# Maintenance Reliability and OEE Shift Handover and Service Report - Loss of Output or Performance

Maintenance Reliability and OEE | Loss of Output or Performance | Asset ID FIX-22-10-03

**Safety gate: Stop, isolate and verify before exposure to hazardous energy. Lockout/Tagout and live testing require the applicable site procedure, authorised controls and a qualified person. Never bypass a guard, interlock or protective device to complete this workbook.**

## How to use this field resource

This is an equipment-agnostic documentation workbook for maintenance reliability and oee. It helps a trained team turn downtime reports into a consistent event record that supports repeatable decisions. It does not identify a fault by itself and does not replace the equipment-specific OEM manual, drawings, limits, permits or a qualified technician's judgement.

| Intake field | Record |
|---|---|
| Asset or equipment ID | _____ |
| Site and location | _____ |
| Reported by / time | _____ |
| Fault situation | Loss of Output or Performance |
| Operating state | Stopped / standby / starting / running / loaded |
| Safety owner | _____ |
| OEM reference used | Document number and revision: _____ |

## Evidence areas for this system

For a loss of output or performance, focus on evidence that can be dated, repeated and handed to another technician. Capture the as-found state before clearing alarms, changing settings or disturbing connections.

| # | Evidence area | First record |
|---|---|---|
| 1 | Failure start and detection time | As-found note: _____ |
| 2 | Asset function lost | As-found note: _____ |
| 3 | Operating context | As-found note: _____ |
| 4 | Temporary restoration | As-found note: _____ |
| 5 | Confirmed cause evidence | As-found note: _____ |
| 6 | Production and safety impact | As-found note: _____ |

## Shift Handover and Service Report

Use this section to compare expected capacity with the actual result under a recorded load. Record baseline, demand, output and limiting indication before choosing the next action.

| Handover field | Prompt | Record |
|---|---|---|
| Asset state | Stopped / restricted / temporary / released | _____ |
| Work completed | What changed and under which document? | _____ |
| Evidence retained | Logs, values, photos, parts or samples | _____ |
| Open risk | What remains uncertain or unavailable? | _____ |
| Operating restriction | Limit, duration and owner | _____ |
| Next action | Owner, due time and escalation point | _____ |
| Acceptance | Outgoing and incoming names | _____ |

### Closed-loop handover

The incoming person repeats the current state, restriction and next action in their own words. Correct any mismatch before responsibility changes hands.

## Maintenance Reliability and OEE Evidence Map

**Evidence first: Preserve alarms, event history, settings, trends and the as-found physical state before reset, disconnection or adjustment. If safe access is uncertain, stop and refer the task to the authorised person.**

| # | System area | Evidence action | Trace | Record |
|---|---|---|---|---|
| 1 | Failure start and detection time | Observe and identify | Evidence ID: _____ | Finding: _____ |
| 2 | Asset function lost | Record source and time | Evidence ID: _____ | Finding: _____ |
| 3 | Operating context | Compare with reference | Evidence ID: _____ | Finding: _____ |
| 4 | Temporary restoration | State what it supports | Evidence ID: _____ | Finding: _____ |
| 5 | Confirmed cause evidence | State what it rules out | Evidence ID: _____ | Finding: _____ |
| 6 | Production and safety impact | Choose the least invasive next check | Evidence ID: _____ | Finding: _____ |

## Scenario boundary

For this loss of output or performance, confirm the complaint with comparable conditions before escalating the repair. Write the boundary before testing so urgency does not quietly change the rules.

| Boundary | Definition |
|---|---|
| Known good condition | _____ |
| Known failed condition | _____ |
| Difference between them | _____ |
| First missing evidence | _____ |
| Stop-work threshold | _____ |
| Escalation owner | _____ |

### Evidence labels

- FACT - directly observed and traceable.
- REPORT - supplied by another person; source recorded.
- INFERENCE - reasonable explanation that still needs a test.
- UNKNOWN - important gap that must not be filled by assumption.
- LIMIT - OEM, engineering or site acceptance value.

## Loss of Output or Performance Condition Workbook

The goal is to compare expected capacity with the actual result under a recorded load. Describe the failed state narrowly enough that another trained person could look for the same thing without being told your suspected cause.

| Question | Boundary prompt | Record |
|---|---|---|
| What changed? | Function, output, indication or behaviour | _____ |
| Where? | Asset, side, circuit, zone or process stage | _____ |
| When? | Sequence step, runtime, load or environment | _____ |
| How often? | Every cycle, random, once, or after delay | _____ |
| What restores it? | Nothing, time, reset, cooling or load change | _____ |
| What stays normal? | Unaffected systems or functions | _____ |
| What changed recently? | Work, software, settings, parts or operating duty | _____ |

## Controlled reproduction plan

| Plan field | Record |
|---|---|
| Safe starting state | _____ |
| One condition to vary | _____ |
| Conditions held constant | _____ |
| Evidence captured | Baseline, demand, output and limiting indication |
| Maximum attempts | _____ |
| Immediate stop signal | _____ |
| Authorising person | _____ |

### Attempt notes

| Attempt | Starting condition | Result | Decision |
|---|---|---|---|
| 1 | State: _____ | Observed: _____ | Next decision: _____ |
| 2 | State: _____ | Observed: _____ | Next decision: _____ |
| 3 | State: _____ | Observed: _____ | Next decision: _____ |
| 4 | State: _____ | Observed: _____ | Next decision: _____ |

