

Operator care and specialist maintenance

Complete a useful abnormality handover, keep operator and specialist responsibilities distinct, and verify a response under comparable conditions before closing the care loop.



Wiping the trace does not establish its source

Fictional teaching case: operator Nia performs the approved external condition check on press P4. The reference photograph shows the accessible base edge clean and dry. At the start of the shift she sees a new oil trace on the floor outside that edge. Earlier absorbent granules and wiping marks show that someone attempted cleanup, but there is no linked defect record.

Your role and the reference condition

Trained operator, team leader and qualified maintenance technician, each within the site-defined role.

Normal: The approved observation point is accessible, identified and compared with a current normal-condition reference. New deviations have a receiving owner and verification plan.

Gap: The floor has been cleaned before, but the source, current status and recurrence are unknown. A green cleaning tick is being mistaken for resolved equipment condition.

Work within these conditions

1. This lesson instructs observation and handover, not disassembly, adjustment, isolation or technical repair.
2. Immediate access control, spill response and operating decisions follow the site procedure and trained authority.

Fictional teaching case. Supplied observations support the exercise; proposed actions are not verified customer results.

See how the method works

Operator care and specialist maintenance contribute different capabilities. Define which observations, cleaning and checks the operator is trained and authorized to perform, with a clear reference for normal condition. When a deviation appears, record it and use the agreed response route. Technical diagnosis, isolation and repair remain with qualified personnel under approved procedures. Verify the response with the operator so the finding does not disappear into a work-order queue. Repeated observations can improve the care standard and maintenance plan. The word autonomous does not mean unrestricted repair, and a generic equipment-health score cannot replace evidence of condition.



Connected method map: Operator: detect, Operator: record, Maintainer: diagnose / act, Joint verification. Every authored connection is shown with a numbered arrow and named legend.

Follow the evidence and decisions

Inspect the supplied case inputs

Observation record	Supplied fictional evidence
Asset / point	P4; external base edge; reference photo NC-P4
Observed at 07:05	New trace beyond base; wiped smear and dry absorbent nearby
Earlier record	Cleaning checklist ticked; no linked abnormality ticket
Operator scope	Approved external observation and local response only
Unknown	Source of fluid, extent and whether it recurs in operation

01 / Record facts before explanations

Nia identifies P4 and the observation point, records time and visible trace, and compares it with NC-P4. She writes source unknown rather than seal failure.

Why: A useful observation preserves what another person can check. Naming an untested cause can send technical work in the wrong direction.

Evidence / check: Ticket AM-P4 names location, normal reference, observation and uncertainty.

02 / Make the authorized immediate response visible

She follows the approved local response and alerts the team leader. The record states what was actually done and who controls any operating or access decision.

Why: Cleaning, containment and equipment disposition are different actions. A tick without an action description cannot establish that the condition is controlled.

Evidence / check: The ticket records response and receiving authority; no technical repair is attributed to the operator.

03 / Complete a receiving handover

The leader routes AM-P4 to maintenance, obtains acknowledgment and agrees a review time. Maintenance receives the reference, observation and operating context, not just a request saying oil leak.

Why: A ticket in a queue is not a completed handoff unless someone owns the next decision.

Evidence / check: Qualified technician accepts the technical assessment; the leader keeps the issue visible at daily review.

04 / Define verification before closure

The operator and technician agree the relevant approved operating condition and observation point for follow-up. The technician documents any technical action separately.

Why: A dry photograph immediately after wiping cannot test recurrence. Verification must be suitable for the failure mode and safe operating context.

Evidence / check: AM-P4 specifies comparable condition, normal reference, observer and evidence; future results remain blank until observed.

05 / Return learning to the care routine

If the follow-up supports closure, the owner links verification and updates the normal reference or check instruction only through its approval route. If residue returns, the ticket stays open or is reopened with the new evidence.

Why: The feedback arrow from joint verification to operator care is essential. It prevents the same symptom becoming an endlessly repeated cleaning task.

Evidence / check: Ticket status, recurrence record and approved standard change are traceable; cosmetic cleanliness is not the closure criterion.

Completed observation and handover - technical outcome still open

Record field	Entry	Meaning / next owner
Identity / reference	P4 base edge; NC-P4; 07:05	Operator: observed deviation
Condition	Oil trace; wiped smear; dry absorbent	Source unknown, not diagnosed
Immediate response	Local procedure followed; leader notified	Leader controls response status
Technical handoff	AM-P4 accepted by maintenance	Qualified assessment pending
Verification	Same approved condition and point	Joint evidence before closure
Feedback	Recurrence returns to AM-P4	Owner updates approved care routine

Residue returns after cleaning

A fictional follow-up under the agreed condition finds a fresh trace at the same point. The checklist still shows cleaning complete.

