

Union Case Handoff Worksheet

Blank worksheet | Part 1: Current position and immediate work

Use with the authoritative case file. Record open questions and confirm responsibility; sending the worksheet alone does not complete a handoff. Attach supporting pages when needed.

01 / Identify the transfer

Case reference / matter type / member or group:

Outgoing representative / receiving representative:

Reason for handoff / intended effective date / current stage:

02 / Put the next action first

Immediate task / owner / backup:

Procedural deadline / review status (separate from an internal target):

Internal preparation target / urgent issue to escalate:

03 / Summarize the position

Issue / last completed action / current response or decision:

Open questions / disputed facts / decisions needed:

Requested remedy / agreed obligation / follow-up still outstanding:

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Blank worksheet | Part 2: Source records and accepted responsibility

Case reference:

Procedures and deadlines depend on the applicable CBA, policy, statute and jurisdiction. Check required notices or substitutions separately. This administrative worksheet is not legal advice or a formal notice.

04 / Preserve the supporting record

Governing document / provision / version / trigger evidence:

Calculation / reviewer / extension request or confirmed change:

Approved case-file location / essential documents / restricted-record custodian:

Missing record or access problem / person to resolve it:

05 / Confirm the handoff

- ☐ Receiving representative can access the appropriate documents and identify the next action.
- ☐ Pending dates, missing information and outstanding commitments were reviewed.
- ☐ Responsibility was accepted and the authoritative assignment record was updated.

Receiving representative / acknowledgment date and time:

If not accepted: assignment coordinator / coverage action / next check:

Who will update the member / other authorized participants / when:

Follow-up check / owner / date / remaining issue:

Guide: labornexa.com/resources/union-case-handoff-guide.html
Follow your union's assignment, access and records-handling procedures.