



Knowledge Transfer Form

As a member of the University community, you were given access to substantial information regarding the University's business operations and clientele. Your knowledge and experience are of immense value to us as we make decisions regarding the direction and need of our organization.

To ensure an orderly transition of responsibilities for which you have been mainly accountable, we ask that you assist us by responding to the following questions. We recommend departing employees complete this a week before they leave.

Employee Information:

Name: _____

Job Title: _____

Supervisor: _____

Last Day of Employment: ____/____/____

1. Fill out a **Project Status Report** providing a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working
2. Are there key people (internal or external contacts) other than those identified in the **Project Status Report** to whom we should be introduced before you leave the organization? If yes, please list and indicate when we might plan for such introductions?

3. Identify external agencies and regulatory groups (i.e. city/state/federal) with whom it is necessary for us to interact in order to fulfill duties of your position.



4. Are there specific files/records related to current or past projects that should be retained over a defined period of time? If yes, please list, identify the location of each, and include the retention period as per State and Federal retention policies.

5. Is there other information not requested on this form that you feel it would be helpful for us to know? If yes, please provide.
