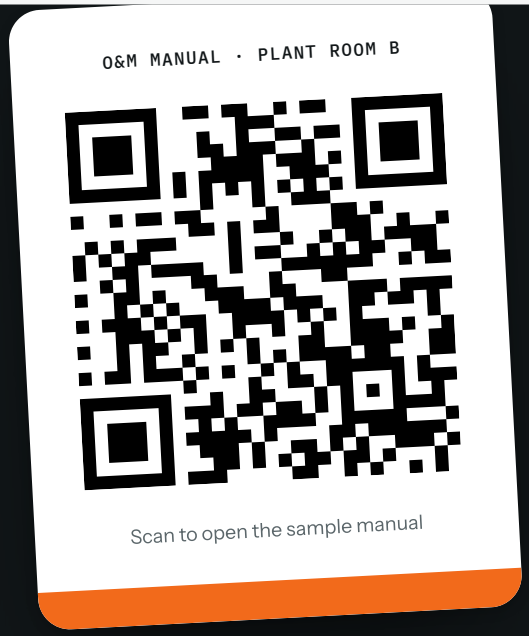
Handover Works

Free guide for UK M&E contractors

Handover, minus the Sunday night.

A practical guide to O&M manuals that get signed off first time.



The O&M manual that writes itself. Opens in one scan.

handoverworks.com

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Worth knowing

Who this is for

Owners, contracts managers and project managers at UK electrical, plumbing and heating, HVAC, fire and security, and AV firms. Basically, anyone who's ever been asked "where's the O&M manual?" two days before handover.

Introduction

Before we start

Put the kettle on. This won't take long.

If you run, manage or price M&E jobs, you already know how a handover goes. The kit's in. Commissioning finally happened. The snag list is down to a loose faceplate and a missing label. And then someone says it.

"Where's the O&M manual?"

Suddenly it's Sunday night and you're on the sofa with a laptop, trying to remember which supplier sent the datasheet for the unvented cylinder, and whether the fire alarm certificate is in your inbox or still on the engineer's van dashboard.

This guide is about not having that Sunday night.

It's not a rulebook. It's what we'd tell you on site over a brew: what goes in the manual, how to collect it as the job goes, what the rules actually ask for, and how to get it signed off first time. Lots of checklists. No jargon. Steal whatever's useful.

Worth knowing

A quick word on the rules

Where we mention regulations, standards or guidance, we've kept it plain and general. Your contract and specification decide what you actually have to hand over, so read those first. And check you're using the latest version of anything we mention.

Chapter 01

Why the manual is always last

Nobody plans for the O&M manual to be late. It just ends up at the back of the queue, every time. Here's why.

You ask for documents too late. The best time to get a datasheet is when you're placing the order. Three months later, the supplier's moved on to other customers and the rep who sold it to you has changed jobs.

Testing happens at the end. You can't have a commissioning certificate before you've commissioned. So the most important documents are always the last to arrive.

Everything lives somewhere different. Some of it's in email. Some is on the shared drive. Some is a photo on an engineer's phone. And some is in the head of the bloke who fitted it, who's now on a job in Reading.

Nobody owns it. If the manual belongs to "the office" or "whoever's free", it belongs to nobody. Until it's urgent.

Turning a pile of PDFs into a manual takes ages. Even with everything in hand, renaming, sorting, indexing and fighting with a PDF editor eats evenings.

None of that is anyone's fault. It's just how jobs run. But it matters, because late paperwork can delay sign-off, final payment or retention release, depending on your contract. And it's one of the few things at the end of a job that's completely in your hands.

Site tip

The good news

Almost all of this is about timing. Move the work earlier and the end of the job gets quiet. The rest of this guide shows you how.

Chapter 02

What actually goes in an O&M manual

An operation and maintenance manual has one job. It tells whoever looks after the building how to run, maintain and eventually replace what you installed.

That person is rarely the one who signs off your handover. It's a facilities manager, a maintenance engineer or a homeowner. Probably a year from now, standing in a plant room with a torch and a phone. Write for them, and you won't go far wrong.

Checklist

The seven sections almost every M&E manual needs

- [ ] **Project info:** the job, the address, the client, your details and an out-of-hours contact, the completion date and when warranties start
- [ ] **What's installed:** a short, plain description of each system and where the main kit is
- [ ] **System sections:** for each system, an equipment list (make, model, serial number, location), datasheets, install and maintenance instructions, how to operate it, and spares
- [ ] **Certificates:** every test and commissioning record
- [ ] **Drawings:** the as-builts, with a drawing register
- [ ] **Warranties:** the documents, the registrations and any conditions, like annual servicing
- [ ] **Contacts:** who to call for support and spares

If your spec names a structure, such as a BSRIA-based or client template, use that one.

