

Production Shift Handover Checklist

By Checklister

☐ Prepare the outgoing shift record

Allow time for a two-way handover and the incoming lead's cross-check.

☐ Identify the production line or work area

Record the exact line, cell or area covered by this handover.

☐ Identify the outgoing and incoming shifts

Record the outgoing and incoming shift identifiers and dates so overnight shifts are unambiguous.

☐ Record the handover time

Use the actual local handover date and time.

☐ Identify the outgoing lead

Choose the person preparing and explaining the record.

☐ Identify the incoming lead

Choose the person receiving and cross-checking the record.

☐ Link the production quantity source

Reference the complete per-order/lot production record with its as-of time. Do not report an unqualified line total across mixed products.

☐ Reconcile one order and lot

Manually add a separate copy of this group for each additional order, lot or unit basis. Rename each group so the incoming lead can find the relevant record. Do not overwrite earlier rows or sum unlike units. If this shift has no active order or lot, remove the unused quantity section before use and record "No active production" with the source/as-of basis in the production-source answer. Do not invent orders or quantities.

☐ Identify the work order and product revision

Use one exact order/product revision for this quantity record.

☐ Identify the lot or controlled WIP grouping

Use one traceable lot/batch or approved WIP grouping for this order.

☐ Record the quantity unit

Output and WIP below must use this same controlled unit; split the record if their units differ.

☐ Record accepted output for this order and lot

Use actual accepted output under the site definition. Do not include unreleased or held stock as accepted output.

☐ Record work in progress for this order and lot

Use actual WIP in the same stated unit. Keep held status separately traceable; do not assume output and WIP can be summed.

☐ Record the quantity source and as-of basis

Add this order/lot's source reference, current step, count basis or limitation when it differs from the production source above or needs explanation. The actual as-of time is recorded separately. Leave blank when the shared source already provides the basis.

☐ Record when these quantities were current

Enter the actual as-of date/time for this order/lot record.

☐ Carry restrictions and priorities forward

Handover acknowledgment cannot restart isolated equipment or release product.

☐ Record equipment faults and operating restrictions

For any affected asset, record its ID, fault/maintenance/isolation reference, current restriction and authorized service/restart owner. Leave blank after checking the source records when no faults/restrictions are reported. Example categories: a machine awaiting maintenance or an out-of-status gauge; tailor to the actual line.

☐ Locate held product and material

For each actual hold, record lot/material identity, quantity/unit, physical location, reason/reference and owner, and match the physical identity against the hold record. Leave blank when no holds exist; do not use an unexplained line-level held total.

☐ Record material shortages and supply constraints

Record affected order/material, required quantity/unit, actual available quantity and expected next update where known. Distinguish shortages from substitutions approved elsewhere; leave blank only when none apply.

- ☐ **Record operating or staffing coverage constraints**
Record the affected operation and coverage gap or other operational constraint without private personal reasons. Identify the accepted owner and next update; leave blank when none apply.
- ☐ **Agree the next approved production priorities**
List the approved next orders or activities in priority order, with the plan reference, due times and dependencies. Keep any held or restricted scope explicit.
- ☐ **Assign every pending check and unresolved action**
Reference the complete accepted open-action list. Each action needs the affected order/lot/asset, next step, accepted owner and agreed time. Add separate native follow-up tasks before finishing so the receiving shift can manage them; leave blank only when no open work remains.
- ☐ **Cross-check and record receipt**
Resolve conflicting figures or restrictions before relying on them.
 - ☐ **Cross-check one critical quantity source with the incoming lead**
With the incoming lead, compare critical order/lot quantities against the source and as-of basis. Add the checked references or a discrepancy here when useful. If there is no active production, verify that status against the source without inventing quantities.
 - ☐ **Cross-check held-material identities and locations**
With the incoming lead, verify applicable physical hold identities/locations against the hold register using authorized access. Note exceptions in the discrepancy field; when no holds exist, verify that against the source record.
 - ☐ **Cross-check equipment restrictions with the incoming lead**
Review applicable asset restrictions against the maintenance/isolation record. Confirm the receiving lead understands what remains restricted and the authorized owner; do not operate or reset equipment to test a restriction.
 - ☐ **Resolve or explicitly assign discrepancies**
For any mismatch, retain the original report and corrected evidence, state what remains uncertain and identify the accepted resolution owner and review time. Leave blank only when the cross-check found no discrepancy.
 - ☐ **Record the incoming lead's acknowledgment**
Record the actual receipt reference and accepted open-action list. Carry equipment and material restrictions into the next readiness review. Receipt does not authorize equipment restart or product release.