READY TO INSPECT — FIELD CHECKLIST

Surge protective device (SPD) quarterly maintenance checklist

A quarterly surge protective device 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), manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The electrician or maintenance tech on the quarterly panel round. When: Every quarter, walked with the panel it protects since a spent SPD looks identical to a healthy one until someone reads the indicators.

Before the round

- [ ] SPD label read for type, voltage and the panel it serves
  Label legible showing type, system voltage and configuration matching the panel it protects, and noted as built into the panel or mounted beside it, with any mismatch reported.
  1 photo required

- [ ] Covers kept closed and PPE confirmed before approach
  Indicators and housing read with panel and SPD covers closed on the round, with PPE chosen from the site's arc-flash risk assessment for the approach.
  No photo required

Indication and alarm

- [ ] Diagnostic indicator read for every phase
  Each phase indicator confirmed showing protected, not just the single summary light; any dark or amber phase noted as a module to replace.
  2 photos required

- [ ] Audible and visual alarm confirmed working
  Alarm exercised or its self-check confirmed, remote signal (dry contact or panel light) confirmed to actually report a fault.
  1 photo required

Connections and mounting

- [ ] Connection points checked for heat and discoloration
  Terminals at the SPD and its dedicated breaker observed or scanned for heat without touching, covers closed, no browning, melting or scorching where visible.
  2 photos required

- [ ] Lead length and mounting observed
  Conductors as short and straight as the install allows, no unnecessary loops, device mounted solidly and close to the panel it serves.
  1 photo required

- [ ] Breaker or disconnect feeding the SPD confirmed on
  Feed breaker or disconnect found closed, not tripped, and labeled for the SPD, with a tripped device reported to the owner rather than reset without finding why.
  1 photo required

- [ ] SPD housing checked for scorching, swelling or odor
  No scorch marks, melted plastic, bulged housing or burning smell at the SPD or its module face, which point to a surge event or a failing module.
  1 photo required

Service

- [ ] Module swaps left to the qualified electrician under lockout
  A spent module changed only by the qualified electrician after the SPD's feed is opened, locked, tagged and proven dead, never pulled live on the round.
  No photo required

- [ ] End-of-life module replaced when indicated
  A module showing spent replaced with the matching type and rating, replacement date recorded so the next round knows the module is fresh.
  No photo required

- [ ] Feed restored and indicators read after any module change
  After a module change, the lock removed by the electrician who hung it, the feed closed, and every phase indicator showing protected before the panel is left.
  No photo required

Records and follow-up

- [ ] Phase status logged beside last quarter's reading
  Each phase's indication and any alarm logged beside last quarter's, so a phase that lost protection shows up with a date.
  No photo required

- [ ] Spent modules and alarms reported to the owner
  Any dark phase, alarm, tripped feed or scorched housing reported to the owner with the module part number, so the replacement is ordered.
  No photo required