

Overview

This standard identifies the competences you need to carry out checks and adjustments to the operation of an escalator installation, to specified standards and in accordance with approved procedures. You will be required to select the appropriate tools and equipment to use, based upon the operations to be performed. The equipment to be checked and adjusted could be either an escalator or passenger conveyor equipment.

Your responsibilities will require you to comply with organisational policy and procedures for the testing and adjusting activities undertaken, and to report any problems with the testing and adjusting activities that you cannot personally resolve, or that are outside your permitted authority, to the relevant people. You must ensure that all tools, equipment, and materials used in the testing and adjusting activities are removed from the work area on completion of the activities, and that all necessary job/task documentation is completed accurately and legibly. You will be expected to work with minimal supervision, taking personal responsibility for your own actions, and for the quality and accuracy of the work that you carry out.

Your underpinning knowledge will provide a good understanding of your work, and will provide an informed approach to applying testing and adjusting procedures on escalator installations. You will understand the escalator equipment being checked and adjusted, and its application, and will know about the use of appropriate equipment and information, in adequate depth to provide a sound basis for carrying out the activities, correcting faults, and ensuring that the escalator operates safely and correctly to the required specification and remains compliant with all standards and regulations. You will also be expected to report where the outcome of the tests and adjustments identifies the need for further investigation or maintenance work.

You will understand the safety precautions required when carrying out the testing activities, especially those for isolating the equipment. You will be required to demonstrate safe working practices throughout, and will understand your responsibility for taking the necessary safeguards to protect yourself and others in the workplace.

Performance criteria

You must be able to:

1. work safely at all times, complying with health and safety legislation and other relevant regulations, directives and guidelines
2. follow the appropriate operating specifications for the equipment being maintained
3. carry out testing and adjustment activities within the limits of your personal authority
4. make the required adjustments in the specified sequence and in an agreed timescale
5. confirm that the adjusted equipment meets the required operating specification
6. report any instances where the equipment fails to meet the required performance after adjustments or where there are identified defects outside the required adjustments
7. complete and store all relevant documentation of the test outcome in accordance with organisational requirements

Knowledge and understanding

You need to know and understand:

1. the specific safety precautions to be taken when testing and adjusting the escalator installation (including any specific legislation, regulations or code of practice relating to the activity, equipment or materials used), and the responsibility they place on you
2. the health and safety requirements of the work area in which you are carrying out the testing and adjustment
3. the organisational procedure(s) for safe systems of work, risk assessment and use of a permit to work
4. hazards associated with carrying out testing and adjusting activities on escalators (such as handling oils/greases, electrical contact, process controller interface, using faulty or damaged tools and equipment, using practices/procedures that do not follow laid-down procedures, moving parts of equipment), and how to minimise them and reduce any risks
5. the personal protective equipment (PPE) that you need to wear during the testing activities
6. what constitutes a hazardous voltage and how to recognise victims of electric shock
7. how to reduce the risks of a phase to earth shock (such as insulated tools, rubber matting, isolating transformers)
8. safe methods of manual handling, and the safe use of mechanical lifting devices
9. how to obtain the required testing documentation and specifications for the escalator being tested, and how to check their currency and validity
10. how to read and interpret the specifications
11. the principles of operation of the equipment being tested or reinstated
12. the tools and equipment to be used during the testing and adjusting activities
13. appropriate methods of checking alignment using measuring equipment
14. procedures for adjustments, settings and checking
15. the checks to be made on tools and equipment used, to ensure that they are fit for service
16. how you would know if the tools or equipment are covered by calibration or legislative inspections
17. tool control during the testing and adjusting of equipment

Testing and reinstating escalator installations

18. the documentation to be completed for the activities undertaken
19. the extent of your own responsibility and to whom you should report if you have problems that you cannot resolve

Scope/range

1.

Carry out all of the following activities during the testing and adjusting activity:

- 1.1 obtain and use the correct issue of drawings and specifications
- 1.2 adhere to procedures or systems in place for risk assessment, COSHH, personal protective equipment and other relevant safety regulations and procedures to realise a safe system of work
- 1.3 follow the approved maintenance schedule for testing and reinstating escalator installations (such as response (direction and stopping) and functional (speed, vibration, safety equipment))
- 1.4 ensure that the escalator area is clear of maintenance equipment, tools, debris and surplus materials
- 1.5 provide and maintain safe access and working arrangements for the area
- 1.6 carry out all work to the appropriate testing standard, at the relevant speed
- 1.7 confirm that the escalator installation is operating to specification
- 1.8 report any instances where the equipment fails to meet the required performance after adjustments or any defects are found
- 1.9 leave the work area in a safe condition on completion of the testing activities

2.

Carry out the testing and adjustment activities on one of the following types of equipment:

- 2.1 escalator
- 2.2 passenger conveyor

3.

Make adjustments to all of the following:

- 3.1 tensions
- 3.2 switches
- 3.3 clearances
- 3.4 alignment
- 3.5 speed of operation

4.

Carry out testing activities in compliance with all of the following:

- 4.1 contractual drawing
- 4.2 British and/or European standards
- 4.3 equipment manufacturer's operating range
- 4.4 customer standards
- 4.5 organisational procedures and schedules
- 4.6 legal requirements

5.

Complete and store all relevant documentation of the test outcome in accordance

Testing and reinstating escalator installations

with organisational requirements, using one of the following:

- 5.1 job cards
- 5.2 servicing log or report
- 5.3 permit to work/formal risk assessment and/or sign-on/off procedures
- 5.4 organisational-specific documentation
- 5.5 electronic reports

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