FREE CHECKLIST

The O&M Handover Checklist

44 things to check

Everything a building services O&M manual needs, and when to ask for it. Tick it off, get your manual accepted first time, and hand over an O&M that doesn't hold up your retention.

When to ask for what

- **Start on site** — Request everything
- **During install** — Collect as you go
- **Commissioning** — Certificates in
- **Before PC** — Essential manual
- **PC plus 4 weeks** — Full manual
- **First year** — Seasonal commissioning

SET IT UP

Start on site

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- [ ] Find the O&M clause in the specification or employer's requirements
- [ ] Agree the format and any template with the main contractor
- [ ] List every system and asset from the equipment schedules
- [ ] List every party and exactly what each one owes
- [ ] Make O&M information a condition of each subcontractor's final payment

THE BASICS

For every asset

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- [ ] Product datasheet for the model actually installed
- [ ] Manufacturer's installation, operation and maintenance manual
- [ ] Commissioning record
- [ ] Warranty certificate, with the start date
- [ ] Recommended spares and maintenance frequencies

HOW IT WORKS

For every system

6

- [ ] System description in plain English
- [ ] Control strategy and BMS (building management system) points list, as commissioned
- [ ] Schematics and as-built drawings at their final revision
- [ ] Isolation points and emergency procedures
- [ ] Asset register as a spreadsheet, ready for the FM (facilities management) team
- [ ] Planned maintenance schedule

CERTIFICATES PEOPLE FORGET

If in your scope

10

- [ ] Water system disinfection certificate and sample results
- [ ] Ductwork air leakage test (DW/143) where specified
- [ ] Fire damper drop test records
- [ ] F-gas records and labelling for refrigerant systems
- [ ] Pipework pressure test certificates
- [ ] Gas installation commissioning records
- [ ] TMV (thermostatic mixing valve) commissioning records
- [ ] Electrical installation certificate (BS 7671)
- [ ] Emergency lighting and fire alarm certificates
- [ ] Commissioning notice to building control (regulation 44)

DELIVERABLES

At handover

8

- [ ] Essential manual before practical completion (PC): project information, asset register, maintenance, isolation and the certificates in so far
- [ ] Full manual within 4 weeks of PC
- [ ] Separate mechanical and electrical manuals if the client wants them
- [ ] COBie (Construction Operations Building information exchange) data, or an asset register ready to import into the client's CAFM (computer aided facilities management) system
- [ ] Building log book in the style of CIBSE (Chartered Institution of Building Services Engineers) TM31
- [ ] Building services information for the CDM (Construction (Design and Management) Regulations 2015) health and safety file
- [ ] Building user guide on BREEAM (Building Research Establishment Environmental Assessment Method) projects
- [ ] Golden thread information in open formats on higher-risk buildings

THE FIRST YEAR

After handover

3

- [ ] Seasonal commissioning at 3, 6, 9 and 12 months, tracked to completion
- [ ] Planned maintenance, statutory checks and warranty expiries on a calendar
- [ ] Manual updated when equipment or certificates change

THE FINAL CHECK

Before you issue

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- [ ] Every certificate signed, dated and for this project
- [ ] Every drawing marked as-built or record, not for construction
- [ ] Literature shows the model actually installed, not the whole range
- [ ] Model numbers match the plant on site
- [ ] Anything missing listed with who owes it
- [ ] Bookmarked PDF plus a tidy electronic folder
- [ ] Handover and training records for the client's team

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Requirements vary by project. Always check the specification, the employer's requirements and the main contractor's handover procedure. Prepared by SF, OnTrack O&M.