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Project Construction Completions and Turnover Procedure



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Project Construction Completions and Turnover Procedure

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Project Construction Completions and Turnover Procedure

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Project Construction Completions and Turnover Procedure

1.0 PURPOSE

The purpose of this Procedure is to outline the events and responsibilities associated with inspection, acceptance and turnover of completed construction work.

This procedure applies to works performed under all Government construction projects executed throughout the Kingdom of Saudi Arabia.

For the purposes of the Construction Management Procedures the Project Management Company is the EPMO appointed by the Entity and references prefixed with "Site", such as Site Construction Department, Site Engineering Department, represent the Project Management Company at Project level, on construction sites.

2.0 SCOPE

Completed construction work shall be inspected and accepted by the Site Construction Department according to the terms and conditions of the Contract.

This procedure outlines the process to be followed by the Site Construction Department to turnover completed facilities

3.0 DEFINITIONS

Definitions	Description
Entity	Entity - includes Government Ministry, EPMO, Engineering Management Company or any other agency authorized by the Government Ministry to work on its behalf
Acceptance Team	A multi-departmental team created to inspect and accept the completed construction contracts Works.
Entity Project Management Organization (EPMO)	Entity Program Management Organization - An integrated team that comprises the Entity PDD and their PMC, and other consultants responsible for managing all the Entity's projects
Deficiencies	All items of work not completed in accordance with contractual requirements.
Exceptions	Deficiencies which the contractor will be allowed to correct after Initial Acceptance. Any exceptions will be at the discretion of the Acceptance Team and/or the Entity (EPMO).
Punch list Item	The Punch list Item is an incomplete work or action item, identified during a walk down on a component of a turnover grouping (system or sub-system) that is required by design documents and/or Contract. Work or action items outside of design documents or Contract scope are considered an out of scope Punch list item in the context of this procedure
Architect / Engineering Consultant (A/E)	Any organization performing Engineering / Detailed Design for a Project
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling program documents and records
Initial Acceptance (I/A)	Written agreement by the EPMO that the Construction Contractor has completed the contracted works, with Exceptions. Also referred to as Preliminary Turnover or Substantial Completion.
Project Management Company (PMC)	Project Management Company - an external consultant engaged by the Entity to deliver capital expenditure infrastructure projects.
Quality Assurance (QA)	Part of quality management focused on fulfilling quality requirements. Quality assurance is a way of preventing errors and avoiding problems when delivering solutions or services to customers.



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Construction Contractor	The Main or Principal Contractor responsible for undertaking the Construction Works on the Project
Site Construction Department	Department within the Project Management Company that is responsible for Construction activities/operations.
Site Engineering Department	Department within the Project Management Company that is responsible for Engineering or design activities/operations.
Site Contracts Department	Department within the Project Management Company that is responsible for administering Contracts.
Site Quality Department	Department within the Project Management Company that provides the approval of and subsequent monitoring of the Construction Contractor's Quality Management Plan (QMP). This involves necessary checks of QA processes and approvals of QC inspections and tests in accordance with the Construction Contractor's approved Inspection and test Plan (ITP)
Initial Acceptance	Written agreement by the EPMO that the Construction Contractor has completed the contracted works, with Exceptions. Also referred to as Preliminary Turnover or Substantial Completion.

4.0 REFERENCES

1. EPM-KD0-PR-000019 - Acceptance and Handover (Initial and Final Acceptance)
2. EPM-KCM-PR-000001 - Project Construction Field Material Management Procedure
3. EPM-KCE-PR-000007 - Project Construction As-Built Drawings Procedure
4. EPM-KCC-PR-000004 - Project Construction Punch List Procedure
5. EPM-EQA-PR-000001 - Project Quality Assurance Audit Procedure
6. EPM-KCC-PR-000001 - Project Construction General Procedure

5.0 RESPONSIBILITIES

5.1 Site Construction Department

The Site Construction Department shall lead the Site Inspection and will be responsible for verifying the Works are complete in accordance with the contract requirements.

