

Heat pump handover checklist



Installer and owner complete this together. Leave the Living with your heat pump sheet in the home.

1. Shown in person

Tick each one once you have shown it, not just told them.

- ☐ Power switch (isolator), inside and outside
- ☐ Hot water cylinder and its pressure gauge
- ☐ What the normal pressure looks like
- ☐ Thermostat and controls in the home
- ☐ Room thermostat position: does it read the room fairly, or does it need moving
- ☐ What the lights on the controls mean
- ☐ The app, and what smart heating does
- ☐ Outdoor unit: keep it clear, where the steam comes from
- ☐ Which settings the owner can change, and which need the installer
- ☐ Where fault messages show, and what to report when calling

2. Done and recorded

- ☐ My heat pump settings (comfort, out/night, hot water, pressure)
- ☐ Who to call, and their phone number
- ☐ Next service date, and who books it (owner or installer)
- ☐ Weekly hot water boost: set up, or owner to set
- ☐ Documents given or emailed: certificate, commissioning record, manuals, warranty and how to claim

3. Questions asked

Note what the owner asked, in their words. It helps improve the sheet and the handover.

Anything the owner was still unsure about

4. Owner sign-off

- ☐ I was shown where everything is, and I know what is normal and when to call.

Owner name and signature

Installer name and signature

Date

- ☐ Sheet left in the property