

LAWRENCE BERKELEY NATIONAL LABORATORY

# Lock Out Tag Out (LOTO) Procedures DB User's Guide

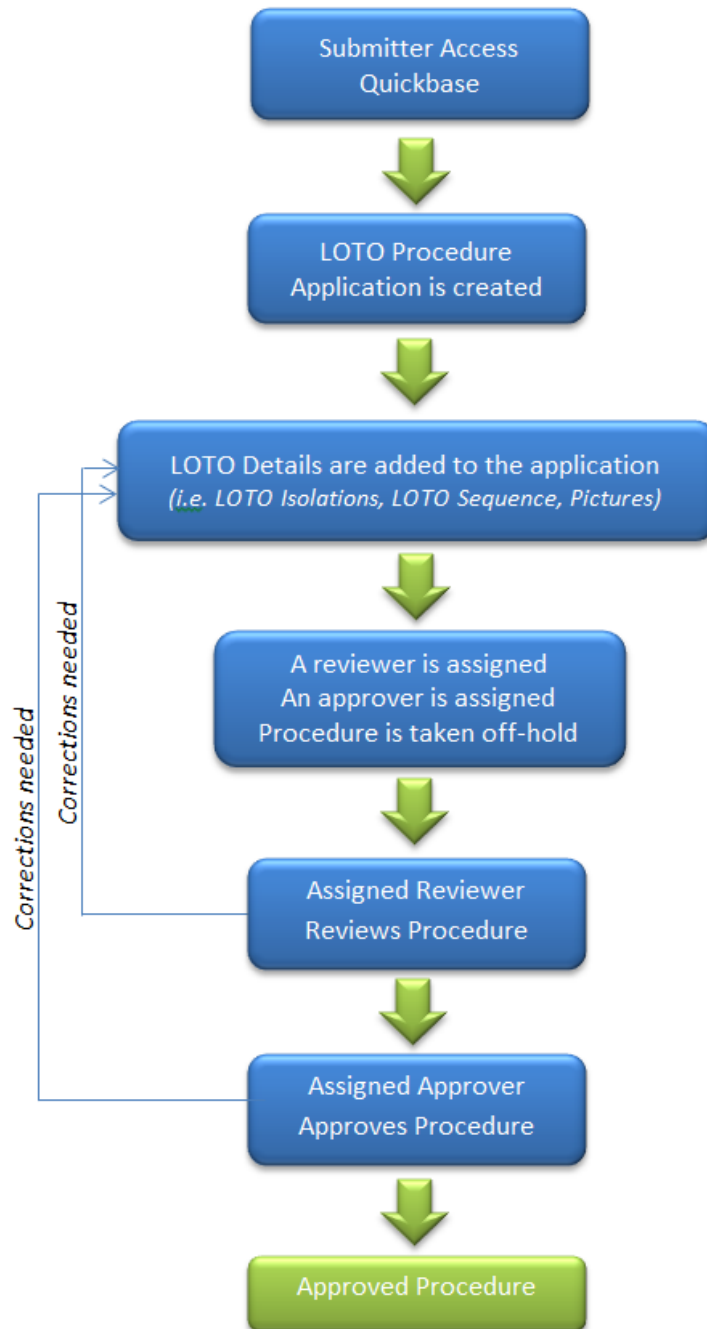
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**LBL Electrical Safety**

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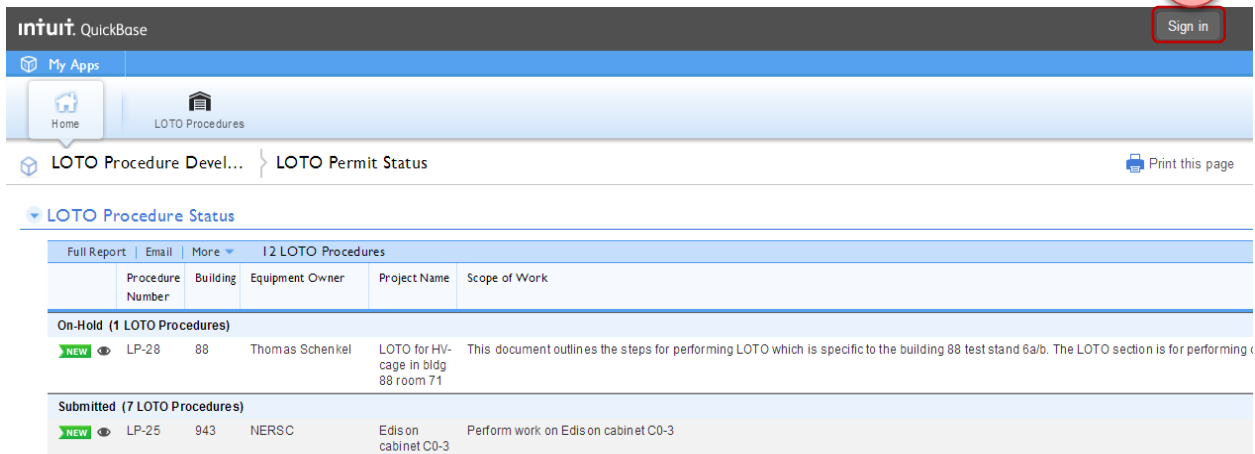
# 1. LOTO Procedure Approval Process