5.2 Site Contracts Department

The Site Contract Department shall issue all formal notifications to the Construction Contractor and lead the quantification and closeout of Exception Items.

5.3 Site Engineering Department

The Site Engineering Department shall support the Site Construction Department in the review of Technical Submissions as required.

5.4 Site Quality Department

The Site Quality Department are responsible for carrying out surveillances and audits on behalf of and as required by the EPMO / PMC Quality Department. The requirements for undertaking the surveillances and audits are contained in the Project Quality Assurance Audit Procedure - EPM-EQA-PR-000001

5.5 Construction Contractor

The construction Contractor shall coordinate with the suppliers and manufacturers required to attend the initial testing and commissioning operations, and shall also prepare all the necessary resources to complete this phase



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6.0 PROCESS/INSTRUCTIONS

6.1 General Requirements

Turnover of completed construction work to an Entity (EPMO) is approved after completion of an Initial Acceptance Inspection. Turnover shall occur under one or more of the following conditions:

- Construction Contractor has completed all Work required by the contract.
- Part of the Works are needed prior to contract completion, and relevant section is usably complete.

An Acceptance Team will be established, consisting of the following functions:

- Site Construction Department
- Site Engineering Department
- Site Contracts Department
- EPMO Representative
- Other Third Party Entities, as appropriate

Turnover can only occur after the Work has been inspected and approved by the Acceptance Team.

Existence of deficiencies at the time of inspection by the Acceptance Team will not impede or bar turnover, unless the deficiencies are of major importance, rendering the facility scheduled for turnover inoperable or unsafe.

The Certificate of Final Acceptance is issued when all work under the contract is complete and all deficiencies are resolved.

The EPMO receiving the completed works must attend commissioning, start-up and testing when scheduled, and arrange for required services and manpower.

The EPMO is responsible for ensuring that all the necessary resources are properly familiarized with the facility prior to the turnover.

6.2 Initial Acceptance (I/A)

6.2.1 Construction Contractor Preparation

The Construction Contractor when ready for turnover of a section of Work, will submit to the Site Construction Department, the Initial Inspection deliverables as listed on the Project Construction Initial Inspection Checklist Template (Sample) as shown in Attachment 2 for that section of the Work

The Construction Contractor shall notify the Site Construction Department when a section of the Works, as defined by the contract, is ready for Initial Acceptance Inspection

If all the required deliverables have not been received and approved, the Site Contracts and Site Construction Departments shall reject the Construction Contractor's request and delay the Initial Acceptance Inspection until the time that all deliverables have been reviewed and accepted.

6.2.2 Site Construction Department Preparation

The Site Construction Department shall prepare the Initial Acceptance Inspection package for that section of the Work as indicated by the Construction Contractor consisting of the following:

1. Contractor's letter requesting Initial Acceptance (I/A) Inspection
2. Initial Acceptance Checklist (Attachment 2)
3. Request for Initial Acceptance Inspection



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4. Final Quantity take-off records
5. Latest revision of the executed Contract
6. Contract Change Orders (CCOs)
7. Complete set of Issued for Construction (IFC) drawings and any relevant revisions
8. Complete set of As-Built drawings, with As-Built Drawing register
9. Approved O&M Manuals
10. Relevant Technical Submittals / Queries / Specifications, as applicable

6.2.3 Review and Appointment of Acceptance Team

The Site Construction Department shall jointly review the I/A Inspection Package with the Site Engineering Department (A/E Consultant if required), the Site Contracts Department, and Entity (EPMO) representatives, also a third party if required. They shall decide upon the individuals that will form the Acceptance Team and be tasked to undertake the Initial Acceptance Inspections.

The Site Engineering Department or A/E Consultant shall support the Acceptance Team in the review of Inspection Test Reports and Technical Submittals.