## Measurement and Evidence Register

**Measurement boundary: This page records an approved test; it does not authorise one. A qualified person must choose the method, instrument category, connection points, isolation state and protective controls from the applicable procedure.**

| ID | Evidence area | Traceable source | Result | When |
|---|---|---|---|---|
| 1 | Failure start and detection time | Method / source: _____ | Value / state: _____ | Time: _____ |
| 2 | Asset function lost | Method / source: _____ | Value / state: _____ | Time: _____ |
| 3 | Operating context | Method / source: _____ | Value / state: _____ | Time: _____ |
| 4 | Temporary restoration | Method / source: _____ | Value / state: _____ | Time: _____ |
| 5 | Confirmed cause evidence | Method / source: _____ | Value / state: _____ | Time: _____ |
| 6 | Production and safety impact | Method / source: _____ | Value / state: _____ | Time: _____ |

## Instrument and reference record

| Control | Record |
|---|---|
| Instrument or data source | _____ |
| Identifier and range | _____ |
| Calibration / validation status | _____ |
| OEM or engineering reference | Document and revision: _____ |
| Equipment operating state | _____ |
| Uncertainty or limitation | _____ |

### Before using a value

- Check units, scale, timestamp and source identity.
- Keep raw evidence where practical; do not retain only a conclusion.
- Record values that disagree with the current theory.
- Compare only like operating conditions.
- Treat a single normal reading as one data point, not proof that an intermittent fault is absent.

## Cause and Evidence Matrix

List competing explanations before the team settles on one. A good next check separates hypotheses; a poor check produces the same answer no matter which cause is true.

| # | Hypothesis | Supporting | Contradicting | Discriminating check |
|---|---|---|---|---|
| 1 | Failure start and detection time hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 2 | Asset function lost hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 3 | Operating context hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 4 | Temporary restoration hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 5 | Confirmed cause evidence hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 6 | Production and safety impact hypothesis | For: _____ | Against: _____ | Next evidence: _____ |

## Five-why chain with evidence

| Level | Explanation | Proof or gap |
|---|---|---|
| Problem | Loss of Output or Performance | Evidence ID: _____ |
| Why 1 | _____ | Evidence: _____ |
| Why 2 | _____ | Evidence: _____ |
| Why 3 | _____ | Evidence: _____ |
| Why 4 | _____ | Evidence: _____ |
| Why 5 | _____ | Evidence: _____ |

### Cause confidence

- Confirmed - reproduced or directly measured against a valid reference.
- Probable - best fit, but one meaningful alternative remains.
- Possible - plausible and worth a safe test.
- Unrelated - contradicted by the evidence.
- Unknown - evidence is missing or unreliable.

## Repair Decision and Return-to-Service Gate

**Release authority: Completion of a repair is not permission to energise or operate. Restore energy and return equipment to service only through the site's authorised process, with guards and protective functions reinstated.**

| Decision field | Record |
|---|---|
| Confirmed problem | _____ |
| Evidence-supported cause | _____ |
| Approved repair reference | Document and revision: _____ |
| Work completed | _____ |
| Parts / settings changed | _____ |
| Residual defect or restriction | _____ |
| Person completing / checking | _____ |

## Controlled verification

| Verification | Acceptance basis | Status |
|---|---|---|
| As-found symptom | Loss of Output or Performance | Absent / present / not tested |
| Primary function | Failure start and detection time | Pass / fail / not tested |
| Related function | Asset function lost | Pass / fail / not tested |
| Protection and alarms | Normal protective state retained | Pass / fail / not tested |
| Leak, heat, noise or damage | No new adverse condition | Pass / fail / not tested |
| Recorded operating condition | Load / mode / duration: _____ | Accepted / restricted |

### Release signatures

- Technical check by: _____ Date/time: _____
- Operations acceptance by: _____ Date/time: _____
- Safety or permit close-out by: _____ Date/time: _____
- Follow-up owner and due date: _____

## Handover, Follow-Up and Prevention Plan

Close the record so the next shift can understand the loss of output or performance, the evidence, the repair decision and any remaining restriction without relying on memory.

| Handover field | Record |
|---|---|
| Current equipment state | _____ |
| What was confirmed | _____ |
| What remains unknown | _____ |
| Operating restriction | _____ |
| Evidence location | Log / work order / folder: _____ |
| Next owner and action | _____ |
| Escalation trigger | _____ |

## Follow-up schedule

| When | Review | Record |
|---|---|---|
| Next shift | Confirm state and restriction | Owner: _____ Result: _____ |
| 24 hours | Review failure start and detection time | Owner: _____ Result: _____ |
| 7 days | Check for repeat events under comparable duty | Owner: _____ Result: _____ |
| 30 days | Review effectiveness and maintenance action | Owner: _____ Result: _____ |

### Prevention decision

- Update the task, limit, drawing or training only when the cause supports it.
- Remove any temporary control by its approved expiry point.
- Share the lesson without exposing private, security-sensitive or proprietary data.
- Record whether the action reduced repeat faults, downtime or diagnostic effort.
- Reopen the analysis if the symptom returns under the same conditions.

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