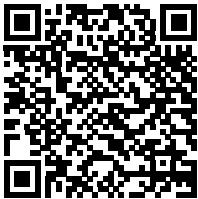


ACADEMY / STUDY BOOK

Maintenance Inspection & Service Planning

Build a vehicle-specific maintenance plan from inspection evidence, service history and the applicable schedule.



Scan to continue this course online and find more Academy training.

<https://mechanicroster.com/index.php/academy/maintenance-inspection-service-planning>

How to use this book

Read the lessons, work each example, then complete the practice questions before checking the answer explanations. Write your evidence and next step in the exercises. Training examples are not vehicle service specifications.

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Before you begin

Basic vehicle-system identification and shop safety orientation. Actual service requires applicable procedures and practical training.

Learning objectives

- Select the correct maintenance schedule and operating-condition category.
- Separate inspection findings, scheduled service and diagnostic concerns.
- Build a prioritized, authorized service plan.
- Verify work and preserve a useful maintenance history.

Course contents

Start with the vehicle, history and schedule

Make a consistent condition inspection

Prioritize and authorize a sensible plan

Verify service and build the next useful record

Worked shop cases / Practical worksheet / Practice assessment / Answer explanations / Further study

Start with the vehicle, history and schedule

A maintenance plan begins with the exact vehicle and its applicable schedule, not a universal mileage package. Record VIN, configuration, mileage, date, service history and relevant use conditions. Time and distance can both matter. An item due by time is not automatically postponed because annual mileage is low.

Check how the manufacturer defines operating categories such as severe service. Do not label every driver severe solely to shorten intervals, and do not assume highway use fits the same category as repeated short trips or a specific demanding application. Use the actual definitions and ask the customer for relevant use information.

Review records before recommending repeat work. A missing receipt means history is uncertain, not proof that the service was never done. Ask for available evidence and describe uncertainty honestly. A maintenance reminder is a useful prompt, but its status alone does not prove that all scheduled work has or has not been performed.

Schedule exercise

A fictional item is due every 12 months or 10,000 miles, whichever comes first. The last documented service was 14 months and 6,000 miles ago. It is due by time under that exercise rule. Do not turn that example into a real interval for any vehicle.

Separate the customer's requested maintenance from symptoms that require diagnosis. A fluid service should not be sold as a guaranteed cure for a warning or drivability problem without appropriate evidence.

Build the schedule from the application

Identify the exact vehicle, powertrain and relevant equipment, then obtain the applicable maintenance information. Time, distance, operating conditions and monitoring systems may all affect what is due. A generic shop package is a sales grouping, not proof that every included operation is required for this vehicle today.

Review history before recommending repeated work. Distinguish verified records from a customer's uncertain recollection and from missing information. "No record available" does not mean "never performed." Ask the next useful question and explain the uncertainty. A previous sticker may be helpful context, but it should not override the correct schedule without understanding what it represents.

Use operating conditions correctly

Where the manufacturer defines different service conditions, determine whether the actual use meets those definitions. Do not label every driver "severe service" merely to shorten intervals. Record the relevant use and source. If an onboard indicator is involved, understand its meaning and any complementary requirements; resetting it is not the same as completing the associated service.

Build the vehicle's maintenance story

Identify the exact vehicle, usage, applicable schedule and known service history. An odometer value alone does not describe time-based items or the operating conditions relevant to a schedule. A missing invoice means the history is unknown, not that the service was definitely never performed. Ask clarifying questions and document the evidence source.

Use manufacturer definitions when considering a severe-service schedule. Do not apply the more intensive category to every customer solely to create more work. Conversely, do not dismiss relevant usage because the vehicle looks clean. Explain how the actual use maps to the applicable criteria and preserve that reasoning in the maintenance plan.

A defensible maintenance recommendation

- Vehicle Exact application and relevant configuration
- History Documented work versus unknown history
- Use Actual conditions and applicable schedule
- Plan Due items, findings and next checks

Try it before reading the answer

An oil-service invoice is missing. What should the advisor record before declaring the service overdue?

Worked answer and reasoning

Record the missing or unverified history, ask for relevant information and compare the applicable time/mileage requirements with what is known. Do not convert absent paperwork into a definite claim that no service occurred.

Make a consistent condition inspection

Use a repeatable checklist with defined inspection methods and status meanings. Record actual observations for applicable fluids, belts, hoses, filters, lighting, tires, leaks and other authorized items. Mark not inspected, not applicable and uncertain distinctly from pass. An attractive green checklist is misleading if inaccessible items were silently treated as normal.

