READY TO INSPECT — FIELD CHECKLIST

Escalator annual maintenance checklist

The annual escalator service is the deep pass: the measurements, cleanings and tests a quarterly round doesn't reach. This checklist keeps the full service on record with the photos that make it defensible later. Work is commonly verified against ASME A17.1 safety code for elevators and escalators, manufacturer's published instructions. Confirm the edition your authority having jurisdiction has adopted.

Who runs it: The facilities lead walking the annual service alongside the licensed elevator contractor and recording observations, while the contractor performs the code-required tests and adjustments. When: Once a year, timed to the elevator contractor's scheduled service so the pit and machine space are open and the safety devices are exercised while the unit is under their control.

Taking the unit out of service

- [ ] Owner told the escalator will be out of service
  Owner and building staff told when the unit stops and for how long, with the alternate route signed so riders are not left looking for a way between floors.
  No photo required

- [ ] Both landings closed off before any plate is lifted
  Full barricades and out-of-service signs at the top and bottom set before the mechanic lifts a landing plate or removes a step, kept in place until the unit is released.
  1 photo required

Safety devices exercised by the contractor

- [ ] Step, skirt and comb safety devices observed during the contractor's test
  Skirt-obstruction, missing-step, comb-impact and handrail-entry devices exercised by the contractor and seen stopping the unit, results noted against what the contractor records.
  2 photos required

- [ ] Broken-step-chain and speed governor checks observed
  Contractor's checks of the step chain and overspeed governor witnessed, the unit seen shutting down on the intended fault rather than assumed.
  1 photo required

- [ ] Step-to-skirt clearance measured along both sides
  Mechanic's gauge run down both skirts with the unit stopped, clearance within the manufacturer's range at every point, a measured value beyond the quarterly look.
  1 photo required

- [ ] Handrail and step speeds measured by the mechanic
  Each handrail's speed read against the step speed on the mechanic's tachometer, within the manufacturer's tolerance and recorded, not judged by eye as on the quarterly round.
  1 photo required

- [ ] Brake stopping distance measured and compared with last year
  Mechanic's measured stop from rated speed with the steps empty, within the manufacturer's range and set against last year's recorded distance.
  No photo required

Pit and machine space

- [ ] Mechanic's lock and tag observed before the machine space is entered
  Lock and tag on the main disconnect and every other source feeding the drive and controller, hung by the mechanic under the site's procedure and verified dead before hands go in.
  1 photo required

- [ ] Pit and truss interior housekeeping observed
  Pit and step-band area free of accumulated lint, debris and lost items, no oil pooling under the drive, access panels refitted after the contractor's work.
  2 photos required

- [ ] Machine space, drive and lighting observed
  Drive machine and controller free of leaks or scorching, machine-space lighting and the stop switch functional, nothing stored in the space.
  1 photo required

- [ ] Drive train and step rollers observed from the machine space
  Drive chain or gear train lubricated per the manufacturer with no dry or stretched links reported, step rollers seen through the opening with no flat spots or cracked tires.
  1 photo required

- [ ] Controller seen with no jumper or bypass left before release
  Mechanic shows every jumper, bypass switch and test link removed or back to normal at the controller, and the safety circuit closed, before the unit is released.
  No photo required

- [ ] Plates refitted and the unit run before the barricades come down
  Landing plates flush and fastened, combs meshing, locks removed by the mechanic who hung them, unit run empty in both directions before riders are let back on.
  1 photo required

Documentation

- [ ] Contractor findings and open items recorded on the building side
  Any deficiency the contractor calls out logged with a photo and a date on the site record so it can be tracked to closure separate from the contractor's report.
  1 photo required

- [ ] Elevator inspector's periodic test and report on file
  Date the elevator inspector witnessed the periodic test and the inspector's report kept on file, with the renewed certificate from the AHJ replacing the posted copy.
  No photo required