SHIELDSPHERE · MODULE & WORKFLOW GUIDE

ZeroState
lockout/tagout, from procedure to periodic inspection

How to find and follow a machine-specific lockout/tagout procedure, record the annual periodic inspection, and export the documents your team needs on the floor.

Version 1.0 | User Guide · for end users | Screens captured July 2026

ShieldSphere's ZeroState module holds your lockout/tagout program: a documented, machine-specific procedure for every piece of equipment with stored energy. Each procedure lists the energy sources to isolate, the ordered steps to bring the machine to zero state and return it to service, the authorized employees and required PPE, and the annual periodic inspection 29 CFR 1910.147 requires.

WHAT'S IN THIS GUIDE

1 What ZeroState does

ZeroState is where your lockout/tagout program lives - a documented, machine-specific procedure for every piece of equipment that can hurt someone with stored energy, kept current and inspected on schedule.

The name is the goal: a machine at *zero state* is one with every energy source isolated and verified, safe to work on. Each procedure carries the whole story:

1. The **energy sources** that must be isolated - electrical, hydraulic, pneumatic, and more.
2. The ordered **steps** to bring the machine to zero state and to return it to service.
3. The **authorized employees**, required PPE, and the person who reviewed it.
4. The annual **periodic inspection** that OSHA 1910.147(c)(6) requires, tracked so it never lapses.

THIS IS A LIFE-SAFETY DOCUMENT

A lockout/tagout procedure is only as good as the person following every step. Read the whole procedure before you start, isolate and verify every energy source it lists, and never skip a step because the machine "looks off".

BUILDING PROCEDURES IS AN ADMIN TASK

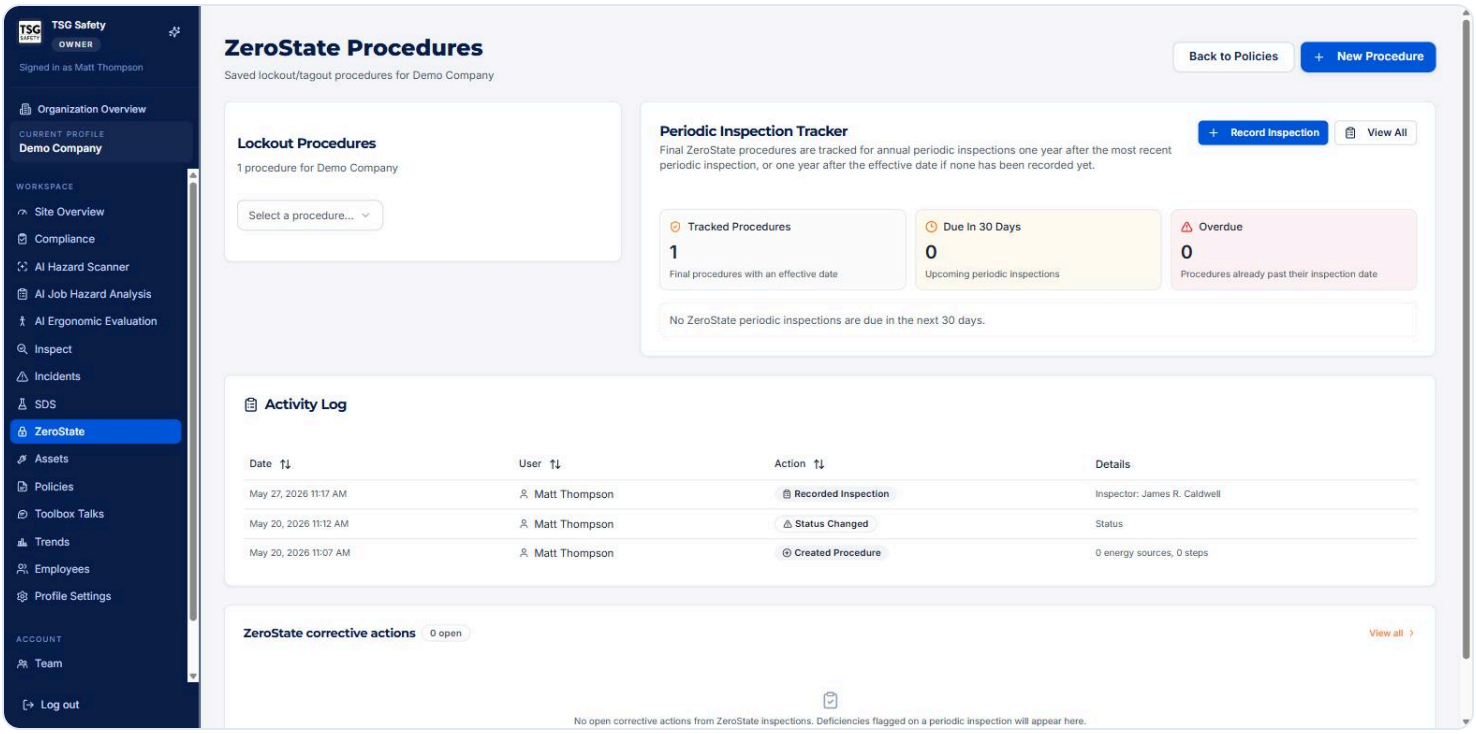
This guide covers finding, following and inspecting procedures. Creating and publishing them - the procedure builder - is covered in the companion **ZeroState Administrator Guide**.