6.2.4 Initial Acceptance Inspection Preparation

After reviewing and approving the required Initial Acceptance Inspection Package deliverables, the Acceptance Team shall fix the date for Initial Acceptance Inspection. The Site Contracts Department shall inform the Construction Contractor of the Inspection date. The date of inspection shall be within a period as defined in the Contract or within a reasonable time, for example 14 days from the date of the Construction Contractor's notification.

The Site Construction Department shall conduct a detailed inspection with the Construction Contractor of the completed section of the construction works to assure that the works are ready for Initial Acceptance Inspection. If not acceptable the Construction Contractor shall complete the Project Construction Punchlist Form Template (Sample) as shown in Attachment 1.

The Construction Contractor will notify the Site Construction Department to request a new detailed inspection to verify all the outstanding items on the Project Construction Punchlist Form have been completed and to reschedule an Initial Acceptance Inspection.

If found acceptable by the Site Construction Department, the Site Contracts Department will notify the Construction Contractor of the Initial Acceptance Inspection scheduled date.

6.2.5 Initial Acceptance Inspection

The Acceptance Team shall conduct the I/A Inspection as scheduled, and identify and record any deficiencies discovered during the inspection on the Project Construction Initial Acceptance Deficiency List Template (Sample) as shown in Attachment 3.

The Acceptance Team will then meet with the Site Contracts Department to review and categorize the deficiencies.

6.2.6 Deficiencies/Exceptions

If the verification reveals that the work has not been executed according to the drawings and specifications, the Site Contracts Department shall advise the Construction Contractor in writing to address all outstanding work and deficiencies, by submitting the Project Construction Initial Acceptance Deficiency List as shown in Attachment 3 to the Construction Contractor.

The Construction Contractor shall remedy all agreed deficiencies, and upon completion of the assigned tasks, make a request for re-inspection of completed works.



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The Acceptance Team shall re-inspect the completed works and if any Exceptions are found the Acceptance Team will prepare a Project Construction Initial Acceptance Exception List as shown in Attachment 4.

Note: Only Deficiencies that do not affect the safe operation of the facility shall be accepted as an Exception. For example, minor electrical works may require the facility power supply to be shut-down to rectify.

The Site Contract Department shall review all Exceptions and classify them as follows:

1. Exceptions that will be corrected, for which an estimated amount will be withheld until resolution.
2. Exceptions which are technically acceptable, for which an estimated amount will be credited to the Entity (EPMO).
3. Exceptions, if any, that are considered as not applicable, in accordance with the contractual conditions and documents.

With the concurrence of the Entity (EPMO), Exceptions can be rectified after the operation of the facility has been handed over to the Entity (EPMO).

The Site Contracts Department is responsible for reaching an agreement with the Construction Contractor over all identified Exceptions and finalization of the Exceptions List.

If no agreement is reached between the Construction Contractor and the Site Contract Department regarding the Exception Items, and with the concurrence of the Entity (EPMO), the dispute resolution process defined in the Contract will be followed.

6.2.7 Initial Acceptance

After finalization of the Exceptions List, the Site Construction Department will notify the Site Contracts Department that the inspected works are acceptable and the Site Contracts Department can prepare and issue the Project Construction Certificate of Initial Acceptance as shown in Attachment 5 to the Construction Contractor.

6.2.8 Resolution of Exception Items after Initial Acceptance

The Site Contracts Department with the assistance of the Site Construction Department is responsible for the implementation of a tracking system to monitor the outstanding Exceptions items and to resolve them expeditiously. The Construction Contractor shall provide a detailed schedule for completing the items identified on the Exceptions List.

The Construction Contractor shall arrange with the Site Construction Department, in conjunction with the Entity (EPMO), for access to the completed works to rectify the Exceptions.

