WHS DOCUMENTS & TEMPLATES

DOC-ISO-PACK · Hazardous Energy Isolation Pack

Product Overview

For: Businesses whose workers isolate plant for maintenance, cleaning or clearing: owners, operations and maintenance managers, supervisors, WHS advisers and workplace assessors

Version 1.0 · 9 November 2026

SAMPLE

Editable hazardous energy isolation documents that work together: an isolation procedure, an isolation record, a VOC and a supervisor's field verification.

People are killed and maimed when plant starts, moves or releases energy while they are in it: clearing a jam, cleaning, adjusting, repairing. A lockout procedure on the wall does not show that every energy source was found, that stored energy was released, that the test for zero energy was done, or that each worker's own lock was on.

This pack covers it end to end. The isolation procedure sets out the steps: identify, isolate, lock and tag, dissipate stored energy, test for zero energy, de-isolate. The isolation record captures each isolation. The VOC checks a worker can do it. The field verification checks the controls are working on the plant. The setup guide shows what to adapt before you use them.

No licence is needed to isolate plant under WHS or OHS laws. Isolation is still safety-critical work: only workers the business has trained, verified and authorised may isolate, and only the plant and energy sources they are authorised for. Electrical work, including isolating, testing or working on electrical circuits beyond an isolator the business has designated for operators, must be done by a licensed electrician under your state or territory's electrical licensing laws. A VOC is the business's own check that a worker can isolate safely: it does not authorise electrical work, and it is not a nationally recognised qualification.

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Hazardous Energy Isolation Procedure

How to isolate hazardous energy on [Plant name and ID] at [Site name]: identify, isolate, lock and tag, dissipate, test, de-isolate

Document number		**Version**	
Site		**Work area**	
Approved by		**Review date**	

1 Purpose and scope

This procedure sets out how to isolate **[Plant name and ID]** at **[Site name]** so that nobody can be hurt by the plant starting, moving or releasing energy while they work on it: for maintenance, cleaning, clearing a blockage, adjustment or inspection inside a guard.

It applies to every person who isolates or works on the plant, including contractors. It is used with the plant's isolation point list and the Isolation Record. Where the manufacturer's instructions add steps, follow them as well.

2 Who may isolate

- Has completed **[Company name]**'s isolation training and has a current isolation VOC for this plant
- Has been authorised by **[Supervisor name]** to isolate this plant
- Has their own personal lock, key and danger tags
- For electrical isolation beyond a designated isolator, testing for dead, or any electrical work: holds an electrical licence
- Has read this procedure, or had it explained, and signed the acknowledgement at the end

Licences and electrical work

No licence is needed to isolate plant under WHS or OHS laws. Isolation is still safety-critical work: only workers the business has trained, verified and authorised may isolate, and only the plant and energy sources they are authorised for. Electrical work, including isolating, testing or working on electrical circuits beyond an isolator the business has designated for operators, must be done by a licensed electrician under your state or territory's electrical licensing laws. A VOC is the business's own check that a worker can isolate safely: it does not authorise electrical work, and it is not a nationally recognised qualification.

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Isolation VOC Assessment Tool

Verification of competency for one worker, isolating hazardous energy on the plant in scope, at [Site name]

Purpose	To check, and record, that a worker can isolate safely on your plant, at your site, following your procedures.
When to use it	Before a new worker does the work unsupervised at the site; when they start on a new type of machine, attachment or task; at the re-verification interval your business sets; and after any of the review triggers in Part K.
Who completes it	An assessor your business has chosen as competent to assess (see Part B). The candidate completes the knowledge questions and signs Part J.
What goes with it	The Knowledge Questions (Candidate) for the candidate to answer, the Marking Guide (Assessor) with the model answers, and the VOC Register to track who is verified and when they are due.

Before you start

- Agree the scope (Part C) with the candidate's supervisor: what the candidate will do, on what, and where.
- Do the pre-assessment checks (Part D) before anything else. If one fails, do not start.
- The candidate answers the knowledge questions. Mark them with the Marking Guide and record the result in Part E.
- Observe the practical work (Part F) in the real work area, during normal work where it is safe, with other people kept clear.
- Watch for the safety-critical fail criteria (Part G) the whole time. Any one stops the assessment.
- Record the evidence, the outcome and the re-assessment plan (Parts H and I), give feedback, and sign off with the candidate (Part J).

