



Operation and Maintenance (O&M) Manuals Checklist

General Information & Document Control

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

Document Title

Document Revision Number

Date of Last Revision

Document Purpose & Scope

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)

 Upload File

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)

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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)

Enter a number...

Detailed Filter Replacement Procedure

Write something...

Attach Filter Replacement Checklist (if applicable)

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Date of Last Lubrication (Pump/Motor)

Enter date...

Lubricant Type and Application Notes

Write something...

Time of Last Calibration (if applicable)

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

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)

 Upload File

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

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

Write something...

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...