



# Periodic Electric Elevator Checklist

Department of Consumer and Business Services  
 Building Codes Division

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 oregon.gov/bcd

Maintenance Company: \_\_\_\_\_

Site Name: \_\_\_\_\_

Current Year: \_\_\_\_\_

Equipment ID: \_\_\_\_\_

## 8.11.2.1 INSPECTION AND TEST REQUIREMENTS

The routine inspections and tests shall include the following:

N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description
<b>8.11.2.1.1 INSPECTIONS MADE FROM INSIDE THE CAR</b>			
<input type="checkbox"/>		(a)	Door reopening device (Item 1.1)
<input type="checkbox"/>		(b)	Stop switches (Item 1.2)
<input type="checkbox"/>		(c)	Operating control device (Item 1.3)
<input type="checkbox"/>		(d)	Car floor and landing sill (Item 1.4)
<input type="checkbox"/>		(e)	Car lighting (Item 1.5)
<input type="checkbox"/>		(f)	Car emergency signal (Item 1.6)
<input type="checkbox"/>		(g)	Car door or gate (Item 1.7)
<input type="checkbox"/>		(h)	Door closing force (Item 1.8)
<input type="checkbox"/>		(i)	Power closing of doors or gates (Item 1.9)
<input type="checkbox"/>		(j)	Power opening of doors or gates (Item 1.10)
<input type="checkbox"/>		(k)	Car vision panels and glass car doors (Item 1.11)
<input type="checkbox"/>		(l)	Car enclosure (Item 1.12)
<input type="checkbox"/>		(m)	Emergency exit (Items 1.13 & 1.20)
<input type="checkbox"/>		(n)	Ventilation (Item 1.14)
<input type="checkbox"/>		(o)	Signs and operating device symbols (Item 1.15)
<input type="checkbox"/>		(p)	Rated load, platform area, and data plate (Item 1.16)
<input type="checkbox"/>		(q)	Standby power operation (Item 1.17)
<input type="checkbox"/>		(r)	Restricted opening of car or hoistway doors (Item 1.18)
<input type="checkbox"/>		(s)	Car ride (Item 1.19)
<input type="checkbox"/>		(t)	Door monitoring system (Item 2.26.5)
<input type="checkbox"/>		(u)	Stopping accuracy (Item 2.26.11)
<input type="checkbox"/>		(v)	Machinery space/control space (8.11.3.1.2)
<input type="checkbox"/>		(w)(1)	Working areas in the car (3.7 and 2.7.5.1) (1) means to prevent unexpected movement (2.7.5.1.1)
<input type="checkbox"/>		(w)(2)	(2) Unexpected car movement device (2.26.2.34)
<input type="checkbox"/>		(w)(3)	(3) Operating instructions for unexpected car movement device (8.6.10.6)
<input type="checkbox"/>		(w)(4)	(4) Operating instructions for egress and reentry procedure (8.6.10.7)
<input type="checkbox"/>		(x)	Equipment access panel electrical device (3.26.1 and 2.26.2.35)

## 8.11.2 INSPECTION TEST PERIODS

The routine inspection and tests of passenger and freight electric elevators shall be made at intervals no greater than six months. All references to "Item" are to ASME A17.2-2010 Guide for Inspection of Elevators, Escalators and Moving Walks.