Inspect within the task's safety boundaries. Hot, pressurized, moving or energized systems may require special conditions. Do not open a hot pressurized system or perform an unfamiliar energized test because the checklist has a box for it. Obtain the correct procedure and qualified help.

Pair each finding with location and evidence. "Fluid leak visible at the lower area" is not yet proof of the originating seal. A dirty exterior surface may need a proper source investigation. Likewise, color alone does not establish every fluid's condition or specification. Use the applicable test, interval and service information.

Useful inspection status language

Status	Meaning
Inspected / meets criterion	Named check completed against a defined reference
Finding recorded	Observed condition needs the stated action or evaluation
Not inspected	No claim about condition
Not applicable	Item does not apply to this configuration

A photograph should show this vehicle and the relevant feature. Use labels and measurements where helpful, and never substitute a generic illustration as inspection evidence.

A checklist is a measurement system

Define what each inspection item means and how it is checked. "Fluids okay" could refer to level, visible condition, leakage, specification or several different checks. Separate them when they require different evidence. Record actual measurements and locations where appropriate. A photograph adds context, but it does not automatically establish a limit or identify the source of a leak.

Use statuses consistently: inspected and within the applicable criterion; finding recorded; not inspected; and not applicable. A blocked view or missing tool belongs under a limitation, not a pass. An inspection with honest boundaries is more useful than a completely green form created from assumptions.

Trace the observation

For a leak, identify where evidence is visible and whether the source is established. For a belt or hose, describe the observed condition and location. For a filter, use the relevant service criterion rather than a dramatic generic photograph. Keep hot, pressurized, moving and energized-system precautions attached to the inspection method. The checklist must not invite an unsafe check just because a box exists.

Distinguish condition from scheduled service

A scheduled replacement and a condition-based repair have different evidence. The schedule may establish when an item is due, while a measured condition may justify a separate repair or diagnosis. Explain the reason for each recommendation. A single red label applied to every item makes the priorities harder to understand.

The fictional table separates a due scheduled item, a measured concern and an unresolved noise. Each needs its own scope and decision. The noise is not automatically cured by the scheduled service, and the measured finding is not merely a reminder. A useful inspection form records enough detail for another person to understand why the status was assigned.

Three different recommendation reasons

- Scheduled item
- Condition finding
- Further diagnosis

Keep schedule-based work, evidence-based findings and unresolved diagnostic concerns distinct in the customer's plan.

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Fictional inspection planning record

Item	Evidence	Proposed scope
Scheduled filter	Applicable schedule due	Named maintenance service
Fluid wetness	Observed at named location	Inspection to establish source
Intermittent noise	Reported, not reproduced	Agreed diagnostic next step

Try it before reading the answer

Which items in this table already establish a unique failed part?

Worked answer and reasoning

None of these entries alone establishes a unique failed part. The scheduled item has a maintenance basis; wetness and the noise require the appropriate investigation. Explain the evidence and uncertainty rather than inventing a diagnosis.

Prioritize and authorize a sensible plan

Sort recommendations into distinct reasons: a documented safety concern, a diagnosed repair, scheduled maintenance due under the applicable guidance, further diagnosis, or an optional improvement. Explain the reason, consequence supported by evidence, scope, cost and timing. Do not claim every due item is an immediate emergency.

Verify the correct fluid, part and service method for the actual application. Similar color, packaging or a broad marketing label is not proof of compatibility. Include required seals, one-time hardware, related checks and disposal in the plan where applicable. Do not invent a universal flush or additive requirement.

Obtain authorization for the selected scope and record declined or deferred items separately. If inspection reveals new work, revise the plan and get the appropriate decision before proceeding. A prepaid maintenance visit does not automatically authorize unrelated repairs.

Prioritization exercise

The vehicle has a documented tire damage concern, an air filter due by the supplied schedule, and an unconfirmed noise. Explain each differently: safety evaluation/action, scheduled service, and diagnosis. Quoting all three as “urgent repairs” hides the nature of the evidence and the decision.

Respect a customer's budget by discussing compatible choices and a clear sequence. Do not remove required safety or verification steps silently to make the price appear lower. If the proposed scope cannot be performed appropriately, explain the limitation.

Prioritize by reason and evidence

Sort findings into a documented safety concern, a diagnosed repair, scheduled maintenance, further diagnosis or an optional improvement. Explain why each belongs in its category. A due maintenance item is not automatically an imminent failure, and an unconfirmed symptom is not yet a repair verdict. The customer should be able to distinguish what is known from what is recommended for investigation.

Build each proposed operation with the correct product/specification, method, associated parts and verification. Similar fluid color or a broad marketing label does not establish compatibility. Do not assume an additive or flush is universally required. Include the applicable requirements and explain optional items separately.

