YOUR COMPANY

Handover information for the building owner

Operation and maintenance manual

What was installed, who supplied it, how each system is operated and maintained, and what has to be inspected and when. Filled while the job runs and handed to the client at completion.

PROJECT

BUILDING ADDRESS		
CLIENT OR BUILDING OWNER	MAIN CONTRACTOR	
COMPILED BY	ISSUED TO	
REVISION	DATE OF ISSUE	STATUS

Issue record

The manual is reissued when a system, a supplier or a maintenance requirement changes. Record each issue here and replace the copy the building owner holds.

REV	DATE	WHAT CHANGED	BY

An editable PDF: type into it in any PDF reader, or print it and fill it in by hand.
Free to use, copy, change and share, with no conditions and no credit needed.

THE WORKS

What was installed, and for whom

Enough for a caretaker who has never met the contractor to place every other section of this manual against the building.

Description of the works

What was built or changed, to which specification and contract, and the parts of the building it serves.

BUILDING REGULATIONS 2010, REG 40(2)

The systems this manual covers

One line per system: heating, hot water, ventilation, electrical, lighting, fire alarm, emergency lighting, security, lifts, controls.

SYSTEM	WHAT IT SERVES	SECTION OF THIS MANUAL

The project team

Who did what, while they can still be found.

ROLE	NAME AND COMPANY	TELEPHONE	EMAIL
Client or building owner			
Main contractor			
Principal designer			
Mechanical installer			
Electrical installer			
Commissioning engineer			

CONTENTS

What this manual holds

The sections a specification usually asks for. Mark each as included or not applicable, and say where the detail sits: this page is the index a reader starts from.

SECTION	INCLUDED	N/A	WHERE TO FIND IT
Description of the works and the systems installed	☐	☐	
As-built drawings and schematics	☐	☐	
Plant and equipment schedule	☐	☐	
Manufacturer operating and maintenance literature	☐	☐	
Operating instructions and controls settings	☐	☐	
Planned maintenance schedule and spares	☐	☐	
Test and commissioning results	☐	☐	
Statutory certificates	☐	☐	
Warranties and guarantees	☐	☐	
Supplier and subcontractor contacts	☐	☐	
F-gas register Where air conditioning, heat pumps or refrigeration were installed	☐	☐	
Fire safety information Building Regulations 2010, regulation 38	☐	☐	
Health and safety file CDM 2015, a separate document, bound in or held apart	☐	☐	

THE SECTIONS NAMED IN THE UNIBUILD ARTICLE ON THE O&M MANUAL AND IN BUILDING REGULATIONS 2010, REGULATIONS 38 AND 40

How the manual is kept

Paper, electronic or both. Where each part is held, who holds the master copy, and how a later reader gets hold of it.

What belongs elsewhere. The construction phase plan, the RAMS and the contract documents are records of how the job was run, not of how the building is operated. The health and safety file is a separate document under CDM 2015 regulation 12(5) for whoever works on the structure next: bind it in if the client prefers, but keep its own cover and contents.

DRAWINGS AND PLANT

As built, and what was installed

What is there rather than what was designed. The plant schedule is the section most often rebuilt from scratch at the end, so record each item as it goes in, before it is boxed in.

As-built drawings and schematics

Marked up as each change was agreed on site. Give the number, the revision, the format and where the file is held.

DRAWING OR SCHEMATIC	NUMBER AND REVISION	FORMAT	WHERE HELD

Plant and equipment schedule

Every item that will be maintained or replaced, with its location, make, model and serial number.

ITEM	LOCATION	MAKE AND MODEL	SERIAL NUMBER	INSTALLED BY	DATE

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A starting point, not legal advice. The specification sets the contents; check the statutory items against the Building Regulations.

OPERATION

How each system is operated

The test of a manual is whether a caretaker with a leaking valve can find out what it is, how to isolate it and who to ring. Write these pages for that reader.

Operating instructions

For anything that has to be operated: how it is started, stopped, adjusted and isolated, and the settings it was commissioned at. Manufacturer literature sits behind this page.

