**Knowledge Transfer Template**

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| **Employee Information** | |
| Employee Name: | Job Title: |
| Supervisor: | Last Day Worked: |

Hey managers – please consider whether any reminders about confidentiality, proprietary information, intellectual property and public disclosures apply!

As a member of the UW-Madison community, you were given access to substantial information at the University. Your knowledge and experience is of immense value to us as we make decisions regarding the direction and needs of our unit.

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:

1. Complete the [Project Status Update](https://uwmadison.box.com/shared/static/8gscdkr0xwywskryupp39uao8lnvl6tl.xlsx) to provide a list of all projects, ongoing tasks, tips, information and other open items on which you are currently working.
2. Are there key people (internal/external contacts) other than those identified in the Project Status Report to whom we should be introduced before you leave the University? If yes, please list and indicate when we might plan for such introductions?

Click or tap here to enter text.

1. Identify external agencies and regulatory groups (i.e., City/State/Federal) with whom it is necessary for us to interact in order to fulfill duties of your position.

Click or tap here to enter text.

1. Are there specific files/records related to 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.

Click or tap here to enter text.

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

Click or tap here to enter text.

1. What computer, lab, or other equipment was assigned to you for use? Where is the equipment?

Click or tap here to enter text.

1. We may contact you if we have additional questions. Please provide contact information should we need to reach you.

Click or tap here to enter text.

1. Is there other information not requested on this form that you feel it would be helpful for us to know? If yes, please provide.

Click or tap here to enter text.