Section 4 – Project handover

4.1 – sales to operations turnover

4.2 – review customer requirements/plans & Specs/contracts and document project scope

4.3 - Review the Estimate Cost Items, Schedule, and Risk Items Identified during Pre-Bid

|  |  |  |
| --- | --- | --- |
|  |  | Contact Information |
| Turnover meeting date |  |  |
| Turnover meeting attendees |  |  |
| Project Number |  |  |
| Project name |  |  |
| Address/location |  |  |
| Consulting engineer: |  |  |
| Mechanical contractor: |  |  |
| Siemens subcontractor: |  |  |
| Project manager: |  |  |
| Design Engineer(s): |  |  |
| Specialist(s): |  |  |

Review customer requirements/plans & Specs/contracts and document project scope

### Customer Requirements

Existing building or new construction:

### Customer plans

Systems involved:

AHU

Exhaust fans

Controllers

Boiler

Chiller

VAV box

VAV Control

Any other systems identified in bid-preparation

### Customer Specs

Communication protocol

Actuators

VAV box provider

VAV Controller type

Tstat

ALN Type

Insight or desigo

DXR?

### Customer Contract

Contract inclusions

Contract exclusions

Sell price

Engineering hours

Does the estimate include graphics and PPCL (is graphics/ppcl engineering bucket?)

Estimated Design hours

Special workflow considerations?

Dampers

VFD’s

AFMS

Flow meters

Issues with cost items?

Schedule

Identify long lead time items

Risk items for pre-bid?