

Preventive Maintenance Work Order

Run a scheduled PM against its task list, record as-found and as-left against specification, and turn every deficiency into a corrective work order before you close it.

◆ Part A — The schedule

1. Work order details

Work order number <i>e.g. PM-2026-0904</i>	
PM schedule reference	
Date due	
Date performed	
Days early or late	
Trigger <i>Calendar / Running hours / Cycles / Condition / Regulatory</i>	
Frequency <i>Weekly / Monthly / Quarterly / Six-monthly / Annual / Other</i>	
Planned duration	
Assigned to	

2. Asset

Asset ID and description	
Location	
Make and model	
Serial number	

Criticality <i>A – critical / B – important / C – routine</i>	
Meter reading at this PM	
Meter reading at last PM	
Isolation or permit required <i>Yes / No – reference</i>	

◆ Part B – The task list

3. PM task list

Task	Done	As found	As left	Initial
Visual inspection for damage, leaks and corrosion	☐			
Clean unit and surrounding area	☐			
Check and record operating readings	☐			
Lubricate per schedule	☐			
Check belt tension and condition	☐			
Check and tighten electrical connections	☐			
Check and tighten mechanical fixings	☐			
Inspect and replace filters	☐			
Check alignment and vibration	☐			
Test safety devices and interlocks	☐			
Check control settings against specification	☐			
Check drainage and condensate paths	☐			
Confirm labelling and signage legible	☐			
Function test through full operating range	☐			

♦ As found and as left in the same row. A PM that only records the final state cannot tell you whether the interval is right.

4. Readings against specification

Measurement	Unit	Specification	As found	As left	Pass
Bearing temperature	°C	< 70	78	62	Y

♦ An out-of-tolerance reading that was corrected is still an out-of-tolerance reading. Record both numbers so the trend survives.

5. Consumables replaced

Item	Part number	Qty	Unit cost	Line total	Next due
Panel filter 594×594×48	FLT-2424-2	4	9.20	36.80	Q1 2027
Consumables total					

♦ Part C — Deficiencies and closure

6. Deficiencies found

#	Deficiency	Severity	Can it wait	Corrective WO raised	Target date
1	Coupling guard cracked	Safety	No	CWO-2026-1191	01/10/2026

#	Deficiency	Severity	Can it wait	Corrective WO raised	Target date

♦ A deficiency without a corrective work order number is a deficiency nobody will fix. This column is the whole reason the PM was worth doing.

7. Labour

Date	Technician	Trade	Hours	Rate	Line total
01/10/2026	J. Farrow	Mechanical	1.75	58.00	101.50
Labour total					

8. PM cost and interval review

Consumables total	
Labour total	
Total cost of this PM	
Planned hours	
Actual hours	
Hours over or under plan	
Deficiencies found at this PM	
Interval recommendation <i>keep, shorten, or lengthen — and why</i>	

♦ Zero deficiencies several visits running usually means the interval is too short, not that the asset is perfect. Say so here rather than leaving the schedule untouched by default.

9. Closure

PM completed in full <i>Yes / No — tasks not done and why</i>	
Asset returned to service <i>Yes / No — date and time</i>	
Isolation removed and tested <i>Yes / No</i>	
Records and asset history updated <i>Yes / No</i>	
Next PM due — date or meter	
Technician name and signature	
Verified by and date	
