

Construction Project Close-Out Checklist

Commercial, contractual and physical close-out steps after practical completion. · Free template from SiteAudit — siteaudit.app/templates

PROJECT

CONTRACT

CLIENT

PRACTICAL COMPLETION DATE

DEFECTS LIABILITY EXPIRY

PREPARED BY

DATE

Ref	Item	Y / N / N/A	Observation / evidence	Action required	Owner	Due date	Status
1. Physical close-out							
1	Site accommodation, plant and temporary works removed						
2	Temporary supplies disconnected and accounts closed						
3	Site fully cleared, cleaned and made good						
4	Surplus materials returned, transferred or disposed of						
5	Final photographic record of the completed works taken						
2. Defects period							
6	Defects reporting procedure issued to the client						
7	Defects log opened and responsibility assigned						
8	Subcontractor obligations during the defects period confirmed in writing						
9	End-of-defects inspection scheduled before the liability period expires						
10	Retention release dates diarised						
3. Commercial							
11	Final account agreed and signed						
12	All subcontractor final accounts settled						
13	Variations, claims and extensions of time closed out						
14	Retention position agreed and release triggered						
15	Outstanding invoices and credits reconciled						
4. Documentation & records							
16	Health and safety file issued and receipt confirmed						

Ref	Item	Y / N / N/A	Observation / evidence	Action required	Owner	Due date	Status
17	As-built information and O&M manuals delivered						
18	Warranties, guarantees and collateral warranties collected						
19	Project records archived to the retention policy						
20	Lessons learned recorded and shared with the team						
5. People & closeout admin							
21	Site team demobilised and reassigned						
22	Access cards, keys and IT accounts recovered						
23	Insurances adjusted from the completion date						
24	Client feedback obtained and reference agreed						

How to use this template

1. Close-out is where margin quietly disappears. Everything here has a cost attached to leaving it undone.
2. Diarise the end-of-defects inspection the day practical completion is certified, not eleven months later.
3. Do not demobilise the site team before the documentation is collected — nobody else knows where it is.
4. Retention is the most commonly forgotten item on this list. Put the release dates in a calendar with an owner.

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