

Checking lift function

Overview

This standard identifies the competences you need to carry out checks and adjustments to the operation of a lift installation whilst undertaking maintenance, 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 includes both traction and hydraulic lifts.

Your responsibilities will require you to comply with organisational policy and procedures for the checking and adjusting activities undertaken, and to report any problems with the checking 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 checking 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 checking and adjusting procedures on lift equipment. You will understand the lift 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 lift operates to the required specification and remains compliant with all standards and regulations. You will also be expected to report where the outcome of the checks identifies the need for further investigation or maintenance work.

You will understand the safety precautions required when carrying out the checking 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.

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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 adjustments 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 maintenance documentation in accordance with organisational requirements

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Knowledge and understanding

You need to know and understand:

1. the specific safety precautions to be taken when checking and adjusting the lift installation during maintenance (including any specific legislation, regulations or code of practice relating to the activity, equipment or materials used), and the responsibility these place on you
2. the safe working practices for lifts (as described in BS7255)
3. the health and safety requirements of the work area in which you are carrying out the checking and adjustment
4. hazards associated with carrying out checks and adjustments on lifts and lift equipment (such as handling oils/greases, stored pressure/force, misuse of tools), and how to minimise them to reduce the risks
5. the organisational procedure for safe systems of work, risk assessment and use of a permit to work
6. the personal protective equipment (PPE) that you need to wear during the checking activities
7. safe methods of manual handling and the safe use of mechanical lifting devices
8. what constitutes a hazardous voltage and how to recognise victims of electric shock
9. how to reduce the risks of a phase to earth shock (such as insulated tools, rubber matting and isolating transformers)
10. how to obtain the required checking documentation and specifications for the lift being checked, and how to check their currency and validity
11. how to read and interpret the specifications
12. the principles of operation of the equipment being checked and set
13. the tools and equipment to be used during the checking and adjusting activities
14. appropriate method of checking alignment using measuring equipment
15. procedures for adjustments, settings and checking
16. the checks to be made on tools and equipment used to ensure that they are fit for service
17. how you would know if the tools or equipment are covered by calibration or legislative inspections
18. tool control during the checking and adjusting of equipment
19. the documentation to be completed for the activities undertaken
20. the extent of your own responsibility and to whom you should report

if you have problems that you cannot resolve

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Scope/range

1. Carry out all of the following activities during the checking and adjusting activity:
 1. obtain and use the correct issue of drawings and specifications
 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
 3. ensure that the lift area is clear of maintenance equipment, tools, debris and surplus materials
 4. provide and maintain safe access and working arrangements for the area
 5. follow the approved maintenance schedule for checking the lift function
 6. carry out all checks, to the appropriate standard, at the relevant speed
 7. confirm that the lift is operating to specification
 8. report any instances where the equipment fails to meet the required performance after adjustments or any defects are found
 9. leave the work area in a safe condition on completion of the activities
2. Carry out the checking and adjustment on all the following:
 1. gearbox or hydraulic oil levels
 2. door operators
 3. lubrication points are oiled/greased to specification
 4. overruns
 5. safety circuits operate correctly
 6. door closing protection devices
 7. ropes and terminations
 8. alarm systems
 9. rope and chain tensioning
 10. safety mechanisms
 11. trailing cables (such as looped correctly)
 12. controller
 13. counterweight (traction lifts only)
 14. lift car travel
 15. lift machine/hydraulic pump unit
 16. sequence and quality of lift ride
 17. ancillary equipment

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3. Make adjustments to all of the following:
 1. tensions (such as ropes, belts, chains)
 2. clearances
 3. switches (such as reed, micro, photo)
 4. alignment door operators overruns door closing protection devices alarm systems safety mechanisms controller lift car travel sequence and quality of lift ride
 5. speed of operation
4. Carry out checking and adjustment in compliance with all of the following:
 1. contractual drawing
 2. customer standards
 3. British and/or European standards
 4. organisational procedures and schedules
 5. equipment manufacturer's operating range
 6. legal requirements
5. Complete and store all relevant maintenance documentation in accordance with organisational requirements, using one of the following:
 1. job cards
 2. servicing log or report
 3. permit to work/formal risk assessment and/or sign-on/off procedures
 4. organisational-specific documentation
 5. electronic records

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