Compliance Review

eSafetyFirst Canada

Lockout/Tag out (LOTO) Online Training Course

The purpose of this document is to outline the compliance review for the eSafetyFirst Canada (eSafetyFirst) online Lockout/Tag out (LOTO) Training course. The course was viewed in its entirety and then reviewed chapter by chapter to determine both compliance and alignment with OHS Legislation.

In Canada, an online LOTO course must align with provincial Occupational Health and Safety (OHS) regulations and should be guided by the national standard **CSA Z460 (Control of Hazardous Energy)**.

Because an online course covers the theoretical "classroom" portion of LOTO, it is designed to build foundational safety literacy. To be considered compliant, the course must achieve certain core learning outcomes. The eSafetyFirst course also provides a robust supplementary information article regarding LOTO, it can be found here, https://esafetyfirst.com/blog/lockout-tagout-safety-protecting-canadian-workers-from-hazardous-energy/. Between the course itself and the supplementary material the learner is provided with information that will be helpful in meeting LOTO requirements across the different jurisdictions in Canada. The course confirms theory component understanding using quizzes.

There are some small revisions that need to be made to the course to meet all the requirements in Canadian industry. The information below indicates the outcomes that the course meets and some required revision points.

All corrective actions are noted in **BOLD RED** font

---

1. Regulatory Framework and Responsibilities

Learners must understand the legal context of hazardous energy control in Canada. The eSafetyFirst course ensures learners can:

- **The supplementary article identifies legislated requirements:** Learners are able to recognize federal or provincial OHS regulations and CSA Z460 standards that govern LOTO.
- **Define Workplace Roles:** Distinguish between the responsibilities of the Employer, Supervisor, and worker responsibilities. These points are covered in **Module 3** of the course and understanding is confirmed with the quiz.

---

2. Recognizing and Assessing Hazardous Energy

Workers must look past "just electricity" and understand that hazard comes in many forms. The eSafetyFirst LOTO course ensures learners can:

- **Identify Energy Sources:** Define and identify the types of hazardous energy. **Module 2** covers:
    - **Electrical,**
    - **Chemical,**
    - **Radiation, and**
    - **Thermal**.
- ~~**NOTE**, the course needs to be revised to include **Mechanical, Hydraulic, and Pneumatic energies** as forms of energy. Many complex systems will contain these types of energy. As an example, heavy machinery will sometimes require multiple workers to facilitate repairs, and these machines may use a combination of electrical controls over pneumatic and hydraulic actuators such as hydraulic lift cylinders.~~ **This has been corrected with a revised slide**
- **Differentiate Kinetic vs. Residual (Potential) Energy:** In **Module 2** learners are taught about stored/residual energy (e.g., a coiled spring, raised hydraulic lift, or trapped steam) which is referred to as potential energy and that it needs to be bled or blocked.

---

3. Lockout vs. Tagout Devices

Learners must understand the physical tools required to isolate a machine. The course outlines these in **Module 1** and reinforces them in the other modules.

- **Differentiate Devices:** Explain the fundamental difference between a physical lock (which prevents operation) and a warning tag (which provides information).
- **Tag information** is covered in **Module 1**
- **Identify Hardware Criteria:** Recognize standard hardware requirements, ensuring that locks and tags are durable, standardized, substantial, and uniquely identifiable to a single worker.

---

4. The Standard Sequence of Lockout (The Steps)

A critical outcome is mastering the exact, step-by-step process required to safely shut down a machine. **Module 2** covers a 5 step process:

- **Shutdown:** Turning off the equipment using normal stopping procedures.
- **Isolation:** Finding and activating all energy-isolating devices (breakers, valves, switches).

- **Application:** Affixing personal locks and tags to the isolation points.
- **Control of Stored Energy:** Dissipating, bleeding, or blocking any residual energy.
- **Verification ("Try-Out"):** Verifying that the equipment is completely de-energized by attempting to restart it before starting work. **This is often emphasized as the most critical step.**

NOTE. A typical lockout sequence also includes 2 other step. **Preparation and Notification** need to be done**.** This means**:**

- ~~**Preparation** means the authorized person (also referred to as the qualified person in the course) will identify the machine, equipment, or process that requires lockout, which sources of energy are present and must be controlled, and what lockout device will be used. This step involves gathering all required equipment (e.g., lockout devices, tags, etc.).~~ **A slide has been added that corrects this.**
- ~~**Notification** is done by informing affected employees of the impending shutdown. This process can be done with the typical toolbox or tailgate meeting, a pre-work or pre-job meeting.~~ **Corrected with a new slide**
- ~~These steps should be added and the process referred to as a 6 or 7 step process (the two steps can be combined). These are the typical steps written into most LOTO programs.~~ **This has been corrected with a revised slide**

---

5. Special and Complex LOTO Processes

The course covers basic lockout and provides some very good straightforward examples. However, but industrial settings often require advanced protocols. These are covered in **Modules 2 and 3**. Learners are provided with the following concepts:

- **Group Lockout:** Learners understand how to safely manage situations where multiple workers are servicing the same machinery (e.g., utilizing group lockboxes, scissor adapters or hasps).
- **Shift/Personnel Changes: Module 3** explains the continuity protocol for transferring lockout protection when shifts change.
- **Module 3** covers **removal protocols:** The module covers the strict safety rules for removing locks, including emergency protocols for when a worker leaves their lock on but has left the job site.

Non-Technical Recommendations

- ~~**CSA Z460** uses the terms **Authorized Employee** (the person applying the lock), and **Affected Employee** (those working in the area). It is suggested these terms be adapted into the course as they are quoted in the standard, used in CCOHS, and commonly used in~~

~~many programs across the different jurisdictions in Canada.~~ **This has been corrected with a revised slide**

References

CCOHS Lockout/ Tag out - https://www.ccohs.ca/oshanswers/hsprograms/lockout.html

---



Kevin Barrett CRSP CRM 13-4856