Create a staged plan honestly

If the customer has a budget constraint, discuss an appropriate sequence and its limits. Do not silently remove necessary steps or minimize a safety concern to make the total fit. Record accepted, declined and deferred items separately, with the information communicated. Obtain approval for changed scope before treating a newly found issue as part of a prepaid maintenance visit.

Prioritize with reasons and explicit decisions

A priority should explain why action is recommended and what uncertainty remains. Separate safety-related findings, due maintenance, further diagnosis and optional improvements. Do not give a guaranteed failure date when the evidence does not support one. Present the proposed scope, cost and timing so the customer can make an informed decision.

Record approved, declined and pending items separately. Approval of one maintenance item does not authorize every related repair. If the inspection reveals added work, use the required revision and authorization process. Keep declined findings visible for the handoff without pressuring the customer or pretending that a decline removes the finding.

From inspection to authorized work

- Explain Evidence, purpose and uncertainty
- Prioritize Reason for timing, not a sales label
- Decide Approved, declined or pending
- Dispatch Only the approved scope

Try it before reading the answer

A customer approves the scheduled filter but not diagnosis of a noise. What may proceed and what remains?

Worked answer and reasoning

Proceed with the approved filter service under its conditions. Keep the noise as an unresolved diagnostic concern and record the customer's decision. Do not perform unapproved diagnosis or imply the filter service resolved the noise.

Verify service and build the next useful record

Before release, verify that the authorized service used the correct materials and method, that disturbed items are secure, and that required level, leak, function and warning checks are complete. The exact conditions for a fluid-level check can vary; record the applicable method rather than assuming cold or hot checks are interchangeable.

Reset a maintenance reminder only when the applicable completed service and procedure justify it. Resetting does not perform the work. Conversely, a reminder that was not reset does not by itself prove the work was omitted. Preserve the actual service record so the next visit is based on evidence.

Document date, mileage, work, relevant specification or product identification, verification and the next interval basis. State what was not done and why. If history remains uncertain, keep that uncertainty in the record rather than inventing a prior service date.

Delivery explanation

“The authorized scheduled service is complete and the required checks are recorded. The noise remains a separate diagnostic recommendation. Your next service planning should use this date and mileage with the applicable schedule, not a generic sticker alone.” This prevents maintenance from being confused with diagnosis.

Review the completed checklist for internal consistency: no completed item should also be marked declined; no not-inspected item should appear as passed. Good records reduce duplicate work, help customers plan and give the next technician a reliable starting point.

Make the completed record useful next time

Record the date, mileage, operations actually performed, relevant product/specification and applicable verification. Distinguish inspection from replacement. A line saying “checked filter” should not become evidence that the filter was replaced at the next visit. Preserve measurements that establish a trend when comparison is appropriate.

Complete the correct reset or service-record update only for work actually performed and according to the vehicle instructions. Verify levels, leaks, assembly condition and relevant operation as required. A reset indicator is not proof of correct fluid, quantity or procedure. If part of the service could not be completed, retain the limitation and the next action.

Plan the next contact

Base the next recommendation on the applicable schedule and documented conditions rather than a universal mileage sticker. Explain how time, distance or actual use affects it. Give the customer the record and an understandable summary of completed and remaining items. Good maintenance planning reduces both missed work and unnecessary repetition.

Leave the next visit a reliable starting point

Record actual work performed, date, mileage, applicable product or procedure details and verification. Reset a service reminder only as appropriate to the performed work and vehicle instructions. A cleared reminder is not proof that a service occurred; the underlying work record matters.

For the next interval, identify the applicable time or mileage trigger rather than inventing a universal recommendation. Explain remaining findings and their agreed follow-up. A consistent record helps the next technician distinguish a new concern from a previously documented item and avoids reselling work because history was poorly captured.

Completion record checklist

Field	Useful content
Work	Named service actually performed
Reference	Applicable schedule/procedure
Timing	Actual date and mileage
Remaining items	Decision and follow-up owner

Try it before reading the answer

Why is “maintenance reset complete” insufficient as the only history entry?

Worked answer and reasoning

It documents a reminder action, not the underlying service, materials, date/mileage context or verification. Record the actual performed work and applicable next requirement.

Work the shop cases

No record is not proof of no service

The current file contains no record of a scheduled fluid service. The customer believes it was done elsewhere but is unsure of the date. The advisor writes “never serviced” and sells a universal flush package without verifying the vehicle's required product or method.

Correct the evidence statement and build a defensible recommendation process.