2 Words you'll see

TERM	WHAT IT MEANS
Lockout/tagout (LOTO)	Isolating a machine's energy so it cannot start while someone works on it, and tagging it so no one re-energizes it.
Energy source	A form of stored or supply energy - electrical, hydraulic, pneumatic, thermal, gravity - that must be isolated.
Isolation point	The exact place you isolate a source - a breaker, a valve - and the lockout device used there.
Zero state	The machine with all energy isolated and verified - safe to service.
Authorized employee	A person trained and named on the procedure to perform the lockout.
Periodic inspection	The annual review of the procedure that OSHA 1910.147(c)(6) requires.
Final	A published, in-force procedure. Only final procedures can be inspected.

3 The ZeroState home screen

Click **ZeroState** in the left sidebar. The home screen is your program at a glance for the current site.



> **ZeroState home.** Pick a procedure on the left, watch the **Periodic Inspection Tracker** for what's due, and read the **Activity Log** for who did what and when.

AREA	WHAT IT SHOWS
Lockout Procedures	A selector for every saved procedure at this site.
Periodic Inspection Tracker	How many final procedures are tracked, how many inspections are due in 30 days, and how many are overdue.
Activity Log	A running history - procedures created, statuses changed, inspections recorded.
ZeroState corrective actions	Any deficiencies flagged on a periodic inspection, as assigned actions.

