Handover Template

For all employees upon termination, extended leave, or change of role

Purpose and document description

This handover template is used when an employee leaves their position, changes roles, or takes extended leave, to ensure a structured transfer of tasks and responsibilities. At an early stage following notice of resignation, role change, or leave application, HR or the immediate manager should conduct a handover discussion focusing on transition and operational continuity.

The template is a support tool; it is not necessary to use all questions, and the manager may add questions if needed. Documentation is voluntary.

The handover discussion and this template do not replace and should not be confused with an exit interview. Unlike the exit interview, which aims to capture the employee's experiences and feedback, the handover discussion has an operational focus. Its purpose is to ensure that tasks, responsibilities, knowledge, and resources are transferred in a structured way.

The template supports documentation of:

- tasks and areas of responsibility
- ongoing projects and deliverables
- files, systems, access rights, and contacts
- critical competencies and ways of working
- needs for knowledge transfer, onboarding, or recruitment of a replacement

The template can also be used as a basis for job postings or for planning onboarding and competence development.

Why is this important?

A structured handover reduces the risk of knowledge loss, creates clarity in responsibilities, and contributes to an effective transition when a role changes or ends. It provides better conditions for a replacement or temp-staff to quickly get up to speed and ensures that operations can continue without unnecessary disruptions.

Tasks, responsibilities, and projects

Q. What are your tasks and areas of responsibility? Please list recurring and temporary tasks.

Q. What ongoing deliverables, deadlines, and project statuses do you have?

Contact list

Q. Who are your key internal and external contacts? (name, email, phone number)

Q. Which internal and external networks are you part of, and how do they contribute to your work? (cost, contact method)

Files, systems, access rights

Q. Which systems do you currently work in?

Q. Email: Is there any email (including attachments or correspondence) that is important for your manager, colleagues, or successor to access or take over?

Q. Important files in OneDrive: Are there files in your OneDrive that are important for your manager, colleagues, or successor to access? (folder structure or file names)

Q. Transfer of OneDrive access: In ongoing collaborations or joint deliverables, does access to files need to be transferred to another employee? If yes, specify name and contact details.

Q. Meetings: Are there any scheduled meetings (including attachments or correspondence) that are important for your manager, colleagues, or successor to access or take over? (recurring meetings or meeting roles, e.g. organiser)

Knowledge transfer, onboarding, or recruitment of replacement

Q. What specialist knowledge do you consider important to transfer to your successor or colleague?

Q. What competencies and/or experience do you recommend we consider when recruiting your replacement? (requirement profile, clarity in job advertisement)

Q. From your perspective, what should your manager consider when welcoming your successor?
(e.g. onboarding, support, tools, key contacts)

Final question

Q. Is there anything else you would like to add that was not covered during today's discussion?

Please note that more interview templates are available on the staff portal.