**Leaver Guidance and Checklist for Line Managers & Employees**

A well-managed leaver process is essential to help provide staff with a positive, lasting impression of their experience with the University. It is also important to ensure compliance with the University’s regulatory obligations and policies in areas such as security, access, data protection, etc and to ensure the return of its equipment and property.

The line manager is responsible for the leaving process and for ensuring that all essential actions are completed.

The checklist below is intended to assist line managers in ensuring that all key essential leaver activities are undertaken when staff leave their department, whether to transfer to another part of the University or to leave altogether. The relevance of each of the activities in the checklist should therefore be assessed and adapted accordingly. The checklist can also be adapted for HPTs, casual and temporary staff leavers.

The Faculty IT Support Teams and the Payroll & Pensions Office also receive notification of the leaver/transferee. Payroll and line managers will liaise concerning any specific matters related to the leaver, as appropriate. IT Services rely on the line manager/supervisor to ensure all IT devices are returned by contacting the IT Service Desk.

**Section 1 - Line Manager Responsibility**

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| **Notification** | **Links to further information** | **Done** |
| Agree a leaving date and ensure the employee has provided a written resignation (letter, email) where applicable | [Human Resources](http://www.bristol.ac.uk/hr/) |  |
| Forward written resignation, including the agreed end date, to HR for action | [Human Resources](http://www.bristol.ac.uk/hr/) |  |
| Agree arrangements for annual leave and ensure any outstanding is taken before the last day of employment or agree exceptional arrangements for payment in lieu  ***Note:*** *You will need to liaise with Payroll to confirm annual leave taken for any adjustments to final pay* | [payroll-uob@bristol.ac.uk](mailto:payroll-uob@bristol.ac.uk) |  |
| Advise employee to expect a formal acknowledgement letter from HR (and further correspondence from the Pensions Office where pension benefits are being taken) | [Human Resources](http://www.bristol.ac.uk/hr/)  [Pensions](http://www.bristol.ac.uk/pensions/) |  |
| Ensure the employee is aware of their own responsibilities (see below) and that these are carried out before they leave |  |  |

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| **Handover of work and responsibilities** | **Links to further information** | | **Done** |
| Arrange a work handover to the appropriate person |  | |  |
| Where the employee is a line manager ensure an interim line manager is identified where necessary and contact your Faculty/Professional Services HR team to update MyERP | [Faculty/Professional Services HR Team](http://www.bristol.ac.uk/hr/contact/#ops) | |  |
| Where the employee has any additional roles assigned to them, ensure a suitable replacement is identified and notify the relevant parties, e.g.:   * Induction Co-ordinator (Finance and HR Systems Support team) * Absence Co-ordinator (Finance and HR Systems Support team) * HPT Co-ordinator (Finance and HR Systems Support team) * Honorary & Associate Co-ordinator (Finance and HR Systems Support team) * First Aider (Health & Safety Representative) * Data Protection Representative (Secretary’s Office) * Disability Co-ordinator (Disability Services) * Designated Individual (DREI) * Research Ethics Officer (DREI) | | Please visit our [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) for further information and contact our systems team via email <[financehr-systems@bristol.ac.uk](mailto:financehr-systems@bristol.ac.uk)>  [Safety and Health Services](http://www.bristol.ac.uk/safety/)  [University Secretary's Office](http://www.bristol.ac.uk/secretary/)  [Disability Services](http://www.bristol.ac.uk/disability-services/)  [DREI](http://www.bristol.ac.uk/red/)  [DREI - Research Governance](http://www.bristol.ac.uk/red/research-governance/) |  |
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| Where the employee is an Honorary/Associate sponsor ensure a replacement is identified | Please visit our [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) particularly the page - [Requesting other staff](https://uob.sharepoint.com/sites/myerp/SitePages/manage-people-staff-request-other.aspx) | |  |
| Ensure key contacts are made aware the employee is leaving, including any mentor/buddy or external 3rd parties as appropriate, ego external funding body, research partners, KTP industrial partner, NHS Honorary Trust etc |  | |  |
| Ensure employee’s details are removed from local websites, local contact lists, photo board, authorised signatory lists etc. |  | |  |
| Where the employee is leaving UOB, go to Develop, open the Development Review Form and select “mark this review as incomplete/unable to take place”. | | [Develop](https://develop.bristol.ac.uk/) |  |
| Contact HR to instigate the recruitment process to replace the employee, where appropriate. | [Human Resources](http://www.bristol.ac.uk/hr/) | |  |

