PPM Checklist Template

Generic planned preventative maintenance checklist for production, manufacturing, industrial and commercial assets | Version 1.0 | Published: 06 July 2026 | Review date: July 2027

Asset ID		**Asset name**		**Site / client**		**PPM frequency**	
Location / area		**Manufacturer**		**Model / serial**		**Planned date**	
Work order / PO		**Permit required?**		**Isolation required?**		**Completed date**	
Engineer		**Client contact**		**Asset criticality**		**Next PPM due**	

Status use	OK = acceptable at time of inspection. Attention = defect, risk, repeat fault or action required. N/A = not applicable to the asset. Not Checked = not completed and should be explained.
Important note	This template is generic. It must be adapted to the asset, manufacturer guidance, site rules, RAMS, permits, statutory inspection duties and client-specific procedures.
Defects	Any safety-critical defect should be made safe, escalated to the client contact and recorded in the defect/action log before handover.

Checklist structure

Section	Purpose
1. Pre-start, permits and safety	Confirm RAMS, permits, isolations, PPE, tools and safe access before maintenance starts.
2. General condition and housekeeping	Capture visible damage, leaks, loose parts, cleanliness, overheating and outstanding defects.
3. Mechanical checks	Check bearings, drives, belts, chains, couplings, conveyors, fasteners, guards and lubrication.
4. Electrical checks	Check panels, cables, isolators, sensors, ventilation, motors and electrical observations within competence.
5-6. Services and safety devices	Check pneumatics, hydraulics, utilities, guards, emergency stops, access and safety-related defects.
7-8. Performance and environmental	Check running performance, repeat fault areas, readings, handover condition, leaks, waste and energy/resource losses.

1. Pre-start, permits and safety / 2. General condition and housekeeping							
Ref	**Check / task**	**Acceptance criteria / method**	**OK**	**Attention**	**N/A**	**Finding / action / defect ref**	**Initials**
1.1	Confirm work scope, asset and PPM frequency	Asset, work order and planned task list match the intended equipment and site requirement.	[ ]	[ ]	[ ]		
1.2	Review RAMS / site instructions / permit requirements	RAMS, permit-to-work, hot work, access, isolation or client procedures reviewed before work starts.	[ ]	[ ]	[ ]		
1.3	Complete isolation / LOTO checks where required	Energy sources identified, isolated, locked and verified in line with site procedure before intrusive work.	[ ]	[ ]	[ ]		
1.4	Check guarding, access and emergency stop locations before starting	Safe access available; guarding and emergency stop positions understood before maintenance work.	[ ]	[ ]	[ ]		
1.5	Confirm correct PPE, tools and test equipment	Required PPE, calibrated/tested equipment and task-appropriate tools are available and suitable.	[ ]	[ ]	[ ]		
2.1	Visual inspection of asset and surrounding area	No obvious damage, leaks, loose parts, missing guards, contamination or unsafe conditions.	[ ]	[ ]	[ ]		
2.2	Check cleanliness around asset, panels, drives and access points	No excessive dust, product build-up, debris, oil, grease or blocked access routes.	[ ]	[ ]	[ ]		
2.3	Inspect fixings, covers, panels, fasteners and mountings	Covers secure, fasteners present, no excessive corrosion, loose panels or missing fixings.	[ ]	[ ]	[ ]		
2.4	Check signs of abnormal heat, smell, noise or vibration	No unusual heat, burning smells, abnormal noise, vibration or signs of overheating.	[ ]	[ ]	[ ]		
2.5	Review previous defects and outstanding actions	Previous defects reviewed; recurring faults or incomplete actions escalated where required.	[ ]	[ ]	[ ]		

3. Mechanical checks							
Ref	**Check / task**	**Acceptance criteria / method**	**OK**	**Attention**	**N/A**	**Finding / action / defect ref**	**Initials**
3.1	Inspect bearings, shafts, housings and rotating parts	No excessive play, noise, heat, damage, contamination or signs of bearing failure.	[ ]	[ ]	[ ]		
3.2	Check belts, chains, pulleys, sprockets and tensioners	Correct tension/alignment; no cracking, fraying, wear, missing guards or damaged teeth.	[ ]	[ ]	[ ]		
3.3	Inspect couplings, keys, guards and drive alignment	Couplings secure; alignment acceptable; guards fitted and no visible wear or loose hardware.	[ ]	[ ]	[ ]		
3.4	Check gearboxes, motors and driven components for leaks	No oil, grease, coolant or process fluid leaks; breathers and seals in acceptable condition.	[ ]	[ ]	[ ]		
3.5	Inspect conveyors, rollers, guide rails and transfer points	Free movement, correct tracking, no jams, sharp edges, excessive wear or damaged rollers.	[ ]	[ ]	[ ]		
3.6	Check mechanical stops, sensor brackets and adjustable parts	Securely fixed, correctly positioned and not loose, bent, worn or interfering with operation.	[ ]	[ ]	[ ]		
3.7	Check lubrication points and grease/oil condition	Lubrication completed where required; no over-greasing, contamination or dry running observed.	[ ]	[ ]	[ ]		

