Overview

This standard identifies the competences you need to hand over maintained and/or installed equipment, and to confirm that the equipment is now ready to run. Following the maintenance and/or installation activity, you will be required to ensure that the equipment is in a safe and operable condition. This will involve checking that all guards/covers and safety devices have been fitted, and that the equipment functions to the required specification.

On handing over the equipment, you will be expected to highlight any new, current or changed operating features of the equipment, and to inform the appropriate person of any future maintenance requirements. You must also ensure that you receive confirmation that everyone involved in the handover accepts that the maintained and/or installed equipment functions to the agreed specification.

Your responsibilities will require you to comply with organisational policy and procedures for the handover activities undertaken, and to report any problems with the handing over procedure that you cannot personally resolve, or are outside your permitted authority, to the relevant people. You will be expected to work to instructions, alone or in conjunction with others, taking full responsibility for your own actions, and for the quality and accuracy of the work that you carry out.

Your underpinning knowledge will be sufficient to provide a sound understanding of your work, and will provide an informed approach to applying maintenance and/or installation handover procedures. 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 to be observed when handing over the maintained and/or installed equipment. You will be required to demonstrate safe working practices throughout, and will understand the responsibility you owe to yourself and others in the workplace/area.
Performance criteria

You must be able to:

P1 work safely at all times, complying with health and safety and other relevant regulations, directives and guidelines

P2 confirm that everyone involved accepts the product or asset is in a satisfactory condition for handover to take place

P3 clearly identify any unusual features of the condition of the product or asset

P4 make the handover and obtain agreement between everyone involved on the precise moment of transfer of responsibility

P5 deal promptly and effectively with problems within your control and report those that you cannot solve

P6 make sure that clear, accurate and complete records of the handover are made
Knowledge and understanding

You need to know and understand:

K1 the health and safety requirements of the area in which the handover is to take place, and the responsibility they place on you

K2 the specific health and safety precautions to be applied during the handover procedure, and their effects on others

K3 the importance of wearing protective clothing and other appropriate safety equipment (PPE) whilst operating/using the equipment during the handover operations

K4 the checking process to be followed before handing over the equipment (such as all guards/covers have been fitted on moving or rotating parts, the equipment functions correctly)

K5 the correct procedure to be followed when handing over maintained and/or installed equipment

K6 the procedure for involving the appropriate people when operating/using the equipment

K7 the need to highlight, where appropriate, any new, current or changed operating features of the maintained or installed equipment

K8 the importance of informing the appropriate person of any future maintenance requirements

K9 the need to confirm that the other person understands how to use/operate the equipment before handing the equipment over to them

K10 the need to ensure that the person you are handing over the equipment to accepts that it is in a satisfactory condition

K11 the organisational documentation procedures to be used with regard to the handover

K12 how to create and maintain effective working relationships with appropriate people (such as encouraging, helping, politeness, open discussions both ways)

K13 the problems that can occur during handover, and how they can be overcome

K14 the extent of your own authority and to whom you should report if you have a problem that you cannot resolve
Additional Information

### Scope/range related to performance criteria

**You must be able to:**

1. Confirm that the equipment is ready to operate, by carrying out all of the following checks:
   1.1. the maintenance and/or installation activity has been completed, and the equipment functions correctly
   1.2. all safety systems or features are functioning correctly
   1.3. any waste materials, safety barriers and warning signs have been removed (where appropriate)
   1.4. any auxiliary systems or equipment involved are connected and operable
   1.5. any environmental controls are operable (where appropriate)
   1.6. others involved in using the equipment are aware that the equipment is about to be operated/used

2. Carry out correct handover procedures for one type of equipment/service from the following:
   2.1. mechanical equipment
   2.2. electrical equipment
   2.3. electronic equipment
   2.4. fluid power equipment
   2.5. process control/instrumentation and control equipment
   2.6. engineering services
   2.7. industrial refrigeration equipment
   2.8. lift equipment
   2.9. medical equipment
   2.10. other specific equipment

3. Carry out all of the following during the handover procedures:
   3.1. operate/use the maintained and/or installed equipment in the presence of the appropriate person(s)
   3.2. confirm that the other person/party accepts that the equipment functions satisfactorily
   3.3. highlight to the appropriate person any changes in the operating procedure (where appropriate)
   3.4. inform the appropriate person of any future maintenance activities that may be required
   3.5. obtain agreement from the other person(s) that they now accept responsibility for the equipment to be returned to service
   3.6. complete any necessary handover documentation

4. Carry out handover procedures to one of the following:
   4.1. production/process operator
   4.2. supervisor of production/process
   4.3. maintenance supervisor
   4.4. customer
5. Carry out the handover, either following two of the following maintenance activities:
   5.1. breakdown
   5.2. preventative maintenance activity
   5.3. scheduled servicing
   5.4. modification to equipment

or

5.5. on completion of the installation activities

6. Complete the relevant paperwork, to include one of the following, and pass it to the appropriate people:
   6.1. job card
   6.2. maintenance log and action report
   6.3. company reporting procedures
   6.4. other handover paperwork
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