TOOLBOX TALK AWARENESS PACKAGES

HAZ-ISO · Isolation and Lockout Awareness

Product Overview

Audience: Workers who maintain, clean, clear or adjust plant and equipment · Duration: 20–30 minutes

Version 1.0 · 8 November 2026

For workers who clean, clear, maintain or adjust plant: why every energy source must be isolated, locked and proved dead before hands go in.

Many serious injuries happen when plant starts, moves or releases energy while someone is working on it: clearing a jam, cleaning, adjusting or doing maintenance. Energy is not only electrical. It can be mechanical, hydraulic, pneumatic, stored in springs, held by gravity, thermal or chemical.

This talk covers what isolation means, the steps from identifying every energy source to proving zero energy, personal locks and danger tags, and the rule that nobody removes another person's lock. It is awareness: workers follow your site's isolation procedure.

Learning outcomes

By the end of the session participants will be able to:

- Explain why plant must be isolated before cleaning, clearing, adjusting or maintaining it
- Identify the types of energy that must be isolated: electrical, mechanical, hydraulic, pneumatic, stored, gravity, thermal and chemical
- Describe the isolation steps: identify, notify, shut down, isolate, lock and tag, release stored energy, and test for zero energy
- Explain that a stop button, an emergency stop or an interlock is not an isolation
- Use a personal lock and danger tag correctly, and explain why nobody removes another person's lock
- Stop and report when isolation points are missing, unclear or do not work

What it covers

Module	Covers
Why isolate	Unexpected start-up and stored energy; Common incidents; What is not an isolation
The isolation steps	Identify every energy source; Isolate, lock and tag; Release stored energy; Test for zero energy
Locks and tags	Personal locks and danger tags; Group isolations; Removing locks and returning plant to service

Activities

- Find the energy: workers list every energy source on a machine they work with (or a photo of one)

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- Lock-on walk-through: the facilitator demonstrates your site's isolation steps on a real isolation point

What is in the package

Item	File
Editable PowerPoint presentation with speaker notes, plus PDF	02_TRAINING_PRESENTATION/Training Presentation.pptx and .pdf
Facilitator guide with a running sheet, discussion prompts and model answers	03_FACILITATOR_GUIDE/Facilitator Guide.docx and .pdf
Participant handout with the key points to take away	04_PARTICIPANT_HANDOUT/Participant Handout.docx and .pdf
Attendance record form, to capture who attended, when, and who facilitated	06_RECORDS/Attendance Record.docx and .pdf
Excel attendance register	06_RECORDS/Attendance Register.xlsx
Multiple-choice theory assessment, to record understanding if your business wants to	05_ASSESSMENT/Theory Assessment.docx and .pdf
Answer key for the assessment	05_ASSESSMENT/Assessment Answer Key.docx and .pdf
Certificate template	06_RECORDS/Certificate Template.docx
Start here: Read Me First, Product Overview, Permitted Use Terms, Version Information	01_START_HERE/ (four PDFs)

What you need to deliver it

- A facilitator such as a supervisor, leading hand or WHS adviser who has read the facilitator guide and knows your site's arrangements for the topic
- A screen or projector, or printed slides or handouts: it works in a crib room, site office or on a video call
- Your own site procedures for the topic, to point to during the session

Questions

Can we add our own site procedures and photos? Yes. The slides, handout and guide are editable, and the facilitator guide marks the places to add your own procedures, contacts and photos of your workplace.

Do we have to use the assessment? No. It is there if your business wants a record that each worker understood the key points. The attendance record on its own shows who attended and when.

