Operator rounds checklist template

infotechnics

Free template and guidance: www.infotechnics.com/operator-rounds-checklist

How to use it

1. **Set up the route.** List the equipment in the order operators will walk it. Give each check a clear description and say when it applies.
2. **Add approved limits and expected conditions.** Use your site's procedures and equipment guidance. Have the route reviewed by someone with the relevant knowledge and authority before it's used.
3. **Record what you find.** Enter the actual reading or observation, the time checked and a status. If a check can't be completed, record why.
4. **Review the findings and hand over open work.** Account for incomplete checks and outstanding actions, and include anything important in the handover.

Status: **C** = Completed, no exception · **E** = Exception recorded · **NC** = Not checked, reason required · **NA** = Not applicable, reason required. Use the letters, not colour alone.

Route identification

Definition fields, agreed when setting up the route.

Site _____ **Area/unit** _____

Route name/ID _____ **Route revision** _____

Operating states covered _____

Planned schedule _____

Procedure reference _____

Route prepared by _____

Approved by _____ **Approval date** _____

Execution fields (date, shift, operator, run reference, start, finish, operating state) go on page 2 for each round. Use the same run reference on continuation sheets and finding records.

Template scope. This is a starting template for routine rounds. Adapt and approve it for your site. It doesn't replace operating procedures, risk assessments or required specialist inspections. Using it isn't site approval: your site supplies its own approval and procedure references.

Before you go out

- [ ] Review the handover and relevant logbook entries for changes affecting the route, including equipment out of service, isolations, overrides and temporary instructions.
- [ ] Check for unavailable equipment, restrictions, isolations, permits and work taking place nearby.
- [ ] Confirm the required PPE, communication equipment (including a radio) and any other equipment specified for the route, such as a gas detector or a device approved for the zones you'll walk through.
- [ ] Know how to raise an urgent finding. Where lone-working arrangements apply, confirm the check-in and return arrangements.

Urgent findings should be reported straight away. Follow your site's escalation procedure. Don't wait until the round is complete, and don't rely on the completed sheet being reviewed later.

How to define a check

ILLUSTRATIVE EXAMPLE ONLY

Equipment	Check	Expectation field	Recording guidance
Example: duty pump	Discharge pressure when running	Enter the site-approved range and units for this operating state.	Record actual pressure, time and status; use a finding reference if outside the approved range.
Example: accessible equipment area	Visible condition from the designated safe observation point	Enter the approved inspection criteria.	Describe any observed change; report and reference the finding as required.
Example: tank	Indicated level	Enter approved operating-state limits and units.	Record the indication; do not assume a universal acceptable level.

Operator rounds checklist

Sheet _____ of _____

Site _____ Area/unit _____ Route name/ID _____ Route revision _____ Date _____ Shift _____

Operator _____ Round/run ref. _____ Actual start _____ Actual finish _____ Operating state _____

Check ID	Equipment / location	Check / applicable state	Approved expectation / units	Reading / observation	Time	Status	Finding / reason ref.
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	
						C · E NC · NA	

Status: **C** = Completed, no exception · **E** = Exception recorded · **NC** = Not checked, reason required · **NA** = Not applicable, reason required. Use the letters, not colour alone.

Finding record

One finding per page. Print extra findings pages as you need them, just as you print extra route sheets.

Route/run ref. _____ Date _____ Shift _____ Operator _____

1 IDENTIFICATION

Finding ID _____ Route/run reference _____

Related check ID _____ ☐ Ad hoc observation

Equipment/tag and location _____

Date/time found _____ Site priority, if used _____

2 FINDING AND ACTION TAKEN

Finding, or reason not checked or not applicable

Action taken, with date/time

3 COMMUNICATION

Person or team informed _____

Communication method _____ Date/time informed _____

4 FOLLOW-UP AND HANDOVER

Follow-up required ☐ Yes ☐ No

Responsible person or team _____ Due time or next review time _____

Task, work-order or reference number, where applicable

Photograph or reference, where available and permitted

Current status and latest update

Handover reference, where relevant _____

This template records follow-up. It does not prescribe maintenance work or authorise equipment operation.

Round review

Complete before the end of the shift.

Route/run ref. _____ Date _____ Shift _____ Operator _____

After the round

- [ ] Account for each check, including anything not completed.
- [ ] Confirm that urgent findings have already been reported.
- [ ] Give outstanding work a responsible person or team and a next action.
- [ ] Include relevant findings and incomplete checks in the shift handover.
- [ ] Complete the review and filing steps required by your site.

Incomplete-check references

_____

_____

_____

Outstanding-finding references

_____

_____

_____

Handover record/reference _____

Additional notes

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Completion and review

The round record can be completed while separately identified follow-up work remains open. Completing the record doesn't mean every issue is closed.

	Name	Signature	Date/time
Round record completed by			
Reviewed by (where your site requires review)			