READY TO INSPECT — FIELD CHECKLIST

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

- [ ] Normal source voltage and frequency read on the controller
  Each phase read on the display against the nameplate rating and the commissioned pickup and dropout settings, with any sag or imbalance noted.
  1 photo required

- [ ] Event log read for transfers since the last visit
  Controller history checked for unplanned transfers, failed transfers and source outages, with each one traced before the switch is tested.
  1 photo required

- [ ] Exercise schedule confirmed on the controller that runs it
  Exerciser day, time and load or no-load mode match the owner's plan, whether set in the switch or the generator controller, and the clock is right.
  No photo required

Before the test

- [ ] Owner notified before the switch is tested
  Building contact told when the switch will transfer and which loads it serves, so nobody is surprised by a blink or a run on the generator.
  No photo required

- [ ] Life-safety loads handled under the owner's procedure
  Emergency lighting, fire alarm, elevators or other life-safety loads on this switch identified, and the owner's procedure followed, including notice to monitoring.
  No photo required

- [ ] Generator service ready with the set in auto
  Whoever runs the generator confirms the set is in auto with no alarms before the switch is commanded; engine-side checks stay with the generator service.
  No 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

- [ ] Emergency source voltage and frequency read while transferred
  While on the emergency source, controller readings checked against the commissioned settings, and the switch holding position without chatter.
  1 photo required

- [ ] Switch back on normal with the controller in automatic
  After retransfer and cooldown, switch on normal, controller in automatic, test switch released, no alarms, and the owner and generator service told.
  1 photo 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

- [ ] Nameplate, arc-flash and source labels legible
  Switch nameplate, arc-flash label and the normal, emergency and load identification readable and matching the building's one-line diagram.
  1 photo required

- [ ] Manual operator and its instructions present at the switch
  Manual operating handle in its holder or on the mechanism, and the manufacturer's instructions for de-energized manual operation kept with the switch.
  1 photo required