OVERDUE IS THE NUMBER THAT MATTERS

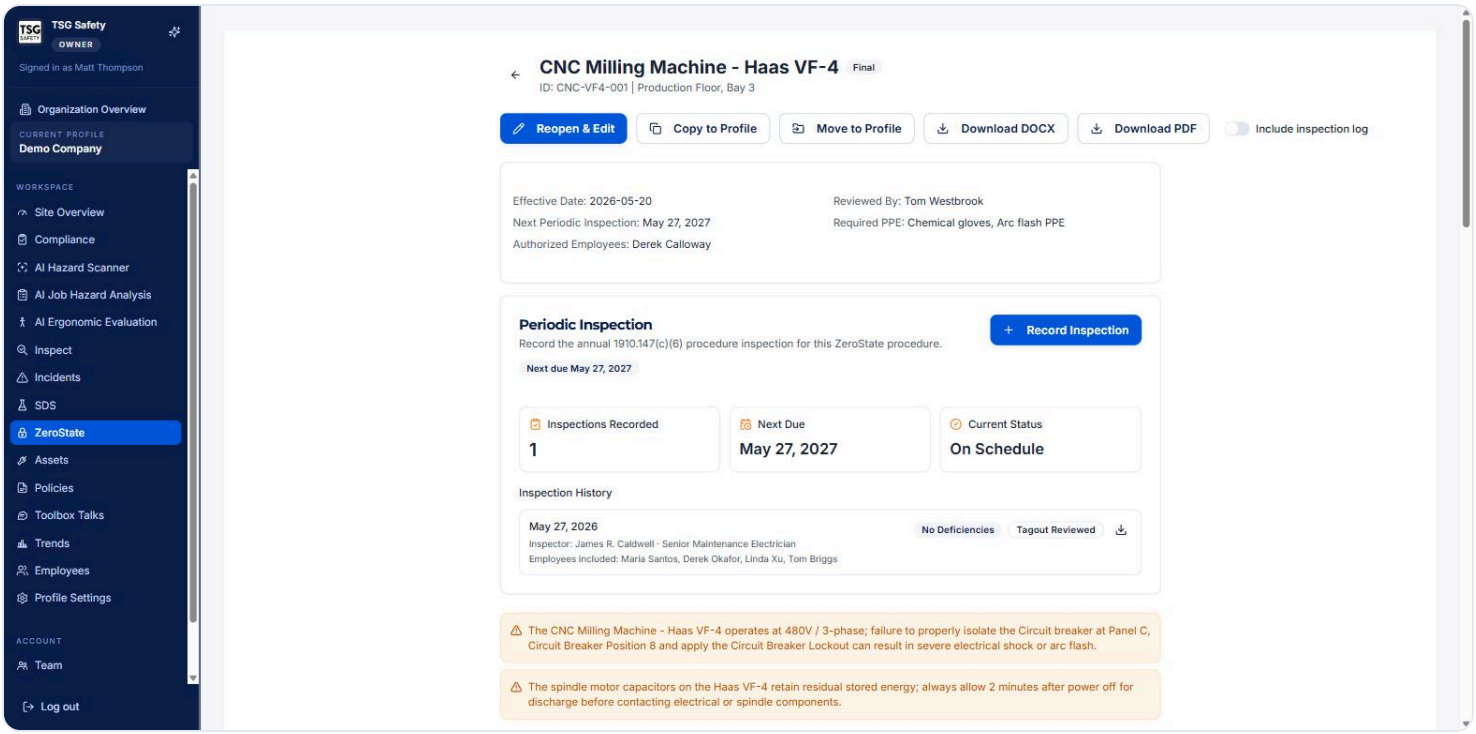
A red **Overdue** count means a procedure has missed its annual inspection - a direct 1910.147 finding waiting to happen. Clear it before anything else.

4 Find and follow a procedure

Everything an authorized employee needs to bring the machine to zero state, on one screen.

