



# Employee Knowledge Transfer Template



<b>Employee Name</b>	
<b>Job Title</b>	
<b>Department</b>	
<b>Termination/Transfer Date</b>	

## Step 1: Complete Project/Active Work Status Report

## Step 2: Answer the Following Questions

1. Are there key contacts (internal/external) other than those identified on the Project/Active Work Status Report to whom we should be introduced to before you leave the department/organization? If yes, please list and indicate when we might plan for such introductions.

2. Do Standard Operating Procedures (SOPs) exist for your role? If yes, are they up to date, and please provide the location and last date of revision.

3. Identify any internal units/groups or external agencies and regulatory groups (i.e. municipal, provincial, federal) to whom it is necessary for us to interact in order to fulfil the duties of your position.

4. Are there specific files/records related to your 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.

5. List important historical/reference documents, if any, in your possession.

6. What equipment was assigned to you for your use? Where is the equipment?

7. May we contact you if we have additional questions? If so, please provide a contact number or email address we should use to reach you.

8. Is there other information not requested on this form that you feel would be helpful for us to know? If yes, please provide. (Should you require more space for any of the above items, please attach a typed page or document).

## Project/Active Work Status Report

<b>Project Description</b>				
<b>Client Contact Information</b>				
<b>Key Project Contacts</b>				
<b>Status of Project</b>				
<b>Timeline for Delivery</b>				
<b>Special Concerns</b>				
<b>Location of Working Files/Documents</b>				
<b>Comments</b>				