6.3 Final Acceptance

The relationship between Initial Acceptance, Exceptions and Deficiencies closure, Final Acceptance and warranty commencement can vary in different contract agreements (terminology for these steps can also vary in different contract agreements). In some cases, the defects liability period and warranty period run concurrently, after Initial Acceptance. In other cases, the warranty period may start after Final Acceptance, for example.

Normally, Final Acceptance should not have any Exceptions, Deficiencies or Punch list items. This is usually defined in the Contract, but exceptions may be made on a case by case basis



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6.3.1 Final Acceptance - Normal

After the resolution of the Exception Items, the Construction Contractor shall notify the Site Construction Department to establish a date for the inspection of Works for Final Acceptance.

The Acceptance Team shall conduct the Final Inspection and ensure that all Exceptions Items have been resolved. If the inspection reveals that the Works are in conformity with the Terms and Specifications of the Contract, the Site Construction Department shall make a recommendation to the Site Contracts Department to issue the Certificate of Final Acceptance as shown on Attachment 8 - EPM-KCC-TP-000014 - Project Construction Final Acceptance Certificate Template (Sample).

6.3.2 Final Acceptance - Remedial Action (If Required)

Normally, if the Final Inspection reveals discrepancies, defects or faults in some of the Works, the Final Acceptance shall be postponed. However, as stated above, in some cases it may be allowed for discrepancies, defects or faults to remain after Final Acceptance.

A Final Acceptance Exceptions List, similar to the Initial Acceptance Exceptions list shown in Attachment 4, shall be prepared. A specified reasonable period of time shall be given for the Exception(s), defects and faults to be completed and corrected, in accordance with the contract requirements.

If the Site Construction Contractor fails to carry out the said remedial work during the specified period, the Acceptance Team may have the right, as it sees fit, to recommend the assignment of the missing portion of Work to others. Completion of the Work shall be at the expense and under the responsibility of the Construction Contractor.

The Site Contracts Department, has the option, with the concurrence of the Entity (EPMO) to deduct the value of the remedial work from any Performance Guarantee, as computed in accordance with the Schedule of Quantities and Prices.

Upon the Site Contracts Department recommendation, and subsequent approval by the Site Construction Department, the Project Construction Final Acceptance Certificate shall be issued to the Construction Contractor.

6.4 Turnover Process

The Site Contracts Department with concurrence of the Site Construction Department, shall arrange for the transfer of all assets related to the Contract, to the Entity (EPMO) by issuing EPM-KCC-TP-000008 Project Construction Turnover Certificate Template (Sample) as shown in Attachment 6

At the time of transfer a Turnover Package prepared by the Site Contracts Department shall be transmitted to the Entity (EPMO). The order and contents as shown in EPM-KCC-TP-000009 Project Construction Turnover Package Template (Sample) Attachment 7.

6.4.1 Post Turnover Activities

The Entity (EPMO) is responsible for assigning responsibility for the physical assets covered by the Turnover Package to a Custodial Contractor. The Site Construction Department has the responsibility to ensure that training, if required, is provided to the Entity (EPMO)'s assigned team prior to Turnover.

However, once the Turnover Certificate is issued, the Entity (EPMO) shall accept responsibility for operations, maintenance, repairs, safety and security of the work turned over, with the sole exception of any item remaining listed on the Exceptions List.



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6.5 Beneficial Occupancy

In urgent cases, a facility may be placed into immediate use by the Entity (EPMO) by taking Beneficial Occupancy. Any such Beneficial Occupancy must be temporary, to be followed by inspections and formal turnover as defined in this Procedure.

The process for effecting Beneficial Occupancy is listed below:

The Entity (EPMO) shall notify the Site Construction Department of the Beneficial Occupancy requirement by providing the following information:

1. Facility required
2. Date required
3. Justification

The Site Construction Department shall assess the feasibility of such request, based on whether the facility can be safely put into use by the required date. In the event the requested Beneficial Occupancy is feasible, the Site Construction Department shall initiate the process by making a request for the Site Contracts Department to officially inform the Construction Contractor.

