



<b>Elevating and Amusement Devices Safety Program</b>	Ref. No.: 288 - 20
<b>ADVISORY</b>	Date: June 15, 2020

**Subject:** Anniversary Dates for Category Tests  
**Distribution:** TSSA website

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This advisory is intended to inform Owners, Contractors and Consultants on the requirements for determining Anniversary Dates for Category tests that are to be established based on previous testing dates. This advisory also addresses the requirements for controlling creep of anniversary dates. (See also Fig. 1: Representation of Original Test Dates and Resulting Anniversary Dates)

### **Scheduled Intervals and Anniversary Dates**

**Anniversary Dates** – Anniversary dates are based on the date that the device underwent the acceptance tests and passed as per section 8.10 for new or altered devices, or when components requiring maintenance or tests were replaced.

The prescribed intervals for CAT 1, 3, and 5 shall be established as per Appendix “N” of the adopted edition of the ASME A17.1 / CSA B44 Safety Code for Elevators and Escalators.

For anniversary dates that cannot be established, because the device is too old, or there are no records to be found on the initial date of the acceptance tests completed, the contractor shall use the pre-existing B44.2 completion dates found in the logbook for the CAT 1, and CAT 3, and establish the CAT 5 test by using the date of the last pull-through of the governor, or for type A safeties, the spin test of the governor.

If there are several different anniversary dates for the CAT testing, the contractor may re-establish the anniversary date, provided the newly scheduled interval does not exceed the CAT interval.

During the initial phase of introducing the requirements of the MCP for existing devices, TSSA permitted the first CAT 5 tests of the device to be completed within the anniversary calendar year. However, the next CAT 5 tests shall be completed on the established month of the previous test for the pull-through of the governor, or for type A safeties, the spin test of the governor.

This permission to complete the first CAT 5 tests during the calendar year is not permitted on those devices that the anniversary date for CAT 5 test has exceeded the calendar year.

Effectively this permission shall expire on January 1<sup>st</sup>, 2020, because all devices in Ontario should have had their first CAT 5 testing completed by that date.

**Creep** – Creep is the number of months that the maintenance frequency for inspections and CAT tests required under section 8.6 have been extended beyond the established anniversary date, or scheduled interval.

**Scheduled Interval** – The prescribed interval as established by the original equipment manufacturer for scheduled maintenance, or if not available, the intervals shall be mutually agreed upon by both the owner/licensee and maintenance contractor and which has been detailed within the MCP for the specific installation.

## **Re-establishing Scheduled Intervals and Anniversary Dates**

Scheduled intervals for multiple units at a site may be different because of staggered acceptance testing from the construction, or modernization phase of the devices. Also, the owner or the maintenance contractor may wish to re-establish the scheduled intervals, because of convenience (seasonal constraints), or to accommodate the additional workload for new contracts. Re-establishing scheduled intervals is permitted, provided the new established date of the CAT tests do not exceed the previous anniversary date of the scheduled interval. The rationale shall be noted in the logbook for the changed dates.

For devices that have undergone a modernization of those components listed in the CAT tests, a new scheduled interval shall be established upon the completion of the acceptance test. However, for those components that were not covered in the scope of the alteration, the old scheduled interval shall remain.

If the contractor wishes to re-establish the scheduled date(s) for those components not affected by the alteration, they can do so, provided the new established date of the CAT tests does not exceed the scheduled interval based on the previous anniversary date. The rationale shall be noted in the logbook for the changed dates.

For missed maintenance tasks and CAT tests that have exceeded the scheduled interval, the contractor is not permitted to re-establish the new interval as the date completed, as this is considered creep. It rewards those individuals that continually miss scheduled intervals, and over time the device is tested less frequently for compliance.

## **Voluntary Shutdown and Return to Service**

For elevating devices voluntarily taken out of service by the owner for lengthy periods of time, and they wish to return the device to service, the instructions to the contractor shall be that all applicable maintenance tasks and category tests shall be completed in accordance to the previously determined anniversary dates. The exception to the rule, would be that the new established anniversary dates would be accepted, provided the owner can demonstrate that the date the device was removed from service are noted in the logbook, or with a TSSA inspection report. A request for inspection may be required.

## **Background**

Effective May 1<sup>st</sup>, 2012, Elevating Devices Code Adoption Document (CAD) as amendment 250-11, required that every new or altered elevator, dumbwaiter, escalator, moving walk, material lift, and freight platform lifts shall conform to the requirements of the ASME A17.1 / CSA B44 – 2010 Safety Code for Elevators and Escalators. This included the requirements of a Maintenance Control Program (MCP) as per section 8.6 to be submitted with every new or altered installation.