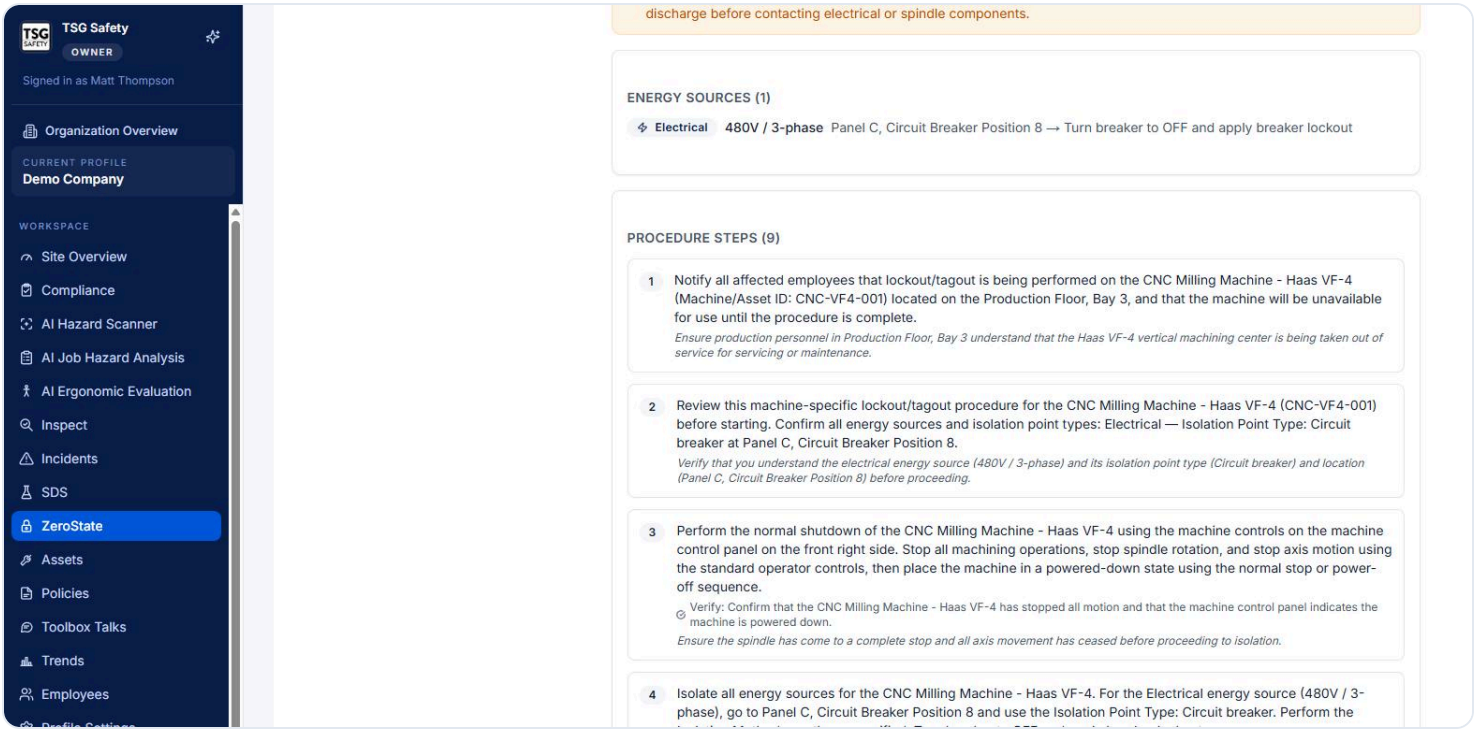
`ZeroState → Select a procedure`

Choose the machine from the **Lockout Procedures** selector. The procedure opens with its summary at the top - effective date, next periodic inspection, authorized employees, who reviewed it, and the required PPE.



> **Procedure detail.** The summary and the **Periodic Inspection** tracker sit up top, with the full inspection history - inspector, deficiencies, tagout reviewed - below.

Scroll down for the parts you follow on the floor: the **energy sources** to isolate, each with its isolation point, and the numbered **procedure steps** - each with a verify note telling you how to confirm the step is done.



