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| **Transfer Checklist - Manager** | | | |
| This checklist is for information only and outlines what a manager needs to do when an employee transfers  to another role at the university. Once the transfer has been processed in People and Money the ‘Moving  Roles – Tasks to finish in your current role’ 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 school or department the employee is transferring to will action the transfer within People and Money, please **do not** process as a termination within People and Money.  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 last working day. * Ensure the employees leave balance is correct (i.e. annual leave taken and planned is recorded) * If the employee transferring is a Line Manager agree who will take over the management responsibilities and change the line manager in People and Money (follow the user guide [‘How to Change a Manager’)](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) * 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). |  |
| **Complete Journey Tasks** | Employees with People and Money access should complete all tasks within the ‘Moving Roles – Tasks to finish in your current role’ Journey assigned within People and Money.  If the employee does not have People and Money access, make sure the employee completes the actions detailed in the [employee transfer 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. |  |
| **Internal Transfer Survey** | Encourage completion of the [Employee Internal Transfer Survey](https://www.ed.ac.uk/human-resources/policies-guidance/leaving-university/exit-survey) |  |
| **Exit interview** | Check whether the employee would like to have a face-to-face [exit interview](https://human-resources.ed.ac.uk/policies-guidance/leaving-university/exit-interview) with you. If yes, arrange and conduct the interview. |  |
| **Systems access** | Identify the **systems** that the employee has access to and arrange for their access to be removed or transferred.  If the employee holds any specific access / areas of responsibility on People and Money or has access to the Employee File system, complete the [People and Money Access Application Form](https://www.ed.ac.uk/human-resources/a-to-z-of-forms) and Raise a Service request to remove their access.  If the employee is an Authoriser on Financial systems, email [finance.helpdesk@ed.ac.uk](mailto:finance.helpdesk@ed.ac.uk) to remove their access. Make sure any outstanding invoices or payments are finalised beforehand. |  |
| **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.  To remove access email [IS.Helpline@ed.ac.uk](mailto:IS.Helpline@ed.ac.uk) with the employee’s name, UUN and their last working in your School/Department and details of the mailboxes and shared drives to be removed. |  |
| **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) |  |
| **School/Department property** | Make sure the employee returns School/Department property, such as:   * equipment (e.g. mobile devices, laptops, tablets, specialist equipment) * office keys * any other property belonging to the School/Department. |  |
| **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. |  |