PREVENTIVE MAINTENANCE

Preventive maintenance checklist

A general PM checklist for a scheduled visit to any asset: isolation and permits, inspect, clean, lubricate, tighten and adjust, test run with readings against limits, parts used, follow-up work raised, and a return-to-service sign-off.

How often: **Per the PM schedule** Who: **Maintenance technician** **About 45 min** **33 items**

Site or area _____ Asset or line _____

Date and time _____ Completed by _____

Before you use it

- A general PM checklist for assets that have no dedicated template in this library, built around the steps most PM task lists share: isolate, inspect, clean, lubricate, tighten, test and record. It makes no claim about what any regulation requires. Air handling units, emergency generators, centrifugal pumps and cooling towers have dedicated checklists here.
- Put the manufacturer's service tasks and limits in first; the inspect, service and test sections are placeholders for them. Keep one checklist per asset and PM interval (weekly, monthly, quarterly, annual), so the record shows which tasks were done at which interval.
- Isolation follows your lockout/tagout procedure; the checklist records that it was done, it does not replace the procedure. The follow-up section matters as much as the tasks: a condition found during the PM that cannot be fixed in the visit becomes its own work order with an owner, not a note at the bottom of the sheet.

Work order

NO.	ITEM	RESULT	NOTES
1	**Scan the asset's tag**	☐ Visited	
2	**Asset and location**	_____	
3	**PM task list and interval**	_____	
4	**Run hours or meter reading at the visit** Leave blank if the asset has no meter.	_____ hours Limit _____	

Before starting

NO.	ITEM	RESULT	NOTES
5	**Work order, task list and manufacturer's procedure in hand**	☐ Pass ☐ Fail ☐ N/A	
6	**Parts and consumables for the visit on hand**	☐ Pass ☐ Fail ☐ N/A	
7	**Asset isolated and locked out per the LOTO procedure, zero energy verified**	☐ Pass ☐ Fail ☐ N/A	
8	**Permits the work needs are in place: hot work, confined space, working at height**	☐ Pass ☐ Fail ☐ N/A	

NO.	ITEM	RESULT	NOTES
9	**PPE for the task worn**	☐ Pass ☐ Fail ☐ N/A	

Inspect

NO.	ITEM	RESULT	NOTES
10	**No damage, corrosion, cracks or loose parts**	☐ Pass ☐ Fail ☐ N/A	
11	**No leaks at seals, fittings, hoses or housings**	☐ Pass ☐ Fail ☐ N/A	
12	**Guards, covers and labels in place and legible**	☐ Pass ☐ Fail ☐ N/A	
13	**Belts, chains, couplings and bearings: wear, tension and alignment within limits**	☐ Pass ☐ Fail ☐ N/A	
14	**Electrical connections tight; cables, glands and enclosures intact**	☐ Pass ☐ Fail ☐ N/A	
15	**Filters, screens and strainers within their service life**	☐ Pass ☐ Fail ☐ N/A	
16	**Photo of any condition found**	☐ Photo taken	

Service

NO.	ITEM	RESULT	NOTES
17	**Cleaned: housings, vents, cooling surfaces and drains**	☐ Pass ☐ Fail ☐ N/A	
18	**Lubricated per the schedule, with the specified lubricant and quantity**	☐ Pass ☐ Fail ☐ N/A	
19	**Fasteners and mountings tightened or torqued**	☐ Pass ☐ Fail ☐ N/A	
20	**Filters, seals or wear parts replaced per the task list**	☐ Pass ☐ Fail ☐ N/A	
21	**Adjustments made to the manufacturer's settings**	☐ Pass ☐ Fail ☐ N/A	
22	**Parts and materials used**	_____	

Test and readings

NO.	ITEM	RESULT	NOTES
23	**Locks removed and the asset returned to service per the procedure**	☐ Pass ☐ Fail ☐ N/A	
24	**Test run: starts, runs and stops normally, no abnormal noise or vibration**	☐ Pass ☐ Fail ☐ N/A	
25	**Safety devices and interlocks tested**	☐ Pass ☐ Fail ☐ N/A	
26	**Operating temperature** Set the limits from the manufacturer's manual and your normal operating range.	_____ °C Limit _____	

NO.	ITEM	RESULT	NOTES
27	**Vibration** Set the limits from the manufacturer's manual and your normal operating range.	_____ mm/s Limit _____	
28	**Other readings the task list calls for**	_____ _____	

Follow-up and sign-off

NO.	ITEM	RESULT	NOTES
29	**Conditions found that need their own work order**	_____ _____	
30	**Follow-up**	☐ None needed ☐ Work order raised ☐ Needs a shutdown or an outside contractor	
31	**Labor time**	_____ hours Limit _____	
32	**Asset status at hand-back**	☐ Returned to service ☐ Running with a restriction ☐ Out of service until the follow-up is done	
33	**Technician**	Name _____ Signature _____ Date _____	

Follow-up

For each failed check or reading out of limit: what was found, what was done, and the work order raised for it.

NO.	WHAT WAS FOUND	ACTION OR WORK ORDER	OWNER	DUE

Free to use and adapt. To run it on mobile, with checkpoint scans, readings checked against their limits as they are entered, and photos and signatures attached to the check, see vardian.io/templates/preventive-maintenance-checklist.