

How to Submit Your Annual Contractor Report and Declaration

STEP 1: Download the spreadsheet

Go to Directive [D-ED 2020-02](#) Annual Contractor Reporting and download the Annual Contractor Reporting Spreadsheet. This spreadsheet has two tabs to complete, one for the unit information, and the other one for certified mechanic updates.

STEP 2: Fill in your sheets

Part 1:

- Confirm that your dates are following the correct format (MM/DD/YYYY).
- Confirm that your licence number is entered exactly as it was issued.
- Complete all mandatory fields (A-F).
- Ensure that the unit numbers follow the correct format, including the prefix "ED", where applicable.
- Leave the field blank if there is no information to enter.
- Do not delete row headers or make edits to the spreadsheet columns.
- Do not enter future or scheduled dates.

Part 2:

- Confirm that your licence number is entered exactly as it was issued.
- Verify that each certified mechanic/in-training in your employ is listed.
- Certificate numbers should be in the correct format, including the prefix CER or CED certificate numbers (e.g. CER-00001234 or CED00012345).

STEP 3: Convert spreadsheet file type

- Before submitting the completed file, you must convert the Excel workbook to a CSV file. The online system will only accept CSV files.
- When converting the workbook to a CSV file, you will be required to save each spreadsheet tab individually. This will result in you having to submit two separate spreadsheets, one for units and another one for certified mechanics.

File name:	D-ED-2020-02_Annual_Contractor_Reporting_Spreadsheet (3)
Save as type:	CSV (Comma delimited)

STEP 4: Log in to your Online Services account

- [Log in](#) to your Online Services account using the email address linked to your contractor licence. If you haven't registered yet, please click the "Not Registered? button".

Go to the "Units" tab located on the left hand-side and click the "Submit Annual Contractor Declaration" button.

Submit Annual Contractor Declaration

STEP 5: Submit the completed spreadsheets

- Fill out the declaration form and attach the spreadsheet(s) by browsing your computer files or using the drag-and-drop function. Sign off on the declaration and hit "Preview". Confirm the submission by hitting the "Submit" button.
- If there are validation errors, you will receive a message indicating the row number, unit number, and nature of the error. Once the error is corrected, please resubmit the spreadsheet.

We have validated your data and found some errors. Please correct the error(s) below and resubmit.

File Name: test case QA - unit data with errors.csv

Row Number	Unit Number	Error Messages
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Common errors include incorrect date or unit number format, or other incorrect data entry.

- If there are no validation errors, you will receive the following message:

Thank you! We have received your spreadsheet(s). It may take three to five business days to process your file(s). You will be notified the outcome of the upload via email.

- You will also receive an email confirming your submission.

Notes:

Class M, MR, and C contractors must submit the spreadsheet, including the information required, to the mandatory.maintenance@technicalsaftybc.ca inbox.

Documentation requirements for non-maintaining contractors: Whenever a non-maintaining contractor performs any testing or work on an elevating device, all related documentation must be retained on-site.

Reporting test dates by maintaining contractors: If a non-maintaining contractor conducts any testing or work on an elevating device, the maintaining contractor must report the test date. The non-maintaining contractor is responsible for providing the test date information to the maintenance contractor and ensuring that all test documentation is included in the on-site records (reporting the last test date performed by a non-maintaining contractor does not make the maintaining contractor responsible for the test itself).

Importance of leaving test records on-site: The Code is clear in the requirement to leave periodic test records on site. This is particularly critical in instances where the non-maintaining contractor performs any testing or work on an elevating device.

Exclusion of non-maintained units: Units not under maintenance must not be listed in the report. Contractors must refrain from reporting units not under their maintenance responsibility since such units must be reported to the mandatory maintenance inbox.

Spreadsheet data entry notes:

- **Wind turbine tower elevators:** The only field applicable to wind turbine tower elevators is “Date of Last Category 1 Test” (Column J).
- **Electric elevators:** Column G, i.e., “Brake Test” is exclusive to electric elevators ¹.
- **Escalators and moving walks:** The date of the last brake test for escalators and moving walks must be reported in Column H, i.e., “Escalator/MW Brake Test” ².
- **B355 Units:** No category test must be reported for B355 units. For B355 units, use Column M, i.e., “Periodic Test (non B44 devices)”.
- **Variance:** Maintenance frequency (Column F) must not be less than 4 times a year without an approved variance from Technical Safety BC.