BUILDING REGULATIONS 2010, REG 40(2)

SYSTEM	HOW IT IS OPERATED AND ADJUSTED	ISOLATION POINT	SET POINTS

Emergency isolation and who to ring

Where each service is isolated, and the number that answers at seven in the evening.

SERVICE	ISOLATION POINT AND HOW	WHO TO RING
Electricity		
Gas		
Water		
Heating and hot water		
Fire alarm and emergency lighting		
Lifts, security or other		

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MAINTENANCE

Planned maintenance and spares

The tasks and intervals the manufacturers set, which become the owner's planned maintenance from the first day. Name who is competent to do each one.

Planned maintenance schedule

One row per task: the item, what is done, how often, by whom, and the manufacturer or standard that sets it.

BUILDING REGULATIONS 2010, REG 40(2)

ITEM OR SYSTEM	TASK	INTERVAL	BY WHOM	REFERENCE

Spares and consumables

Filters, lamps, fuses, belts and refrigerant: the part, where it comes from and how many were left on site.

ITEM	PART NUMBER	SUPPLIER	LEFT ON SITE

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CERTIFICATES

Test, commissioning and statutory records

In full rather than in summary. The day a certificate is issued is the day to file it: this is the section most often chased at the end of a job.

Commissioning and test results

The sheet, who signed it and the date each system was signed off.

SYSTEM	RESULT OR SHEET REFERENCE	ENGINEER	DATE

Statutory and other certificates

Whoever issued each one supplies it. Add the rows your specification asks for.

CERTIFICATE	ISSUED BY	REFERENCE	DATE	HELD
Electrical installation certificate				
Gas safety record				
Fire alarm commissioning certificate				
Emergency lighting completion certificate				
Water system test or disinfection record				
Lifting equipment thorough examination				
Pressure systems written scheme				
Air tightness test				

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F-GAS AND WARRANTIES

The refrigerant record, and what is guaranteed

Where air conditioning, heat pumps or refrigeration went in, the refrigerant record starts at installation and the owner keeps it for five years. The warranties start the day the item is installed, not the day the manual is read.

F-gas register

The operator keeps records for equipment holding F gas equivalent to 5 tonnes or more of carbon dioxide: the type and quantity of gas at installation and any added, the dates and results of leak checks, gas recovered or disposed of, and the installing company's name, address and certificate number. The first entries are made here.

GOV.UK, RECORD F GAS IN EQUIPMENT YOU OWN OR SERVICE

SYSTEM	GAS TYPE	CHARGE, KG	CO2E, TONNES	INSTALLER AND F-GAS CERTIFICATE NUMBER	INSTALLED

Warranties and guarantees

With their start dates and what voids them.

ITEM	SUPPLIER OR INSTALLER	PERIOD	STARTS	CONDITIONS

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HANDOVER

Contacts, and the handover record

The contacts page is the one the owner uses most and the one least often kept up. Collect each entry when the order is placed, not when the job closes.

Supplier and subcontractor contacts

COMPANY	SYSTEM OR TRADE	CONTACT	TELEPHONE OR EMAIL

Statutory information given

Fire safety information goes to the responsible person by completion, or by first occupation where that is earlier, and is acknowledged in writing. Operating and maintenance information goes to the owner within five days of completion. The CDM health and safety file goes to the client at the end of the project.

BUILDING REGULATIONS 2010, REGS 38 AND 40; CDM 2015, REG 12(10)

INFORMATION	GIVEN TO	DATE	ACKNOWLEDGED
Fire safety information Regulation 38, where the Fire Safety Order applies to the building			
Operation and maintenance information Regulation 40, where Part L applies to the work			
Health and safety file CDM 2015 regulation 12(10), projects with more than one contractor			

Handover record

COMPILED BY, FOR THE CONTRACTOR	POSITION	SIGNATURE	DATE

RECEIVED BY, FOR THE CLIENT	COMPANY	SIGNATURE	DATE