



Checklists and Procedures in Maintenance

Every organization claims they have procedures or “checklists” to eliminate self-induced failures or missed steps, but are they followed? Are they accurate? Are they written to a sufficient level of detail? Have they ever been reviewed? Do we know the difference and when to use them?

A checklist is a type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task. Checklists are appropriate for vehicles, mobile equipment, equipment set-ups, equipment or line starts and stops, etc.

A procedure specifies a method for performing a task, it is written to a specification. A procedure is designed to describe who, what, where, when, and why by means of establishing accountability in support of the implementation of that specification. The "How" is further documented in the form of work instructions which further support a procedure by providing a greater level of detail. Procedures are appropriate for Preventive Maintenance (PM), Predictive Maintenance (PdM), equipment rebuilds, refurbishments, or overhauls, corrective maintenance activities, etc.

Both can and should be utilized in support of maintenance activities where applicable.

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