Engineering Site Visit Checklist

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A practical site visit template for recording engineering observations, defects, risks, maintenance improvements, PPM opportunities and client handover actions across industrial, commercial, manufacturing and production environments.

Document	Engineering Site Visit Checklist	**Purpose**	Client site review, defect capture, reliability improvement and maintenance planning
Company	DEVA Maintenance Services LTD	**Scope**	Industrial, commercial, manufacturing and production engineering support
Use	Printable checklist and editable client resource	**Document owner**	Company Director

How to use this checklist

1	Complete visit details and pre-start checks before beginning the site review.
2	Work through each section, marking status as OK, Attention, Defect or N/A.
3	Record important issues in the action log with priority, owner and target date.
4	Use the asset snapshot to capture equipment needing PPM creation, remedial work or condition monitoring.
5	Reference photos, notes and documents so the client can review evidence quickly.
6	Complete the handover summary and agree next steps before the visit is closed.

Status and priority guide

Status	Meaning	Priority	Meaning
OK	Acceptable condition / no action identified.	P1 Critical	Immediate safety, compliance, production or major breakdown risk. Escalate before leaving site.
Attention	Issue or improvement opportunity to review.	P2 High	Significant reliability, downtime, quality or safety risk. Plan corrective work urgently.
Defect	Fault, unsafe condition or reliability risk requiring action.	P3 Medium	Plan into maintenance schedule or improvement plan.
N/A	Not applicable to this site, asset or visit scope.	P4 Low	Minor issue, housekeeping, observation or improvement opportunity.

1. Visit details and pre-start checks

Client / site		**Visit date**	
Site address		**Visit type**	
Client contact		**DEVA engineer**	Daryl Gibson
Area / line		**Job / PO ref**	
Visit purpose		**Time on site**	

Pre-start / site readiness checks

Check	Yes / No / N/A	Notes / reference
Site induction completed and access requirements understood.		
PPE requirements confirmed and suitable for the work area.		
RAMS, permit-to-work and site control requirements confirmed where applicable.		
Isolation / LOTO requirements understood before any intrusive inspection or work.		
Working at height, MEWP, FLT, hot work, confined space or lifting requirements identified where relevant.		
Client contact, escalation route and handover method confirmed.		
Photos, evidence and confidentiality rules agreed with the client where required.		
Immediate hazards or stop-work concerns escalated before proceeding.		

2. Engineering site visit checklist

Area	Ref	Check / observation	Status	Priority	Findings / notes	Action required	Owner / target
Safety & access	SAF-01	Site access, walkways, platforms and working areas are safe, clear and suitable for maintenance work.					
Safety & access	SAF-02	Guards, interlocks, emergency stops and safety devices are present, accessible and free from obvious damage.					
Safety & access	SAF-03	Isolation points are identifiable and suitable for safe maintenance work.					
Safety & access	SAF-04	Hot work, confined space, working at height or lifting requirements are identified where relevant.					
Safety & access	SAF-05	Any immediate hazards, unsafe conditions or stop-work concerns are escalated to the client contact.					
Asset condition	ASS-01	Key production assets are visually reviewed for damage, wear, corrosion, leaks, contamination or deterioration.					
Asset condition	ASS-02	Asset identification is clear enough to support maintenance planning and reporting.					
Asset condition	ASS-03	Critical assets, bottleneck equipment or repeat problem areas are identified.					
Asset condition	ASS-04	Spares or consumables that appear to be causing downtime are noted.					
Asset condition	ASS-05	Temporary repairs, bypasses, missing covers or unsupported modifications are recorded.					

2. Engineering site visit checklist

Area	Ref	Check / observation	Status	Priority	Findings / notes	Action required	Owner / target
Mechanical	MEC-01	Bearings, shafts, couplings, belts, chains, sprockets and pulleys show no obvious signs of wear or misalignment.					
Mechanical	MEC-02	Fasteners, brackets, guards, mounts and structural supports are secure and suitable.					
Mechanical	MEC-03	Lubrication condition, grease points, oil levels and lubrication access are reviewed.					
Mechanical	MEC-04	Conveyors, rollers, guides, rails, stops and transfer points are checked for wear and adjustment issues.					
Mechanical	MEC-05	Mechanical noise, vibration, heat, movement or repeat failure evidence is recorded.					
Mechanical	MEC-06	Lifting, moving or mechanical handling equipment concerns are noted for client review.					
Electrical & controls	ELE-01	Panels, isolators, cable runs, glands, containment and accessories show no obvious damage or exposure.					
Electrical & controls	ELE-02	Sensors, switches, actuators and control devices are mounted securely and operating as expected where observed.					
Electrical & controls	ELE-03	Signs of overheating, loose connections, water ingress, contamination or poor panel condition are noted.					
Electrical & controls	ELE-04	Emergency stop, reset and operator controls appear accessible and labelled where required.					

