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| **Leavers Checklist - Manager** | | | |
| This checklist is for information only and outlines what a manager needs to do when an employee resigns from  their role at the university. Once the termination has been processed in People and Money the appropriate  Leaver Journey will be assigned. Managers have a responsibility to check that all tasks are completed before the employees last day. Please review the [Line Manager Guide to Journeys](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) for further information.  The [Guide to Employment Separation](https://www.ed.ac.uk/human-resources/policies-guidance/user-guides) may also be a useful reference. | | | |
| **Employee name:** |  | **Last working day:** |  |

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| **Area** | **Action** | **Complete** |
| **Resignation** | * Resignation letter or email received. * Agree end of employment date and last working day. * Confirm outstanding leave entitlement. * Agree arrangements for any outstanding leave with the employee. * Approve any agreed annual leave in People and Money. To ensure that the employee is paid correctly, this must be done by the 9th of the month in which the employee is leaving, or by the last day of employment if this is before the 9th. * Confirm that the leave balance is correct, as any outstanding accrued annual leave will automatically be paid in the employee’s final salary payment. Any leave taken over what is accrued by the leave date will be deducted from the final salary payment. If, after confirming that the leave records are up to date, a balance adjustment is required, contact the School/Department Administrator. * If the employee leaving is a Line Manager, agree who will take over the management responsibilities. * Follow the People and Money user guide [How to process terminations](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) to enter the leave details. If the employee leaving is a Line Manager provide details of who will be taking over this responsibility. * Upload resignation letter to the Employee File SharePoint (if you do not have access send to your School/Dept. Administrator (SDA) or if no SDA send to HR Helpline). * Remind the employee to save or print payslips and P60s before they leave.   Note – a letter will be sent to the employee to confirm their resignation once People and Money has been updated with the leave details.  If the employee does not have access to their work email you should provide them with a copy of the ‘Acceptance of resignation’ or ‘Confirmation of Contract End Date’ letter. This will be automatically saved to the employee’s SharePoint file under Category 01 – Contract, Subcategory 08 – End of Employment, when HR Operations approve the termination. If you do not have access to this, you can request a copy from your local school or department administrator. |  |
| **Complete Journey Tasks** | Employees with People and Money access should complete all tasks within the ‘Leaving the University of Edinburgh’ Journey assigned within People and Money.  If the employee does not have access to People and Money support them to complete the actions detailed in the [employee leaver checklist](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/leavers-checklist). This checklist must be returned to you. Review and send to your local School/Professional Services Group HR team who will upload it to the employee’s file. |  |
| **Exit survey** | Encourage completion of the [employee exit survey](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/exit-survey). |  |
| **Exit interview** | After the employee has completed the exit survey, they may want to continue the conversation and have a face-to-face [exit interview](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/exit-interview) with you.  If your employee has not requested a face-to-face interview, you may want to check whether the employee would like the opportunity to have one. |  |
| **Occupational Health** | Where the employee is on the health surveillance programme, check that an exit appointment is arranged with Occupational Health. |  |
| **Systems access** | Identify the **systems** that the employee has access to and arrange for their access to be removed or transferred. If the employee is a line manager, ensure that their direct reports are assigned to an appropriate employee on People and Money, who will temporarily or permanently undertake management responsibility for them. Access to People and Money is removed automatically the day after the employee leaves so please make sure any outstanding invoices or payments are finalised. |  |
| **Review data and access** | Review and arrange for **data** held by the employee in electronic and paper format (e.g. files on shared drives, SharePoint sites, Wiki pages and emails) to be either transferred or deleted.  Discuss **access** held solely by the employee to specific Outlook mailboxes, SharePoint sites or shared drive folders and arrange for it to be either transferred or removed. |  |
| **University property** | Make sure the employee returns University property, such as:   * 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. |  |
| **Intellectual property** | Confirm employee has returned or destroyed all copies of information owned by the University, and any key business information.  Check that the employee has completed the ‘Intellectual property’ section on their leaver checklist. |  |
| **Handover** | Make sure the employee provides an adequate 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) |  |
| **Reference requests** | If you receive a reference request for the employee before or after they leave, please include the following wording within your reference: “*This reference is provided in a personal capacity and it does not represent the views of the University of Edinburgh”.*  HR can provide standard factual references, these can be requested by raising a Service Request via People and Money ‘Service Request>Forms>Reference Request’.  Further guidance on providing a reference can be found on the [Information Compliance Services](https://information-compliance.ed.ac.uk/guidance/further/requesting-references) webpages. |  |
| **Replacement of Post** | If you are replacing the employee who is leaving you should follow the [Guide to Recruitment and Onboarding](https://www.ed.ac.uk/human-resources/policies-guidance/user-guides) to seek approval to recruit and create a job requisition in People and Money.  If you are not replacing this post then you should raise a Position Change service request to either deactivate the position or reduce the FTE. |  |