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TOOLBOX TALK

Isolation and Lockout Awareness

Why every energy source is isolated, locked and proved dead before hands go in

20–30 minutes · Workers who maintain, clean, clear or adjust plant and equipment

[Company name] · [Date] · [Facilitator name]

ISO

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What this talk is, and is not

This talk covers

- ✓ Why plant must be isolated before you work on it
- ✓ The types of energy to isolate
- ✓ The isolation steps, locks and danger tags
- ✓ Your part: check, stop and report

This talk is not

- ✕ Electrical work, or testing circuits for dead
- ✕ Training to authorise isolations or run permits
- ✕ High-voltage or process isolation training
- ✕ Our procedure: **[Your isolation procedure]**

Awareness only. You follow your site's isolation procedure. Electrical work, such as removing fuses or testing for dead, is done only by a licensed electrician.

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Why isolate

Many serious injuries happen when plant starts, moves or releases energy while someone is working on it.

- Clearing a jam, cleaning, adjusting or maintaining: hands go where the machine moves
- Someone else starts the plant, not knowing you are in it
- Automatic or remote controls start it with no warning
- Stored energy is released: a spring, a hydraulic ram, a raised load

A composite example

- An operator stops a conveyor with the stop button to clear a jam. A second operator, at the far end, sees it stopped and presses start.
- The first operator's arm is pulled into the drive.

Stopped is not safe. Isolated, locked and proved is.

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Energy is not only electrical

Energy that drives the plant

- Electrical: motors, heaters, controls
- Mechanical: moving parts, flywheels still turning
- Hydraulic: oil under pressure in rams and lines
- Pneumatic: compressed air in lines and cylinders

Energy that stays behind

- Stored: springs, accumulators, capacitors
- Gravity: raised loads, platforms, counterweights
- Thermal: hot surfaces, steam, hot liquids
- Chemical: process lines, tanks, gases

Find every source. One missed is enough.

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Duties under WHS or OHS laws

The business must

- Manage the risks of plant, including unexpected start-up and stored energy
- Provide isolation points, locks, tags and isolation procedures
- Train and supervise everyone who isolates plant
- Consult workers on how plant is isolated

You must

- Isolate as the procedure says, every time, however short the job
- Fit your own lock and tag; never remove another person's
- Never bypass or defeat an isolation, guard or interlock
- Report isolation points that are missing, unclear or do not work

Most of Australia has harmonised WHS laws; Victoria's OHS laws take a different form. The duties apply in substance everywhere.

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TOOLBOX TALK · HAZ-ISO

Isolation and Lockout Awareness

Participant handout · keep this

Plant that starts, moves or releases energy while someone is working on it causes serious injuries. Keep this page.

The isolation steps

1. Identify every energy source, using the isolation procedure for this plant
2. Notify the operator and anyone affected that the plant is being isolated
3. Shut the plant down with its normal controls
4. Isolate every energy source at its isolation point
5. Fit your personal lock and danger tag to every isolation point
6. Release or restrain stored energy: bleed, block, lower, vent, cool
7. Test for zero energy: try to start it, check gauges, then return controls to off

Energy to isolate

- Electrical, mechanical, hydraulic, pneumatic
- Stored (springs, accumulators), gravity (raised parts)
- Thermal (heat, steam) and chemical (lines, tanks)

Not an isolation

- A stop button or emergency stop
- An interlocked guard
- Switching off at the control panel
- A tag with no lock

Locks and tags

- Your own lock and danger tag on every isolation point, or on the lock box
- Only you remove your lock
- Out of service tags mark faulty plant; they do not protect a person
- Abandoned lock? Only the lock removal procedure

Duties

- The business provides isolation points, locks, tags, procedures and training, and consults you
- You isolate every time, never bypass an isolation or guard, and report problems
- Electrical work, such as removing fuses or testing for dead, is for a licensed electrician

Stop and report when

- An isolation point is missing, unclear or will not lock
- The procedure does not match the plant
- Someone asks you to skip a step
- Report to: **[Who to report to here]**

Stopped is not safe. Isolate, lock, tag and test before hands go in.

This is awareness training. It is not a licence, a ticket, a permit or a competency. It does not authorise you to do electrical work or to isolate plant beyond what your site's procedure and training allow.

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