|  |  |  |  |
| --- | --- | --- | --- |
| **canot**  **Leavers Checklist - Employee** | | | |
| This checklist outlines what you need to do before you leave your role at the University and is only for use by employees who cannot access People and Money. If you cannot action any of the steps, you should discuss this with your line manager in the first instance.  For the majority of employees, once your leaving details have been entered into People and Money you will receive a series of tasks for completion through People and Money. To access this please navigate to the Journeys App. Further details can be found within the [Employee Guide to Journeys.](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) You should complete all tasks in the ‘Leaving the University of Edinburgh’ Journey before your last day of employment. | | | |
| **Name:** |  | **Assignment number:** |  |
| **School/Department:** |  | **Last working day:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Area** | **Action** | | **Complete** |
| **Letter of resignation** | Send **written notice of resignation** **(email or letter)** to your line manager, giving the notice specified in your [Conditions of Service](https://www.ed.ac.uk/human-resources/policies-guidance/conditions-service). | |  |
| **Forwarding address and contact details** | **Confirm with your manager that your address and personal email address details are correct** on People and Money and amend if it has changed or will be changing.  If you currently have a job application in progress for an internal role at the University, you should contact the recruiting manager for the vacancy to provide your personal email address because your internal email address will be deactivated when you leave. | |  |
| **Annual leave** | Confirm with your manager that your leave records are up to date. To ensure that you are paid the correct amount, all annual leave must be booked and approved in People and Money by the 9th of the month in which you are leaving, or by your last day of employment if this is before the 9th. Please note this is not applicable if you are on a Guaranteed Hours (GH) contract. | |  |
| **Finances** | * If you are on a **GH contract** or paid hourly via Time Cards or timesheet, confirm with your manager or timekeeper that all hours worked have been submitted. Hours must be approved by your manager in People and Money **before** your last day of employment. * Submit any outstanding **expenses claims** in People and Money. * **Pay any sums due to the University** such as library fines, loan balances. * If you are a member of the **Childcare Voucher** scheme request to leave the scheme via the [MyLifestyle portal](https://uoe.sharepoint.com/sites/human-resources/pay-and-reward/SitePages/Mylifestyle.aspx) * Cancel any **paid employee benefits** e.g. Car parking, Centre for Sport and Exercise membership. * If you have a **student scholarship** check with your School/Department whether payments will continue when your employment ends. | |  |
| **Payslips, P60s and P45s** | **Save or print Payslips and P60s** you wish to keep, as access to this information will not be available when you leave. If you are unable to access People and Money, please contact your manager in the first instance.   * To access Payslips from April 2022 onwards in People and Money click on Me > Pay > My Payslips * To access P60s (2022-2023 onwards) in People and Money click on Me > Pay > Year-End Documents   Payslips and P60s that pre-date April 2022 can be requested from payroll. Ask your manager to create a Service Request, or email [hrhelpline@ed.ac.uk](file:///C:\Users\skane2\Downloads\hrhelpline@ed.ac.uk)  Your final payslip and P45 will be posted to your home address, please confirm with your manager that your contact details are up to date on People and Money. | |  |
| **Pension** | If you are 55 or older, let your School/Professional Services Group HR team know if you **intend to access your pension**. If yes, the more notice you can provide the better, as our pension providers normally require 3 months’ notice.  Contact the Pensions team for further information [PensionsManager@ed.ac.uk](mailto:PensionsManager@ed.ac.uk) or 0131 650 2284.  Visit the Pensions page on the [Finance Specialist Services site](https://uoe.sharepoint.com/sites/FinanceSpecialistServices/SitePages/Pensions-Team.aspx) to find out more about the options for your pension benefit after leaving the University. | |  |
| **Exit survey and exit interview** | Complete the online [exit survey](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/exit-survey). After completing the survey, if you would like to have the opportunity to continue the conversation, please contact your manager or another senior member of staff in your School/Department. They will then arrange and conduct a face-to-face exit interview with you. | |  |
| **Handover** | Provide a handover containing information about:   * regular or re-occurring meetings, reports or tasks * key documents, procedural notes or reference material and where to find them * the status of recent and current projects, reports or tasks and details relating to; actions needed, stakeholders, budget (if applicable), critical issues, challenges or priorities * key contacts details (internal and external) * [Health & Safety Handover Arrangements](https://www.ed.ac.uk/health-safety/guidance/workplaces-general/handover-arrangements) | |  |
| **Returning University property** | Return the following items to your School/Department on, or by your last working day:   * equipment (e.g. mobile devices, laptops, tablets, specialist equipment) * documentation deemed valuable to the University stored on portable media or in paper form * software including media and licensing information * car parking fob or key * staff card * office keys * any other property belonging to the University. | |  |
| **Your desk** | Clean your desk and empty any cabinets or drawers containing your belongings. | |  |
| **IT account access** | Your staff account (which includes email) will expire 30 days after you leave the University. Follow Information Services’ (IS) [recommended actions](https://www.ed.ac.uk/information-services/help-consultancy/it-help/leaving-university). | |  |
| **Intellectual property** | Tick ‘Complete’ and sign below to confirm that you have returned, or destroyed all copies of information owned by the University, and any key business information as agreed with your line manager.  Guidance on [secure deletion](https://www.ed.ac.uk/infosec/how-to-protect/secure-deletion) can be found on the Information Security website. | |  |
| **Actions must be completed by your last working day** | | | |
| **Signature:** |  | **Date:** |  |

**Please sign and return this checklist to your manager, who will send it to your local School/Professional Services HR team to upload to your employee file.**