Repair, modernise or replace

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/planning-lift-repairs-and-modernisation/

01 / Checklist item

Topic — Context

Question / record — Building / lift reference and planning period

Targeted repair

Modernisation

Replacement

Evidence / source

Open question / owner / due date

02 / Checklist item

Topic — Context

Question / record — Problem, building needs and evidence supplied

Targeted repair

Modernisation

Replacement

Evidence / source

Open question / owner / due date

03 / Checklist item

Topic — Safety

Question / record — Current restrictions / deadlines and action owner (confirm with competent provider)

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

04 / Checklist item

Topic — Feasibility

Question / record — Feasible? Evidence or reason ruled out; further investigation needed

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

05 / Checklist item

Topic — Scope

Question / record — Work included and quote version / date / validity

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

06 / Checklist item

Topic — Retained equipment

Question / record — Equipment retained, assessed condition and remaining limitations

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

07 / Checklist item

Topic — Outcome

Question / record — Expected benefit, evidence, uncertainties and how to assess it

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

08 / Checklist item

Topic — Cost

Question / record — Lift works price and VAT basis

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

09 / Checklist item

Topic — Cost

Question / record — Building/electrical work, access, making good and disposal

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

10 / Checklist item

Topic — Cost

Question / record — Surveys, professional advice, testing, examination and approvals

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

11 / Checklist item

Topic — Cost

Question / record — Temporary arrangements and communications

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

12 / Checklist item

Topic — Cost

Question / record — Contingency, exclusions and unknown costs (do not treat blanks as zero)

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

13 / Checklist item

Topic — Funding

Question / record — Whole-project budget, payment dates and funding approvals

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

14 / Checklist item

Topic — Future costs

Question / record — Maintenance, examinations, alarms and foreseeable work over the same period

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

15 / Checklist item

Topic — Disruption

Question / record — Parts lead time, expected outage, access requirements and uncertainties

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

16 / Checklist item

Topic — Support

Question / record — Parts, technical support, maintenance access and warranty

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

17 / Checklist item

Topic — Completion

Question / record — Records, checks and return-to-service arrangements

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

18 / Checklist item

Topic — Decision

Question / record — Chosen option / date / authorised decision-maker

Targeted repair	Modernisation	Replacement

Evidence / source	Open question / owner / due date

19 / Checklist item

Topic — Decision

Question / record — Reasons, rejected options, conditions and review date

Targeted repair

Modernisation

Replacement

Evidence / source

Open question / owner / due date