The Study Transition Handoff Checklist

Make a transition review easier by identifying open work, decision authority and acceptance evidence. Use your controlled systems for the actual records and this sheet as a conversation guide.

For Clinical operations teams preparing a staffing or study-ownership transition. Original planning tool - November 2026.

01 / Use this worksheet

Set aside fifteen minutes. Work on your own copy and choose one next step with a date. Mark unknowns honestly. Revisit the sheet in a week to compare the plan with what happened. Keep personal or confidential details in your own records.

Prepared by: _____ **Date:** _____

Review date: _____ **One person to involve:** _____

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02 / Define the transition boundary

State what is changing: a role, site portfolio, vendor interface or broader study responsibility. Name the outgoing owner, incoming owner and approving manager. Record the effective date as proposed or confirmed. A handoff needs a clear boundary; otherwise both parties can reasonably assume the other person still owns a critical action.

Responsibility moving and effective date: _____

Outgoing, incoming and approving roles: _____

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03 / Inventory the open work

List outstanding deliverables, decisions, follow-ups and upcoming deadlines in the approved internal system. Include items awaiting another function rather than recording only tasks the outgoing owner can complete. Mark status using evidence and retain the source link. Avoid copying participant information, confidential source records or credentials into a general-purpose checklist or public inquiry.

Open item, owner, due date and record link: _____

Highest-priority unresolved dependency: _____

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04 / Check access and practical readiness

Confirm the incoming owner has the approved access, required training, current controlled documents and escalation contacts needed for the assigned work. Record missing prerequisites and who resolves them. Do not share passwords or inherit another person's account as a shortcut. A scheduled start date does not establish readiness to perform every study responsibility.

Access or training prerequisite: _____

Resolution owner and expected completion: _____

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05 / Walk through the next real decision

Choose an upcoming event and ask the incoming owner to describe what they will review, decide and escalate. Use the actual governance process rather than a theoretical task list. This discussion can reveal missing context before the transition takes effect. Keep authority and acceptance explicit; receiving a file is not the same as accepting responsibility.

Upcoming decision and required information: _____

Who accepts ownership, and how? _____

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06 / Schedule a short verification review

Set a review after the first relevant task or milestone. Check whether open items remained visible, responsibilities were understood and a new blocker emerged. Document any continuing support from the outgoing owner and its end point. Close the transition only through the organization's approved process, with evidence appropriate to the responsibilities being transferred.

Verification date and review owner: _____

Evidence needed to accept the transition: _____

A transition planning aid, not a controlled procedure or guarantee of inspection readiness. Use sponsor/CRO requirements and authorized records. Staffing scope, qualifications and availability require separate confirmation.

NEXT STEP / Discuss study transition support

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