

Automatic transfer switch (ATS) quarterly maintenance checklist

A quarterly automatic transfer switch round is short on purpose: it catches the wear items that fail between annual services. This checklist is sized for a tech with a phone. Every item says what to look at and the photo that proves the round happened. Work is commonly verified against NEC (NFPA 70), NFPA 110, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The electrical or facilities tech on the quarterly round, coordinated with whoever runs the generator so the building isn't dropped. When: Every quarter, tied to the generator exercise since the transfer switch is what proves the generator actually picks up the load.

Controller and status

- ☐ **Controller display and source indicators read**
Normal source present, controller in automatic, no active alarms or lockouts, source-available and switch-position lights matching reality. 1 photo required
- ☐ **Time-delay and pickup settings match the commissioned record**
Engine-start, transfer and retransfer delays checked against the setup sheet, not just left at whatever the last tech entered. 1 photo required

Transfer test

- ☐ **No-load or exercise transfer observed end to end**
Switch commanded to transfer and retransfer, mechanism moving fully to each position, position confirmed on the controller and by the mechanical indicator. 2 photos required

Enclosure

- ☐ **Enclosure closed, sealed and clear**
Door latched, gaskets intact, no water staining or rodent entry, required working clearance kept in front of the switch. 1 photo required