

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.