2. Engineering site visit checklist

Area	Ref	Check / observation	Status	Priority	Findings / notes	Action required	Owner / target
Electrical & controls	ELE-05	Electrical work required beyond visual observation is flagged for competent review before action.					
Pneumatics / hydraulics	PNE-01	Air leaks, damaged hoses, failing fittings or poor pipework condition are identified.					
Pneumatics / hydraulics	PNE-02	FRLs, regulators, gauges, valves and cylinders are visually checked for condition and suitability.					
Pneumatics / hydraulics	PNE-03	Hydraulic leaks, damaged hoses, cylinder issues or oil contamination concerns are recorded.					
Pneumatics / hydraulics	PNE-04	Pressure, flow or actuation issues affecting reliability or performance are noted.					
Pneumatics / hydraulics	PNE-05	Energy losses from compressed air or fluid power systems are highlighted where observed.					
Utilities & services	UTI-01	Compressed air, water, steam, extraction, vacuum, process services or other utilities are reviewed where relevant.					
Utilities & services	UTI-02	Leaks, poor insulation, poor routing, unsupported services or damaged pipework are noted.					
Utilities & services	UTI-03	Utility isolation, labelling and accessibility are reviewed where visible.					
Utilities & services	UTI-04	Utility-related downtime, quality or energy loss opportunities are captured.					

2. Engineering site visit checklist

Area	Ref	Check / observation	Status	Priority	Findings / notes	Action required	Owner / target
Production performance	PRO-01	Repeat stoppages, jams, adjustments, speed losses or changeover issues are discussed with site personnel.					
Production performance	PRO-02	Known downtime causes are captured and linked to engineering follow-up where possible.					
Production performance	PRO-03	Quality defects, scrap, rework or process losses with engineering causes are identified.					
Production performance	PRO-04	Operator feedback is captured where it helps identify practical maintenance improvements.					
Production performance	PRO-05	OEE-related availability, performance or quality losses are translated into engineering actions where possible.					
PPM / maintenance system	PPM-01	Existing PPM routines are reviewed for practicality, frequency, value and whether checks are being completed.					
PPM / maintenance system	PPM-02	Obvious missing checks, duplicated checks or low-value checks are identified.					
PPM / maintenance system	PPM-03	Lubrication, inspection, safety-device, housekeeping and condition monitoring checks are considered.					
PPM / maintenance system	PPM-04	Maintenance history, repeat faults and breakdown records are reviewed where available.					
PPM / maintenance system	PPM-05	Recommended PPM additions or changes are captured for the task library or asset plan.					

2. Engineering site visit checklist

Area	Ref	Check / observation	Status	Priority	Findings / notes	Action required	Owner / target
Housekeeping / environment	HOU-01	Engineering work areas are reviewed for housekeeping, waste control, spill risk and storage issues.					
Housekeeping / environment	HOU-02	Oils, greases, chemicals, rags, filters, swarf, packaging and waste routes are considered where relevant.					
Housekeeping / environment	HOU-03	Leaks, drips, dust, debris or contamination risks are identified and escalated where required.					
Housekeeping / environment	HOU-04	Opportunities to reduce waste, energy losses, scrap or unnecessary material use are captured.					
Close-out / handover	CLO-01	Key findings are discussed with the client contact before leaving site where possible.					
Close-out / handover	CLO-02	Immediate risks, defects or restrictions are clearly communicated.					
Close-out / handover	CLO-03	Follow-up actions, owners, priorities and target dates are agreed where possible.					
Close-out / handover	CLO-04	Photos, notes and additional documents are referenced in the action or photo log.					
Close-out / handover	CLO-05	Any work outside agreed scope is clearly separated from visit observations and recommendations.					

3. Observation and action log

Record significant defects, risks, reliability issues, safety concerns, environmental concerns and improvement opportunities.

ID	Ref / area	Finding / issue	Risk / impact	Priority	Recommended action	Owner	Target date	Status
A-001								
A-002								
A-003								
A-004								
A-005								
A-006								
A-007								
A-008								
A-009								
A-010								

4. Asset snapshot and PPM opportunities

Capture assets requiring maintenance planning, condition monitoring, remedial work or PPM creation.

Asset ID	Area / line	Asset description	Criticality	Existing PPM?	Observed condition	Recommended action	Frequency

5. Photo / evidence log

Photo ref	Area / asset	Related action	Description	File name / link	Notes
P-001					
P-002					
P-003					
P-004					
P-005					

6. Handover and sign-off

Overall summary			
Immediate concerns raised?		**Follow-up required?**	
Client contact		**Date**	
DEVA engineer	Daryl Gibson	**Signature**	

Template note: this checklist is a generic client resource. It does not replace site-specific RAMS, permits, statutory inspection requirements, client procedures or competent person assessments.