

Project handover checklist template

A handover checklist makes sure the client gets everything they need to run what you installed: documents, training, closed snags, keys and passwords, warranties and a support route.

Project	Site	Completed by	Date
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1. Project

1.1 Customer Required

TEXT

1.2 Site Required

TEXT

1.3 Project reference Required

TEXT

1.4 Handover date Required

DATE

1.5 Client representative receiving handover Required

Name and role.

TEXT

2. Documents

Mark each one. Anything 'To follow' needs a date.

2.1 Handover documents

CHECKLIST GRID

Check	Issued	To follow	N/A
Test and commissioning results	☐	☐	☐
As-installed product list with serial numbers (panels, inverters, batteries, chargers)	☐	☐	☐
As-built drawings or marked-up layouts	☐	☐	☐
O&M manuals	☐	☐	☐
Manufacturer warranties	☐	☐	☐
Certificates issued by the relevant trades, e.g. electrical installation certificate	☐	☐	☐
Configuration backups, settings and monitoring portal details	☐	☐	☐
Maintenance requirements and the customer's own checks	☐	☐	☐

2.2 Documents to follow, owner and date

↳ Shown when any row is To follow

NOTES

2.3 Upload the handover pack

PDF or zip of everything issued.

FILE UPLOAD

3. Statutory information

Only some projects need these. Check who holds the duty.

3.1 CDM health and safety file information passed to the principal designer or principal contractor

CHOOSE ONE

☐ Yes

☐ No

☐ Not applicable

3.2 MCS handover pack and certificate (solar PV and other MCS-certified work)

CHOOSE ONE

The certificate is generated once the installation is registered on the MCS Installation Database.

☐ Issued

☐ Certificate to follow

☐ Not applicable

3.3 Fire safety information identified for the responsible person (Building Regulations reg. 38)

CHOOSE ONE

☐ Yes

☐ No

☐ Not applicable

3.4 Notes on statutory information

↳ Shown when any answer is No or to follow

NOTES

4. Training and demonstration

4.1 User training given **Required**

YES / NO

☐ Yes ☐ No

4.2 Who was trained

Names and roles.

↳ Shown when User training given is Yes

NOTES

4.3 Training date

↳ Shown when User training given is Yes

DATE

4.4 Reason and date for training

↳ Shown when User training given is No

NOTES

5. Snags

5.1 Snag list status **Required**

CHOOSE ONE

☐ All closed

☐ Open items agreed with client

☐ Open items not agreed

5.2 Open snag references

Reference, owner and target date for each.

↳ Shown when Snag list status is not All closed

NOTES

6. Keys, access and credentials

Every physical and digital key, logged by who received it.

6.1 Handed over

CHECKLIST GRID

Check	Handed over	Retained by us	N/A
Keys, cabinet and isolator keys	☐	☐	☐
Fobs and access cards	☐	☐	☐
Charger RFID cards	☐	☐	☐
Admin usernames and passwords	☐	☐	☐
Monitoring portal access	☐	☐	☐
Software licences and subscriptions	☐	☐	☐
Cloud or portal account ownership	☐	☐	☐

6.2 Item list with quantities

e.g. 3 × cabinet keys, 12 × RFID cards. Send passwords by a secure route, not on this form.

NOTES

6.3 Photo of keys and items handed over

PHOTO

7. Warranties and aftercare

7.1 Warranty start date **Required**

DATE

7.2 Warranty period (months)

READING

7.3 Aftercare arrangement **Required**

☐ Service agreement in place

☐ Warranty only

☐ Ad hoc call-outs

☐ None

CHOOSE ONE

7.4 Support contact and fault reporting route explained **Required**

☐ Yes ☐ No

YES / NO

7.5 Next planned maintenance visit

↳ Shown when Aftercare arrangement is Service agreement in place

DATE

7.6 Checked by (project manager) **Required**

SIGNATURE

7.7 Received by (client) Required

SIGNATURE