It's not the health and safety file

People mix these up all the time. Under the CDM Regulations 2015, the principal designer puts together the health and safety file: what someone needs to know to do future building work safely. The O&M manual is about running and maintaining the systems. The two often travel together, but they're different things. Your contract will say what goes where. And it's not a brochure: if you didn't install it, it doesn't go in.

Chapter 03

The one habit that fixes most of it

If you only take one thing from this guide, make it this:

Ask for the O&M documents when you order the kit. Not when you hand over the job.

When you're placing an order, the supplier wants your business. They know exactly which model you're buying. They'll send what you ask for. Three months later, the same request is a favour.

On site

Same request, two moments

In March, on the purchase order: "Please send the datasheet, install and maintenance instructions and warranty terms for this model." Back the same week, filed under Heating. Done.

In June, two days before handover: "Hi, sorry to bother you, do you have the O&M info for the boiler we bought in March?" They send a 60-page brochure for the whole range. You start scrolling.

What to ask for

Be specific, or you'll get the brochure. For each item, ask for:

- the datasheet for the exact model and variant
- installation instructions
- operating or user instructions
- maintenance instructions, with service intervals
- warranty terms, including how to register it and anything that keeps it valid
- spares and part numbers
- any certificates or declarations that come with it

Ask for PDFs, named by product. Your future self will thank you.

Make it automatic

Put one standard paragraph on every purchase order, so nobody has to remember. There's wording you can copy at the back of this guide.

There's more at handoverworks.com/templates/supplier-request.

File it the day it lands

Make one folder per system at the start of the job: Electrical, Heating, Ventilation, Fire and so on. When a document arrives, it goes straight in the right folder. Not "I'll sort it later". Today.

Keep a simple tracker of what you've asked for and what's come in. A spreadsheet's fine.

Site tip

Photograph the rating plate

Get the team to snap the rating plate of every bit of kit as it goes in. It takes five seconds. It gives you the model and serial number, and it saves a return visit when the client asks "which one did you fit?"

Watch the kit nobody owns

The documents most likely to go missing are for things that didn't come through your own orders:

- **free-issue kit** from the client or main contractor
- **packaged plant** bought through a nominated supplier
- **specialist subbies** working for you, like a commissioning engineer or a fire alarm programmer

Sort out who provides what on day one, and get it in writing. Otherwise it'll be nobody's job in week 40.

Chapter 04

Trade by trade: your kit list

Every job's different and your spec comes first. But these are the documents that come up again and again. Check the current edition of any standard mentioned.

Checklist

Electrical

- [ ] Electrical installation certificates and schedules of test results (BS 7671)
- [ ] Distribution board schedules
- [ ] Datasheets for switchgear, boards and protective devices
- [ ] Lighting schedules and lighting control info
- [ ] Emergency lighting certificates and records (BS 5266-1)
- [ ] Earthing and bonding details
- [ ] EV chargers, solar PV and batteries: commissioning records and registrations

Checklist

Plumbing and heating

- [ ] Boiler and heat pump datasheets, install and service instructions
- [ ] Manufacturer commissioning checklists, such as Benchmark, where they apply
- [ ] Gas Safe Building Regulations compliance certificates where relevant
- [ ] Unvented cylinder paperwork
- [ ] Flushing and inhibitor records
- [ ] Water system disinfection or flushing records where needed
- [ ] Controls info: programmers, stats, zone valves
- [ ] Thermostatic mixing valve details and upkeep

Checklist

HVAC and ventilation

- [ ] Equipment list for AHUs, fan coils, extract fans, MVHR and split systems
- [ ] Commissioning and balancing records
- [ ] Refrigerant records for anything with F-gas in it
- [ ] Filter types, sizes and change intervals
- [ ] Controls and BMS details
- [ ] Ventilation commissioning info the Building Regulations ask for

Checklist

Fire and security

- [ ] Fire alarm certificates for design, install, commissioning and acceptance (BS 5839-1 for commercial, BS 5839-6 for homes)
- [ ] Zone plans and cause and effect
- [ ] Panel programming summary and user instructions
- [ ] Intruder, CCTV and access control commissioning records and user guides
- [ ] Service requirements

