

**LEAVERS CHECKLIST FOR MANAGERS**

**Line Managers are to complete this form and return to HR for the Employee Record and Audits.**

|  |  |  |  |
| --- | --- | --- | --- |
| Date: |  | Leaving Date: |  |
| Name: |  | Payroll Number: |  |
| Dept. |  | Dept Section: |  |
| Researcher \* | Yes[ ]  No [ ]   | Maternity Returner? | Yes[ ]  No [ ]   |

This form is intended to guide the leaver and their manager through a handover and leaving process. It should be supplemented with detailed notes where necessary.

|  |  |
| --- | --- |
| **Action** | **Mark box** [x]  **when completed or N/A****(Insert any details)** |
| **Meeting with Manager** |  |
| 1. Has a meeting taken place between the employee and Line Manager to discuss work handover and responsibilities.
2. List outstanding work and document working procedures as necessary
3. Plan for completion of immediate tasks before termination
4. Re-allocate long term responsibilities
 | [ ]   |
| **Records and Data** |  |
| 1. (a) Have all electronic files and software used throughout the employment period been left on an appropriate accessible network, server or other storage device, as agreed with the Line Manager?

(b) Has all electronic data been clearly identified? What are the access, storage, transfer or disposal arrangements for data? (c) Where are the electronic research records, Protocols, algorithms, etc? Have file names, file structures, passwords etc. been given to the Line Manager? | [ ]  [ ]  [ ]   |
| 1. Has all data generated during the employment period been left in an accessible and documented state, transferred or archived? This includes lab books, paperwork, conference posters, abstracts and results. Leaver to provide Line Manager with a detailed record.
 | [ ]   |
| 1. Have data registers relating to data stored off site been completed or updated? Provide details
 | [ ]   |
| **IT Equipment and Data** |  |
| 1. (a) Have arrangements for the return of IT equipment been discussed, e.g. laptop, mobile phones?

(b) Has the Leaver’s email account had all unnecessary email messages deleted ?(c) The Leaver should inform IT Help Desk if they need to be removed from email alias lists and also inform the holder of other mailing lists.(d) Have the IT department been advised of the final working day to disable passwords and user accounts? | [ ]  [ ]  [ ]  [ ]   |

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| **Website Pages and Data** |  |
| 1. Have all web pages looked after by the Leaver on the main RVC website been assigned to another member of staff?
 | [ ]   |
| **Finance**  |  |
| 1. If any travel arrangements for beyond the leaving date have been paid for in advance, have Finance, Travel Bookers or Trainline been informed?
 | [ ]   |
| 1. Have all outstanding expense claims been sent to Finance?
 | [ ]   |
| 1. If applicable, has a College credit card been returned to Finance?
 | [ ]   |
| 1. Have all outstanding overtime claim forms been completed?
 | [ ]   |
| 1. Have you any outstanding payments to RVC?
 | [ ]   |
| 1. Have you advised Finance to remove from Agresso?
 | [ ]   |
| **First Aiders / Fire Marshalls** |  |
| 1. If the Leaver is a designated First Aider or Fire Marshall, has the Departmental Safety Officer been notified?
 | [ ]   |
| **Access Cards and Keys** |  |
| 1. (a) Have all electronic access cards been returned to the Line Manager?

(b) Have all college keys been returned? | [ ]  [ ]   |
| **Research Activity** |  |
| 15.5 Biological Material \* Does the employee have biological research material in RVC freezers (e.g. Nucleic acid, GMO, infectious materials). If yes, these need to be destroyed or handed over (with provenance) to the line manager or other specified employee.  \* Please also notify your Departmental Safety Supervisor (DSS) | [ ]  If yes, please provide details: |
| **Human Resources** |  |
| 1. Have Human Resources received the Leaver’s resignation letter?
 | [ ]   |
| 1. Have HR been notified of future correspondence details for the purposes of sending final payslips, P45s, P60s and P11D reports?
 | [ ]   |
| 1. Does the Leaver need to keep IT access, their RVC staff page or their RVC email address active beyond their leaving date? If so, the manager needs to request this via Helpdesk@rvc.ac.uk detailing the closing date and any forwarding email addresses at least one week prior to the leaving date.
 | [ ]   |
| 1. Review the annual leave record. Is there outstanding leave to be taken or has more than the allowance been taken? Research funded staff do not receive paid holiday and all other staff need approval from their Line Manager if holiday is to be paid.
 | [ ]   |
| 1. Line Manager to discuss with HR requirements for a replacement.
 | [ ]   |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employee Signature |  | PrintedName |  | Date |  |
| Manager Signature |  | Printed Name |  | Date |  |

Please sign, scan and return this form to HR hr@rvc.ac.uk. Thank you.