Summary of Required Test Dates based on Unit Type (If Applicable)

	Brake Test ¹	Escalator/MW Brake Test ²	Sheave Jammer Test ³	Category 1 Test	Category 3 Test	Category 5 Test	Periodic Test (non-B44 devices)
Column	G	H	I	J	K	L	M
Electric Elevators	✓	-	✓	✓	-	✓	-
Hydraulic Elevators	-	-	-	✓	✓	✓	-
Escalators and Moving Walks	-	✓	-	✓	-	✓	-
Dumbwaiters	-	-	-	✓	✓	✓	-
Rack-and-Pinion Elevators	-	-	-	✓	-	✓	-
Elevators used for Construction	-	-	-	✓	✓	✓	-
Special Purpose Personnel Elevators	-	-	-	✓	✓	✓	-
Limited Use Limited Application Elevators	-	-	-	✓	✓	✓	-
Wind Turbine Tower Elevators	-	-	-	✓	-	-	-
Platform Lifts and Stair Lifts for Barrier-Free Access (B355 Units)	-	-	-	-	-	-	✓

¹ Refer to [Safety Order: Driving Machine Brake - Electric Elevators](#)

² Refer to [Safety Order: Escalator and Moving Walk Brake and Start-up Requirements](#)

³ Refer to [Safety Order: Thyssenkrupp Northern Elevator Traction Sheave Brake \(Sheave Jammer\) Maintenance](#)

Test date: Test dates for multi-day tests should reflect the last date of completion.

Reporting period: The reporting period must be limited to January 1st to December 31st of the prior year. Contractors adding units to their portfolio between January 1 and January 15 must refrain from reporting these units. Reporting should be done by the maintenance contractor responsible for the unit through the end of the reporting year.

- All tests should be completed by the end of December within one year of the last test date (with a 5-year interval for Category 5 tests). The period from January 1st to January 15th is designated for paperwork completion and submission of the annual contractor report. Tests conducted between January 1st and January 15th are considered non-compliant if the previous test was conducted more than one year prior.

Reasons for incomplete tests: Column N contains the reasons for partially performed tests, or if performing the test was not feasible; a test not performed is considered a non-compliance to the unit. List which tests are incomplete in Column O (Example: Category 1, Category 5, Brake, Periodic)

- **Environmental or OHS hazard:** The number of attempts to perform the test and gain access must be documented in column O.
- **Inaccessible or access issues:** The number of attempts to perform the test and gain access must be documented in column O.
- **Asset owner refusal:** In cases of asset owner refusal, all correspondence related to the refusal must be retained and produced if requested by Technical Safety BC Safety Officer.
- **Unit undergoing alteration:** In cases where the unit is undergoing planned modification or alteration, the alteration permit # must be included in Column O.
- **New unit to portfolio:** "New Unit to Portfolio" shall not be used for incomplete tests.
- **Unit is in shut down status:** Refer to [Safety Order: Mandatory requirements for removing elevating devices from service](#)

Note:

If the tests are complete, columns N and O must be left blank.

Guidance on "New Unit to Portfolio": The reason "New Unit to Portfolio" is reserved for active units that have never been reported (i.e., unit being in service for less than a year). Active units' test dates must be reported by the current maintenance contractor. If a new maintenance contractor is engaged, the maintaining contractor must report the test dates for such units based on the on-site documentation.

Therefore,

- If the unit has been in service for less than a year, test dates must be reported based on acceptance inspection date. In this case, the code "New Unit to Portfolio" must be selected.
- If the unit has been in service for more than a year, test dates available in the logbooks and on-site documentation must be reported, even if the unit is new to the portfolio of the current maintenance contractor.
 - If the tests have been conducted by the previous maintenance contractor, the reason "New Unit to Portfolio" must be selected in column "N" of the Excel spreadsheet. The current maintenance contractor may provide the name of the contractor that had performed the tests in column "O".

Pre-submission checks:

- **Duplicate entries:** Prior to submitting a report, it is essential to thoroughly check for duplicate unit ID entries.
- **Future date entries:** Prior to submitting a report, it is essential to verify that no future dates (anticipated date of test) have been entered. Only completed tests must be reported.

Deadline for Category 5 test compliance:

- The 2016 Code was adopted in April 2020, and MCP requirements came into effect between April 2020 and October 2021. All existing units were required to have the MCP in place no later than 30 September 2021. Therefore,
 - Category 5 tests for all hydraulic units are required to be completed:
 - No later than the end of 2026, if the unit was in service prior to September 30, 2021, and it has not been altered since regardless of when the stated start date was. This deadline translates to a 5-year period from the date but is flexible to align with the calendar year. Subsequently, Category 5 tests shall be conducted within 5 years from the date of the initial Category 5 test.
 - Within 5 years from the date the unit was put into service, if the unit was put into service after October 1, 2021.
 - Category 5 tests for all electric units are required to be completed:
 - Within 5 years from the date the unit was put into service. Or, within 5 years from the date the last B44.2 5-year test was completed. (**First** Category 5 test may be adjusted within the calendar year due, there after must be done on or before the adjusted date)