## 2. Sign into Quickbase: LOTO Procedure System

Step 1 - Navigate to: <https://lbnl.quickbase.com/db/bh93igfed>

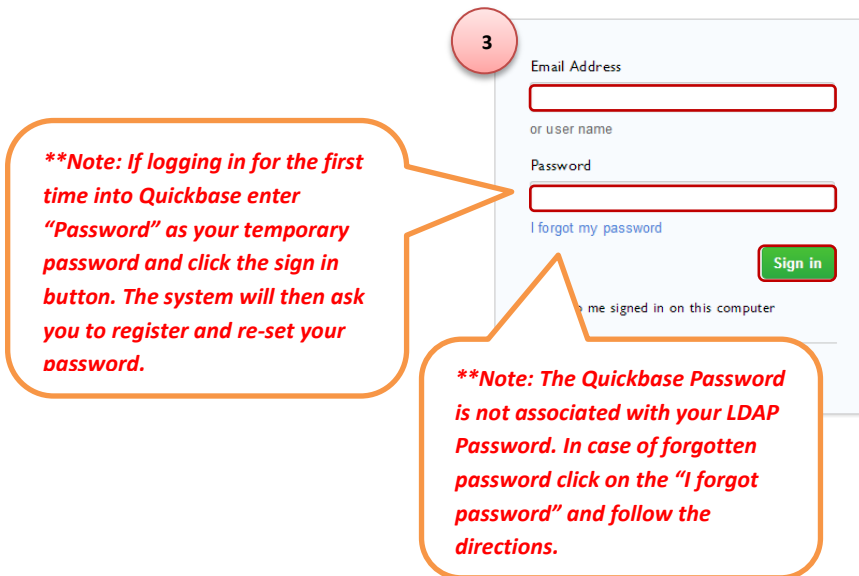
Step 2 - Click on the sign-in button in the upper right corner of the page. **Sign in is only required if you are a reviewer or approver. Anyone who has access to the Internet can input an application.**



The screenshot shows the Quickbase interface for the LOTO Procedure System. The top navigation bar includes 'My Apps', 'Home', and 'LOTO Procedures'. The main content area displays 'LOTO Procedure Status' with a table of procedures. A red circle with the number '2' highlights the 'Sign in' button in the top right corner of the page header.

Full Report	Email	More	12 LOTO Procedures		
	Procedure Number	Building	Equipment Owner	Project Name	Scope of Work
<b>On-Hold (1 LOTO Procedures)</b>					
	LP-28	88	Thomas Schenkel	LOTO for HV-cage in bldg 88 room 71	This document outlines the steps for performing LOTO which is specific to the building 88 test stand 6a/b. The LOTO section is for performing
<b>Submitted (7 LOTO Procedures)</b>					
	LP-25	943	NERSC	Edis on cabinet C0-3	Perform work on Edis on cabinet C0-3

Step 3 – Enter your LBNL Email Address and your password, then click the sign in button.



The screenshot shows the Quickbase sign-in form. A red circle with the number '3' highlights the form fields. Two callout boxes provide instructions: one for first-time users and one about password requirements.

**\*\*Note: If logging in for the first time into Quickbase enter "Password" as your temporary password and click the sign in button. The system will then ask you to register and re-set your password.**

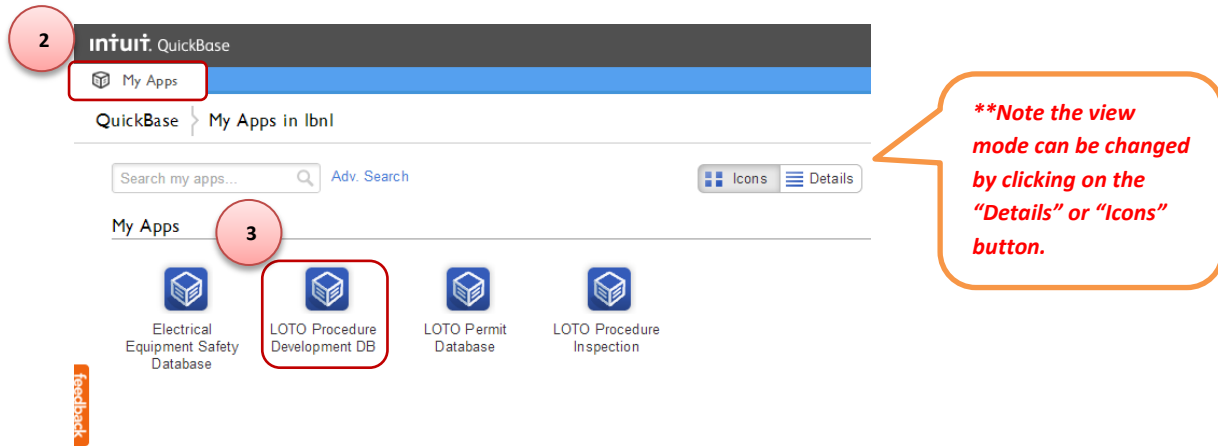
**\*\*Note: The Quickbase Password is not associated with your LDAP Password. In case of forgotten password click on the "I forgot password" and follow the directions.**