N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description
<b>8.11.2.1.2 INSPECTIONS MADE IN MACHINE ROOM/SPACE</b>			
<input type="checkbox"/>		(a)	Equipment exposure to weather (2.7.6.6)
<input type="checkbox"/>		(b)	Means of access (Item 2.1)
<input type="checkbox"/>		(c)	Headroom (Item 2.2)
<input type="checkbox"/>		(d)	Means necessary for tests (2.7.6.4)
<input type="checkbox"/>		(e)	Inspection and test panel (2.7.6.5)
<input type="checkbox"/>		(f)	Lighting and receptacles (Item 2.3)
<input type="checkbox"/>		(g)	Enclosure of machine room/spaces, control room/spaces (Item 2.4)
<input type="checkbox"/>		(h)	Housekeeping (Item 2.5)
<input type="checkbox"/>		(i)	Ventilation (Item 2.6)
<input type="checkbox"/>		(j)	Fire extinguisher (Item 2.7)
<input type="checkbox"/>		(k)	Pipes wiring and ducts (Item 2.8)
<input type="checkbox"/>		(l)	Guarding of equipment (Item 2.9)
<input type="checkbox"/>		(m)	Numbering of elevators machines and disconnect switches (Item 2.10)
<input type="checkbox"/>		(n)	Maintenance path and maintenance clearance (Item 2.7.2)
<input type="checkbox"/>		(o)	Stop switch (2.7.3.5 and 2.26.2.24)
<input type="checkbox"/>		(p)	Disconnecting means and control (Item 2.11)
<input type="checkbox"/>		(q)	Controller wiring, fuses, grounding, etc. (Item 2.12)
<input type="checkbox"/>		(r)	Static control (Item 2.15)
<input type="checkbox"/>		(s)	Machinery supports and fastenings (Item 2.16)
<input type="checkbox"/>		(t)	Drive machine brake (Item 2.17)
<input type="checkbox"/>		(u)	Traction drive machines (Item 2.18)
<input type="checkbox"/>		(v)	Gears bearings and flexible connections (Item 2.19)
<input type="checkbox"/>		(w)	Winding drum machine (Item 2.20)
<input type="checkbox"/>		(x)	Belt or drive chain machine (Item 2.21)
<input type="checkbox"/>		(y)	Motor generator (Item 2.22)
<input type="checkbox"/>		(z)	Absorption of regenerated power (Item 2.23)
<input type="checkbox"/>		(aa)	Traction sheaves (Item 2.25)
<input type="checkbox"/>		(bb)	Secondary and deflector sheaves (Item 2.26)
<input type="checkbox"/>		(cc)	Rope fastenings (Item 2.27)



N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description	
<b>8.11.2.1.2 INSPECTIONS MADE IN MACHINE ROOM/SPC continued</b>				
<input type="checkbox"/>			(dd)	Terminal stopping devices (Item 2.28)
<input type="checkbox"/>			(ee)	Operating devices
<input type="checkbox"/>			(ff)	Governor over speed switch and seal (Item 2.13)
<input type="checkbox"/>			(gg)	Car and counterweight safeties (Item 2.29)
<input type="checkbox"/>			(hh)	Code data plate (8.6.1.3) (Item 2.14)
<input type="checkbox"/>			(ii)	Emergency brake (2.19.3)
<input type="checkbox"/>			(jj)	AC drives from a DC source (Item 2.24)
<input type="checkbox"/>			(kk)	Slack rope device (Item 2.20)
<input type="checkbox"/>			(ll)	Wiring diagrams (8.6.1.6.3)
<input type="checkbox"/>			(mm)	Rope retainers or restraints for seismic risk zones (Item 2.42)
<input type="checkbox"/>			(nn)	Seismic and displacement switches (Item 2.42)
<b>8.11.2.1.3 INSPECTIONS MADE FROM TOP OF CAR</b>				
<input type="checkbox"/>			(n)	Counterweight safeties (Item 3.29)
<input type="checkbox"/>			(o)	Floor and emergency identification numbering (Item 3.9)
<input type="checkbox"/>			(p)	Hoistway construction (Item 3.10)
<input type="checkbox"/>			(q)	Hoistway smoke control (Item 3.11)
<input type="checkbox"/>			(r)	Pipes, wiring, and ducts (Item 3.12)
<input type="checkbox"/>			(s)	Windows, projections, recesses, and setbacks (Item 3.13)
<input type="checkbox"/>			(t)	Hoistway clearances [Items 3.14 and 3.34.1(a) and (f)]
<input type="checkbox"/>			(u)	Multiple hoistways (Item 3.15)
<input type="checkbox"/>			(v)	Traveling cables and junction boxes (Item 3.16)
<input type="checkbox"/>			(w)	Door and gate equipment (Item 3.17)
<input type="checkbox"/>			(x)	Car frame and stiles (Item 3.18)
<input type="checkbox"/>			(y)	Guide rails fastening and equipment (Item 3.19)
<input type="checkbox"/>			(z)	Governor rope (Item 3.20). Shall be inspected and replaced per ASME 17.6, Part 1
<input type="checkbox"/>			(aa)	Governor releasing carrier (Item 3.21)
<input type="checkbox"/>			(bb)	Fastenings and hitch plate (Item 3.22)
<input type="checkbox"/>			(cc)	Suspension means (Item 3.23) Shall be inspected and replaced per ASME 17.6, Part 1
<input type="checkbox"/>			(dd)	Compensation means (Item 3.34)
<input type="checkbox"/>			(ee)	Machinery space/control space (8.11.2.1.2)
<input type="checkbox"/>			(ff)(1)	Working areas on the car top (2.7.5.1) (1) Means to prevent unexpected movement (2.7.5.1.1)
<input type="checkbox"/>			(ff)(2)	(2) Unexpected car movement device (2.26.2.34)
<input type="checkbox"/>			(ff)(3)	(3) Operating instructions for unexpected car movement device (8.6.10.6)
<input type="checkbox"/>			(ff)(4)	(4) Operating instructions for egress and reentry procedure (8.6.10.7)
<input type="checkbox"/>			(gg)	Equipment exposure to weather (2.7.6.6)
<input type="checkbox"/>			(hh)	Machinery supports and fastenings (2.9.1 and 2.9.3)
<input type="checkbox"/>			(ii)	Guarding of exposed auxiliary equipment (2.10.1)

