Storage — Point Value

- Are lubricant containers stored in a heated, ventilated area? _____
- Are all drums stored off the floor in a spill containment station? _____
- Is the lubricant storage area separated and protected from contamination sources? _____
- Are there provisions for clean and orderly storage of rags, sample bottles, top-off containers, grease guns and other lubrication accessories? _____
- Are containers (drums, pails, etc.) clearly marked to avoid misapplication of lubricants? _____
- Are samples taken on new oil (drums or bulk) to verify type, cleanliness and contamination? _____
- Is storage area neat, clean and well maintained? _____
- Are lubricants consolidated to minimize inventory? _____
- Are identical lubrication products (drums, grease, etc.) stored in the same location to avoid confusion and help ensure oldest products are used first? _____

Category Subtotal _____ Possible Points _____

Handling and Dispensing

- Is the proper drum-moving equipment (drum dolly, caddy, grippers, drum hoists, etc.) used for moving drums? _____
- Are oil and grease products purchased through a single vendor? _____
- Is the date on lubricant containers used to ensure the oldest lubricant is used first? _____
- If lubricant is more than two years old, is it sampled before use? _____
- Are top-off containers covered tightly? _____
- Is oil drawn from drums or bulk tanks only when it is ready to be used? _____
- If drum pumps are used, does each drum have its own pump to avoid contamination with different oils? _____
- Are top-off containers clearly marked with the proper product information? _____
- Are top-off containers kept clean? _____
- Is a different container used for each brand, grade and type of oil to avoid contamination? _____
- On clean and/or critical systems, is oil filtered before it is introduced to the machines? _____
- Are breathers or desiccant filters used on drums or other bulk containers? _____
- Is dispensing equipment visibly clean? _____

Category Subtotal _____ Possible Points _____

Safety

- Are spilled or leaking containers removed from the area, and any spilled product cleaned up? _____
- Are all oily rags placed in tightly closed safety containers and disposed of regularly, based on area safety and environmental procedures? _____
- Where necessary, are machines properly shut down before lubricating or taking samples? _____
- Are fall protection precautions followed for high lubrication points? _____

Point Value

- Is the storage area properly ventilated to avoid excessive inhaling of fumes? _____
- Is proper lifting and moving equipment used when moving drums? _____
- Is a fire suppression system in place in the oil storage area? _____
- Are MSDS sheets maintained in the area, or can they be retrieved quickly from another source? _____

Category Subtotal _____ Possible Points _____

Training

- Has a person(s) been identified for performing lubrication in the area? _____
- Has the identified person(s) received formal lubrication education and training within the last three years? _____
- Is the identified person(s) the only individual responsible for lubrication tasks? _____
- Is area management supportive of lubrication training needs? _____

Category Subtotal _____ Possible Points _____

Preventive Maintenance

- Are the lubrication preventive maintenance frequencies based on speed, environment and hours of operation, or at a minimum, based on the original manufacturers' recommendations? _____
- Are preventive maintenance tasks in place to ensure equipment is routinely lubricated? _____
- Does the preventive maintenance task list the type and proper amount of grease to add, specifying number of strokes of the lubricator's grease gun, based on bearing size or manufacturer's recommendations? _____
- Has the lubricator's grease gun been checked for proper operation? _____
- When performing preventive maintenance tasks, is the specific amount of grease indicated? _____
- Does the technician use a grease gun with a known output? _____
- Are machine fill ports and grease fittings tagged with the proper lubricant identification? _____
- Are grease fittings cleaned before adding grease? _____
- Is the lubricator's grease gun stored in a clean, dry area? _____
- Are the proper greasing procedures followed for bearings with drain plugs? _____
- Does the lubricator understand that different greases may be incompatible and should be evaluated before mixing? _____

Category Subtotal _____ Possible Points _____

Oil Analysis

- Have all oil-using machines been evaluated for inclusion in the oil analysis portion of the lubrication program? _____
- Have equipment "tests" (profiles) been set up for each equipment type to ensure all equipment receives proper testing? _____
- Are PMs set up to take samples on a regular basis? _____
- Is there a procedure for drawing oil samples? _____

Point Value

- Is the person taking samples trained in the proper procedure for drawing oil samples? _____
- Are sample bottles kept in a clean area and opened only when ready to take a sample? _____
- Are sample ports installed on equipment where applicable? _____
- Are lab results carefully reviewed by a trained individual to monitor condition of oil and equipment? _____
- Are lab results (particles, moisture, viscosity, etc.) used proactively to eliminate causes of failure? _____
- Is oil changed in machines as condition warrants, and have routine oil changes been eliminated? _____
- Does the area use portable oil filtration equipment? _____
- Are oil cleanliness levels monitored closely, and are they an important consideration of this lubrication program? _____
- Does the area use portable oil filtration equipment in response to analysis data? _____
- Are lube and oil analysis preventive maintenance results documented in the Maintenance Management Data System history? _____

Category Subtotal _____ Possible Points _____

Recycling / Disposal

- Is oil recycled or disposed of properly according to area environmental procedures? _____
- Are dedicated containers provided for waste oil until pickup by a recycler? _____
- Is the proper documentation used for the tagging of waste oil containers? _____
- Are used oil containers stored in a containment area? _____

Category Subtotal _____ Possible Points _____