### 3. Accessing the LOTO Procedure Application

Step 1 – Log into Quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Click on the “My Apps” tab on the left top of the page. (It will display the applications for which you have been granted access)

Step 3 – Click on the desired “LOTO Procedure Development DB” to access the application. (This page might look different depending on the current view mode)



## 4. LOTO Procedures Home Dashboard

Step 1 – Log into Quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Access the LOTO Procedure Application. (Refer to section 3 of this document)

The Home Dashboard is the system point of reference. In the Dashboard you will find:

1. A report of all the procedures in the system grouped by their respective approval status.
2. Button to initiate / create a new LOTO Procedure
3. List of other applications within Quickbase (i.e LOTO Permit system, EEWP)
4. A list of tables for which you have been granted access within the currently accessed application
5. You can always return to this dashboard by clicking on the “Home” button

The screenshot shows the Quickbase interface for the LOTO Procedure application. The top navigation bar includes 'My Apps' with links to EEWP, LOTO Permit Database, LOTO Procedure Development, and Electrical Equipment Safety. A 'Home' button is circled with a red circle and the number 5. The main navigation bar contains icons for LOTO Procedures, Electrical Isolations, Non-Electrical Isolations, Energy dissipation devices, Divisions, Reviewers, and New Table. A red circle with the number 4 is around the 'New Table' icon. Below the navigation bar, there are options for 'Import/Export', 'Print this page', 'Share to Exchange', and 'Customize this Page'. A red circle with the number 2 is around the 'Add LOTO Procedure' button. The main content area is titled 'LOTO Procedure Status' and shows a table with 12 LOTO Procedures. A red circle with the number 1 is around the table. The table has columns for Procedure Number, Division, Building, Equipment Owner, Project Name, and Scope of Work. It is divided into 'On-Hold (1 LOTO Procedures)' and 'Submitted (7 LOTO Procedures)'. The 'On-Hold' section contains one entry: LP-28, AFRD, 88, Thomas Schenkel, LOTO for HV-cage in bldg 88 room 71. The 'Submitted' section contains three entries: LP-25, NERSC, 943, NERSC, Edis on cabinet C0-3; LP-24, NERSC, 943, NERSC, Edis on cabinet C0-2; and LP-23, NERSC, 943, NERSC, Edis on cabinet C0-1.

Procedure Number	Division	Building	Equipment Owner	Project Name	Scope of Work
<b>On-Hold (1 LOTO Procedures)</b>					
LP-28	AFRD	88	Thomas Schenkel	LOTO for HV-cage in bldg 88 room 71	This document outlines the steps for performing LOTO which is specific to the building 88 test stand 6a/b. The LOTO section is for perf
<b>Submitted (7 LOTO Procedures)</b>					
LP-25	NERSC	943	NERSC	Edis on cabinet C0-3	Perform work on Edis on cabinet C0-3
LP-24	NERSC	943	NERSC	Edis on cabinet C0-2	Perform work on Edis on cabinet C0-2
LP-23	NERSC	943	NERSC	Edis on cabinet C0-1	Perform work on Edis on cabinet C0-1

## 5. Look up, create, or clone a LOTO Procedure

### a) Search / Look up for an existing LOTO Procedure

Step 1 – Log into Quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Click on the “LOTO Procedures” tab

Step 4 – Type a specific LOTO Procedure ID (i.e. LP-1), or some specific argument (i.e. cabinet C0-3) then press the enter key. (This function will search for the arguments typed and return a relevant list of procedures for the arguments provided)

Step 5 – Chose to “edit” or “view” LOTO Procedure by clicking on the “pencil” or “eye” symbol respectively.

My Apps EEWP LOTO Permit Database LOTO Procedure Develo... Electrical Equipment Safe...

Home Users LOTO Procedures Electrical Isolations Non-Electrical Isolations Energy dissipation devices Divisions Reviewer

LOTO Procedures Home + New LOTO Procedures

SETTINGS REPORTS & CHARTS

FILTERS

Status

- Approved
- On-Hold
- Submitted

Equipment Owner

- Building Manager
- Greg Rosenquist
- NERSC
- NERSC Division

Search these LOTO Procedures

LOTO Procedure Status 12 LOTO Procedures

Procedure Number	Division	Building	Equipment Owner	Project Name	Scope of Work
<b>On-Hold (1 LOTO Procedures)</b>					
LP-28	AFRD	88	Thomas Schenkel	LOTO for HV-cage in bldg 88 room 71	This document outlines the steps for perform
<b>Submitted (7 LOTO Procedures)</b>					
LP-25	NERSC	943	NERSC	Edis on cabinet C0-3	Perform work on Edis on cabinet C0-3

