Indiana University Human Resources lockup

# **Work Transition Plan: Exiting Employee**

This template can be used to document ongoing duties, current projects, and important role information with the goal of easing the transition of tasks and knowledge. After the employee completes the template, a conversation between the exiting employee and manager should take place to ensure understanding.

***Details:*** *List the key aspects of the role, provide a bulleted list of duty details and documentation of associated processes and timelines. Include links to access supporting documents. To ensure the workgroup has access to documentation, move all documents to a shared location.*

***Recommendations/Next Steps:*** *Provide a summary of next steps or actions to take, including key stakeholders who need to be informed of the change. Provide recommendation of who might be able to support this effort during the transition.*

## **Ongoing Job Duties**

| **Duty/Responsibility** | **Details** | **Recommendations/Next Steps** |
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## **Current Special Projects**

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| **Duty/Responsibility** | **Details** | **Recommendations/Next Steps** |
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## **Internal and External Partners/Collaborators**

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| **External or External Partner** | **Contact Information** | **Notes About the Partner** |
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What else should be discussed to ensure a smooth and effective transition?

What else should be discussed to ensure the individual taking over this work is set up for success?