Checklist

AV, smart home and controls

- [ ] A device list with locations, models and network addresses
- [ ] Network diagrams and rack layouts
- [ ] Configuration notes
- [ ] User guides written for the client, not for you
- [ ] A safe way to hand over passwords and admin logins, kept out of the manual itself
- [ ] Support contacts and any subscriptions or licences

Checklist

Every trade, every job

- [ ] An equipment list with make, model, serial number and location
- [ ] As-built drawings and a drawing register
- [ ] Warranty documents, registrations and conditions
- [ ] Maintenance tasks and how often they're due
- [ ] Contacts for support and spares

Chapter 05

The bits only you can write

Suppliers send datasheets. Testing gives you certificates. But a good manual also needs a few pages that only your team can write. They're also the pages reviewers miss most when they're not there.

What each system does

Write a few plain sentences per system. What does it do, what does it serve, where's the main kit, and how is it controlled? Write it for someone who's never set foot in the building.

On site

Something like this

"Two wall-hung condensing boilers in the ground-floor plant room heat the radiators on all three floors. A seven-day programmer controls the heating, with weather compensation. The system is sealed and pressurised."

That took about a minute to write. In six months, nobody will remember it.

How to run it

Cover how to start it, stop it and isolate it safely. Say what the common alarms or faults mean, and how to change the everyday settings, like the heating times. Keep it short and point to the manufacturer's instructions for the detail.

How to look after it

Pull the maintenance tasks out of the manufacturer documents into one simple table per system: the task, how often, and who should do it. Flag anything a warranty depends on, like an annual service.

Who writes what

Decide at the start. A setup that works well is this: the project manager owns the manual, each engineer writes the description for their systems, and the office files documents as they arrive.

Chapter 06

The rules, in plain English

You don't need to be a lawyer to do a good handover. But it helps to know what's out there. Here's the short version. Check the current wording and your contract.

Your contract and spec come first. They usually say what the manual must contain, what format it's in, how many copies you need and when it's due. Some contracts tie handover documents to completion or payment. Read those bits at the start of the job, not the end.

Building Regulations. In England, the Building Regulations ask for the building owner to get information about the fixed building services and how to maintain them. For buildings covered by the Fire Safety Order, fire safety information has to be handed over by completion, or first occupation if that comes first. Wales, Scotland and Northern Ireland have their own systems.

CDM 2015. The health and safety file we talked about in chapter 2. The principal designer prepares it, and it's separate from the O&M manual.

BSRIA guidance. BSRIA publishes guidance on building manuals, handover and commissioning. Lots of specs point to it. If yours names a BSRIA guide, follow its structure.

Soft Landings. BSRIA's Soft Landings framework, and the Government Soft Landings approach used on many public jobs, are about planning for handover and the first months of use from day one. On a Soft Landings job you might be asked to help with training or come back for reviews after handover.

The Building Safety Act 2022 and the golden thread. For higher-risk buildings, the Act brought in a "golden thread" of building information that has to be kept digitally and kept up to date. In England, a higher-risk building is at least 18 metres or seven storeys high with at least two residential units. During design and construction, hospitals and care homes of that height count too. Most M&E jobs aren't on one. If yours is, expect the principal contractor to ask for information in a set format and on a set timetable.

Site tip

Here's the thing

Every rule above rewards the same habits: organised, digital, system by system, and done as the job goes. Get those right and you're in good shape whatever the job.

Chapter 07

Before you hit send: the ten-minute check

A manual that comes back with comments costs far more time than ten minutes of checking. If you can, get someone who didn't put it together to run through this.

Checklist

The ten-minute check

- [ ] Does it follow the structure the spec asks for?
- [ ] Is every system covered, including free-issue kit and subbies' work?
- [ ] Is there a certificate for every test, signed, dated and complete?
- [ ] Are the drawings the final as-builts, with a register?
- [ ] Does every item on the equipment list have its datasheet and maintenance info?
- [ ] Are the model numbers, serial numbers and locations filled in?
- [ ] Are the warranty conditions and start dates clear?
- [ ] Are there plain descriptions and operating notes, not just datasheets?
- [ ] Have you removed every trace of the last job you copied from?
- [ ] Could a stranger find a given document in under a minute?