### b) Create a new LOTO Procedure

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Click on the “LOTO Procedures” tab

Step 4 – Click on the “New LOTO Procedures” button

My Apps LOTO Procedure Development DB New App

Home LOTO Procedures **3**

LOTO Procedures LOTO Procedures Home **4** + New LOTO Procedures

REPORTS & CHARTS

Search these LOTO Procedures

**LOTO Procedure Status 12 LOTO Procedures**

Procedure Number	Division	Building	Equipment Owner	Project Name	Scope of Work
<b>On-Hold (1 LOTO Procedures)</b>					
<b>UPDT</b> LP-28	AFRD	88	Thomas Schenkel	LOTO for HV-cage in bldg 88 room 71	This document outlines the steps for performing LOTO which is specific to the building 88 test stand 6a1
<b>Submitted (7 LOTO Procedures)</b>					
LP-25	NERSC	943	NERSC	Edis on cabinet C0-3	Perform work on Edis on cabinet C0-3

Step 5 – Fill in the LOTO Procedures Application form. List all isolations in section 6.

Step 6 – Click the “Save” button at the top of the page.

Complex LOTO Procedures Add Complex LOTO Procedures **6** Save Cancel

REPORTS & CHARTS

**LOCKOUT TAGOUT (LOTO) PROCEDURE APPLICATION** **5**

Division

Equipment Owner

Additional Contacts

1. Procedure Title

2. Name of Equipment

3a. Facility 3b. Building 3c. Room

4. SCOPE OF WORK (Describe the work to be performed after equipment is locked out)

5. Areas Affected by LOTO Procedure

6. Isolation Checklist  
 List isolation points:

Isolations can be added to the procedure once the record is created. To create record and proceed click "save" at the top of form.



Step 7 – Verify that the LOTO Procedure has been created

### c) Clone an existing LOTO Procedure

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Search for the existing LOTO Procedure desired to be cloned and click the view symbol. (Refer to section (a) above)

Step 4 – Click on the “More” option on the top right corner of the screen

Step 5 – Click on “Copy this LOTO Procedure”

The screenshot shows the top navigation bar with 'My Apps', 'LOTO Procedure Development DB', and 'New App'. Below is a breadcrumb trail: 'Home' > 'LOTO Procedures'. The main header includes 'LOTO Procedures' and 'LOTO Procedures #28' with a 'REPORTS & CHARTS' link. On the right, there are buttons for '+ New LOTO Procedures', 'Email', and a 'More' dropdown menu. A red circle labeled '4' highlights the 'More' button. The dropdown menu is open, showing options: 'Copy this LOTO Procedures', 'New notification...', and 'Print'. A red circle labeled '5' highlights the 'Copy this LOTO Procedures' option. Below the menu, the form fields for 'Procedure Number: LP-28', 'Status: On-Hold', and 'Set LOTO Procedure on-hold' are visible, along with a 'Preview Draft' button. At the bottom, there are fields for 'Date Submitted: 01-24-2014', 'Date Reviewed:', and 'Date Approved:'.

Step 6 – Make any changes as appropriate

Step 7 – Click the “Save” button

The screenshot shows the 'Add LOTO Procedures' form. The breadcrumb trail is 'LOTO Procedures' > 'Add LOTO Procedures' > 'REPORTS & CHARTS'. The form title is 'LOCKOUT TAGOUT (LOTO) PROCEDURE APPLICATION'. It contains several sections: 'Division' (AFRD), 'Equipment Owner', 'Additional Contacts', '1. Procedure Title' (LOTO for HV-cage in bldg 88 room 71), '2. Name of Equipment' (HV-cage, test stand 6a/b), '3a. Facility' (LBNL Main Site), '3b. Building' (88), and '3c. Room' (71). Section '4. SCOPE OF WORK' contains a text area with instructions. Section '5. Areas Affected by LOTO Procedure' contains a text area with details. Section '6. Isolation Checklist' has a note: 'Isolations can be added to the procedure once the record is created. To create record and proceed click "save" at the top of form.' A red circle labeled '6' highlights the 'Add LOTO Procedures' breadcrumb. A red circle labeled '7' highlights the 'Save' button at the top right.

**\*\*Note isolations will not copy automatically when cloning a procedure. The isolations will have to be imported after the permit is cloned. Please refer to section 6-b for instructions on how to import isolations.**

Step 8 – Verify that the LOTO Procedure has been created

## 6. Add or Import Isolations to a LOTO Procedure

### a. Add Electrical Isolations

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

Step 4 – Scroll down to Section 6 of the LOTO Procedure Application and click on the “Add Electrical Isolation” button.

6. Isolation Checklist

ⓘ Import all isolations from an existing LOTO procedure

Import Isolations

Electrical Isolations:

Add Electrical Isolation 4

Non-electrical Isolations:

Add Non-Electrical Isolation

Stored Energy Dissipation Devices:

Add Energy dissipation device

Step 5 – Fill out the electrical isolation details of the data entry form. *(leave blank any information that is not known i.e. Arc Flash Energy, boundary, and PPE)*

Step 6 – Click the “Save” button, the isolation will be automatically added to the referenced LOTO Procedure listed on the “LOTO Procedure Number” field in this data entry form highlighted in red.