N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description	
<b>FOR AREAS IN SEISMIC RISK ZONE 2 OR GREATER</b>				
<input type="checkbox"/>			(jj)	Anchoring of beams and supports (Item 3.34.1(b))
<input type="checkbox"/>			(kk)	Rope retainers and snag guards (Items 3.34.1(c) and (d))
<input type="checkbox"/>			(ll)	Position restraints (Item 3.34.1(e) and (g))
<input type="checkbox"/>			(mm)	Car and counterweight guide rails system (Item 3.34.1(h))
<input type="checkbox"/>			(nn)	Horizontal clearance of car and counterweight, snag-point clearance, and rail fastening
<input type="checkbox"/>			(oo)	Rope restraint/retainers and snag guards (Item 5.16.1)
<input type="checkbox"/>			(pp)	Rope retainer and snag guard for compensating ropes or chains and compensating sheave fastening
<input type="checkbox"/>			(qq)	Sheaves with nonmetallic groove surfaces (8.6.4.1.8) (Item 3.34)
<b>8.11.2.1.4 INSPECTIONS MADE FROM OUTSIDE THE HOISTWAY</b>				
<input type="checkbox"/>			(a)	Car platform guard (Item 4.1)
<input type="checkbox"/>			(b)	Hoistway doors (Item 4.2)
<input type="checkbox"/>			(c)	Vision panels (Item 4.3)
<input type="checkbox"/>			(d)	Hoistway door locking device (Item 4.4)
<input type="checkbox"/>			(e)	Access to hoistway (Item 4.5)
<input type="checkbox"/>			(f)	Power closing of hoistway doors (Item 4.6)
<input type="checkbox"/>			(g)	Sequence operation (Item 4.7)
<input type="checkbox"/>			(h)	Hoistway enclosure (Item 4.8)
<input type="checkbox"/>			(i)	Elevator parking device (Item 4.9)
<input type="checkbox"/>			(j)	Emergency and access hoistway openings (Item 4.10)
<input type="checkbox"/>			(k)	Separate counterweight hoistway (Item 4.11)
<input type="checkbox"/>			(l)	Standby power selection switch (Item 4.12)
<input type="checkbox"/>			(m)	Means necessary for tests (2.7.6.4)
<input type="checkbox"/>			(n)	Inspection and test panel (2.7.6.5)
<input type="checkbox"/>			(n)(2)	Inspection operation (2.26.1.4.1)
<input type="checkbox"/>			(n)(3)	Inspection operation with open door circuits (2.26.1.5)
<input type="checkbox"/>			(o)	Equipment exposure to weather (2.7.6.6)



