

Handing over and confirming completion of installation or commissioning activities

Overview

This standard identifies the competences you need to hand over equipment that has been installed or commissioned, to the appropriate person, prior to it entering service. Following the installation activity, you will be required to either set up the equipment and hand it over to another person to complete the required commissioning activities, or to complete the commissioning operation yourself. In either of these cases, this will involve checking that all the equipment and safety devices are operable and correctly set and/or calibrated, and that the equipment functions, safely and correctly, to the required specification. Following commissioning, and in addition to the above, checks for full operational requirements and production specifications, including run rate, are to be carried out before final handover to the appropriate person.

On handing over the equipment, you will be expected to highlight any unusual or changed operating features of the equipment, and to inform the appropriate person of any possible future maintenance requirements. You must also ensure that you receive documented confirmation that everyone involved in the handover accepts that the equipment is in a satisfactory condition to be put into service.

Your responsibilities will require you to comply with organisational policy and procedures for the handover activities undertaken, and to report any problems with the handover procedure that you cannot personally resolve, or are outside your permitted authority, to the relevant people.

You will be expected to work with a minimum of supervision, taking personal responsibility for your own actions and for the quality and accuracy of the work that you carry out.

Your underpinning knowledge will provide a good understanding of your work, and will provide an informed approach to applying handover procedures following installation and commissioning. You will understand the equipment being handed over, and its application, and will know about the operating procedures and potential problems, in adequate depth to provide a sound basis for carrying out the activities safely and correctly.

You will understand the safety precautions required when carrying out the final commissioning and handover activities, especially those for isolating the equipment. You will be required to demonstrate safe working practices throughout, and will understand your responsibility for taking the necessary safeguards to protect yourself and others in the

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workplace.

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Performance criteria

You must be able to:

1. work safely at all times, complying with health and safety and other relevant regulations, directives and guidelines
2. confirm that everyone involved accepts the product or asset is in a satisfactory condition for handover to take place
3. clearly identify any unusual features of the condition of the product or asset
4. carry out the handover procedures and obtain agreement between everyone involved on the precise moment of transfer of responsibility
5. deal promptly and effectively with problems within your control and report those that you cannot solve
6. complete records of the handover in accordance with organisational requirements

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Knowledge and understanding

You need to know and understand:

1. the health and safety requirements of the area in which the handover is to take place, and the responsibility they place on you
2. the isolation and lock-off procedure or permit-to-work procedure that applies to the equipment being installed/commissioned
3. the specific health and safety precautions to be applied during the handover procedure, and their effects on others
4. the importance of wearing protective clothing (PPE) and other appropriate safety equipment during the handover, and where it may be obtained
5. the checking process to be followed before handing over the equipment (such as are the safety and quality systems operable, does the equipment function to specification, run rate)
6. the appropriate handover procedure, depending on the activity carried out (installation or commissioning)
7. the procedure for involving the appropriate people when starting up the equipment during the handover
8. the need to highlight any unusual or changed operating features of the equipment
9. the importance of informing the appropriate person of any future maintenance requirements
10. the need to confirm that the other person understands the equipment operating procedures
11. the need to ensure that the person you are handing over the equipment to accepts that it is functioning correctly
12. the organisational documentation procedures applicable to the handover
13. how to create and maintain effective working relationships with appropriate people (such as encouraging, helping, politeness, open discussions both ways)
14. the problems that can occur during handover, and how they can be overcome
15. the extent of your own authority, and whom you should report to if you have problems that you cannot resolve

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Scope/range related to performance criteria

1. Confirm that the equipment is ready for handover, by carrying out **all** of the following checks, as applicable to the equipment being handed over:
 1. the installation and/or commissioning activity has been completed and the equipment functions to specification
 2. all safety systems are functioning correctly
 3. any waste materials, safety barriers and warning signs used specifically for installation/commissioning activities have been removed
 4. any auxiliary systems or equipment involved are connected and operable
 5. environmental controls are operable
 6. others involved in using the equipment are aware of impending start-up/handover
2. Carry out the correct handover procedures for **one** type of equipment/service from the following:
 1. manual
 2. computer controlled
 3. semi-automatic
 4. engineering services
 5. fully automatic
 6. process/control
 7. other specific equipment
3. Carry out **all** of the following during the handover procedures:
 1. run the installed and/or commissioned equipment through a complete cycle, in the presence of the appropriate person
 2. confirm that the other person accepts that the equipment functions satisfactorily, to specification
 3. highlight to the appropriate person any modifications or unusual features in the operating procedure
 4. hand over all documentation relating to operating instructions, service/maintenance requirements
 5. obtain agreement from the other person that they now accept responsibility for the equipment being handed over
 6. complete any necessary handover documentation

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7. confirm that the other person knows who to contact, and how, for future maintenance requirements

4. Carry out handover procedures to **one** of the following people:
 1. commissioning engineer
 2. maintenance supervisor
 3. production/process supervisor
 4. other specific person

5. Complete the relevant records/paperwork, to include **one** of the following, and pass it to the appropriate people:
 1. job card
 2. installation report
 3. commissioning report
 4. other specific handover paperwork

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