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| **IT equipment, data security and other equipment** | | **Links to further information** | | **Done** | |
| Ensure the employee returns **all** IT equipment, e.g. laptop, desktop, tablet, mobile phone, external hard disk, memory stick(s), etc to the Faculty IT Support Team – please raise a ticket with the IT Service Desk to arrange this. This should include a review of what IT equipment the employee may have at home.  UoB branded workwear must be disposed of as confidential waste. Contact Waste & Recycling to arrange collection.  *U*cards must be returned to Card Services.  **NOTE. All equipment bought via any University budget, including research grants, remains University property and must be returned for re-use. Such equipment cannot be gifted to the employee.** | | [IT Services](http://www.bristol.ac.uk/it-services/)  [Waste & Recycling (uniform secure disposal)](http://www.bristol.ac.uk/green/doing/waste/waste-management-guide/confidential-waste/)  [Card Services](http://www.bristol.ac.uk/cardservices/) |  | |
| Ensure the employee either securely transfers or makes available UoB documents, data, or any other information relevant to UoB business to the appropriate person, e.g. line manager, or relevant University filestore.  This includes information held by the employee in the following: | | [IT Services](http://www.bristol.ac.uk/it-services/) |  | |
|  | * UoB Email account * Personal email account(s) |  |  | |
|  | * Personally owned devices (phones, tablets, memory sticks) |  |  | |
|  | * University contracted cloud storage spaces, e.g. OneDrive |  |  | |
|  | * Personal storage account(s) |  |  | |
| Any data related to the University’s business held in personal accounts or on personally owned devices must be deleted once transferred. | |  |  | |
| Ensure the employee transfers their access to UoB social media accounts to the new role holder or line manager. This must include a change of password. | | [IT Services](http://www.bristol.ac.uk/it-services/) |  | |
| Contacts the IT Service Desk to review and amend/remove as appropriate the employee’s: | | [IT Services](http://www.bristol.ac.uk/it-services/) |  | |
|  | * access rights (physical & electronic) |  |  | |
|  | * software subscriptions |  |  | |
|  | * access to filestores |  |  | |
| Arrange to amend/remove as appropriate the employee’s access to shared resources such as local intranet sites, Sharepoint sites, shared mailboxes, Microsoft Groups and Teams, etc. | | [SharePoint groups and Teams access](https://uob.sharepoint.com/sites/systemsupport/SitePages/o365groups-teams.aspx)  [Distribution groups (mailing lists)](https://uob.sharepoint.com/sites/systemsupport/SitePages/Distribution-list-guidance.aspx?web=1https%3a//) |  | |

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| **For Academic / Clinical Staff** | **Links to further information** | **Done** |
| Ensure a successor for stewardship of research data is identified under the Research Data Management Policy and copies of relevant data passed on. Where not identified, this will devolve upwards to the Head of School or Faculty Dean | [Research Data Management](https://data.bris.ac.uk/) |  |
| Inform the Research Governance Team (RED) and the Information Rights Officer in the Secretary’s Office (where research or teaching involves human participants, their tissue and/or data) | [Research Governance](http://www.bristol.ac.uk/red/research-governance/)  [University Secretary's Office](http://www.bristol.ac.uk/secretary/) |  |
| Professors – liaise with the Dean/HR to instigate the Emeritus Professor consideration process for eligible employees | [Faculty Deans](http://www.bristol.ac.uk/faculties/deans.html)  [Human Resources](http://www.bristol.ac.uk/hr/) |  |

**Section 2 - Employee responsibility**

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| **Administrative actions** | | | **Links to further information** | **Done** |
| **Update personal details** on MyERP before last day of employment, particularly a contact address | | | Please visit our [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) particularly the page - [View or update your contact details](https://uob.sharepoint.com/sites/myerp/SitePages/Personal-contact.aspx) |  |
| **Download from MyERP any payslips** needed for personal records (access to MyERP will not be possible after the last day of employment) | | | Please visit our [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) particularly the page - [Payslips and P60s](https://uob.sharepoint.com/sites/myerp/SitePages/Getting-paid-payslips.aspx) |  |
| **[If you receive workflow tasks in MyERP]** - Ensure that you have completed any outstanding workflow tasks before your last day of employment and set up a substitute to cover any transitional period (if applicable). | | | Please visit our [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) particularly the page - [Setting a substitute](https://uob.sharepoint.com/sites/myerp/SitePages/Personal-set-substitutes.aspx) |  |
| Return *U*Card to Card Services or line manager (or the Faculty or department office) | | | [University Card Services](http://www.bristol.ac.uk/cardservices/) |  |
| Return any University property or equipment to the line manager (or the Faculty or department office as appropriate). This will include, for example: | |  | |  |
|  | * Keys | |  |  |
|  | * Mobile telephone | |  |  |
|  | * Laptop | |  |  |
|  | * Tablet | |  |  |
|  | * Other IT equipment | |  |  |
|  | * Purchasing card | |  |  |
|  | * Car parking permit | |  |  |
|  | * Uniform/clothing/personal protective equipment. Branded goods should be re-used or securely destroyed | | [Waste & Recycling (uniform secure disposal)](http://www.bristol.ac.uk/green/doing/waste/waste-management-guide/confidential-waste/) |  |
|  | * Other equipment | |  |  |
| Complete the Exit Questionnaire using MyERP (or paper copy if no PC access) | | | [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) particularly [Exit questionnaire - leaving the University](https://uob.sharepoint.com/sites/myerp/SitePages/Personal-exit-questionnaire.aspx) |  |
| If transferring to another job in UOB, ask the Develop team to update your Develop “Reviewer” to your new line manager. | | | [sd-course@bristol.ac.uk](mailto:sd-course@bristol.ac.uk) |  |
| Contact the Payroll & Pensions Office about any queries related to pay, P45, pensions etc | | | [payroll-uob@bristol.ac.uk](mailto:payroll-uob@bristol.ac.uk)  [Pensions](http://www.bristol.ac.uk/pensions/) |  |
| Make any outstanding expenses claims before the last day of employment, using MyERP | | | [Finance Services](https://uob.sharepoint.com/sites/finance-services)  [MyERP Support Pages](https://uob.sharepoint.com/sites/myerp) - [Claiming expenses](https://uob.sharepoint.com/sites/myerp/SitePages/Expenses-claiming.aspx) |  |
| Visit IT Service’s web page to view IT information for staff leaving the University | | | [IT access when leaving the University](https://uob.sharepoint.com/sites/itservices/SitePages/your-data-after-you-leave-the-university.aspx) |  |
| Clear workspace of personal belongings and equipment | | |  |  |