Maintenance company changeover

Fill in your building details, record what is confirmed and keep open actions visible. Read the linked guide before using this worksheet.

Fill the shaded boxes on screen or print and write by hand. Save your completed copy. Use extra copies for more entries and a separate sheet for longer notes.

Building / lift reference

Guide: https://liftownersguide.co.uk/guides/changing-lift-maintenance-companies/

01 / Checklist item

Task — Check signed agreement, notice method, authority and end date

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

02 / Checklist item

Task — Confirm incoming provider acceptance, equipment list and start date/time

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

03 / Checklist item

Task — Confirm outgoing cover end date/time and any interim arrangements

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

04 / Checklist item

Task — Confirm routine, breakdown and out-of-hours contacts

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

05 / Checklist item

Task — Confirm entrapment response and responsibility across changeover

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

06 / Checklist item

Task — Confirm alarm line/SIM, monitoring, transfer and competent verification

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

07 / Checklist item

Task — Transfer latest examination report, any scheme and next due date

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

08 / Checklist item

Task — Confirm examination booking and who arranges it

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

09 / Checklist item

Task — Transfer open defect actions, original deadlines and completion evidence

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

10 / Checklist item

Task — Transfer service history, fault history and available technical records

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

11 / Checklist item

Task — Agree ownership of open repairs, parts orders, warranties and charges

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

12 / Checklist item

Task — Arrange authorised keys/access securely (no credentials in this sheet)

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

13 / Checklist item

Task — Confirm first visit, access contact and maintenance programme

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

14 / Checklist item

Task — Update building team and resident contact information

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action

15 / Checklist item

Task — Collect first visit record and agree follow-up review

Responsible person / organisation	Target date/time	Status
		To confirm

Written confirmation / record location	Confirmed by / date	Unresolved gap / next action