N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description	
<b>8.11.2.1.5 INSPECTIONS MADE IN THE PIT</b>				
<input type="checkbox"/>			(a)	Pit access, lighting, stop switch, and condition (Item 5.1)
<input type="checkbox"/>			(b)	Bottom clearance and runby (Item 5.2)
<input type="checkbox"/>			(c)	Car and counterweight buffer (Item 5.9)
<input type="checkbox"/>			(d)	Final terminal stopping devices (Item 5.3)
<input type="checkbox"/>			(e)	Normal terminal stopping devices (Item 5.4)
<input type="checkbox"/>			(f)	Traveling cables (Item 5.5)
<input type="checkbox"/>			(g)	Governor-rope tension devices (Item 5.6)
<input type="checkbox"/>			(h)	Compensating chains, ropes, and sheaves (Item 5.10)
<input type="checkbox"/>			(i)	Car frame and platform (Item 5.7)
<input type="checkbox"/>			(j)	Car safeties and guiding members (Item 5.8)
<input type="checkbox"/>			(k)	Machinery space/control space (8.11.2.1.2)
<input type="checkbox"/>			(l)	Working area in the pit (2.7.5.2) (1) Means to prevent unexpected movement [2.7.5.2 (a) or (b)]
<input type="checkbox"/>			(l)(2)	(2) Unexpected car movement device (2.26.2.34)
<input type="checkbox"/>			(l)(3)	(3) Operating instructions for unexpected car movement device (8.6.10.6)
<input type="checkbox"/>			(l)(4)	(4) Operating instructions for egress and re-entry procedure (8.6.10.7)
<input type="checkbox"/>			(m)	Equipment exposure to weather (2.7.6.6)
<input type="checkbox"/>			(n)	Machinery supports and fastenings (2.9.1 and 2.9.3)
<input type="checkbox"/>			(o)	Guarding of exposed auxiliary equipment (2.10.1)
<input type="checkbox"/>			(p)	Pit inspection operation (2.26.1.4.4)
<b>8.11.2.1.7 OBSERVATIONS MADE OF WORKING PLATFORMS</b>				
<input type="checkbox"/>			(a)	Working platforms (2.7.5.3 and 2.7.5.4) (1) Operating instructions (8.6.10.8)
<input type="checkbox"/>			(b)	Retractable stops (2.7.5.5) (1) Retractable stop electrical device (2.26.2.37)
<input type="checkbox"/>			(c)	Inspection operation (2.26.1.4.4)

<b>8.6.4.19 CATEGORY ONE PERIODIC TEST REQUIREMENTS (ANNUAL)</b>				
N/A	DUE DATE	DATE TESTED	ASME-2010	Description
<input type="checkbox"/>			8.6.4.19.1	Oil buffers (Item 5.9.2.1)
<input type="checkbox"/>			8.6.4.19.2	Safeties (8.7.2.14 through 8.7.2.28) <b>NO LOAD</b>
<input type="checkbox"/>			8.6.4.19.3	Governors [Item 2.13.2.1(a)]
<input type="checkbox"/>			8.6.4.19.4	Slack-rope devices on winding drum machine (Item 2.20.2.1)
<input type="checkbox"/>			8.6.4.19.5	Normal and final terminal stopping devices (2.25) (Items 3.5.2.1 and 3.6.2.1)
<input type="checkbox"/>			8.6.4.19.6	Firefighters' emergency operation - <b>INCLUDES SMOKE DETECTORS</b>
<input type="checkbox"/>			8.6.4.19.7	Standby or emergency power operation (Item 1.17.2.1)
<input type="checkbox"/>			8.6.4.19.8	Power operation of door system (Item 1.8.1)
<input type="checkbox"/>			8.6.4.19.9	Broken rope, tape, or chain switch (2.26.2.6) (Item 3.26.1.1)
<input type="checkbox"/>			8.6.4.19.10	E/E/PES Electrical protective devices and written checkout procedure
<input type="checkbox"/>			8.6.4.19.11	Ascending car overspeed protection and unintended car movement [2.19.1.2(a) and 2.19.2.2(a)]
<input type="checkbox"/>			8.6.4.19.11 (c)	Rope brakes (Oregon Amendment: Table 2-L) <b>Annually tested and tagged with MM/YY</b>
<input type="checkbox"/>			8.6.4.19.12	Traction-loss detection means (2.20.8.1)
<input type="checkbox"/>			8.6.4.19.13	Broken-suspension-member and residual-strength detection means (2.20.8.2 and 2.20.8.3)
<input type="checkbox"/>			8.11.2.1.2 (oo)	Seismic devices (Oregon Amendment: Table 2-L) <b>Annually tested and logged with MM/YY</b>

