Preventive Maintenance Checklist

A checklist for running a scheduled preventive maintenance (PM) program.

Set up the PM program

- [ ] Build an asset register of equipment to be maintained.
- [ ] Assign each asset a unique ID and location.
- [ ] Define the PM tasks required for each asset.
  Base tasks on manufacturer manuals and your organization's procedures.
- [ ] Set the interval for each task by time, runtime or usage.
- [ ] Schedule PM work orders in your CMMS or calendar.
- [ ] Assign tasks to qualified technicians and book downtime.

Prepare for the PM task

- [ ] Review the work order, asset history and manuals.
- [ ] Gather the required parts, consumables and special tools.
- [ ] Confirm spares are on hand before starting.
- [ ] Notify operations of planned downtime.
- [ ] Apply lockout/tagout and follow safety procedures.
- [ ] Wear the required personal protective equipment.

Inspection and condition checks

- [ ] Inspect for wear, leaks, corrosion, noise and vibration.
- [ ] Check belts, bearings, seals and moving parts.
- [ ] Record temperatures, pressures and other key readings.
- [ ] Compare readings against normal operating ranges.
- [ ] Test safety devices, guards and emergency stops.
- [ ] Note any developing faults for follow-up.

Service tasks

- [ ] Clean equipment, filters, vents and cooling systems.
- [ ] Lubricate components per the lubrication schedule.
- [ ] Check and top up or change fluids as required.
- [ ] Tighten fasteners and check alignment and tension.
- [ ] Replace wear parts at their planned life.
- [ ] Test the asset under normal operating conditions after service.

Calibration and parts

- [ ] Calibrate instruments and gauges to specification.
  Use traceable standards where required by your procedures.
- [ ] Record calibration results and next due dates.
- [ ] Log all parts and materials used on the work order.

- [ ] Update spare parts stock levels and reorder points.
- [ ] Tag failed or replaced parts for inspection or disposal.
- [ ] Flag obsolete parts that need a sourcing plan.

Records and review

- [ ] Complete and close the work order in the CMMS or log.
- [ ] Record the date, technician and time taken.
- [ ] Raise follow-up work orders for issues found.
- [ ] Track downtime, costs and recurring failures by asset.
- [ ] Review PM intervals and tasks against actual results.
- [ ] Adjust the schedule to improve reliability over time.