An Interface Meeting shall be convened by the Site Construction Department with the Entity (EPMO) and Construction Contractor to review and document the agreed scope of work to be Beneficially Occupied by the Entity (EPMO) on a date agreed to by both parties. A Beneficial Occupancy Turnover Certificate similar to the Project Construction Turnover Certificate as shown in Attachment 6 shall be prepared by the Site Contracts Department with concurrence by the Site Construction Department and accepted by both parties

Upon Beneficial Occupation of the facility, the Entity (EPMO) shall assume responsibility for operation and maintenance of the agreed scope of work. The Construction Contractor shall continue to retain overall responsibility for the Beneficially Occupied work as per Contract.

The Site Contracts Department/Construction Department will hold regular Interface Meetings with both the Entity (EPMO) and the Construction Contractor to review:

1. Work Progress
2. Works planned – short-term look ahead
3. Logistics requirement
4. Any technical submission or data that needs to be shared

Note: Any activity that will impact the ability of the Construction Contractor to complete the contracted works as planned should be avoided where possible and any activity that has the potential to impact the Construction Contractor shall be brought to the attention of the Site Contracts Department.

7.0 ATTACHMENTS

1. EPM-KCC-TP 000010 - Project Construction Punch list Form Template
2. EPM-KCC-TP-000004 - Project Construction Initial Acceptance Checklist Template
3. EPM-KCC-TP-000005 - Project Construction Initial Acceptance Deficiencies List Template
4. EPM-KCC-TP-000006 - Project Construction Initial Acceptance Exceptions List Template
5. EPM-KCC-TP-000007 - Project Construction Initial Acceptance Certificate Template
6. EPM-KCC-TP-000008 - Project Construction Turnover Certificate Template
7. EPM-KCC-TP-000009 - Project Construction Turnover Package Template
8. EPM-KCC-TP-000014 - Project Construction Final Acceptance Certificate Template



Attachment 1 - EPM-KCC-TP-000010 - Project Construction Punch list Form Template

[illegible]



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Attachment 2 - EPM-KCC-TP-000004 - Project Construction Initial Acceptance Checklist Template

INITIAL ACCEPTANCE CHECK LIST					
Inspection Type: ☐ Partial ☐ Close-Out					
Contractor:			Contract No.		
Scope:					
Work Inspected:					
Project Construction Lead:		Date Initial Inspection Requested by Contractor:		No. of Previous Partial Inspections:	
Prior to Initial Inspection:		Yes	No	N/A	Initial
1. *As-built Drawings Received/Approved		☐	☐	☐	
2. *O&M Manuals Received/Approved		☐	☐	☐	
3. Spare Parts Received		☐	☐	☐	
4. Warranties Received (Contractor furnished items only)		☐	☐	☐	
5. Performance Bond Received, valid until _____		☐	☐	☐	
6. Change Order(s) Proceed		☐	☐	☐	
7. All Claims Processed		☐	☐	☐	
* Mandatory for Initial Inspection					
SIGN OFF					
CLOSE OUT INSPECTION ONLY:					
Construction Department Concurrence:					
_____		_____		_____	
(Print Name)		(Signature)		(Date)	
Contracts Department Concurrence:					
_____		_____		_____	
(Print Name)		(Signature)		(Date)	

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Attachment 3 - EMP-KCC-TP-000005 - Project Construction Initial Acceptance Deficiencies List Template

[illegible]

[illegible]



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Attachment 5 - EPM-KCC-TP-000007 - Project Construction Initial Acceptance Certificate Template

PROJECT LETTERHEAD

[Construction Contractors Address]
Kingdom of Saudi Arabia

Attention : [Name]
[Project Manager]

Subject : Contract No. [XYZ]
[Scope of Work and Location]

CERTIFICATE OF INITIAL ACCEPTANCE

Gentlemen :

As provided for in the Contract XYZ between the *Client* and *Construction Contractor Company Limited* the *Client* hereby certifies Initial Acceptance of the Work of *Scope of Work and Location*, effective "*insert Arabic and Gregorian dates here*".