<b>8.6.4.20 CATEGORY FIVE PERIODIC TEST REQUIREMENTS (5-YEAR)</b>				
N/A	DUE DATE	DATE TESTED	ASME-2010	Description
<input type="checkbox"/>			8.6.4.20.1	Car and counterweight safeties (Item 2.29.2.1)
<input type="checkbox"/>			8.6.4.20.2	Governors (Item 2.13.2.1)
<input type="checkbox"/>			8.6.4.20.3	Oil buffers (Item 5.9.2.1)
<input type="checkbox"/>			8.6.4.20.4	Braking system (Item 2.17.2.1)
<input type="checkbox"/>			8.6.4.20.5	Emergency and standby power operation (2.17.2.1) <b>FULL LOAD</b>
<input type="checkbox"/>			8.6.4.20.6	Emergency terminal stopping and speed-limiting devices (2.25.4 and Item 5.3.2.1, or for static control elevators, 2.25.4. and Item 2.28.2.1)
<input type="checkbox"/>			8.6.4.20.7	Power opening of doors (Item 1.10.2)
<input type="checkbox"/>			8.6.4.20.8	Leveling zone and leveling speed [Item 1.10.2(b)]
<input type="checkbox"/>			8.6.4.20.9	Inner landing zone (Item 1.10.2.1)
<input type="checkbox"/>			8.6.4.20.10	Emergency stopping distance
<input type="checkbox"/>			8.6.4.20.11	Emergency brake (2.19.3.2)

<b>QUARTERLY FIREFIGHTERS' EMERGENCY OPERATION 8.11.2.1.6 (Oregon Amendment: Table 2-L)</b>			
JAN-MAR	APR-JUN	JUL-SEP	OCT-DEC
<b>NOTE: ATTACH TEST TAGS TO EQUIPMENT AS APPROPRIATE</b>			



## General instructions:

This checklist reflects the **minimum routine** maintenance and testing standards that apply to your **electric** passenger and freight elevators.

Not all of the items that appear on this checklist will be applicable to your equipment. A licensed elevator contractor is capable of assisting you in determining those items that pertain to your equipment. **Check the “N/A” box for all items that do not apply.**

Item numbers (e.g., Item 1.1, 2.12) found in the description column refer to **ASME A17.2, Guide for Inspection of Elevators, Escalators and Moving Walks**. This guide provides information on how to perform routine maintenance checks and periodic tests. (Available through the Tech Bookstore; 800-ASK-BOOK.)

The checklist is to be kept in the respective elevator machine room in clear view and kept up-to-date. You will need one checklist for each elevator per year.

### Who should perform elevator maintenance and testing?

Only properly licensed elevator personnel or owner-authorized personnel are allowed to perform maintenance and tests on elevator equipment.

Please refer to the shaded items in the description column on the checklist. The shaded items may be performed by persons authorized by the building owner. **The items not shaded can be performed only by licensed elevator personnel.**

Any owner-authorized person performing maintenance or testing must know how to perform the maintenance evaluation or test and be capable of recognizing incorrect elevator standards or operation. Corrections in operation or other repairs must be performed by licensed elevator personnel employed by a licensed elevator contractor.

### Filling out the checklist

The owner is responsible for ensuring the checklist is kept current. The person or firm performing the required items must be indicated on the checklist. Where there is insufficient room to enter all information on the checklist, a separate sheet or log book may be used.

The log book entry should clearly reference the checklist item number found after each maintenance and test description entry. In all cases, the date (*mm/dd or mm/yyyy as applicable*) must be entered on the checklist.

The checkbox  following the item description is to be checked only if the task was performed by owner-authorized personnel. Leave the box unchecked if the item was performed by licensed elevator personnel.

### Example: Routine checklist entries

N/A	(1 <sup>st</sup> ) JAN-JUN	(2 <sup>nd</sup> ) JUL-DEC	Description		
<input type="checkbox"/>	4/25	10/15	(a)	Door reopening device (Item 1.1)	<input type="checkbox"/>
<input type="checkbox"/>	4/17	10/12	(f)	Car emergency signal (Item 1.6)	<input checked="" type="checkbox"/>
<input type="checkbox"/>	4/25 26 lbs	10/15 26 lbs	(h)	Door closing force (Item 1.8)	<input type="checkbox"/>

When measurements are required, they should be entered in the date box associated with the item. For example, the pressure relief reading should be entered as noted in the following example:

### Example: Checklist entry and measurements

N/A	DUE DATE	DATE TESTED	ASME-2010	Description
<input type="checkbox"/>	11/2019	10/2019 550 psi	8.6.5.14.1	Relief Valve Setting and System Pressure Test

### Additional recordkeeping

The owner is also required to provide a means to document trouble calls and other information that pertain to the operational history of the elevator. The documentation must also describe abnormalities that were discovered or occurred during routine maintenance checks and tests and what was done to correct the abnormalities.

This log should be kept on site and preferably in the elevator machine room. There is currently no particular format for keeping this information.

New checklists will be available online at [www.bcd.oregon.gov](http://www.bcd.oregon.gov) or may be obtained from this office by calling 503-373-1298.