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| **Transfer Checklist - Employee** | | | |
| This checklist outlines what you need to do before you transfer to a new role within the University and is only for use by employees who do not have access to 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 transfer 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 within the ‘Moving Roles - Tasks to finish in your current role’ Journey before you transfer to your new role. You will also receive a Journey titled ‘Getting Started in a new role’, this will provide tasks for you to complete to help you get started in your new job. | | | |
| **Name:** |  | **Assignment number:** |  |
| **School/Department:** |  | **Last working day:** |  |

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| --- | --- | --- |
| **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). |  |
| **Annual leave** | Make sure your annual leave record is up-to-date.  Not applicable if you are on a Guaranteed Hours (GH) contract. |  |
| **Finances** | * If you are on a GH contract or paid via a timesheet, make sure all hours worked are submitted. * Submit any outstanding expenses claims. * If you have a student scholarship check with your School/Department whether payments will continue |  |
| **Internal Transfer Survey** | Complete the online [Employee Internal Transfer Survey](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/exit-survey). |  |
| **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 School/Department 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) * office keys * any other property belonging to the School/Department. |  |
| **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. |  |
| **Your desk** | Clean your desk and empty any cabinets or drawers containing your belongings. |  |