ENERGY-ISOLATION PLANNING RECORD

01 / Identify equipment and every energy source

For authorized personnel preparing an equipment-specific plan. This record does not replace the approved energy-control procedure. Identify all energy sources, isolating devices and stored energy before maintenance is authorized. Tag-only isolation needs a second measure and supervisor approval (SWP-001).

Equipment / unit ID	Location	Procedure ID / revision

Work scope	Prepared by	Planning date

Energy source / magnitude	Isolating device / location	Lock or tag-only (second measure)	Stored energy / control method	Verification method / acceptance

Drawing / manufacturer / approved procedure references

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02 / Shutdown, isolation and verification

Write the equipment-specific sequence and name the authorized person responsible. Include notification, safe shutdown, isolation, lock / tag application, stored-energy control and verification before work. Before the try-start, check that nobody is exposed; after it, return the controls to off or neutral. Record reaccumulation controls where needed.

Equipment / unit ID

Procedure ID / revision

Step / task	Specific method / device / location	Responsible person	Verification record / time

Group isolation / lockbox arrangements

Shift handover / contractors / personnel changes

Guarantee of isolation # (Canada federal electrical work)

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03 / Restoration and approval

Plan restoration under the approved procedure: check the equipment and work area, account for people, follow authorized lock-removal arrangements and notify affected workers. Record exceptions through the site process.

Equipment / unit ID

Procedure ID / revision

Work completion / guards restored / tools removed

Personnel accounted for / affected workers notified

Authorized lock removal / exception procedure reference

Controlled restart / testing / return-to-service arrangements

Unresolved issues / work restrictions / further review

Last periodic inspection of this procedure (date / inspector)

Prepared by name / acknowledgement

Prepared date

Authorized reviewer name / acknowledgement

Approval / review date

ENERGY-ISOLATION PLANNING RECORD

Additional site information / continuation

Include any energy source, interlock or handover arrangement not covered in the planning record. Copy this sheet when needed and identify the record it belongs to.

Record / inspection reference	Equipment / unit ID	Date

Additional equipment-specific requirement	Procedure / device / responsible reviewer

Custom fields: name the information you need to record

Your field label	Your entry

Additional notes / explanation of N/A / attachments