

Customer Handover Pack

A customer handover pack record: completion and handover dates, certificates in the pack and to follow, manuals, warranties and keys, each system demonstrated, where the controls and shut-offs are, outstanding items, aftercare and the customer's signature.

1. Job

Project

Client

Site *

Site address

Handover date *

Time

Date the work was completed

Does the energy efficiency requirement of Part L apply to the work? (choose one)

For example a new boiler, heat pump, windows or an extension. Ask the designer or building control if you are not sure.

☐ Yes ☐ No ☐ Not sure

Days from completion to this handover (if applicable; worked out automatically in the app)

If applicable: This handover is more than five days after completion. Where regulation 40 applies, the information should reach the owner no later than five days after completion: record when it was first given if that was earlier.

Handed over by *

Work completed

Building Regulations 2010, regulation 40 (England and Wales). Where requirement L1 of Part L (conservation of fuel and power) applies to the work, the person carrying it out must, no later than five days after completion, give the owner enough information about the building, its fixed building services and their maintenance requirements for it to be run using no more fuel and power than is reasonable.

2. Documents and keys

Certificates (tick all that apply)

- ☐ Electrical installation or minor works certificate
- ☐ Gas Safe building regulations certificate
- ☐ MCS certificate
- ☐ Building control completion certificate
- ☐ FENSA or Certass certificate
- ☐ Fire door or fire stopping certificates
- ☐ None for this job

Manuals and warranties (tick all that apply)

- ☐ Manufacturer manuals
- ☐ Product warranties
- ☐ Workmanship guarantee
- ☐ Insurance-backed guarantee
- ☐ None for this job

Keys or fobs handed over

Certificates and documents to follow (copy this block for each one)

Document * (choose one)

- ☐ Electrical installation or minor works certificate
- ☐ Building regulations compliance certificate (competent person scheme)
- ☐ MCS certificate
- ☐ Building control completion certificate
- ☐ FENSA or Certass certificate
- ☐ Product warranty registration
- ☐ Insurance-backed guarantee
- ☐ Operating and maintenance manual
- ☐ Other: _____

Who will send it

Expected by

Days from the handover (if applicable; worked out automatically in the app)

Documents to follow (worked out automatically in the app)

Photo of the pack (photos: attach, or note the file names)

3. Demonstrations

Systems shown to the customer (copy this block for each one)

System or product *

Demonstrated?☐ Yes ☐ No**User guide given?**☐ Yes ☐ No**Notes**

Systems handed over (worked out automatically in the app)

Demonstrated (worked out automatically in the app)

User guide given (worked out automatically in the app)

If applicable: A system has not been demonstrated. Arrange a time to show the customer, or record why it was not needed.

Where the controls and shut-offs are (copy this block for each one)**What it is *** (choose one)

- ☐ Water stop tap
- ☐ Gas emergency control valve
- ☐ Consumer unit
- ☐ Boiler or heat pump controls
- ☐ Heating programmer or thermostat
- ☐ Isolation switch
- ☐ Water meter
- ☐ Alarm panel
- ☐ Other: _____

Where it is

Shown to the customer?☐ Yes ☐ No**Photo** (photos: attach, or note the file names)

Controls and shut-offs shown (worked out automatically in the app)

Maintenance the customer needs to arrange, and when

Aftercare contact

4. Sign-off

Outstanding items agreed at handover (copy this block for each one)

What is outstanding *

Agreed completion date

Photo (photos: attach, or note the file names)

Outstanding items (worked out automatically in the app)

If applicable: Items are outstanding. Give the customer the agreed dates and close each one with a return visit record.

Customer satisfaction (choose one)

☐ Very satisfied ☐ Satisfied ☐ Not satisfied

Customer comments

Happy to leave a review?

☐ Yes ☐ No

Customer name

Customer signature

Installer name *

Installer signature