DESIGNED & BUILT

Project Closeout Checklist

Use this checklist to organize completion reviews, handover information, and outstanding actions. Keep supporting records with the project files.

Project

Contractor or contract

Reviewer and review date

Choose one status per item. Complete means the action or supporting record has been verified. Follow up means an action remains. Confirm applicability before choosing N/A.

Completion and outstanding work

Review what is complete and give each remaining item a clear follow-up.

Ref	Closeout item	Status
01	Confirm the current scope of work and identify any unfinished or excluded work.	Pending
02	Complete a walkthrough with the people responsible for reviewing the work.	Pending
03	Update the punch list with exact locations, responsible parties, and target dates.	Pending
04	Verify reported corrections and keep the supporting review notes or photographs.	Pending
05	Record deferred or seasonal work with the written decision and next review date.	Pending
06	Confirm final cleaning, waste removal, and protection of completed surfaces.	Pending
07	Record the status of temporary works, temporary services, and site restoration.	Pending
08	Assign a next action and responsible person to each remaining completion item.	Pending

Notes and supporting records

Agree the closeout scope with the project team. Record outstanding work, responsible parties, and target dates before closing the review.

Project Closeout Checklist

Inspections tests and turnover

Collect the project-specific review records and resolve outstanding comments.

Ref	Closeout item	Status
09	List the final inspections and reviews applicable to the project and their status.	Pending
10	Collect inspection results and identify unresolved comments or follow-up visits.	Pending
11	Record the status of applicable occupancy or use approvals and any conditions.	Pending
12	Collect applicable equipment startup, testing, balancing, and commissioning reports.	Pending
13	Confirm that outstanding test findings have a responsible party and follow-up date.	Pending
14	Record demonstrations or checks of controls, shutoffs, and system operation.	Pending
15	Confirm the status of utility transfers, service accounts, and permanent connections.	Pending
16	Record turnover dates, access arrangements, and any agreed operating restrictions.	Pending

Notes and supporting records

Project Closeout Checklist

Documents and record information

Organize the information the owner will need after handover.

Ref	Closeout item	Status
17	Collect the agreed record drawings and identify remaining updates or missing files.	Pending
18	Confirm record documents identify their source, date, and known outstanding information.	Pending
19	Collect the final specifications, approved product information, and equipment schedules.	Pending
20	File approved changes, written clarifications, and other scope decision records.	Pending
21	Collect required operating and maintenance manuals in usable, agreed formats.	Pending
22	Confirm equipment labels, model numbers, and serial numbers match the handover records.	Pending
23	Organize inspection, test, permit, and approval records in the project file.	Pending
24	Give the owner access to the handover files and record where the final set is stored.	Pending

Notes and supporting records

Project Closeout Checklist

Operations training and warranties

Prepare the owner to operate, maintain, and obtain support for the completed work.

Ref	Closeout item	Status
25	Schedule owner training for installed equipment, controls, and maintenance tasks.	Pending
26	Record training dates, attendees, topics, and remaining questions.	Pending
27	Provide emergency contacts and instructions for locating shutoffs and service access.	Pending
28	Transfer keys, access devices, codes, and equipment credentials through an agreed process.	Pending
29	Deliver agreed spare materials, filters, tools, and extra stock with an inventory.	Pending
30	Collect written warranties and record the covered work and responsible contacts.	Pending
31	Record warranty start and end dates from the actual warranty documents.	Pending
32	Confirm service contacts, maintenance schedules, registrations, and follow-up visits.	Pending

Notes and supporting records

Project Closeout Checklist

Contract records and handover

Reconcile the records and confirm who owns the remaining actions.

Ref	Closeout item	Status
33	Reconcile the change log with the final scope and written approval records.	Pending
34	Review the final account and identify unresolved amounts or documentation requests.	Pending
35	Record final payment and retained-amount status with the person responsible under the agreement.	Pending
36	Collect the closeout documents called for by the project agreement and track missing items.	Pending
37	Record applicable completion milestones and the supporting written determinations.	Pending
38	Confirm who receives unresolved questions and warranty service requests after handover.	Pending
39	Review the handover record with the owner and record acknowledged outstanding items.	Pending
40	Archive the final record set and assign owners and target dates for all open closeout actions.	Pending

Notes and supporting records

Closeout follow up

Record open items by checklist reference and supporting record. Use additional copies of this page when needed.

Follow up item 1

Checklist and record reference

Responsible person and target date

Outstanding item or required action

Response and status

Follow up item 2

Checklist and record reference

Responsible person and target date

Outstanding item or required action

Response and status

Follow up item 3

Checklist and record reference

Responsible person and target date

Outstanding item or required action

Response and status

Follow up item 4

Checklist and record reference

Responsible person and target date

Outstanding item or required action

Response and status

Review summary

Next closeout review or action

Reviewed with and date

Keep the completed checklist with the handover records. A completed review may still include open actions that need follow-up.