6

Electrical Isolations > Add Electrical Isolation

SETTINGS | REPORTS & CHARTS

Save | Cancel

5

LOTO Procedure Number \*  
LP-25

Line Number \*

Equipment Descriptor \* | Isolation Point \* | Isolation Position

Drawing number

---

AC/DC | Voltage | Arc Flash Boundary

Arc Flash PPE

Arc Flash Attachment  
Choose File | No file chosen

**\*\*Note: Required fields are marked with an (\*)**

**\*\*Note: more information regarding each field can be found by clicking on the (?) symbol**

Step 8 – Verify that the Isolation has been created

## b. Add Non-electrical Isolations

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

Step 4 – Scroll down to Section 6 of the LOTO Procedure Application and click on the “Add Non-Electrical Isolation” button.

6. Isolation Checklist

Import all isolations from an existing LOTO procedure

Import Isolations

Electrical Isolations:

Add Electrical Isolation

Non-electrical Isolations:

Add Non-Electrical Isolation

3

Stored Energy Dissipation Devices:

Add Energy dissipation device

Step 5 – Fill out the non-electrical isolation details of the data entry form. (leave blank any information that is not known)

Step 6 – Click the “Save” button, the isolation will be automatically added to the referenced LOTO Procedure listed on the “LOTO Procedure Number” field in this data entry form highlighted in red.

6

Non-Electrical Isolations } Add Non-Electrical Isolation

SETTINGS    REPORTS & CHARTS

5

LOTO Procedure Number:  
LP-25

Line Number

Equipment Descriptor    Isolation Point    Isolation Type    Isolation Position

Drawing Number

---

Energy Source

Pressure    Thermal    Chemical

PPE

Save    Cancel

Step 7 – Verify that the Isolation has been created

### c. Add Energy Dissipation Devices

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

Step 4 – Scroll down to Section 6 of the LOTO Procedure Application and click on the “Add Energy Dissipation Device” button.

6. Isolation Checklist

ⓘ Import all isolations from an existing LOTO procedure

Import Isolations

Electrical Isolations:

Add Electrical Isolation

Non-electrical Isolations:

Add Non-Electrical Isolation

Stored Energy Dissipation Devices:

Add Energy dissipation device

Step 5 – Fill out the energy dissipation device details of the data entry form. (leave blank any information that is not known)

Step 6 – Click the “Save” button, the isolation will be automatically added to the referenced LOTO Procedure listed on the “LOTO Procedure Number” field in this data entry form highlighted in red.

5

6

Energy dissipation devices } Add Energy dissipation device

LOTO Procedure Number:  
LP-25

Line Number:

Equipment Descriptor      Dissipation Point      Stored Energy Type

Magnitude

PPE

Device

Save

Step 7 – Verify that the Isolation has been created

#### d. Import Isolations

For similar Equipment LOTO Procedures it is often useful to clone an existing LOTO Procedure as in section 5-c. In these cases it is also useful to add the same isolations to the cloned procedure. One can then use the Import Procedures feature to copy and add isolations from one procedure to the other.

Step 1 – Log into quickbase LOTO Procedure Application. (Refer to section 2 of this document)

Step 2 – Enter the LOTO Procedure Application. (Refer to section 3 of this document)

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

Step 4 – Scroll down to Section 6 of the LOTO Procedure Application and type the LOTO Procedure Number of the LOTO Procedure you would like to import isolations from.

Step 5 – Click on the “Import Isolations” button.

6. Isolation Checklist

4 **Import all isolations from an existing LOTO procedure**

28

**\*\*Note: Enter only the numeric Permit Procedure ID i.e. 240 (No letters, dashes, or spaces)**

5 **Import Isolations**

Electrical Isolations: **Add Electrical Isolation**

Non-electrical Isolations: **Add Non-Electrical Isolation**

Stored Energy Dissipation Devices: **Add Energy dissipation device**

Step 6 – The system will prompt the message below, click on the “Save” button

6 **Save this record?**

You've made changes to this LOTO Procedures. Do you want to save these changes before going to the next screen?

**Save** Don't Save Cancel

Step 7 – Verify that the Isolation has been created

## 7. Specify the Procedure Lock Out Tag Out (LOTO) Sequence


Procedure Lock Out Tag Out (LOTO) Sequence can be specified in three ways. By using a default list of LOTO Steps (Step 2a below), by describing the LOTO sequence within the application (Step 2b below), or by attaching a document to the application (Step 2c below).

