

PM Triage Worksheet

Two pages. Days 7 through 14 of the PM Compliance Recovery install. Classify every overdue PM by asset criticality, rank it, and clear the A-class list before you install kitting.

Companion to: *Fix the System*, Chapter 15. **Who uses it:** the maintenance planner, maintenance supervisor, and reliability engineer, working together. **When:** Week 2 of the PM Compliance Recovery install. Re-run every quarter thereafter, or any time PM compliance drifts below 85% for two consecutive periods. **Why this exists:** you cannot fix a PM program whose backlog you do not understand. The triage worksheet forces you to look at every overdue PM, classify it, and make a decision. It is painful. It is non-negotiable. A plant that runs the install without doing the triage will get a compliance bump from the install moves alone, then regress when the un-triaged overdues start aging into emergencies.

Step 1 — Pull the overdue list

From the CMMS, export every PM that is currently past its due date. Include:

- Work order number
- Asset tag
- Asset description
- PM description (or PM template code)
- Original due date
- Days overdue (today minus original due date)
- Assigned technician (if assigned)

If your CMMS cannot export this list, build it manually. The triage cannot proceed without it.

Step 2 — Classify each asset by criticality

For every asset on the list, assign A / B / C:

- **A — Critical.** Loss of this asset stops production plant-wide, affects safety, affects regulatory compliance, or carries a replacement cost above \$50K.
- **B — Important.** Loss of this asset affects a production line or a support system but not the whole plant. Replacement cost between \$10K and \$50K.
- **C — Standard.** Shop-floor tools, low-consequence equipment, duplicate capacity available, replacement cost under \$10K.

If you do not already have a criticality classification for an asset, do it now. Do not guess. Ask the operations manager for each ambiguous case.

Step 3 — Fill the triage table

Group the list by criticality. Sort within each group by days overdue (most overdue first).

A-Class overdue (CRITICAL — these are the emergency-waiting-to-happen list)

WO #	Asset	PM Description	Days Overdue	Parts Issue?	Planner	Triage Decision	Target Clear Date

Triage Decision column options:

- **EXECUTE** — clear within 14 days, no exceptions
- **ESCALATE** — parts / resource blocker requiring plant-manager attention
- **RECLASSIFY** — PM is not actually required on this asset (document why)

B-Class overdue

WO #	Asset	PM Description	Days Overdue	Parts Issue?	Planner	Triage Decision	Target Clear Date

Triage Decision column options:

- **EXECUTE** — clear within 30 days
- **RESCHEDULE** — move into the next cycle with a revised due date (only if the asset's condition supports the deferral)
- **RECLASSIFY** — PM not required on this asset

C-Class overdue

WO #	Asset	PM Description	Days Overdue	Triage Decision	Target Clear Date

Triage Decision column options:

- **EXECUTE** — clear within 60 days
- **RESCHEDULE** — move into next cycle

- **RECLASSIFY** — PM not required; remove from the PM template
- **ABSORB** — C-class overdues on duplicate-capacity equipment can often be absorbed by operating the duplicate and scheduling the deferred asset into the next natural window

Step 4 — Tally and set the clear-list

Class	Total overdue	Execute	Escalate	Reschedule	Reclassify / Absorb
A				n/a	
B		n/a			
C		n/a			

Commitment: A-class cleared by _____ (target: day 42 of install). B-class cleared by _____ (target: day 56 of install). C-class managed — on a trajectory toward zero, not necessarily zero.

Step 5 — Identify the root-cause buckets

Across the whole overdue list, count how many were blocked by each cause. This feeds the Day 14-21 interviews and the install plan.

Cause	Count
Parts unavailable or wrong part number on WO	
PM displaced by break-in work	
Labor not scheduled (tech assignment missing or reassigned)	
Procedure unclear, missing, or known-wrong	
Asset not accessible (production schedule conflict, lockout conflict, permit conflict)	
Deferred by supervisor or planner decision (document why for each)	
Unknown — no cause captured on the WO	

The largest bucket is where the install plan concentrates. For most plants, the largest bucket is **parts**. If your largest bucket is something else, your install plan looks different from Ray's.

Step 6 — Sign-off

Role	Name	Signature	Date
Planner (lead)			
Maintenance supervisor			
Reliability engineer			
Plant manager (sign-off on A-class clear commitment)			

What to avoid

- **Reclassifying too aggressively.** "We don't need that PM anymore" is sometimes true. It is usually a way to make the number go down without doing the work. Require a written justification for every RECLASSIFY decision on A- and B-class.
- **Mixing triage with install.** The triage is diagnosis. The install starts after triage. Do not begin kitting discipline while the overdue list is still un-sorted.
- **Skipping the root-cause count (Step 5).** The install plan is shaped by Step 5. A plant that skips it defaults to the textbook install sequence and discovers at day 60 that their biggest cause was something the sequence does not address.
- **Using the triage as a punitive exercise.** The overdues are the system's failure, not a technician's failure. Keep the language structural, not personal.

End of worksheet. File with the install plan from Day 21-30.