SCE Offboarding

Knowledge Transfer Template

As a member of the University of North Carolina, you were given access to substantial information regarding University business and procedures.  You also developed substantial knowledge in your role and procedures for dealing with common responsibilities in your position.  Your knowledge is of immense value to our organization. ​

To ensure an orderly transition of the responsibilities for which you have been accountable, please assist us by responding to the following questions. Use as many pages as you need.

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| Name | Click or tap here to enter text. |
| Job Title | Click or tap here to enter text. |
| Manager | Click or tap here to enter text. |
| Last Day with Department | Click or tap to enter a date. |
| What current projects and tasks will be continued? | Click or tap here to enter text. |
| Are there any subject matter experts that can be consulted on your projects? | Click or tap here to enter text. |
| What groups or agencies are you required to interact with to complete your responsibilities? | Click or tap here to enter text. |
| Are there any specific files/records related to current or past projects that should be retained and would be useful to a new employee? Where are these files located? | Click or tap here to enter text. |
| Please list any historical/reference documents, if any, in your possession. | Click or tap here to enter text. |
| What equipment was assigned to you to use?  Where is the equipment and what training did you receive to use it? | Click or tap here to enter text. |
| May we contact you if we have additional questions?  What contact method would be best? | Click or tap here to enter text. |
| Is there any other information that you feel would be helpful for a new employee in your role to know? | Click or tap here to enter text. |