Step 1 – Log into quickbase LOTO Procedure Application. *(Refer to section 2 of this document)*

Step 2 – Enter the LOTO Procedure Application. *(Refer to section 3 of this document)*

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

Step 4a – Scroll to Section 7 and answer “No” to the specified question. (This is ideal in the case of simple LOTO or when a specific LOTO sequence is not required for the scope of work)

7. Is a specific LOTO Sequence required for LOTO? 

No

4a

**\*\*Below is the default LOTO Steps.**


### 3. LOTO SEQUENCE

*When locking out the equipment, follow the LOTO Implementation Steps for each isolation. When restoring the equipment, follow the LOTO Clearance Steps to clear each isolation*

<b>LOTO Implementation Steps</b>	<b>LOTO Clearance Steps</b>
1. Preparation: review all hazards and controls and perform full employee briefing	1. Verify all work complete and guards in place, or stop all work and install suitable barricades and/or attendants, as required
2. Notify affected personnel, verify that it is safe to shut down the equipment	2. Notify affected personnel, and verify that it is safe to start up the equipment
3. Perform normal equipment shutdown	3. Remove devices for Stored Energy if previously applied (blocks, grounds...)
4. Isolate the energy source	4. Remove LOTO Device, Lock & Tag
5. Apply LOTO Device, Lock & Tag	5. Restore power to the equipment
6. Release Stored Energy if necessary, apply devices if necessary (blocks, grounds...)	
7. Attempt to Restart the Equipment	
8. Verify Zero Energy State	

**\*\*This table will not show within the application. It will only show in the draft print out or in the final approved print out. Both can be accessed in the top part of the LOTO Procedure application.**

#### LOCKOUT TAGOUT (LOTO) PROCEDURE

Procedure Number: LP-21 Status: Approved  Set LOTO Procedure on-hold 

Preview Draft

Print Approved Procedure

Step 5b – Scroll to section 7 choose “Yes” to the specified question. Then proceed to describe the LOTO Sequence in the “Describe LOTO Required Sequence” field.

7. Is a specific LOTO Sequence required for LOTO? Yes

**Describe Required LOTO Sequence:**

To establish LOTO:  
=====

- 1) In form contact person (e.g. Qing Ji at x4802), verify that the test stand is safe to shut down and that it is safe to perform LOTO.
- 2) Before LOTO is performed, ensure that all the equipment (including power supplies and RF generators) are properly shut down and ready for LOTO.
- 3) Switch off the disconnect breaker (labeled "6A Disconnect") on the north wall, apply LOTO device, lock and tag (see pic#1).
- 4) Switch off the disconnect breaker (labeled "6B Disconnect") on the north wall, apply LOTO device, lock and tag (see pic#1).
- 5) Switch off the front panel circuit breaker (labeled "B88R71TS6-1") on the control rack, apply LOTO device, lock and tag (see pic#2).
- 6) Challenge the LOTO, and attempt to restart the equipment.
- 7) Before entering the caged area, inspect the safety drop switches (labeled "6A HV Relay" and "6B HV Relay", see pic#3) to verify they are closed.
- 8) When entering the cage, place ground hooks to both floating racks (labeled "6A Grounding point #1" and "6B grounding point #1", pic#4).

Work can now be safely performed on the test stand if the previous steps have been followed.

To release from LOTO:  
=====

- 1) Before removing LOTO locks and restoring power to the equipment, confirm that it is safe to re-energize:
  - a) Ensure that all covers and doors are in place
  - b) Equipment is in safe condition
  - c) Personnel are in safe position
- 2) Remove LOTO locks and tags.
- 3) Notify all personnel affected by LOTO that work is completed and power is to be restored.
- 4) Re-energize and restore equipment to normal condition.

**Equipment Specific Procedure:**  
 No file chosen

**Attach Supporting Documents:**

Supporting Document #1:  No file chosen

Supporting Document #2:  No file chosen

Supporting Document #3:  No file chosen

5b

Step 6c – Scroll to section 7 choose “Yes” to the specified question. Then Proceed to attach the LOTO Sequence Document in the “Equipment Specific Procedure” field. Then reference the document in the “Describe LOTO Required Sequence” field. *(This is the ideal option when having a complex procedure with special formatting)*

7. Is a specific LOTO Sequence required for LOTO? Yes

**Describe Required LOTO Sequence:**

refer to attached document - "Name"

**Equipment Specific Procedure:**

 No file chosen

**Attach Supporting Documents:**

Supporting Document #1:  No file chosen

Supporting Document #2:  No file chosen

Supporting Document #3:  No file chosen

6c



## 8. Attach Pictures

Step 1 – Log into quickbase LOTO Procedure Application. *(Refer to section 2 of this document)*

Step 2 – Enter the LOTO Procedure Application. *(Refer to section 3 of this document)*

Step 3 – Navigate to the desired Procedure and click on the edit button. (refer to section 5-a)

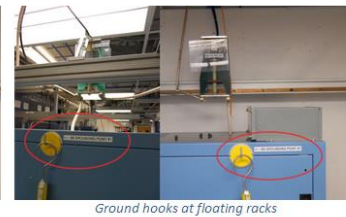
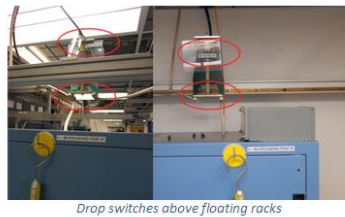
Step 4 – Choose file to upload by clicking on the “Choose File” button for Picture #1.