The Initial Acceptance is qualified by "*insert number here*" exception, which is identified on the attached Initial Acceptance Exception List. The amount of SR "*insert amount here*" will be withheld from the final payment until delivery and acceptance of exception item No. "*insert exception item reference here*".

Notwithstanding such Initial Acceptance and the issuance of this Certificate, *Construction Contractor Limited*, shall remain obligated under all those provisions of the Contract such as, but not limited to, the Confidentiality, Warranty, Liability, Indemnity and Release, and Taxes and Assessment provisions thereof, which expressly or by their nature extend beyond the issuance of this Certificate.

The Warranty provisions of the Contract will be administered by *Custodian Organization*. The *Custodian Organization* is the Authorized Representative for Warranty Administration. The *Project* Authorized Representative will be responsible for all matters relating to closeout of the Contract.

Very truly yours,

(Name)
Project Manager for Project



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Attachment 6 - EPM-KCC-TP-000008 - Project Construction Turnover Certificate Template

TURNOVER CERTIFICATE		
CONSTRUCTION CONTRACTOR:		CONTRACT No.
TITLE:		COMPLETION/ACCEPTANCE NODE:
WILL THIS TURNOVER COMPLETE THE CONTRACT? ☐ YES ☐ NO	TURNOVER DATE: DD / MM / YY	CORRESPONDING TO: DD / MM / YY
THE FOLLOWING DEPARTMENT REPRESENTATIVES HAVE REVIEWED THE ASSETS TO BE TURNED OVER AND ENDORSE THEIR COMPLIANCE TO THE TERMS AND CONDITIONS OF THE CONTRACT EXCEPT AS NOTED ON THE ATTACHED DEFICIENCY LIST. NUMBER OF ITEMS ON DEFICIENCY LIST ATTACHED _____ (STATE NO. OF ITEMS, IF NONE, STATE ZERO)		

FOR CLIENT			
TITLE	NAME	SIGNATURE	DATE
CONSTRUCTION DEPARTMENT:			
CONTRACTS REPRESENTATIVE:			
PROJECT MANAGER:			

FOR CUSTODIAN			
TITLE	NAME	SIGNATURE	DATE



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Attachment 7 - EPM-KCC-TP-000009 - Project Construction Turnover Package Template

TURNOVER PACKAGE LIST	
FACILITY:	DATE OF TURNOVER:
LOCATION:	
DESCRIPTION:	
CUSTODIAN:	PROJECT LEAD:

Prior to Initial Inspection:	Yes	No	N/A
1. Turnover Certificate	☐	☐	☐
2. Approved Facilities Data Sheet	☐	☐	☐
3. BOQ of Equipment / Material being Turned Over	☐	☐	☐
4. Warranties Received (Contractor furnished items only)	☐	☐	☐
5. O&M Manuals and Catalogues of Equipment Installed	☐	☐	☐
6. As-Built Drawings	☐	☐	☐
7. Initial Acceptance Certificate with Exception Items, if applicable	☐	☐	☐

CONCURRENCE:		
Project Manager Concurrence:		
_____	_____	_____
(Print Name)	(Signature)	(Date)
Custodian Concurrence:		
_____	_____	_____
(Print Name)	(Signature)	(Date)



CONSTRUCTION CONTRACTOR'S NAME:	DATE:
CONSTRUCTION CONTRACTOR'S ADDRESS:	CONTRACT NO.
SUBJECT / (TITLE OF CONTRACT:	

Dear Sirs:

The part of the work described and accepted herein, together with those parts accepted by Certificate of Acceptance No. _____ through _____, constitutes acceptance of all the Work under the Contract.

Description of Work:

SAMPLE

Yours,

(Name)

(Title)