick one.

1. How does this crew bump-test a machine today? Who pulls the locks, and does everyone come out first?
2. Has anyone seen a tool fly off a machine on restart? Where was it left?
3. After a test, does the machine get fully re-locked and re-verified before anyone touches it, or does the lock just go back on the disconnect?

08 ATTENDANCE & SIGN-OFF

All attendees confirm they participated in this Toolbox Talk and understand the content covered.

NAME (PRINT)	SIGNATURE

SUPERVISOR SIGNATURE

_____ Date: _____

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