

Switchboard maintenance planning checklist

Use this worksheet to define maintenance scope, responsibility and records. Set intervals and acceptance criteria from the installed equipment instructions, site requirements, duty and condition.

CWS policy: no live work

External observations use closed enclosures and existing safe viewing or monitoring arrangements. Internal inspection and servicing require planned de-energised access under the site isolation procedure, including control of all supplies and stored energy and verification of isolation by appropriately licensed and competent personnel.

This worksheet does not authorise work and is not a switching, isolation, testing or maintenance procedure. The responsible electrical team must approve the site-specific work scope and safe method.

Asset and site	Planning information
Site / area: _____	Board tag / serial: _____
Asset owner: _____	Responsible electrical team: _____
Inspection date: _____	Work plan / revision: _____
Equipment manuals: _____	Operating duty / environment: _____

01 / External observations

Record findings without removing covers or exposing energised parts. Assign an action where safe access or information is inadequate.

Observation	Finding / action reference
Enclosure condition, visible moisture, corrosion or physical damage.	_____
Accessible labels, board identity and drawing references.	_____
Access, housekeeping and clearances against the site design.	_____
Existing indicators, alarms, metering and maintenance notifications.	_____
Visible ventilation openings and accessible filter condition.	_____

For an abnormal condition, notify the responsible electrical team and follow the site response procedure. Agree any restriction, shutdown or investigation before further work.

Plan de-energised service

Specify tasks before the outage. Each task needs an applicable equipment instruction, responsible person, safe work arrangement and result record.

Task to consider	What the plan must establish
Internal condition and cleanliness	Scope, safe access, cleaning method and materials permitted for the installed equipment.
Connections and busbar joints	Inspection or checking method permitted by the manufacturer. Apply torque checks only where required by the applicable instructions; blanket annual retightening is not a universal task.
Protection and operating mechanisms	Exact device and control-unit version, test or service procedure, acceptance criteria, settings record and competence.
Interlocks, control and safety interfaces	Functions to check, simulation boundaries, responsible designer and confirmation of restored operation.
Insulation and protective-circuit tests	Suitability of the method, equipment to disconnect or protect, test conditions and acceptance criteria. Record the instrument and results.
Thermal or load assessment	Permitted viewing or monitoring arrangement, representative operating conditions, available readings and assessment responsibility. Do not expose energised parts.
Alterations and remedial work	Approved scope, parts, drawings, verification requirements and handover records.

Use the declared duty and actual instructions

This worksheet prescribes no generic 80% loading limit or fixed inspection cycle. Compare load, temperatures and service requirements with the documented assembly and device conditions. Account for environment, criticality, operating cycles, deterioration and applicable site requirements.

Interval or trigger: _____

Basis / instruction / revision: _____

Outage and access agreed with: _____

Record findings and close actions

A useful maintenance record shows condition, evidence, responsibility and completion. A checked box alone does not establish that an assembly is fit for continued service.

Reference / location	Finding and evidence	Action / owner / due date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Before handover	Record / reference
Work completed and unresolved items	_____
Settings, drawings and records updated	_____
Restoration / verification record	_____
Next review date or trigger and its basis	_____
Completed by / reviewed by / date	_____

Use the correct equipment documents

Retain the instructions matching the assembly, device, control unit and revision in the asset record. These examples are different document families, not interchangeable procedures.

MasterPacT MTZ with MicroLogic Active: DOCA0305EN-01, March 2026.

MasterPacT MTZ with MicroLogic X: DOCA0099EN-05, September 2024.

CWS planning guide: Industrial switchboard maintenance.

Document owner: Clive Wilson Switchboards. Revision 1 replaces the earlier CWS maintenance checklist and review draft for general planning. Equipment manuals and the site-approved work plan take precedence. Verify references when preparing the actual work.

Discuss your asset record and proposed work with CWS

03 214 4264 | admin@clivewilson.co.nz | clivewilson.co.nz