Decision

Record recurrence against AM-P4, retain or reopen unresolved status and send the evidence to maintenance and the leader. Review the immediate response again under the local procedure.

Reasoning

The cleaning task may be complete while the equipment condition remains unresolved. Repeating the wipe and closing the ticket would discard contrary evidence.

What would change the decision?

A comparable observation with time, location and condition challenges the closure claim; it does not by itself identify the cause.

Practise with a changed case

The guard window is clean, but the mark returns

New fictional case: trained operator Dev checks the exterior viewing window of enclosed unit U7. The reference is a clear window with no fresh smear. The approved check permits external observation and cleaning only when the local procedure allows it. A recurring internal smear is visible after two documented external cleans; no abnormality ticket exists.

Fact	Status
Point	U7 exterior viewing window; reference NC-U7
History	Two external cleans; internal smear reappears
Authority	External approved care only
Proposal from colleague	Open the enclosure and wipe inside
Missing	Technical owner and comparable verification record

Your task

1. Complete the observation/handover without naming an untested cause.
2. Explain the response to the proposed enclosure access.
3. Define the evidence that would support closure or trigger further investigation.

Use the next page to record your reasoning before reading the answer.

Your practice worksheet

The guard window is clean, but the mark returns

Asset / point / reference / time

Observed fact versus hypothesis

Permitted immediate response

Receiving technical owner / acknowledgment

Comparable verification and feedback to standard

Complete your reasoning before turning to the answer. Use the separate learner workbook for group practice.

Check your reasoning and transfer it

1. Record U7, the window, NC-U7, recurring internal smear and the two external cleans. Source remains unknown; do not call it a particular failed component.
2. Do not turn an external-care instruction into authority to open the enclosure. Route technical access and assessment to the qualified role under its procedure while the leader manages the local response.
3. Closure needs the agreed technical and condition evidence, not a clean exterior. Recurrence under comparable conditions keeps the issue active and informs the care routine or maintenance plan.

Suggested completed record

Record field	Suggested entry
Observation	Recurring internal smear after two external cleans
Immediate decision	Stay within approved external-care scope
Handoff	Qualified technical owner accepts assessment
Verification	Comparable condition; record recurrence or verified normal
Feedback	Update authorized standard only after reviewed learning

Plausible wrong turns

1. Autonomous maintenance is not unrestricted repair.
2. A cleaning record is not evidence that a source of deterioration was corrected.

Evidence of a sound answer

1. Separate observation from diagnosis and cleaning from closure.
2. Name a receiving role and review point.
3. Make verification-to-care feedback explicit.

Take the learning back to work

Commitment	Agreed follow-through
Owner	Asset owner with operator, team leader and maintenance
Record	Abnormality ticket linked to normal-condition reference and work order
Review	At the agreed handover/verification point and daily while unresolved
Verification evidence	Accepted ownership, authorized action, comparable condition observations and recurrence status
If unresolved	Keep the condition visible, reassess local controls and escalate technical support; feed recurrence into planned maintenance or structured investigation.

Help someone else apply the method

Prepare

1. Illustrated normal/abnormal condition panel
2. Blank abnormality ticket
3. Role cards: operator, leader, qualified maintenance

Minutes	Activity and coaching prompt
5	Describe only visible facts Which words are observations and which are diagnoses?
7	Demonstrate the receiving handoff Who has accepted the next decision?
9	Complete U7 practice What evidence would challenge a closure claim?
6	Trace verification feedback What changes in tomorrow's check, and who approves it?

Debrief

1. Coach vague reports by asking for asset, point and normal reference.
2. If the learner repeats a warning only, ask them to complete the actual ticket and verification plan.

Individual or remote practice

Fill the ticket first, then assign each action to a role and draw the return from verification to the care routine.

Connect the method and check its boundaries

Before application

1. Training and access rules
2. Normal-condition references

Outside this lesson

1. Autonomous does not mean unqualified repair
2. Equipment wellness is not an invented health score

JIPM: About TPM

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Cross-functional loss prevention; autonomous and planned maintenance differ

Method reference; original OPEX scenario and diagram are synthetic teaching content, not source case results.

[Open this lesson and its visual aids](#)