



Transition Plan

Employee		Last Updated	
Position		Supervisor	
<p>Position Description: List your primary responsibilities and any employees, if any, who report to you.</p>			
<p>Position Qualifications: List your qualifications such as college degrees, certifications and so forth.</p>			
<p>Current Work Schedule: Enter your work schedule, i.e., Monday through Friday 8:00 a.m. to 5:00 p.m.</p>			
Position Responsibilities			
<p>Tasks:</p> <ol style="list-style-type: none"> Describe your tasks and how often you complete those tasks. <p>Note: For recurring tasks, document each task by listing the specific steps to complete the task including paper and electronic processes. List other employees who are responsible for various parts of the task.</p>			
<p>Recurring Meetings You Attend:</p> <ol style="list-style-type: none"> Record the meeting title and day and time, meeting point of contact and your role in the meeting. 			
<p>Automated Computer Systems Documentation</p> <p>If you use automated computer systems, document the name of the system, the purpose of the system, who uses the system and how they use it, who owns the data (who is the manager in charge of the data), the technical contact, user permissions and the application and data sources that the system uses.</p>			
<p>Business Contacts</p> <p>List all business contacts with whom you interact and the purpose of the relationship.</p>			



Transition Plan

Transition Activities for Deployment (Overseen by supervisor)	Completion Date	Comments
Information provided on relevant business issues.		
Information provided on projects, initiatives and tasks.		
Information provided on direct reports, if applicable.		
Location of documents and records disclosed.		
Key contact information provided.		
Current colleagues notified.		
Tasks discussed between employee and supervisor.		
Support role of incumbent during transition period finalized, if applicable.		
Training requirements for position discussed and executed/in progress.		
Staff notified of position being temporarily filled by [insert name].		
IT/Facilities notified of access changes.		
[Insert other activity]		



Transition Plan

Transition Activities for Reintegration (Overseen by supervisor)	Completion Date	Comments
<i>Request for Personnel Action, SF 52</i> submitted to HR.		
Physical relocation carried out, if applicable.		
Information provided on relevant issues.		
Information provided on projects, initiatives and tasks.		
Information provided on new direct reports, if applicable.		
Location of documents and records disclosed.		
Key contact information provided.		
Relevant system IDs and passwords provided to supervisor.		
Meeting held with staff.		
Tasks discussed between service member and supervisor.		
Training requirements for position discussed and executed/in progress.		
[Insert other activity]		

Transition Plan Agreement

Employee Signature

Date

Supervisor Signature

Date