

# Project Turnover Checklist

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## Project Closeout Documentation

Ensuring all necessary documentation is compiled and readily available for the receiving party.

### Project Completion Date

Enter date...

### Summary of Project Performance

Write something...



## Final Project Report

 Upload File

## Total Project Cost (Actual)

Enter a number...

## Lessons Learned & Recommendations

Write something...

## Contractor Performance Rating

- Excellent
- Good
- Fair
- Poor

## Outstanding Contractual Obligations (if any)

Write something...

## Date of Final Payment

Enter date...

# As-Built Drawings & Specifications

Verification and handover of final, approved drawings and specifications reflecting actual construction.


## Complete As-Built Drawing Set

 Upload File

## Summary of Changes from Original Design

Write something...

## Revised Specification Documents (if applicable)

 Upload File

## Description of Deviations/Substitutions (with approvals)

Write something...

## Revision Number of As-Built Drawings

Enter a number...

### Date of As-Built Drawing Completion

Enter date...

### Drawing Format/Software Version

- AutoCAD 2023
- Revit 2024
- Other (Specify in Long Text)


## Operation & Maintenance (O&M) Manuals

Provision of comprehensive O&M manuals for all systems and equipment installed.


### Confirm receipt of complete O&M Manual set

Write something...

### Upload O&M Manual (Mechanical)

 Upload File

### Upload O&M Manual (Electrical)

 Upload File

### Upload O&M Manual (Plumbing)

 Upload File

### Upload O&M Manual (Fire Protection)

 Upload File

### Manuals cover all systems?

Yes

No

### If 'No', please specify missing manuals or areas of concern:

Write something...

### Number of copies provided:

Enter a number...

## Warranties & Guarantees

Collection and transfer of all warranties and guarantees for materials, equipment, and workmanship.

### Warranty Documents - General Contractor

 Upload File

## Warranty Documents - Subcontractors

 Upload File

## Warranty Tracking System Used?

Yes

No

## Details of Warranty Tracking System (if applicable)

Write something...

## Warranty Period - Roofing (Years)

Enter a number...

## Warranty Period - HVAC (Years)

Enter a number...

## Warranty Period - Electrical (Years)

Enter a number...

### Date Warranty Documents Provided

Enter date...

### Notes/Comments Regarding Warranties

Write something...

## Training & Demonstrations

Provision of training and demonstrations to the receiving party on system operation and maintenance.

### Description of Training Provided

Write something...

### Topics Covered in Training

- System Operation
- Routine Maintenance
- Troubleshooting
- Safety Procedures
- Emergency Procedures

### Number of Trainees Attended

### Date of Training Session

### Training Materials (Manuals, Videos, etc.)

 Upload File

### Trainer Signature

### Trainer Name

### Receiving Party Representative Name

# Financial Closeout

Final invoice reconciliation, payment confirmation, and closure of financial records.

## Final Invoice Amount

## Final Invoice Document

 Upload File

## Invoice Issue Date

## Payment Due Date

## Amount Paid

### Payment Received Date

Enter date...

### Notes on Financial Reconciliation (e.g., discounts, adjustments)

Write something...

### Payment Status

- Paid
- Partially Paid
- Unpaid

### Bank Account Details (Receiving Party)

Write something...

## Permits & Approvals

Verification of all permits and approvals received and documentation provided for future reference.

### Final Approved Permits

 Upload File

### Permit Status Summary

Write something...

### Number of Permits Received

Enter a number...

### Permit Closure Status

- Completed
- Pending
- Conditional
- Rejected

### Permit Expiration Dates (if applicable)

Enter date...

### Notes Regarding Permit Conditions or Restrictions

Write something...

# Site Condition & Security

Assessment and documentation of site conditions, securing the site, and removing debris.

