



# Operation And Maintenance (O&M) Manuals Checklist

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## General Information & Document Control

Covers document identification, revision control, contact information, and overall manual organization.

### Document Title

Write something...

### Document Revision Number

Enter a number...



**Date of Last Revision**

Enter date...

**Document Purpose & Scope**

Write something...

**Project Name**

Write something...

**Contact Person (O&M Manager)**

Write something...

**Contact Phone Number**

Write something...

**Contact Email Address**

Write something...

### Document Distribution List (Spreadsheet)

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### Document Change Log (Brief Summary of Revisions)

Write something...

## System Descriptions & Performance Data

Details on each system's purpose, functionality, components, and expected performance metrics. Includes schematics and diagrams.

### System Overview Description

Write something...

### System Rated Capacity (e.g., gallons per minute)

Enter a number...

### Operating Pressure (PSI or kPa)

Enter a number...

### System Schematic Diagram (PDF)

 Upload File

### Key Component List with Model and Serial Numbers

Write something...

### Expected System Efficiency (%)

Enter a number...

### Control System Type (e.g., PLC, DDC)

- PLC
- DDC
- Manual
- Other

### Piping and Instrumentation Diagram (P&ID) - PDF

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# Routine Maintenance Procedures

Step-by-step instructions for regular maintenance tasks, including frequency, required tools, and safety precautions.

## Filter Inspection Frequency (Months)

## Detailed Filter Replacement Procedure

## Attach Filter Replacement Checklist (if applicable)

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## Date of Last Lubrication (Pump/Motor)

## Lubricant Type and Application Notes

### Time of Last Calibration (if applicable)

Enter time...

### Calibration Status (if applicable)

- Pass
- Fail
- Not Applicable

### Pressure Reading (System Pressure)

Enter a number...

## Corrective Maintenance Procedures

Guidance on troubleshooting and repairing system failures, including diagnostic procedures and repair steps.

### Describe the diagnostic process for identifying the root cause of a failure.

Write something...

**Detail the step-by-step procedure for repairing/replacing [Specific Component - e.g., pump motor].**

Write something...

**Record the measured voltage/current during repair (specify unit).**

Enter a number...

**Upload photos/videos documenting the repair process.**

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**Select the replacement part used (if applicable).**

- Part A
- Part B
- Part C
- Other - Specify in LONG\_TEXT

**Date of Repair**

Enter date...

### Time of Repair

Enter time...

### Describe any unusual circumstances encountered during repair.

Write something...

### Severity of Failure (impact on operations)

- Minor
- Moderate
- Major
- Critical

## Safety Procedures & Emergency Response

Covers safety protocols for maintenance personnel, lockout/tagout procedures, and emergency response plans related to each system.

### Lockout/Tagout (LOTO) Procedures Description

Write something...

### Required Personal Protective Equipment (PPE)

- Safety Glasses
- Hard Hat
- Gloves
- Hearing Protection
- Safety Boots
- Respirator


### Emergency Contact Information (Names, Phone Numbers)

Write something...

### Specific Hazards Associated with Each System (e.g., Chemical Exposure, Electrical Shock)

Write something...

### Site Emergency Response Plan (Maps, Flowcharts)

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### Emergency Evacuation Routes

- Clearly Marked
- Adequately Lit
- Accessible

### Procedures for Handling Hazardous Materials (if applicable)

Write something...

### Fire Extinguisher Inspection & Training

- Training Records Available
- Extinguishers Properly Labeled
- Monthly Inspections Performed

## Warranty Information & Service Contracts

Details on equipment warranties, service agreements, and contact information for vendors and service providers.

### Summary of Equipment Warranties

Write something...

## Warranty Documents (PDF)

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## Primary Service Provider

- Provider A
- Provider B
- Provider C
- Other (Specify in LONG\_TEXT)

If 'Other' selected above, specify service provider:

Write something...

## Service Contract Number

Enter a number...

## Service Contract Start Date

Enter date...

### **Service Contract Expiration Date**

Enter date...

### **Contact Person (Service Provider)**

Enter a number...

### **Contact Phone Number (Service Provider)**

Write something...

### **Contact Email (Service Provider)**

Write something...

## **Record Keeping & Log Sheets**

Templates and instructions for documenting maintenance activities, inspections, and system performance data.

### **Date of Maintenance/Inspection**

Enter date...

### **Time of Maintenance/Inspection**

Enter time...

### **Meter Readings (e.g., kWh, Gallons)**

Enter a number...

### **Description of Work Performed**

Write something...

### **Condition Assessment (e.g., Excellent, Good, Fair, Poor)**

- Excellent
- Good
- Fair
- Poor

### Issues Identified

- Noise
- Leaks
- Vibration
- Efficiency Loss
- Corrosion
- Other

### Detailed Description of Issues (If Applicable)

Write something...

### Next Scheduled Maintenance

- Within 1 Week
- Within 1 Month
- Within 3 Months
- As Needed

### Technician Signature

# Equipment Lists & Spare Parts

Complete inventory of equipment with model numbers, serial numbers, and recommended spare parts list.

## Equipment Name

## Quantity

## Manufacturer

## Model Number

## Serial Number

### Equipment Photo/Diagram

 Upload File

### Recommended Spare Part Name

Write something...

### Recommended Spare Part Quantity

Enter a number...

### Supplier Contact Information (Spare Parts)

Write something...

### Criticality Level (High/Medium/Low)

- High
- Medium
- Low

# Regulatory Compliance

Addresses relevant codes, standards, and regulations related to system operation and maintenance.

## List Applicable Codes and Standards (e.g., IBC, ASHRAE, NFPA)

Write something...

## Which Environmental Permits are Relevant?

- Air Quality Permit
- Water Discharge Permit
- Waste Management Permit
- Stormwater Permit
- Other (Specify in LONG\_TEXT)

## Permit Expiration Dates (Year)

Enter a number...

## Date of Last Regulatory Compliance Audit

Enter date...

### Summary of Findings from Last Compliance Audit (if applicable)

Write something...

### Are there any specific noise ordinances to consider?

Yes

No

### Upload Copies of Key Permits and Certificates

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## Training & Qualification

Information on required training and qualifications for personnel responsible for system operation and maintenance.

### Summary of Required Training Topics

Write something...

### **Mandatory Training Modules (select all that apply)**

- Electrical Safety
- HVAC System Operation
- Fire Protection Systems
- Building Automation Systems
- Lockout/Tagout Procedures
- Environmental Regulations
- Fall Protection
- Personal Protective Equipment (PPE)

### **Minimum Hours of On-the-Job Training Required**

Enter a number...

### **Date of Last Safety Refresher Training**

Enter date...

### **Qualified Trainer Verification Method**

- Certificate of Completion
- Company-Approved Training Program
- Vendor-Provided Training
- Other (Specify in LONG\_TEXT)

**Attach Training Certificates/Records (max 3 files)**

 Upload File

**Description of any specialized equipment training required.**

Write something...