

Energy Isolation: Preserve Protection at Shift Change

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Why this matters

A repair can continue while the people change. Transfer the actual isolation status and each person's protection before the incoming crew enters the work boundary.

Objective: Identify the applicable transfer procedure and evidence that protection continues through the handoff.

Key hazards or failure points

Unprotected incoming worker; unclear coordination; missing isolation information; stored energy returning; premature device removal; contractor mismatch.

Practical controls

- Use the equipment-specific procedure and applicable industry rules. Identify who coordinates groups, contractors and the shift transfer.
- Preserve required protection through the approved handoff sequence. Only designated trained personnel perform isolation actions and prescribed verification.
- Record work status, isolation boundaries, stored-energy controls and restrictions. Keep servicing separate from the authorization to restore equipment.

Verify It in the Field

The coordinator reconciles actual equipment and protected workers with the procedure, isolation record and incoming work scope.

Outgoing and incoming personnel review required verification results, continuing controls and unresolved restrictions from a safe position.

Before exposure, the designated person confirms each incoming worker's protection under the applicable arrangement; record completion, responsibility and time.

Stop and reassess

Hold for an unexplained device, changed scope, unknown worker status or a gap in protection. Keep clear and notify the coordinator. Resolve, verify and authorize the transfer before servicing resumes.

Ask the crew

1. What protects each incoming worker?
2. Which energy control needs continuing attention?
3. Who can authorize the next step?

Use this HOP tool — Turnover: Using the actual handoff record from a safe position, the incoming person explains the equipment state, remaining work and protection arrangement. The outgoing person resolves discrepancies. Name who confirms continuity and the point when responsibility transfers; do not manipulate devices for this exercise.

Sources: OSHA 1910.147(a), (f)(3)–(4); OSHA 1926.417; OSHA 1926.702(j); DOE Vol. 2, pp. 52–53. HOP concepts adapted from DOE-HDBK-1028-2009, Vol. 2 (June 2009). No claim to original U.S. Government work; no government endorsement implied.

Free next step: JHA/JSA planning and field-verification worksheet

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/group-isolation-shift-change