## Final Site Cleanliness Score (1-10)

## Description of Site Conditions upon Turnover

## Areas Secured (Select all that apply)

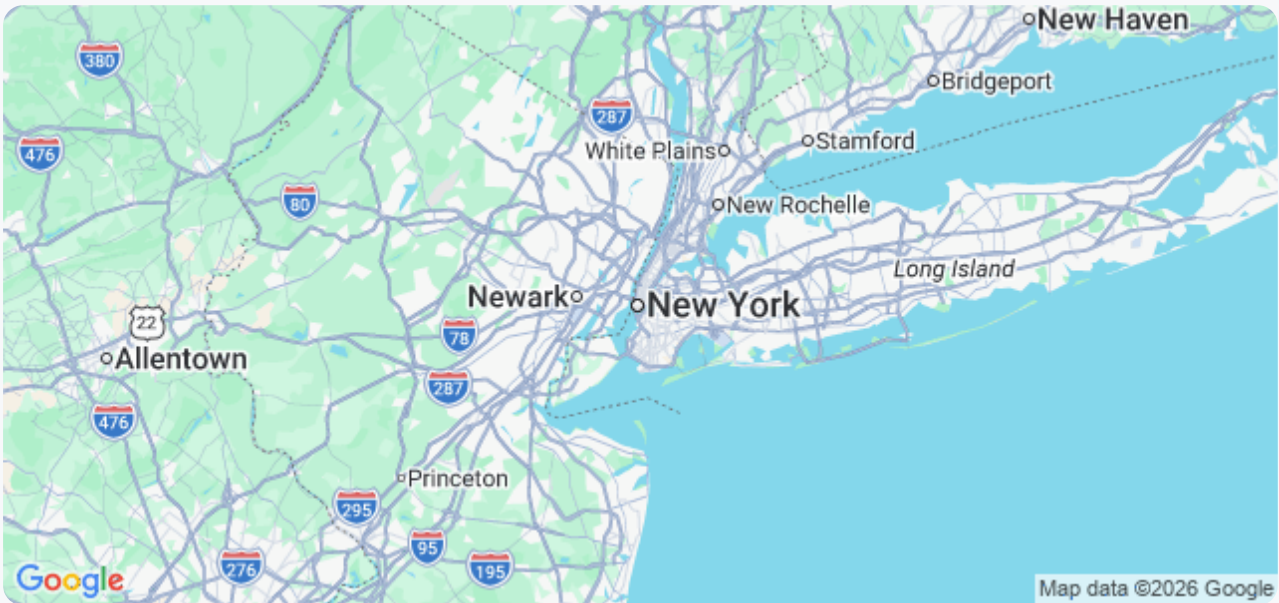
- Perimeter Fencing
- Gates
- Storage Areas
- Equipment Pads
- Underground Utilities
- Landscaping
- Other (Specify in LONG\_TEXT)

### Date of Final Site Walkthrough

Enter date...

### GPS Coordinates of Main Site Entrance

 [Set My Current Location](#)



### Photos of Site Condition

 [Upload File](#)

### Name of Security Personnel (if applicable)

Write something...

**Details of any remaining security concerns.**

Write something...

**Contractor Representative Signature (Site Condition)**

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## Equipment & Tools

Return or transfer of all equipment and tools belonging to the contractor.

**List of Equipment and Tools to be Transferred**

- Power Tools (Drills, Saws, etc.)
- Hand Tools (Hammers, Wrenches, etc.)
- Surveying Equipment (Total Station, Level)
- Heavy Machinery (Excavator, Loader)
- Specialized Tools (Specific to Project)


**Detailed Condition Report of Each Item**

Write something...

### Quantity of Each Item Transferred

Enter a number...

### Photographic Evidence of Equipment Condition

 Upload File

### Transfer Method (Return or Sale)

- Return to Contractor
- Sale to Client (specify price)

### Notes Regarding Specific Equipment Issues or Agreements

Write something...

## Outstanding Issues & Punch List

Resolution and documentation of all outstanding issues and completion of the punch list.

### Summary of Outstanding Issues

Write something...

### Number of Open Punch List Items

### Updated Punch List Document

 Upload File

### Target Completion Date for Punch List Items

### Categories of Remaining Items (e.g., Mechanical, Electrical, Civil)

- Mechanical
- Electrical
- Civil
- Structural
- Finishes
- Landscaping

### **Details of the highest priority issue and proposed solution**

Write something...

### **Status of Punch List Completion**

- Not Started
- In Progress
- Completed
- Delayed

### **Contractor Representative Signature for Punch List Acknowledgment**

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