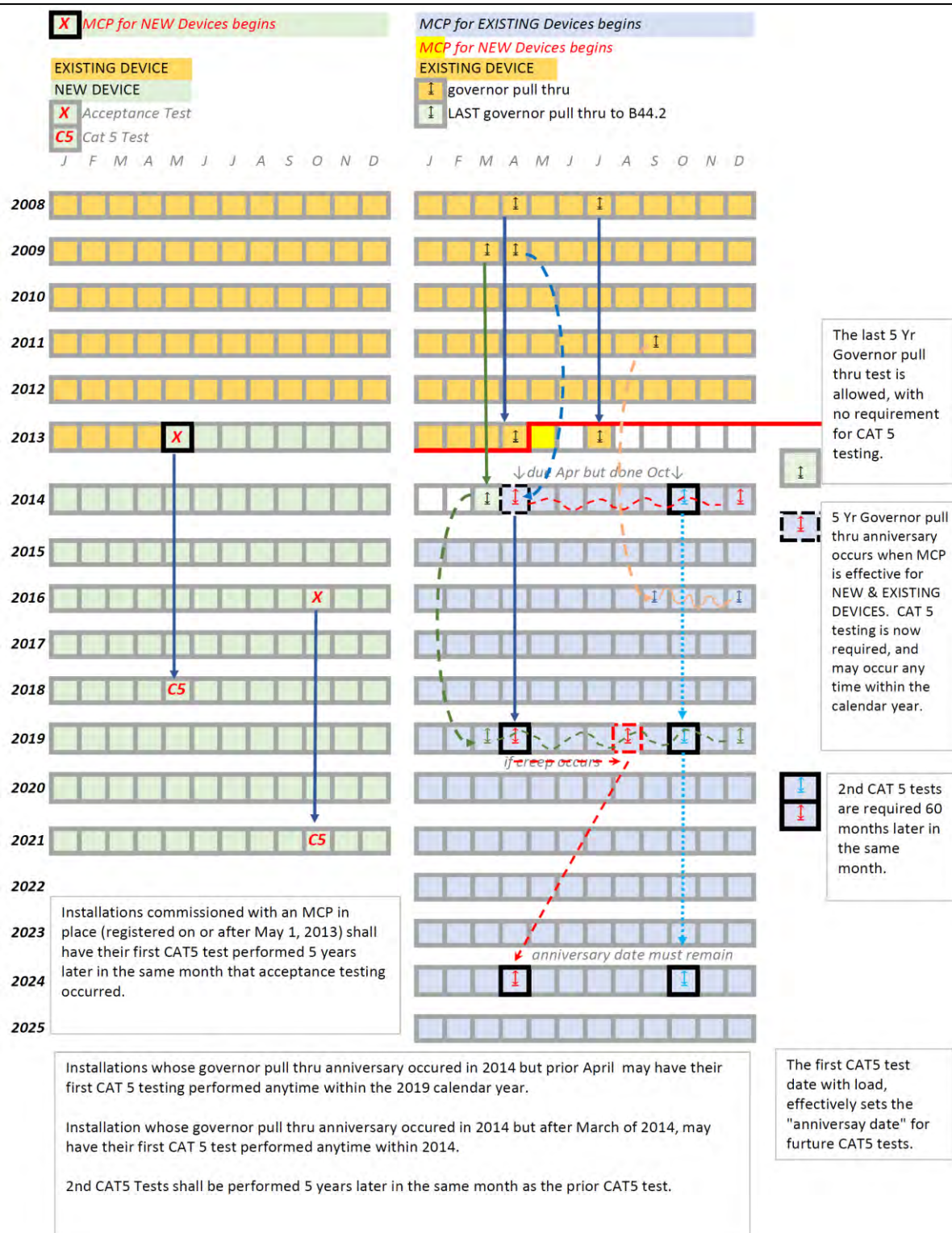
On September 15<sup>th</sup>, 2013 the publication and adoption of the CAD as amended 261-13 rev.1 was made available to industry stakeholders.

With the adoption of this latest CAD, existing installations were to conform to section 8.6, requiring an MCP to be implemented on or before March 31, 2014. There were provisions in the CAD for existing devices to continue to use the requirements of the CSA B44.2-2007 for maintenance up to the March 31<sup>st</sup> deadline.

The CAD also adopted Appendix "N" with the recommended maintenance frequency described in section 8.6, but in no case, shall the interval between maintenance visits to an elevating device exceed three months, nor shall it exceed the manufacturer's specified limit or other imposed limit which is less than three months. In addition, the interval for 8.6.4.13.1 Door Systems shall not exceed six months.

As outlined in Appendix "N", there are tests that shall be performed at intervals of 12 months for Category (CAT) 1, thirty-six months for CAT 3, and sixty months for CAT 5, and under no circumstances shall completed tests exceed the prescribed intervals.

Fig. 1: Representation of Original Test Dates and Resulting Anniversary Dates



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