**OFF-BOARDING: KNOWLEDGE TRANSFER**

To provide for an orderly transition of responsibilities, it is beneficial for managers to dedicate time to collaborate with a departing employee to document current/outstanding projects, upcoming deadlines, contact information for outside vendors, and other institutional knowledge that might be lost during the transition. Below are some suggestions for documenting information for a smooth transition.

**Consider asking the employee to provide:**

1. A project status report which might include:
   1. A list of all current, outstanding, and important upcoming projects, deadlines and tasks, including contact information for members of committees/taskforces
   2. A list of ongoing regular tasks or open items currently in progress
2. A list of key people (internal/external) that the employee currently interacts with
3. Compilation of specific files/records/emails related to current or past projects
4. Have employee create a .pst file of all work related emails. Instructions can be found here: <https://www.uml.edu/docs/create-pst.pdf>

**Please Note:**

If access to the employee’s computer files and/or emails is required to ensure business continuity ***after the employee leaves, the manager must coordinate with Information Technology and Human Resources.***