Diagnostic intake checklist

Prepare a clear machine and job record before asking for technical help. This is an intake worksheet, not a diagnostic procedure.

Use this with a qualified technician. Record observations, sources and unknowns; follow the applicable manufacturer and workplace procedures for any work.

- [ ] **01 / Machine identity**

  Make, model, full serial or approved serial range, power type, hour-meter reading and date. Note attachments or modifications that affect the job.

- [ ] **02 / Reported symptom**

  Use the operator’s own description where helpful. Copy the exact displayed code or message without assigning it a universal meaning.

- [ ] **03 / Conditions and timing**

  When did it first occur? Intermittent or repeatable? Record warm/cold state, operating context and what changed before the complaint. Do not recreate an unsafe condition.

- [ ] **04 / Observed evidence**

  Separate what a qualified technician observed from what was reported. Include dates and available approved photos or readings without exposing private records.

- [ ] **05 / Recent work**

  Previous job reference, parts replaced, software or configuration changes and the recorded outcome. A previous replacement does not verify a cause.

- [ ] **06 / Checks already completed**

  Who performed each check, under which applicable procedure, and what was actually found? Record incomplete checks as incomplete.

Diagnostic intake checklist / continued

☐ 07 / Source and permission

Document title, revision, page or section, machine applicability and authority to share it. Mark missing or mismatched references explicitly.

☐ 08 / Current status and owner

Record the machine’s status under your established process, the qualified person responsible and the next review. Do not use an AI answer as return-to-service authorization.

☐ 09 / Reviewed case note

After review, record the finding, approved action, observed result, unresolved questions and reviewer. Preserve corrections and source context.

Your working notes

Machine / job reference:

Reported condition and timing:

Applicable source and revision:

What is known / what is still missing:

Qualified reviewer / next action / date:

Primary references / consulted September 27, 2026

OSHA · Powered industrial trucks

Toyota · Model and serial number identification