ChecklistGuro

Preventive Maintenance Optimization Checklist

Asset Identification & Prioritization

Focuses on accurately identifying critical assets and prioritizing them for optimization based on risk and impact.

Asset Count (Total)

Enter a number...

Asset Count (Critical - High Risk)

Enter a number...

Asset Count (Critical - Medium Risk)

Enter a number...

Asset Count (Non-Critical)

Enter a number...

Risk Assessment Methodology Used

- [ ] FMEA
- [ ] HAZOP
- [ ] Bowtie Analysis
- [ ] Other (Specify)

Justification for Critical Asset Designation (For Top 5)

Write something...

Criteria Used for Asset Prioritization

- [ ] Safety
- [ ] Production Downtime Impact
- [ ] Repair Cost
- [ ] Environmental Impact
- [ ] Regulatory Compliance

Asset Register / Inventory List

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Date of Last Asset Prioritization Review

Enter date...

Current PM Program Review

Analyzes existing PM tasks, frequencies, and procedures to identify inefficiencies and opportunities for improvement.

Overall Description of Current PM Program

Write something...

Total Number of PM Tasks Scheduled

Enter a number...

PM Scheduling Method (Time-Based, Meter-Based, etc.)

- [ ] Time-Based
- [ ] Meter-Based
- [ ] Manufacturer Recommendations
- [ ] Other (Specify)

Types of PM Tasks Currently Performed (Select all that apply)

- [ ] Lubrication
- [ ] Inspection
- [ ] Cleaning
- [ ] Calibration
- [ ] Replacement of Consumables
- [ ] Testing
- [ ] Other (Specify)

Average Downtime per Equipment Failure (Hours)

Enter a number...

Method for tracking PM Completion

- [ ] CMMS
- [ ] Spreadsheet
- [ ] Paper Records
- [ ] Other (Specify)

List equipment with PM frequency exceeding manufacturer recommendations and reason

Write something...

Data Collection & Analysis

Gathers data on equipment performance, failure rates, repair costs, and downtime to inform optimization decisions.

Average MTBF (Mean Time Between Failures) for Critical Assets

Enter a number...

Average MTTR (Mean Time To Repair) for Critical Assets

Enter a number...

Total Maintenance Costs (Labor + Materials) per Year

Enter a number...

Summary of Recent Failure Analysis Reports

Write something...

Condition Monitoring Technologies Currently Used (e.g., Vibration Analysis, Infrared Thermography)

- [ ] Vibration Analysis
- [ ] Infrared Thermography
- [ ] Oil Analysis
- [ ] Ultrasonic Testing
- [ ] None

Date of Last Comprehensive Equipment Performance Review

Enter date...

Data Sources Currently Used for Maintenance Information

- [ ] CMMS (Computerized Maintenance Management System)
- [ ] Work Order Records
- [ ] Equipment Logs
- [ ] Operator Reports
- [ ] External Supplier Data

Upload Historical Work Order Data (CSV or Excel)

Upload File

Task Optimization & Modification

Re-evaluates specific PM tasks, including their necessity, frequency, and procedures, based on data and industry best practices.

Is the current PM task truly preventative, or mostly reactive?

- [ ] Preventative
- [ ] Reactive
- [ ] Unsure

Current PM Frequency (e.g., days, weeks, months)

Enter a number...

Recommended PM Frequency (based on analysis)

Enter a number...

Justification for frequency change (if applicable)

Write something...

Does the current PM task require a specialized tool or skill?

- [ ] Yes
- [ ] No
- [ ] Unsure

Which components are inspected during this PM task?

- [ ] Lubrication
- [ ] Filters
- [ ] Belts/Chains
- [ ] Electrical Connections
- [ ] Sensors
- [ ] Hydraulic Lines
- [ ] Other (specify in LONG_TEXT)

If 'Other' selected for components, please specify:

Write something...

Is the current inspection method adequate?

- [ ] Yes
- [ ] No
- [ ] Unsure

Recommendations for improving the PM task:

Write something...

Condition Monitoring Implementation

Explores and implements condition-based monitoring techniques to predict failures and optimize maintenance schedules.

Identify Initial Equipment for Condition Monitoring

- [ ] Critical Equipment with High Failure Rates
- [ ] Equipment with High Downtime Impact
- [ ] Equipment with Limited Accessibility
- [ ] Equipment with Complex Systems

Select Condition Monitoring Technologies

- [ ] Vibration Analysis
- [ ] Infrared Thermography
- [ ] Oil Analysis
- [ ] Ultrasonic Testing
- [ ] Motor Current Signature Analysis (MCSA)
- [ ] Pressure Monitoring
- [ ] Temperature Monitoring

Initial Sensor Placement Count

Enter a number...

Target Implementation Date for Sensors

Enter date...

Justification for Sensor Selection

Write something...

Data Collection Frequency

- [ ] Continuous
- [ ] Daily
- [ ] Weekly
- [ ] Monthly

Equipment Layout/Schematic

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Acceptable Threshold for Early Warning

Enter a number...

Resource Allocation & Training

Assesses and optimizes the allocation of personnel, tools, and spare parts to support the optimized PM program.

Number of Maintenance Technicians Currently Assigned

Enter a number...

Average Maintenance Technician Skill Level (1-5, 1=Entry, 5=Expert)

Enter a number...

Current Allocation of Maintenance Technicians by Equipment Type

- [ ] Machinery
- [ ] Electrical
- [ ] Pneumatics
- [ ] Hydraulics
- [ ] Utilities
- [ ] Other (Specify)

Description of Current Training Programs for Maintenance Staff

Write something...

What areas of training are needed to improve efficiency and effectiveness?

- [ ] PLC Programming
- [ ] Hydraulic Systems
- [ ] Electrical Troubleshooting
- [ ] Predictive Maintenance Technologies
- [ ] Root Cause Analysis
- [ ] Other (Specify)

Date of Last Maintenance Staff Skills Assessment

Enter date...

Budget Allocation for Maintenance Training (Annual)

Enter a number...

Notes on resource constraints impacting PM optimization (e.g., staffing shortages, budget limitations)

Write something...

Documentation & Reporting

Ensures accurate documentation of the optimized PM program and establishes reporting mechanisms to track performance.

Summary of Optimization Changes

Write something...

Estimated Cost Savings (Annual)

Enter a number...

Reduction in Downtime (Hours/Year)

Enter a number...

Reporting Frequency (PM Optimization Review)

- [ ] Monthly
- [ ] Quarterly
- [ ] Annually

Date of Last PM Program Review

Enter date...

Supporting Data (e.g., Failure Analysis Reports)

Upload File

Key Performance Indicators (KPIs) Tracked

Write something...

Document Control Status

- [ ] Draft
- [ ] Approved
- [ ] Revised

Document Version Number

Write something...

Continuous Improvement & Review

Establishes a process for ongoing monitoring, evaluation, and refinement of the PM optimization checklist and associated procedures.

Last Review Date

Enter date...

Frequency of Review (in months)

Enter a number...

Summary of Review Findings

Write something...

Areas of PM Program needing further investigation/improvement

- [ ] Task Frequency
- [ ] Task Procedures
- [ ] Spare Parts Management
- [ ] Condition Monitoring Techniques
- [ ] Training Requirements
- [ ] Documentation Accuracy

Action Items Identified during Review

Write something...

Target Completion Date for Action Items

Enter date...

Overall PM Program Health (Post-Review)

- [ ] Excellent
- [ ] Good
- [ ] Fair
- [ ] Needs Improvement

Reviewer Name

Write something...

Reviewer Signature