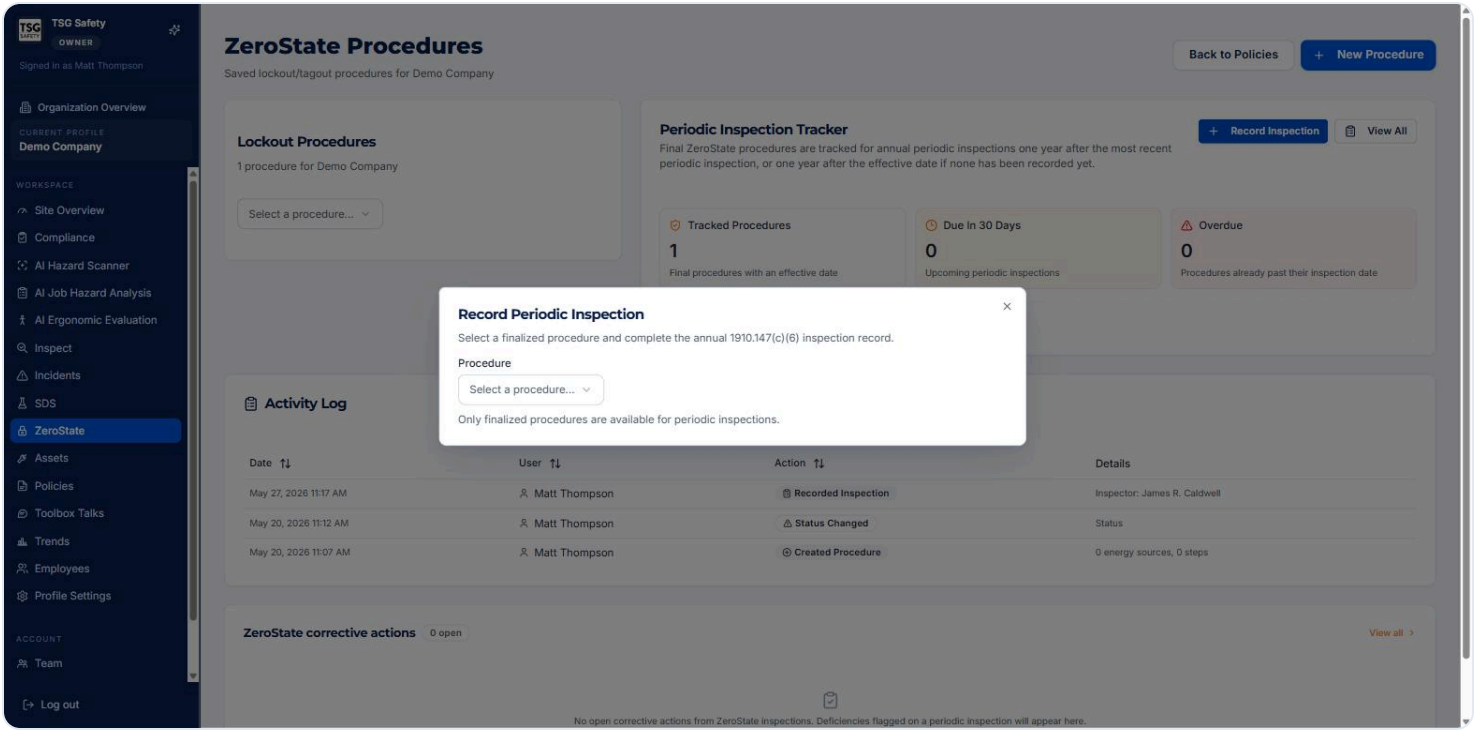
Energy sources and steps. Isolate every source listed, and work the steps in order - the italic verify notes are how you prove each one before moving on.

5 Record a periodic inspection

OSHA wants each procedure inspected once a year. This is where you log it so the tracker resets.

`ZeroState → Record Inspection`

Click **Record Inspection** on the home screen (or on a procedure), pick the **finalized procedure**, and complete the annual 1910.147(c)(6) record - the inspector, the employees included, whether the tagout was reviewed, and any deficiencies found.



Record Periodic Inspection. Only **finalized** procedures appear here - a draft cannot be the subject of an official inspection.

DEFICIENCIES BECOME WORK

Anything you flag as a deficiency on the inspection shows up under **ZeroState corrective actions** on the home screen, with an owner and a due date - so a failed inspection turns into a tracked fix, not a note in a binder.

6 Export and share

From any procedure, the buttons across the top turn it into a document for the floor or the file:

Download PDF

The full procedure, ready to print and post at the machine.

Download DOCX

The same procedure as an editable Word file, for when you need to drop it into a larger document.

The **Include inspection log** toggle adds the periodic-inspection history to the exported document - useful when an auditor wants to see not just the procedure but its inspection record.

7 Troubleshooting

SYMPTOM	CAUSE AND FIX
A procedure is not in the Record Inspection list	Only **finalized** procedures can be inspected. A draft must be published first (see the Administrator Guide).
The Overdue count is red	A procedure has passed its annual inspection date. Record the periodic inspection to clear it.
I need to change a step or energy source	Use **Reopen & Edit** on the procedure - an admin task covered in the Administrator Guide.
The procedure is for the wrong site	Use **Copy to Profile** or **Move to Profile** on the procedure.
An auditor wants the inspection record too	Turn on **Include inspection log** before downloading the PDF or DOCX.

Screens captured from the live application in July 2026 using a demonstration site. Your screens will show your own data. Building and publishing procedures is covered in the companion **ZeroState Administrator Guide**. Lockout/tagout is life-safety work - follow every step of your site's approved procedure. Because ShieldSphere ships changes regularly, check the version above against the current release before circulating this guide widely.