



Employee Safety

4 Ways to Improve Your Lockout/Tagout System

Kellie Escoto | May 29, 2025

In metalworking, just about everything runs on energy, be it electric, thermal, mechanical, hydraulic or pneumatic. Without proper control, hazardous energy can damage machinery and injure workers. When it's time to do maintenance, repairs or inspections on equipment, it is critical that energy is properly controlled.

That's where a lockout/tagout system comes into play. Lockout/tagout devices reduce the risk of hazardous energy release by locking down a machine's energy source, preventing operators from turning it on or using it. But this safety standard is often neglected or outdated, leaving companies exposed to costly repairs or fines and workers at risk for dangerous accidents. ***Lockout/tagout is among the most cited safety standards*** by the U.S. Occupational Safety and Health Administration (OSHA), with nearly 3,000 recorded violations in 2024.

An effective lockout/tagout system starts with leadership, says Josh Harper, senior national accounts manager at Master Lock. "Often, the problem is not the employee forgetting to apply the lock. More likely, they were not trained in the procedure, or they didn't have the tools necessary to do it," he says. "If there's an OSHA violation, more often than not that means management has missed a step."

"Often, the problem is not the employee forgetting to apply the lock. More likely, they were not trained in the procedure, or they didn't have the tools necessary to do it."

Josh Harper
Master Lock

Employers looking to provide a safe workplace, reduce costs and stay ahead of OSHA standards can follow these four steps to improve lockout/tagout systems.

1. Update Lockout/Tagout Policies and Procedures

Consistent policies and procedures ensure that hazardous energy is properly controlled. As organizations change—whether they’re hiring new employees, expanding to additional locations or upgrading equipment—standardizing and updating policies across the board is essential.

“If you get new equipment or you expand, it’s time to audit policies,” says Gil Truesdale, president and chief revenue officer of Martin Technical.

Read more: Your Guide to OSHA Lockout/Tagout Rules: Preventing Deadly Accidents

Audit Existing Systems

Look in depth at your existing lockout/tagout system. Have there been incidents or *near misses*? Does upgraded equipment need new procedures? Identify the key areas where your current process must be updated.

“Let’s take a snapshot in time and say, today this is where we are, and our policy says this is where we need to be,” Truesdale says. “All we’ve got to do is figure out the gap analysis between those two. That’s where the policy comes in to bridge that gap.”

Keep It Simple

The most effective procedures are straightforward. When procedures are unnecessarily complex, employees may miss critical steps. Procedures and equipment should be labeled clearly, making the steps easy to follow in real time.

Make It Accessible

Employees should be able to easily access procedures so that they can be sure they are following them properly. Consider using an app-based guide or storing appropriate information with each machine.

“When you have a printed procedure, how do you know that the employee followed the proper steps?” Harper says. “With a digital procedure database, employees can follow it step by step on their phone.”

2. Implement Ongoing Training

Once your updated lockout/tagout procedures are in place, ensure that employees fully understand them. Go beyond new-hire onboarding and yearly refreshers—implement regular training, safety moments in meetings and spot-checks to assess opportunities for real-time improvements.

“The procedures become a map that you use no matter the situation or location,” Truesdale says. “Now that you have it, you use it to train people to that new policy and get them up to speed.”

Read more: Digitizing Lockout/Tagout: Obstacles and Opportunities

3. Evaluate Lockout/Tagout Performance and Adjust as Needed

A lockout/tagout system can’t be put in place and forgotten. New or upgraded equipment, updated

compliance standards and industry improvements can drastically change the landscape of lockout/tagout. Plan for ***routine internal audits*** to make sure you stay on top of safety.

Truesdale recommends taking advantage of ***OSHA's Voluntary Protection Programs***, a collaboration between OSHA and manufacturers that helps employers stay compliant with standards. "If you get new machinery or expand to new locations, you can bring OSHA in and get advice," he says. "They can tell you where to focus your efforts from a safety perspective."

4. Stay Compliant with Advanced Lockout/Tagout Technology

Integrating technological improvements in your lockout/tagout system can make procedures more efficient and add a layer of accountability. Digital and cloud-based systems are trackable, making spot-checks and annual audits more accurate and effective. "It provides a digital trail," Harper says. "You'll know whether the steps were followed with every single lockout."

Here are some technological improvements in lockout/tagout:

Bluetooth-Enabled Locks

These ***padlocks connect to Bluetooth***, enabling users to unlock them with a tap of their phone. And if there is an incident or a near miss, you can check whether the proper procedure was followed and determine whether the policy needs to be updated.

QR Codes

Placing ***QR codes*** directly on equipment means operators and technicians can quickly access instructions, video guides or training resources for the specific machine they are using, rather than searching through physical guides for the applicable procedure.

Cloud-Based Auditing

Digitize your lockout/tagout system with cloud-based software that makes writing, managing, sharing and auditing efficient. "These tools give safety managers the ability to create well-formatted procedures and make sure they look the same across multiple facilities," Harper says.

What steps have you taken to optimize your lockout/tagout policy and procedures? Let us know in the comments below.