Project Handover Template

Paste into the shared handover document or the email accompanying it. Replace every bracketed field. Use "not recorded" when source records do not establish a detail; arrange a confirmation rather than guessing. This is a working handover, not a substitute for required approval or access-transfer processes.

Project and handover

Project: [Name]

Prepared on: [Date]. Records reviewed through: [Date and missing records].

Outgoing owner: [Name]. Incoming owner: [Name or proposed name].

Responsibility accepted: [Confirmed by whom and when, or awaiting confirmation].

Current scope and next milestone

[Agreed deliverable, exclusions, target date, and conditions required before proceeding.]

Source: [Dated record and passage or timestamp].

Decisions the incoming owner needs

[Current decision, why it was made if recorded, and the earlier decision it replaces. Keep proposals separate.]

Source: [Current and earlier dated records].

Open work and dependencies

[Next action, recorded owner, due date or condition, and what it depends on. Mark proposed actions as proposed.]

Source: [Dated record and passage or timestamp].

What still needs confirming

[Missing approval, release check, owner, date, or unanswered question. Say what record is missing.]

Confirm with: [Person or team]. Confirmation needed by: [Date or not recorded].

Access and supporting records

[Links to the plan, source notes, task board, and access-request process. Never paste passwords or secret keys.]

Recipient access checked: [Resource, person, date, result, or not checked].

Recipient check

[Record whether the incoming owner can identify the first action, explain one consequential decision, open the required resources, and name what still needs confirmation. Enter the result for each check, or not yet checked.]

Checked together on: [Date or not yet checked]. Remaining questions: [Questions].

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