

Construction Job Handover Checklist

By Checklister

☐ Agree scope and the receiving parties

Receipt does not establish contractual acceptance, legal release or commissioning certification.

☐ Identify the project and handover boundary

Identify exactly which project, building, phase or system this handover covers. State exclusions so the receiver knows its boundary.

☐ Record the handover scope revision

Reference the agreed scope or requirements schedule and its revision/date.

☐ Identify the receiving contact

Record the named person receiving this package and their project role. Confirm the operating owner where different; formal acceptance follows the authorized project process.

☐ Record the receiving operating owner

Use when the operator or facilities owner differs from the receiving contact. Record the named owner and the systems they will operate.

☐ Reconcile the required handover items

Compare the agreed handover requirements with the completed scope. Record missing, disputed or excluded items with their owners when present; leave this exception answer blank when no such items remain.

☐ Review open punch items with the receiving party

Discuss any open punch items and record their references, impacts, accepted owners and agreed dates. Retain receiver acknowledgment in the approved record. Leave blank when no punch items remain.

☐ Build the index and record required deliverables

Starter document examples: retain only applicable deliverables, rename for actual systems and add missing requirements before use. Link a separate controlled index when the project uses one; otherwise use the deliverable fields as the index where permitted.

☐ Assemble the controlled document index

If the project has a separate document index, add its controlled reference here. Otherwise the deliverable fields below may serve as this handover's index where the project process permits. Do not create a duplicate index solely for this answer.

☐ Starter document: As-built drawings

Confirm the approved final drawing set identifies the handed-over areas/systems and revision. Rename, remove or duplicate this example before use. For an applicable item record its controlled reference and revision; leave irrelevant examples out.

☐ Starter document: Operation and maintenance manuals

Check the manuals cover the installed asset models and normal approved operating/maintenance information. Rename, remove or duplicate this example before use. For an applicable item record its controlled reference and revision; leave irrelevant examples out.

☐ Starter document: Warranties and service contacts

Check applicable warranty terms, start dates, provider contacts and the process for reporting faults. Rename, remove or duplicate this example before use. For an applicable item record its controlled reference and revision; leave irrelevant examples out.

☐ Starter document: Inspection and commissioning records

Check the approved records identify the actual systems/tests and status; possession of a file does not establish certification. Rename, remove or duplicate this example before use. For an applicable item record its controlled reference and revision; leave irrelevant examples out.

☐ Starter document: Asset register and maintenance schedule

Check installed asset identifiers and applicable maintenance responsibilities against the handed-over scope. Rename, remove or duplicate this example before use. For an applicable item record its controlled reference and revision; leave irrelevant examples out.

☐ Verify the final files and recipient access

Use current labeled versions in an authorized location. Keep superseded records under the project retention process.

☐ Check that each indexed file is the intended final version

Open the actual indexed files and compare labels/revisions with the approved set. Record mismatches in the blocker field and add a separate corrective task for the affected item.

☐ Have the receiver test access to the handover files

Have the named receiver open the actual approved links with their own account. Test every critical record and representative items from each remaining document class; capture the tested scope in the next answer.

- ☐ **Record the files and access scope actually tested**
Identify the receiver, date and tested document references, including the critical files and sampled classes. State observed failures; do not substitute "access checked" for a scope.
- ☐ **Assign a document or access blocker for resolution**
For each missing, wrong-version or inaccessible item, record its reference, accepted owner and agreed date. Use native task assignments/due dates for follow-up; leave blank only when the review found no blockers.
- ☐ **Demonstrate, transfer and record receipt**
Only qualified staff give technical demonstrations. Use the approved secure process for keys and access.
- ☐ **Complete the agreed demonstration or training**
For training required by the agreed scope, record trainer, date, systems demonstrated, receiving participants and outcome. Use the approved operating procedure; remove this step before use when training is not part of the handover.
- ☐ **Resolve or assign questions from the demonstration**
Record any unanswered operating question with its accepted owner and agreed date. Add a separate corrective task for unclear critical instructions; leave blank only when no questions remain.
- ☐ **Verify receipt of authorized keys and access**
When required by this handover, verify actual keys, badges or approved application access and record its status. Capture the receiving custodian and transfer reference separately. Leave blank or remove the step when no access transfer applies.
- ☐ **Identify the receiving access custodian**
Record who received the applicable keys, badges or application access. Leave blank only when no access transfer is required.
- ☐ **Record the approved access-transfer reference**
Reference the key register or secure-sharing/transfer record and the relevant systems. Use a non-secret-bearing reference; leave blank only when no access transfer is required.
- ☐ **Record exactly what the receiver received**
Link the actual receipt with its scope, versions and explicit exceptions. Formal acceptance and contractual notices stay in their authorized process.
- ☐ **Record the actual receipt date**
Enter when the receiving party acknowledged the identified handover items.
- ☐ **Confirm the owner of remaining handover work**
Choose the internal coordinator and record the accepted open-action list in the task notes. Assign individual follow-ups and due dates; if none remain, record that instead of inventing an owner.