Why manuals usually come back

- Missing or unsigned certificates
- Tender drawings instead of as-builts
- Range brochures instead of the actual model
- No equipment list or serial numbers
- The wrong structure
- No index, or bookmarks that go nowhere
- Datasheets but no "how to run it"
- No warranty info
- Wonky phone photos of paper certificates
- Another site's address on page 3 (it happens)

If it comes back anyway

Don't panic. Reply to every comment, saying what you changed and where. If one's unclear, pick up the phone. Then fix the cause, not just the document.

Chapter 08

After handover: the manual someone opens at 11pm

Here's who really reads your manual.

On site

Sunday, 11pm

The heating's gone off in a block of flats. The resident in flat 12 finds a little label on the boiler cupboard. They scan it with their phone, the manual opens, they find the page on low pressure, top it up, and go back to bed.

Nobody rings you. Nobody rings anyone.

That's the whole point. A binder on a shelf in the site office doesn't help that person. Neither does a 400-page PDF in an inbox they've never seen.

Paper, PDF or digital?

Give the client what your contract asks for. Lots of specs still want a PDF, and some still want it printed. But think about giving them a digital version as well:

- **sorted by system,** so it's easy to find things
- **opened from a QR code** stuck near the kit, on the board or on the front of the folder
- **easy to update** when something gets swapped, without reprinting the lot

Make it stick

- Put the QR label where people actually look.
- Show the client's team the manual during training.
- Keep your own copy, so you can answer quickly when they call.

A manual that's easy to use makes your work easy to look after. And it's a quiet reminder of who did a good job.

Toolkit

Your handover timeline

Stick this on the wall.

Checklist

At contract award and project start

- [ ] Read the spec and contract clauses on handover documents
- [ ] Note the structure, format and deadline
- [ ] Decide who owns the manual
- [ ] Set up one folder per system and a document tracker
- [ ] Agree who provides documents for free-issue kit, packaged plant and subbies
- [ ] Add the supplier wording to your purchase orders

Checklist

During the install

- [ ] File documents against their system as they land
- [ ] Photograph rating plates and note locations
- [ ] Mark up drawing changes
- [ ] Chase missing documents before you pay the invoice

Checklist

Before and during commissioning

- [ ] List every certificate, who signs it and when
- [ ] Engineers write their system descriptions
- [ ] File certificates as they're done, and check signatures and dates

Checklist

Before you submit

- [ ] Put it together in the right structure
- [ ] Do the ten-minute check
- [ ] Get a second pair of eyes on it

There's a fuller checklist, free, at handoverworks.com/checklist.

Toolkit

Copy-and-paste supplier wording

On site

For your purchase order

"Please supply, with the order confirmation or before delivery, PDF copies of the datasheet, installation instructions, operating instructions, maintenance instructions and warranty terms for each item on this order, specific to the model supplied. We need these for the operation and maintenance manual."

On site

If they haven't arrived by delivery

"Thanks for the delivery of [items] for [project]. We're still waiting on the O&M documents we asked for on order [PO number]: [list]. Could you send PDFs for the exact models supplied by [date]? They're for the client's O&M manual."

On site

Before you pay the invoice

"Before we process invoice [number], can you let us know when the outstanding O&M documents for [items] will arrive? If you don't have them, who at the manufacturer can help?"

More wording, free, at handoverworks.com/templates/supplier-request.

Your next handover

Drop in the paperwork. Your client opens it in one scan.

Handover Works is for UK M&E and building-services contractors. Drop in the job's paperwork: datasheets, certificates, test sheets and drawings. We build the O&M manual, sorted by system. You check it and approve, and nothing is published until you do. Your client opens it by scanning the QR label on the kit.

Start free. Pay when you publish.

Start free →

See a real manual

Plans start at £49 a month + VAT.

START FREE
HANDOVERWORKS.COM/START

SAMPLE MANUAL
HANDOVERWORKS.COM/SAMPLE

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Sources. Building Safety Act 2022, and HSE and Building Safety Regulator guidance on higher-risk buildings (at least 18 metres or seven storeys high, with at least two residential units). Building Regulations 2010, regulation 40 (see Approved Document L) and regulation 38 (fire safety information for buildings covered by the Regulatory Reform (Fire Safety) Order 2005). Construction (Design and Management) Regulations 2015, with HSE guidance L153. BSRIA Soft Landings Framework 2018 (BG 54/2018).

The O&M manual that writes itself. Opens in one scan. General information only, not legal or contractual advice. Always check your contract, your specification and the current version of any regulation or standard. Published by Handover Works.