**Knowledge Transfer Document**

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 is of immense value to us as we make decisions regarding the direction and needs 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.

Name:

Job Title:

Supervisor:

Last Date Working:

1. Attach a Project Status Document providing a list and status of all projects, ongoing tasks, and other open items on which you are currently working.

2. Are there key people (internal/external contacts), external agencies, or other regulatory groups to whom we should be introduced before you leave the organization? If yes, please list and provide contact information.

3. List important historical/reference documents, if any, in your possession. Identify who they will be transitioned to prior to your departure.

4. Outside of the standard office equipment (phone, desktop computer, etc.), what additional equipment was assigned to you for use? Where is the equipment?

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.

6. May we to contact you if we have additional questions? If so, please provide a contact number and/or e-mail address should we need to reach you.

If you need more space for any of the above items, please attach an additional typed page to this document. Thank you for your service to the University of Wisconsin – Green Bay!