# VFD and Servo Drive Systems Fault Intake and Triage Worksheet - Recurring Fault After Repair

VFD and Servo Drive Systems | Recurring Fault After Repair | Asset ID FIX-08-01-10

**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 vfd and servo drive systems. It helps a trained team preserve alarm history and operating context before resets, parameter edits or replacement. 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 | Recurring Fault After Repair |
| Operating state | Stopped / standby / starting / running / loaded |
| Safety owner | _____ |
| OEM reference used | Document number and revision: _____ |

## Evidence areas for this system

For a recurring fault after repair, 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 | Alarm and event history | As-found note: _____ |
| 2 | Incoming supply state | As-found note: _____ |
| 3 | Drive status and command source | As-found note: _____ |
| 4 | Motor and feedback connection | As-found note: _____ |
| 5 | Load and motion condition | As-found note: _____ |
| 6 | Parameter-change record | As-found note: _____ |

## Fault Intake and Triage Worksheet

Use this section to compare the new event with the original evidence and the completed repair record. Record what changed, what stayed the same and how long the repair held before choosing the next action.

| Triage field | Prompt | Record |
|---|---|---|
| Exact complaint | What did the reporter see, hear, smell or lose? | _____ |
| First occurrence | Date, shift, runtime or cycle | _____ |
| Current state | Active, intermittent, cleared or unknown | _____ |
| Operational impact | Stopped, degraded, quality, safety or nuisance | _____ |
| Recent change | Repair, setting, product, operator or environment | _____ |
| Evidence preserved | Logs, alarms, trend, photo or sample | _____ |
| Escalation | Owner, urgency and safe holding condition | _____ |

### Triage decision

- Stop and secure if any safety boundary is uncertain.
- Preserve volatile evidence before reset or power cycle.
- Separate confirmed facts from the reporter's theory.
- Assign one owner for the next authorised action.
- State what must happen before operation can resume.

## VFD and Servo Drive Systems 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 | Alarm and event history | Observe and identify | Evidence ID: _____ | Finding: _____ |
| 2 | Incoming supply state | Record source and time | Evidence ID: _____ | Finding: _____ |
| 3 | Drive status and command source | Compare with reference | Evidence ID: _____ | Finding: _____ |
| 4 | Motor and feedback connection | State what it supports | Evidence ID: _____ | Finding: _____ |
| 5 | Load and motion condition | State what it rules out | Evidence ID: _____ | Finding: _____ |
| 6 | Parameter-change record | Choose the least invasive next check | Evidence ID: _____ | Finding: _____ |

## Scenario boundary

For this recurring fault after repair, reopen the diagnosis instead of repeating the same replacement without evidence. 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.

## Recurring Fault After Repair Condition Workbook

The goal is to compare the new event with the original evidence and the completed repair record. 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 | What changed, what stayed the same and how long the repair held |
| 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 | Alarm and event history | Method / source: _____ | Value / state: _____ | Time: _____ |
| 2 | Incoming supply state | Method / source: _____ | Value / state: _____ | Time: _____ |
| 3 | Drive status and command source | Method / source: _____ | Value / state: _____ | Time: _____ |
| 4 | Motor and feedback connection | Method / source: _____ | Value / state: _____ | Time: _____ |
| 5 | Load and motion condition | Method / source: _____ | Value / state: _____ | Time: _____ |
| 6 | Parameter-change record | 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 | Alarm and event history hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 2 | Incoming supply state hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 3 | Drive status and command source hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 4 | Motor and feedback connection hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 5 | Load and motion condition hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 6 | Parameter-change record hypothesis | For: _____ | Against: _____ | Next evidence: _____ |

## Five-why chain with evidence

| Level | Explanation | Proof or gap |
|---|---|---|
| Problem | Recurring Fault After Repair | 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 | Recurring Fault After Repair | Absent / present / not tested |
| Primary function | Alarm and event history | Pass / fail / not tested |
| Related function | Incoming supply state | 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 recurring fault after repair, 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 alarm and event history | 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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