

SELF-AUDIT CHECKLIST · CANADA

CSA B167 Overhead Crane Compliance Checklist

A practical, vendor-neutral self-audit for owners of overhead travelling cranes, hoists, jib cranes and monorails in Canada. Work through each item, mark your status, and you will have a written picture of where your program actually stands.

ADVICE FROM SOMEONE WHO DOESN'T SELL THE ANSWER.

Your crane supplier sells their product line. We recommend the right option — from any OEM.

How to use this checklist. Mark each line Yes or No. Every “No” is a gap to assign an owner and a date. Most findings are documentation gaps rather than equipment failures — and documentation gaps are what regulators and insurers look at first.

1. Jurisdiction & Applicable Edition

Checklist item	Yes	No	Action / owner
Confirmed which CSA B167 edition your provincial OHS regulation names (editions in active use include B167-96 (R2007), B167-16 and B167:26).			
Confirmed whether the standard is adopted by reference (mandatory) or used as guidance in your jurisdiction.			
Confirmed which additional standards apply to your equipment (CMAA, ASME B30, manufacturer requirements).			
Documented the applicable edition and regulation citation in your written crane program.			

2. Crane Register & Equipment Data

Checklist item	Yes	No	Action / owner
Complete register of every lifting device on site (bridge, gantry, jib, monorail, hoists, below-the-hook devices).			
Each unit has a unique identifier physically marked on the equipment.			
Rated capacity legibly marked on the crane and on each hoist / load block.			

Checklist item	Yes	No	Action / owner
Duty / service classification recorded for each unit (CMAA class or equivalent) and compared to actual usage.			
Manufacturer, model, serial number, year of installation and span/lift recorded.			
Original manuals, load charts, wiring diagrams and design documents available and retrievable.			

3. Written Maintenance Program

Checklist item	Yes	No	Action / owner
A documented preventive maintenance program exists in writing (not just a service vendor's invoice history).			
Maintenance intervals are defined and justified by duty class, environment and manufacturer recommendations.			
Responsibilities are assigned: who performs, who verifies, who approves return-to-service.			
A named competent person is designated for the crane program.			
Procedures exist for lockout/tagout, safe access to runways and working at height on cranes.			
Repairs and replacement parts are documented, including who authorized the work.			

4. Inspections & Records

Checklist item	Yes	No	Action / owner
Pre-use / shift inspections performed by operators and recorded.			
Periodic (frequent and periodic) inspections performed at defined intervals by qualified personnel.			
Inspection reports identify deficiencies, severity and required corrective action, not just pass/fail.			
Deficiencies are tracked to closure with dates and sign-off.			
Records are retained for the period your jurisdiction requires and are accessible for audit.			

Checklist item	Yes	No	Action / owner
Wire rope, hooks, chains and slings inspected and retirement criteria documented.			
Load testing / functional testing records available for new installs, major repairs and modifications.			

5. Structure, Runway & Mechanical Condition

Checklist item	Yes	No	Action / owner
Runway rails inspected for alignment, span, elevation, wear and rail clip condition.			
End stops, bumpers and rail sweeps present and serviceable.			
Girder, endtruck and connection condition assessed for cracking, corrosion and deformation.			
Wheels, gearboxes, couplings and bearings inspected for wear and lubrication.			
Brakes (hoist, bridge, trolley) tested and adjusted; holding capability verified.			
Hoist rope reeving, drum grooving and rope guides inspected.			

6. Electrical & Controls

Checklist item	Yes	No	Action / owner
Upper and lower limit devices functional and tested at defined intervals.			
Overload protection / load monitoring functional where fitted or required.			
Emergency stop and main disconnect functional and accessible.			
Power distribution (conductor bar, festoon, energy chain, cable reel) inspected for wear, arcing and damage.			
Radio / pendant controls labelled, directional markings correct and matched to crane motion.			
Control panel condition, enclosure ratings and grounding verified for the environment.			

7. Operators, Training & Rigging

Checklist item	Yes	No	Action / owner
Operators trained and evaluated on the specific crane type and controls they use.			
Training records include theory, practical evaluation, date and evaluator.			
Refresher intervals defined and tracked; retraining after incidents or equipment change.			
Riggers trained; rigging gear inspected, tagged and removed from service when defective.			
Load handling practices documented (no side pulls, no riding loads, travel path control).			

8. Modifications, Modernization & Change Control

Checklist item	Yes	No	Action / owner
Any modification, capacity change or control upgrade reviewed and approved by a qualified engineer.			
Manufacturer or engineering approval on file for structural or capacity-affecting changes.			
As-built documentation, wiring diagrams and manuals updated after modernization.			
Post-modification testing and commissioning records retained.			

9. Contractor & Vendor Oversight

Checklist item	Yes	No	Action / owner
Scope of service contracts reviewed against what the standard and your program actually require.			
Exclusions, travel, parts markup and response commitments understood in writing.			
Vendor inspection reports reviewed by the owner, not simply filed.			
Recommendations from vendors evaluated independently before capital is committed.			

10. Program Governance

Checklist item	Yes	No	Action / owner
Crane program reviewed at a defined interval by management.			
Capital plan reflects repair-versus-replace decisions and end-of-life equipment.			
Incident and near-miss data feed back into maintenance and training.			
Gap list from this checklist has an owner, a target date and a budget line.			

Have gaps you want reviewed independently?

Crane Advisory Group is an independent overhead crane and material handling consultancy with 15+ years in the crane industry. We sell no cranes, parts or service contracts — so what you get back is a recommendation, not a quote.

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This checklist is general guidance only. It does not replace the CSA B167 standard, provincial occupational health and safety regulations, manufacturer requirements or professional engineering judgement. Confirm requirements for your specific jurisdiction and application.