Step 5 – Add Description for Picture #1. *(Description will be shown below the picture in the final approved procedure print out)*

Step 6 – Repeat the process for the rest of the pictures (2-4). *(Note: only four pictures are allowed)*

Attach Procedure Pictures: (Only four pictures allowed)

<p>4</p> <p>Picture #1</p> <p><a href="#">disconnect.png</a> <input type="button" value="Revisions"/> <input type="checkbox"/> Delete this file</p> <p><input type="button" value="Choose File"/> No file chosen</p> <p>5</p> <p>Description for picture #1</p> <p><input type="text" value="Disconnects at north wall"/></p>	<p>Picture #2</p> <p><a href="#">power.png</a> <input type="button" value="Revisions"/> <input type="checkbox"/> Delete this file</p> <p><input type="button" value="Choose File"/> No file chosen</p> <p>Description for picture #2</p> <p><input type="text" value="Power distribution in rack"/></p> <p>Picture #3</p> <p><a href="#">relay.png</a> <input type="button" value="Revisions"/> <input type="checkbox"/> Delete this file</p> <p><input type="button" value="Choose File"/> No file chosen</p> <p>Description for picture #3</p> <p><input type="text" value="Drop switches above floating racks"/></p> <p>Picture #4</p> <p><a href="#">hook.png</a> <input type="button" value="Revisions"/> <input type="checkbox"/> Delete this file</p> <p><input type="button" value="Choose File"/> No file chosen</p> <p>Description for picture #4</p> <p><input type="text" value="Ground hooks at floating racks"/></p>
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## 9. Submit Procedure for Review

Once the LOTO Procedure has been drafted and ready for review. The Permit can be taken off hold and the approval process will begin.

Step 1 – Log into quickbase LOTO Procedure Application. *(Refer to section 2 of this document)*

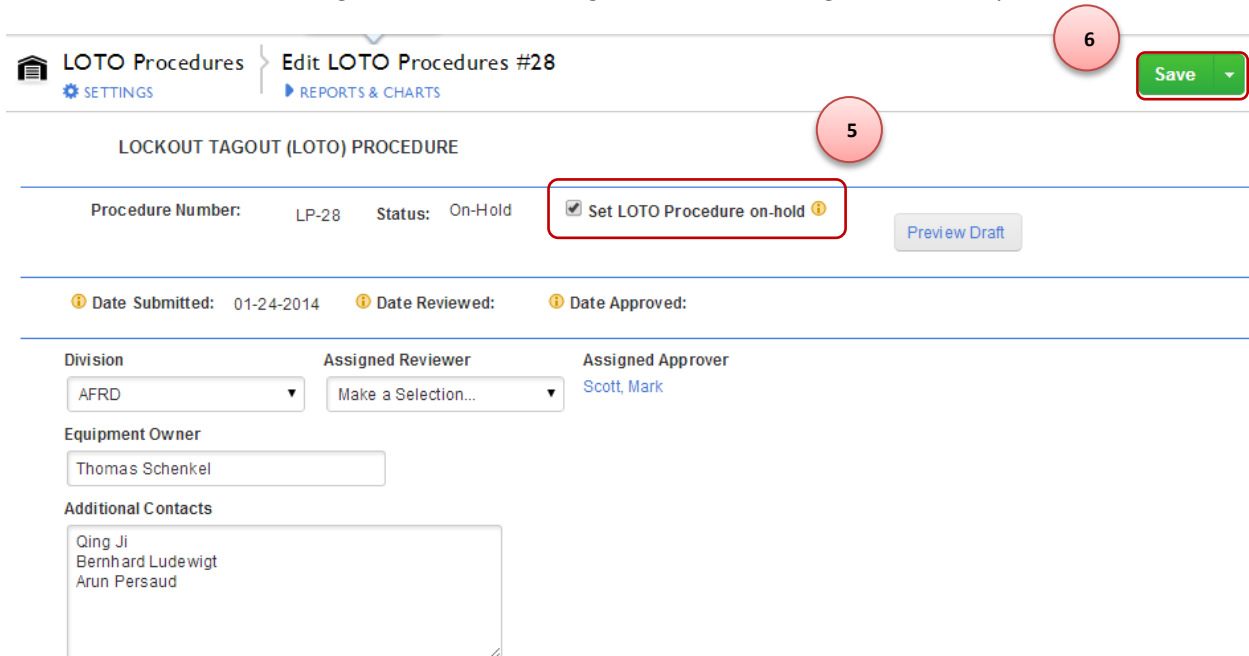
Step 2 – Enter the LOTO Procedure Application. *(Refer to section 3 of this document)*

Step 3 – Navigate to the desired LOTO Procedure and click on the “Edit” button. (refer to section 5-a)

Step 4 – Fill out every section of the LOTO Procedure Application and verify that all the information is correct to the best of your ability