Additional mechanical notes / readings

4. Electrical checks							
Ref	**Check / task**	**Acceptance criteria / method**	**OK**	**Attention**	**N/A**	**Finding / action / defect ref**	**Initials**
4.1	Visual inspection of control panel exterior	Panel secure, clean, labelled, accessible and free from damage, overheating or contamination.	[ ]	[ ]	[ ]		
4.2	Inspect cables, glands, plugs, sockets and flexible leads	No exposed conductors, crushed cables, missing glands, loose plugs or damaged insulation.	[ ]	[ ]	[ ]		
4.3	Check isolators, switches, push buttons and indicators	Devices operate correctly, are labelled, accessible and not damaged or loose.	[ ]	[ ]	[ ]		
4.4	Check panel ventilation, filters and cooling arrangements	Ventilation clear; filters clean; no excessive dust, blocked fans or signs of panel overheating.	[ ]	[ ]	[ ]		
4.5	Inspect sensors, photocells, proxes and cable routes	Sensors secure, clean, correctly positioned and cables protected from damage or snagging.	[ ]	[ ]	[ ]		
4.6	Check motor, drive and control equipment condition	No abnormal heat/noise; drives and starters free from visible faults; covers and labels intact.	[ ]	[ ]	[ ]		
4.7	Record any electrical test readings required by site procedure	Readings recorded where applicable; abnormal values escalated to competent person/client contact.	[ ]	[ ]	[ ]		

Electrical readings / observations / items requiring competent follow-up

5. Pneumatic, hydraulic and services / 6. Safety devices and compliance checks							
Ref	**Check / task**	**Acceptance criteria / method**	**OK**	**Attention**	**N/A**	**Finding / action / defect ref**	**Initials**
5.1	Inspect air lines, hoses, fittings, FRLs and valves	No leaks, damaged hoses, loose fittings or excessive contamination in bowls/filters.	[ ]	[ ]	[ ]		
5.2	Check pressure settings and regulators	Set pressures match site/asset requirements and are not adjusted without approval.	[ ]	[ ]	[ ]		
5.3	Inspect cylinders, actuators and valve islands	Smooth operation, no sticking, impact damage, air leaks or loose mountings.	[ ]	[ ]	[ ]		
5.4	Inspect hydraulic hoses, cylinders and power packs	No leaks, hose damage, abnormal heat, noise, low fluid level or unsafe hose routing.	[ ]	[ ]	[ ]		
5.5	Check coolant, water, steam, vacuum or process services	No leaks, blockages, damaged pipework or uncontrolled discharge observed.	[ ]	[ ]	[ ]		
6.1	Check fixed and interlocked guards	Guards present, secure and not bypassed; interlocks function only where safe and authorised to test.	[ ]	[ ]	[ ]		
6.2	Check emergency stops and reset arrangements	Emergency stops accessible and functional where tested under site-approved conditions.	[ ]	[ ]	[ ]		
6.3	Check warning labels, asset ID and hazard markings	Labels visible, legible and suitable for safe operation and maintenance access.	[ ]	[ ]	[ ]		
6.4	Check safe access, platforms, steps and working area	Access equipment and platforms appear safe, secure and free from trip/slip hazards.	[ ]	[ ]	[ ]		
6.5	Confirm safety defects are escalated immediately	Any safety-related defect is made safe and communicated to client contact before handover.	[ ]	[ ]	[ ]		

7. Operational performance / 8. Environmental and waste control							
Ref	**Check / task**	**Acceptance criteria / method**	**OK**	**Attention**	**N/A**	**Finding / action / defect ref**	**Initials**
7.1	Run asset under normal operating conditions where possible	Asset runs smoothly with no abnormal noise, vibration, heat, leaks, alarms or instability.	[ ]	[ ]	[ ]		
7.2	Check product flow, transfer, alignment and changeover points	No jams, misfeeds, poor tracking, alignment issues or recurring process interruptions.	[ ]	[ ]	[ ]		
7.3	Check repeat fault areas and known weak points	Known issues reviewed; any repeat fault trend recorded and escalated for corrective action.	[ ]	[ ]	[ ]		
7.4	Record condition readings where applicable	Temperature, vibration, pressure, current, speed or other readings recorded if required.	[ ]	[ ]	[ ]		
7.5	Confirm asset returned to production-ready condition	Asset cleaned, guards fitted, tools removed, isolations removed and client handover complete.	[ ]	[ ]	[ ]		
8.1	Check for oil, grease, coolant, chemical or process leaks	No uncontrolled leaks; any spill risk contained and reported in line with site procedure.	[ ]	[ ]	[ ]		
8.2	Dispose of waste, rags, parts and packaging correctly	Waste segregated and handled through client-approved routes or authorised disposal.	[ ]	[ ]	[ ]		
8.3	Check energy or resource waste opportunities	Air leaks, water leaks, excessive running, heat losses or avoidable waste recorded where found.	[ ]	[ ]	[ ]		
8.4	Leave area clean and free from maintenance waste	Work area left clean, safe and suitable for production use.	[ ]	[ ]	[ ]		

Handover notes

Defect / Action Log

Use this section for defects, follow-up work, safety concerns, repeat faults, improvement opportunities and closure evidence.

Defect ref	Issue / finding	Priority	Action required	Owner	Target date	Status / closure evidence
1						
2						
3						
4						
5						
6						
7						
8						

Completion and handover

PPM completed by		**Date**		**Client / site contact**	
Asset safe to return?	Yes [ ] No [ ] Restrictions [ ]	**Follow-up required?**	Yes [ ] No [ ]	**Next PPM due**	
Engineer signature		**Client signature**		**Document ref**	