

PLANNING + HANDOVER CHECKLIST

Keep your project details together.

Use with your advisor and your written proposal. Blank fields are for your notes; this checklist is not a proposal, agreement or product approval.

Service(s) and proposal reference

Advisor / installation contact

Openings, rooms or areas included

Manufacturer / product line / exact model

Quantity / verified sizes or measured areas

Finish / color / glass / material / controls

Before you approve

Products and scope

Make sure each service, product and location is listed. Mark decisions that still need to be finalized.

Price and allowances

Identify total price, included work, fees, repair allowances, exclusions and how a change is priced and approved.

People and timing

Name the contracting company, measurement responsibility, permit/inspection responsibility, work sequence and contact.

FROM SELECTION TO COMPLETION

A practical handover checklist.

Before ordering

- ☐ Final measurements and product configurations verified.
- ☐ Selected-product data and applicable approval/installation documents received.
- ☐ Written manufacturer and workmanship terms reviewed separately.
- ☐ Site access, preparation, ordering and permit responsibilities confirmed.

During work

- ☐ Changes, additional price and timing documented before approval.
- ☐ Removal, disposal, protection, finishing and cleanup checked against scope.
- ☐ Questions and concerns directed to the named installation contact.

At completion

- ☐ Operation or startup demonstration completed for applicable products.
- ☐ Walkthrough and remaining punch-list items documented.
- ☐ Required inspections and available closeout records received.
- ☐ Care instructions, product identifiers, warranty registration and claim contact retained.
- ☐ Wind-mitigation or other reports received only where included in your proposal.

Keep company documents current

Match the company in your agreement to its license and applicable coverage. Review the separate general liability certificate and workers' compensation certificate. SUNZ master policy WC095-00001-026 lists January 1, 2026 to January 1, 2027; client effective date September 22, 2026. It covers leased employees, not subcontractors. The insurer confirms current coverage and applicable terms.

Need the actual project document package? Contact help@hurricanesafetyprogram.org or (850) 900-8924.