Step 5 – Locate the “Set LOTO Procedure on-hold” checkbox and un-check the checkbox

Step 6 – Click on the “Save” button. *(The Procedure will automatically change status from On-Hold to Submitted. An email will be generated to the assigned reviewer to begin the review process)*



LOTO Procedures } Edit LOTO Procedures #28

SETTINGS REPORTS & CHARTS

LOCKOUT TAGOUT (LOTO) PROCEDURE

Procedure Number: LP-28 Status: On-Hold  Set LOTO Procedure on-hold ⓘ

Preview Draft

ⓘ Date Submitted: 01-24-2014 ⓘ Date Reviewed: ⓘ Date Approved:

Division: AFRD Assigned Reviewer: Make a Selection... Assigned Approver: Scott, Mark

Equipment Owner: Thomas Schenkel

Additional Contacts: Qing Ji, Bernhard Ludewigt, Arun Persaud

Step 7 – Verify the status changes to “Submitted”

## 10. Reviewing Procedures

Step 1 – Review all data entered in the procedure application. Verify that the Isolations, Isolation Sequence, and Procedure are correct

Step 2 – If the LOTO Permit application requires corrections check the “Corrections Required” checkbox and skip to step 4. Do not proceed further until corrections have been completed

Step 3 – Initial in the “Reviewed by” field to review the LOTO Procedure. *(The application status will change from submitted to reviewed; an email will be generated notifying the submitter, reviewer, and approver that the Procedure has been reviewed)*

Step 4 – Click on the “Save” on the top of the page

The screenshot shows the '8. Review' step of the LOTO Procedures application. The breadcrumb trail includes 'LOTO Procedures' and 'Edit LOTO Procedures #27'. A 'Save' button is highlighted with a red circle and the number '4'. The main form area has a red circle with the number '3' next to it. The form contains a 'Reviewed by (Initials)' field with 'cgp' entered, and a checkbox labeled 'Put the LOTO Procedure on-hold (pending corrections)' which is currently unchecked.

## 11. Approving Procedures

Step 1 – Review all data entered in the procedure application. Verify that the Isolations, Isolation Sequence, and LOTO Procedure details are correct

Step 2 – If the LOTO Permit application requires corrections check the “Corrections Required” checkbox and skip to step 4. Do not proceed further until corrections have been completed

Step 3 – Initial in the “Approved by” field to approve the LOTO Procedure. *(The application status will change from reviewed to approved; an email will be generated notifying the submitter, reviewer, and approver that the Procedure has been approved)*

Step 4 – Click on the “Save” on the top of the page

The screenshot shows the '9. Approval' step of the LOTO Procedures application. The breadcrumb trail includes 'LOTO Procedures' and 'Edit LOTO Procedures #27'. A 'Save' button is highlighted with a red circle and the number '4'. The main form area has a red circle with the number '3' next to it. The form contains an 'Approved by (Initials)' field with 'cgp' entered, and a checkbox labeled 'Put the LOTO Procedure on-hold (pending corrections)' which is currently unchecked.

## 12. Corrections Required

Step 1 – Fix the required corrections as outlined by the “Reviewer” or “Approver” in the comments at the bottom of the application

Step 2 – Once the corrections are completed click on the “Corrections Completed” checkbox

Step 3 – Click on the “Save” button. *(The application status will change from “Corrections Required” to “Corrected and re-submitted”; an email will be generated notifying the submitter, reviewer, and approver that the Procedure has been re-submitted with corrections)*

The screenshot shows the 'Edit LOTO Procedures #27' form. At the top right, a red circle with the number '3' highlights the 'Save' button. Below the form title, a red circle with the number '2' highlights the 'Corrections Completed' checkbox. The form includes fields for Procedure Number (LP-27), Status (Submitted), and a 'Set LOTO Procedure on-hold' checkbox. Below these are fields for Date Submitted (01-24-2014), Date Reviewed, and Date Approved. There are also dropdown menus for Division (Testing), Assigned Reviewer (testign\_user\_CGP), and Assigned Approver (Peregrina, Cruz). Text input fields for Equipment Owner (testing record) and Additional Contacts (test) are also visible.

## 13. Print a Drafted or Approved Procedure

Step 1 – To print a drafted LOTO Procedure click on the “Print Draft”

Step 2 – To print an approved LOTO Procedure click on the “Print Approved Procedure”

The screenshot shows the 'LOTO Procedures #21' form. At the top, there is a navigation bar with 'My Apps' and 'New App' buttons. Below that is a menu with 'Home', 'Users', 'LOTO Procedures', 'Electrical Isolations', 'Non-Electrical Isolations', 'Energy dissipation devices', 'Divisions', 'Reviewers', and 'New Table'. The form title is 'LOTO Procedures #21'. Below the title, there is a '+ New LOTO Procedures' button and 'Edit', 'Email', and 'More' options. The form includes fields for Procedure Number (LP-21), Status (Approved), and a 'Set LOTO Procedure on-hold' checkbox. At the bottom, a red box highlights the 'Print Approved Procedure' button.