

# SOP Template: Handoff of Outstanding Tasks and Upcoming Interventions

This SOP details the **handoff of outstanding tasks and upcoming interventions**, ensuring seamless communication and continuity between team members. It includes clear guidelines for documenting pending activities, transferring responsibilities, scheduling upcoming interventions, and confirming understanding between parties. The objective is to minimize errors, avoid task duplication, and maintain operational efficiency by providing a structured approach to task transition.

## 1. Purpose

To provide a standardized process for the handoff of incomplete tasks and upcoming interventions between team members, safeguarding continuity, accountability, and operational excellence.

## 2. Scope

This SOP applies to all staff members involved in task management, project work, and shift transitions where the transfer of responsibility is required.

## 3. Responsibilities

- **Outgoing Personnel:** Document and communicate all outstanding tasks and upcoming interventions accurately.
- **Incoming Personnel:** Review, confirm, and take ownership of the transferred responsibilities.
- **Supervisors/Managers:** Ensure compliance with this SOP and assist in resolving ambiguities.

## 4. Procedure

1. **Prepare Handoff Documentation**
  - List all outstanding tasks and upcoming interventions in a clear and structured format (use the handoff log template below).
  - Include task descriptions, deadlines, responsible parties, and any relevant details or instructions.
2. **Review and Confirm**
  - Outgoing and incoming personnel review the documentation together, either in person or via a virtual meeting.
  - Confirm mutual understanding of each task, clarifying any ambiguities.
3. **Transfer Access and Materials**
  - Ensure all necessary resources, files, or system access are transferred to the incoming team member.
4. **Schedule Follow-up**
  - If required, set up a follow-up check-in to address questions or concerns post-handoff.
5. **Document Completion**
  - Both parties sign off on the handoff log to confirm the transfer of responsibility.

## 5. Handoff Log Template

| Task/Intervention              | Description                   | Deadline   | Status  | New Responsible Party | Notes                 |
|--------------------------------|-------------------------------|------------|---------|-----------------------|-----------------------|
| Example: Submit Project Report | Finalize and submit Q2 report | 2024-07-05 | Pending | Jane Smith            | Draft in shared drive |

## 6. Confirmation of Handoff

- Outgoing Personnel: \_\_\_\_\_ Date: \_\_\_\_\_
- Incoming Personnel: \_\_\_\_\_ Date: \_\_\_\_\_

**Note:** This SOP should be reviewed annually and updated as needed to reflect changes in procedures or organizational requirements.