



Preventive Maintenance Checklist

A working checklist by frequency — daily to annual

The intervals below are typical industry practice, not gospel. Always defer to your equipment OEM's manual and to local safety code. On anything that runs irregularly, run-hours beat calendar days.

LOTO

Lock out / tag out before any task that opens a guard or a panel. No task marked LOTO should be signed off without it.

How to set frequency

Frequency tier	Typical interval	What it checks	Who does it
DAILY	Every shift or start-up	Leaks, noise, gauges, guards, cleanliness, safety devices	Machine operator
WEEKLY	7 days / ~40 run-hours	Lubrication, belt tension, filters, fluid levels, fasteners	Operator or junior tech
MONTHLY	~30 days / ~160 run-hours	Alignment, calibration, electrical connections, wear parts	Maintenance technician
QUARTERLY	90 days	Deeper inspection, vibration and thermal checks, seals, valves	Technician or specialist
ANNUAL	Yearly / planned shutdown	Overhaul, bearing and seal replacement, full calibration, safety certification	Technician + OEM or contractor



Factory Investigator



Asset / Line: _____ Asset ID: _____ Month: _____

Task	Freq	Spec / notes	LOTO	Technician	Date	✓	Sign-off
Walkaround for leaks, odd noise, and vibration	DAILY	Operator, start of shift; report anything abnormal before running	NO				
Check gauges, pressures, and temperatures against normal range	DAILY	Record readings; flag out-of-range values	NO				
Confirm guards, E-stops, and safety interlocks work	DAILY	Never run with a bypassed safety device	NO				
Clean work area, remove swarf and debris, wipe down	DAILY	Contamination hides leaks and wear	NO				
Lubricate points per the lube chart	WEEKLY	Right grease or oil type and quantity; over-greasing damages seals	NO				
Check and top up fluid levels (coolant, hydraulic, oil)	WEEKLY	Investigate any level that keeps dropping	NO				
Inspect belts, chains, and hoses for tension and wear	WEEKLY	Replace before failure, not after	YES				
Clean or replace air and intake filters	MONTHLY	Restricted airflow overheats motors and drives	YES				
Check alignment, backlash, and fastener torque	MONTHLY	Use the OEM torque spec; log the values	YES				
Inspect and tighten electrical connections; check for heat	MONTHLY	LOTO first; thermal scan on panels	YES				
Test calibration on gauges, sensors, and safety devices	QUARTERLY	Recalibrate to spec; document results	YES				
Vibration and thermal inspection on motors and bearings	QUARTERLY	Trend the readings to catch developing faults	NO				
Inspect seals, gaskets, and valves; replace wear parts	QUARTERLY	Stage parts from spares in advance	YES				
Full teardown, bearing and seal replacement, overhaul	ANNUAL	Plan into a shutdown; use the OEM kit	YES				
Complete safety and compliance certification	ANNUAL	Pressure vessels, lifting gear, electrical per local code	YES				



Worked example: rotary screw air compressor

ASSET TAG AC-01

Asset / Line: Rotary screw air compressor

Asset ID: AC-01

Month: July 2026

Task	Freq	Spec / notes	LOTO	Technician	Date	✓	Sign-off
Drain condensate from the receiver tank	DAILY	No standing water; auto-drain working	NO	MS	12 Jul 2026	✓	MS
Check operating temperature and pressure	DAILY	Within OEM range; discharge temp below limit	NO				
Listen for air leaks at fittings and hoses	DAILY	No audible leaks; fix on discovery	NO				
Check and clean the air intake filter	WEEKLY	Replace if restricted; note the pressure drop	YES				
Inspect and top up compressor oil	WEEKLY	Level in the sight glass; correct grade	NO				
Check belt tension and condition	MONTHLY	OEM deflection spec; no cracks or glazing	YES				
Replace oil filter and separator element	QUARTERLY	Per run-hours or the OEM interval	YES				
Change compressor oil	ANNUAL	OEM oil and interval; sample if trending	YES				
Inspect motor bearings and electricals	ANNUAL	LOTO; thermal and vibration check	YES				



Asset / Line: _____ Asset ID: _____

There is also a fillable spreadsheet version — with a CMMS-import sheet — at factoryinvestigator.com/preventive-maintenance-checklist/

