

RISE

Retrofit information,
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Air Sourced Heat Pump(ASHP) Handover Essentials

Supply chain advice pack

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www.riseretrofit.org.uk

Introduction

The handover process for a newly installed, MCS-compliant, residential Air Source Heat Pump (ASHP) must provide the resident with full documentation, verified commissioning data, and clear operational guidance. It ensures the system meets MIS 3005 (MCS Heat Pump design standard) requirements, Building Regulations, and manufacturer specifications, and that the resident understands how to operate the system efficiently. MCS compliance is a requirement of PAS2035, which underpins Warm Homes SHF W3 and LG grant funding. This advice pack provides a detailed, structured explanation aligned with MCS expectations.

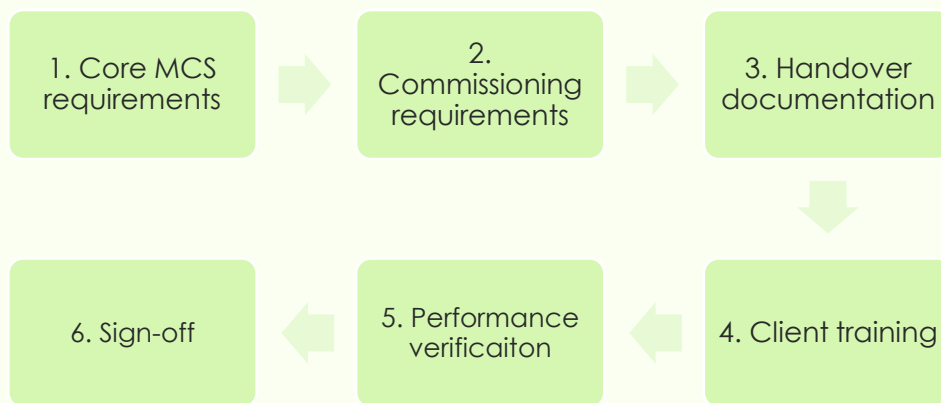


Figure 1 - Advice pack contents

1. Core MCS requirements for ASHP handover

MCS requires installers to follow the Heat Pump Installation Standard MIS 3005-1:2025 1.0, which sets out mandatory commissioning and handover obligations. The handover must include system documentation, performance data, user instructions, and confirmation that the system has been installed and commissioned in accordance with MCS standards¹.

2. Commissioning requirements

A system cannot be handed over until commissioning has been completed.

Key technical checks include²:

Heat pump unit

- Verification of correct electrical supply, protection devices, and safe isolation.
- Confirmation of correct refrigerant charge (factory or adjusted per manufacturer).
- Validation of airflow clearances around the outdoor unit.

¹ City & Guilds - Air Source Heat Pump Systems available [here](#)

² Safety Culture - ASHP Customer Handover Form available [here](#)

- Testing of defrost cycle operation.

Hydraulic system

- System flushing and cleaning.
- Filling with inhibitor or glycol (if required).
- Pressure testing and leak checks.
- Verification of correct flow rates and pump settings.
- Balancing of heating circuits (radiators or UFH).

Controls and settings

- Setting the weather compensation curve.
- Configuring room thermostats and zoning.
- Setting DHW temperature and schedules.
- Enabling legionella protection cycles.
- Ensuring immersion heater backup is correctly configured to avoid unnecessary use.

These commissioning checks are recorded in an MCS-compliant handover form.

3. Required handover documentation pack



An MCS-compliant ASHP handover pack must include³:

System documentation

- System schematic showing components and pipework.
- Location of all key components (heat pump, cylinder, valves, sensors).
- Heat loss calculations and system design data.
- Radiator/UFH design outputs and flow temperature design.

Regulatory compliance

- MCS Certificate (confirming MIS 3005 compliance).
- Building Regulations compliance certificate (Part L, Part P, Part G3(Hot water supply and systems) if applicable).
- Grid connection documentation (G98/G99 where required).

Commissioning records

- Commissioning checklist (MIS 3005 format).
- Flow/return temperatures, system capacity, seasonal coefficient of performance (SCOP) at design temperature.

³ Grid guru – Heat pump handover page available [here](#)

- DHW performance data.
- Installer declaration that the system meets MCS standards.

Warranties and guarantees

- Manufacturer warranties.
- Insurance-backed workmanship guarantee (required under MCS consumer code).

User manuals

- Heat pump unit manual.
- Controller/thermostat manual.
- Cylinder/buffer tank manual.

4. Client demonstration and training

MCS requires installers to ensure the resident understands how to operate the system. This includes:

System operation

- How the heat pump works (low flow temperature, continuous operation).
- How to adjust room temperatures.
- How weather compensation affects comfort and efficiency.
- How to set DHW schedules.

Energy efficiency guidance

- Setting Thermostatic Radiator Valves (TRVs).
- Avoiding unnecessary “boost” or “max” settings. These tend to use disproportionately more energy than a ‘steady state’ setting
- How to maintain efficient operation during cold weather.

Maintenance requirements

- Cleaning filters (if applicable).
- Keeping the outdoor unit clear of debris and snow.
- Annual servicing, according to the manufacturer’s warranty requirements

Safety and emergency information

- How to isolate power.
- What to do in case of leaks or faults.
- Contact details for support.

5. Performance verification

Before handover, the installer must verify that the system meets the design performance:

- Achieves design flow temperature.
- Provides adequate domestic hot water (DHW).
- Operates within expected noise levels.
- Shows correct coefficient of performance (COP)/ seasonal coefficient of performance (SCOP) based on commissioning data.
- No error codes or abnormal cycling.

These performance metrics are typically recorded in the MCS commissioning form.

6. Final sign-off

A compliant handover includes:

- A walkthrough of the system with the resident.
- Confirmation that all documentation has been provided.
- Client/resident signature acknowledging:
 - System explained
 - Documentation received
 - System functioning correctly

This is part of the MCS consumer protection framework.

Summary

- Follow the MCS Heat Pump Installation Standard MIS 3005-1:2025 1.0
- Make sure that required key technical checks have been completed.
- Check that the MCS-compliant ASHP handover pack includes all necessary documentation.
- The resident needs to understand how to operate the system correctly.
- Check that the system performs as designed.
- Obtain client sign off.

Resources



Podcast: All RISE podcasts are available [here](#).

Podcast: "Heat Pump Lessons from Retrofit with Kensa" available [here](#).



Masterclass: All RISE masterclasses are available [here](#).

Masterclass "Heat pumps in retrofit projects with Sureserve" available [here](#).



Heat pump advice packs

Available on the RISE website

This pack aims to share insights, good practices, and lessons learned from the sector. It is intended for informational purposes only and does not constitute as recommendations or endorsements of specific suppliers, products, or services or as legal advice. Please always check the latest regulations.