Licences, authorisation and the VOC

No licence is needed to isolate plant under WHS or OHS laws. Isolation is still safety-critical work: only workers the business has trained, verified and authorised may isolate, and only the plant and energy sources they are authorised for. Electrical work, including isolating, testing or working on electrical circuits beyond an isolator the business has designated for operators, must be done by a licensed electrician under your state or territory's electrical licensing laws. A VOC is the business's own check that a worker can isolate safely: it does not authorise electrical work, and it is not a nationally recognised qualification.

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Supervisor Field Verification Checklist

Hazardous energy isolation: check the isolation controls are in place and working

Site		**Areas and plant checked**	
Date and time		**Shift**	
Verified by		**Isolation records sampled (numbers)**	

How to verify

- Visit plant that is isolated now, as well as plant that is running. Look at the locks, tags and records, not only the procedure.
- Mark each check Pass, Not met or N/A. Pass means you saw the control in place and working. If you did not see it, it is not a Pass.
- Write what you saw in the evidence column: the plant, the isolation record number, a photo reference.
- Talk to the people isolating and working on plant, using the questions after the checks.
- Record every Not met in the actions table, with an owner and a due date. Fix what you can on the spot, and record that too.

Escalate now

If a ★ critical control is Not met, act before you leave the area. Stop the work on that plant until the isolation is made safe, and tell **[Escalation contact]** the same shift. A failed critical control is a high potential incident: report it as one.

Checks

★ marks a critical control: one whose failure could let plant start, move or release energy while a person is in it. Delete checks that do not apply, and add your own.

No.	Look for (★ critical control)	Pass	Not met	N/A	What you saw (evidence)
Procedures and isolation points					
1	Each plant sampled has a current isolation point list that matches the plant ★	☐	☐	☐	
2	Isolation points are labelled, can be reached, and can be locked ★	☐	☐	☐	
3	Designated isolators for operators are identified; other electrical isolation is left to licensed electricians ★	☐	☐	☐	
Live isolations (sample)					
4	Every isolation point on the record is isolated, locked and tagged on the plant ★	☐	☐	☐	
5	Every person working on the plant has their own lock on (at the point or on the lock box) ★	☐	☐	☐	

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Editable hazardous energy isolation documents that work together: an isolation procedure, an isolation record, a VOC and a supervisor's field verification.

What the full product contains

- **Hazardous energy isolation procedure: identify, isolate, lock and tag, dissipate stored energy, test for zero energy, de-isolate; hazards, controls and stop-work points**
  02_ISOLATION_PROCEDURE/Hazardous Energy Isolation Procedure.docx and .pdf
- **Isolation record, permit style: energy sources and isolation points, stored energy, test for zero energy, personal locks, de-isolation and sign-off**
  03_ISOLATION_RECORDS/Isolation Record.docx and .pdf
- **Supervisor field verification checklist of isolation controls, with Pass, Not met, actions, escalation and evidence**
  05_FIELD_VERIFICATION/Supervisor Field Verification Checklist.docx and .pdf
- **VOC assessment tool, the same as DOC-ISO-VOC**
  04_VOC_ASSESSMENT/Isolation VOC Assessment Tool.docx and .pdf
- **VOC knowledge questions (candidate) and marking guide (assessor)**
  04_VOC_ASSESSMENT/Isolation VOC Knowledge Questions (Candidate) and Isolation VOC Marking Guide (Assessor), .docx and .pdf
- **Excel VOC register**
  04_VOC_ASSESSMENT/Isolation VOC Register.xlsx
- **How the documents work together: one page**
  01_START_HERE/How the Documents Work Together.docx and .pdf
- **Setup guide: what to adapt before use**
  01_START_HERE/Setup Guide.docx and .pdf
- **Start here: Read Me First, Product Overview, Permitted Use Terms, Version Information**
  01_START_HERE/ (four PDFs)

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