



University of Queensland Medical Society Inc.

UQMS Handover Template

Introduction

With each UQMS role handing over to someone new each year it is important that they receive a handover document with all the information they need to get started. It is part of your job to prepare a document for the person stepping into your role for next year so they can keep your amazing work going.

Your handover should act as a How to Document for your successor and include; passwords, timeline, description of different tasks, helpful protocols, challenges and general advice. This may include things such as example emails.

You should set up a document at the start of your role, fill it in over the duration of your term and complete and finalise it at the conclusion of your term. In particular, any time you come across something in your role that is difficult or where there isn't a prescriptive process, take note of how you handled it and who the major stakeholders are.

This document includes a range of template types and you are free to choose the template that suits your role best.

At the end of the year you should have a cohesive document. You should make this document easily accessible on your google drive.



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How To Position

Handover guide to succeed as "position"!

Message to your successor

Hi...

Role Description

- 1.
- 2.

Goals of this Role/Task

- 1.
- 2.
- 3.

Difficulties encountered and how to deal with them

- 1.

Top 5 recommendations/things I would change

- 1.
- 2.
- 3.
- 4.
- 5.



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Email Template

[insert example emails]

Part of Your Role

Part of role 1 (e.g. managing subcom)

Part of role 2 (e.g. Campaign 1)

Part of role 3 (e.g. optimal communication with stakeholder x)

Projects or Tasks

Activity	Who were involved? Who was the lead?	Resources used?	Approximate time required/ongoing?

Issues Throughout The Year

Issues	How you would change them for next year

Timeline

Month	Events	Other
January		
February		
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		



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Resources

Resource	Why it was helpful?	Link / Where to Find it?

Rolling Handover Notes

During the role: fill in the above as you go, and you can record notes below:

January

- What activities/jobs have you accomplished within the last month? Please divide by task/initiative
- What tasks are still ongoing?
- What have been the major pressure points and difficulties this month and how did you deal with them?
- What key achievements in your planning timeline have you met at this point?
- Who have you been communicating with outside of your team and in what context?
- What issues have you had escalated to you or have you had to escalate further, and why?
- What are some good resources, contacts etc? (Any resources you think will be useful that you've used in your tasks this month. Please be as detailed as possible- include links where possible, including to internal documents).

February

- What activities/jobs have you accomplished within the last month? Please divide by task/initiative
- What tasks are still ongoing?
- What have been the major pressure points and difficulties this month and how did you deal with them?
- What key achievements in your planning timeline have you met at this point?
- Who have you been communicating with outside of your team and in what context?
- What issues have you had escalated to you or have you had to escalate further, and why?
- What are some good resources, contacts etc? (Any resources you think will be useful that you've used in your tasks this month. Please be as detailed as possible- include links where possible, including to internal documents).