Your evidence, decision and next step:

Compare with the model answer

Record that service history is unverified, not that service never occurred. Request available records and obtain the correct vehicle-specific interval, product and method. Explain what is due based on known time/distance/conditions and where uncertainty remains. Do not substitute a universal flush for the applicable operation. Quote the actual proposed scope and obtain the decision. The resulting record should clearly establish what this visit performed for future planning.

One inspection, three different recommendations

An inspection finds a documented tire damage concern, an air filter due under the applicable schedule and a noise whose cause is not identified. The estimate labels all three “urgent repairs.” The customer can fund only part of the visit.

Reclassify the items, explain their different evidence and propose an honest conversation about scope and next steps.

Your evidence, decision and next step:

Compare with the model answer

The tire finding requires its appropriate safety/condition assessment and action; the filter is scheduled maintenance; the noise needs diagnosis before a repair claim. Explain the evidence and consequence supported for each, without inventing a failure date. Discuss appropriate priorities and limitations with the customer, record decisions separately and obtain authorization for the selected scope. Do not call the unconfirmed noise a specific repair or silently remove required safety/verification steps to reduce the price.

Apply it to a job

Apply the fictional 12-month/10,000-mile rule to three histories. Build an inspection sheet using pass, finding, not inspected and not applicable without mixing them. Sort a tire concern, scheduled filter and unexplained noise into different recommendation categories. Write an authorized service plan and a delivery record with date, mileage and open items.

Concern / scenario

Observation, measurement and reference

Interpretation and next action

Unknowns and who needs to review

Verification and handoff

Check your understanding

- Select a schedule using configuration and actual operating conditions.
- Distinguish missing records from confirmed missing service.
- Use honest inspection statuses and specific evidence.
- Separate safety, repair, maintenance, diagnosis and optional recommendations.
- Create a completed record that supports the next visit.

Practice assessment

Ungraded practice, separate from the final assessment. Answers and reasoning follow in the next section.

1. An exercise interval is 12 months or 10,000 miles, whichever first. It has been 14 months and 6,000 miles. Is it due under that rule?

- A. Yes, by time
- B. No, mileage always controls
- C. Only if a warning appears
- D. Only after 20,000 miles

2. An item was inaccessible. Which status is honest?

- A. Pass
- B. Not inspected
- C. Not applicable automatically
- D. Repaired

3. An unexplained noise appears during maintenance. What should be proposed?

- A. A guaranteed additive cure
- B. Automatic replacement of the most common part
- C. A defined diagnostic step, not an unproven repair
- D. No record because it was not requested

4. A reminder was reset. Does that prove service was performed?

- A. Yes for every item.
- B. Only if the dashboard is green.
- C. Only if the car is new.
- D. No; the actual work record is needed.

5. A due scheduled item and an unconfirmed noise should be grouped how?

- A. As different reasons and proposed scopes
- B. As identical confirmed failures
- C. As one automatically approved repair
- D. As optional items without explanation

6. Which next-service note is most defensible?

- A. One interval used for all vehicles
- B. The applicable time/mileage trigger and source
- C. The earliest date that maximizes sales
- D. A date inferred only from vehicle appearance

7. An owner reports a recent service but has no invoice. What is accurate?

- A. Confirmed absence of service
- B. Verified invoice evidence
- C. Owner-reported history, not yet independently documented
- D. Proof the service was performed incorrectly

8. What should remain in the record after a recommendation is declined?

- A. An approval entry
- B. A completed-work entry
- C. No trace of the finding
- D. Finding, decision and agreed follow-up

Answer explanations

1. Yes, by time

The earlier threshold controls this fictional rule. It is not a universal vehicle interval.

Review: Start with the vehicle, history and schedule

2. Not inspected

Access limits do not establish condition or applicability.

Review: Make a consistent condition inspection

3. A defined diagnostic step, not an unproven repair

A symptom needs investigation and an authorized scope.

Review: Prioritize and authorize a sensible plan

4. No; the actual work record is needed.

Reminder state and performed work are different evidence.

Review: Verify service and build the next useful record

5. As different reasons and proposed scopes

The evidence and purpose differ.

Review: Make a consistent condition inspection

6. The applicable time/mileage trigger and source

The next plan should follow applicable information.

Review: Verify service and build the next useful record

7. Owner-reported history, not yet independently documented

Label the information source honestly.

Review: Start with the vehicle, history and schedule

8. Finding, decision and agreed follow-up

A decline changes authorization, not the observed history.

Review: Prioritize and authorize a sensible plan

Further study

Use current vehicle and equipment information for actual service. These resources support further learning; lessons and questions in this book are original.

ASE maintenance and light-repair scope

<https://ase.com/tests/g1/>

NHTSA tire maintenance guidance

<https://www.nhtsa.gov/vehicle-safety/tires>