**The transfer of employee information to a new line manager**

*This guidance is relevant to those individuals that move roles internally and therefore are allocated a new line manager, or for those staff who stay in existing roles but are allocated a new line manager. Either way, below captures the information that the new line manager should request from the previous line manager.*

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| **Number** | **Tick or N/A** | **Activity** |
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| **1.** |  | **Line manager checks**When a line manager receives a new internal member of their staff into their team, they should check that they have all relevant contact details on ERP listed correctly. This should include correct address, emergency contact, contact telephone numbers.  |
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| **2.** |  | **Occupational Health Reports**It is reasonable for new line managers to be aware of recent health issues, particularly when it involves reasonable adjustments. Therefore new line managers should be given access to Occupational Health recommendations from the period of 1 year prior to date of transfer.  |
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| **3.**  |  | **Wellness action plans/Reasonable Adjustment plans.**New line managers should be given access to Wellness action plans and Reasonable Adjustment plans from the period of 1 year prior to date of transfer. |
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| **4.**  |  | **Live conduct or capability warnings.** Line managers should have access to live conduct and capability warnings. With regards to formal capability procedures, however, line managers should also have access to all relevant paperwork that led to the warning itself, e.g. Performance Improvement Plans, Occupational Health Reports, Sickness reports.  |
|  |  | **Informal discussion record on conduct or capability issues –** Line Managers should have access to any informal notes within the last 1 year.  |
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| **5.**  |  | **One to One documentation**A new line manager should ideally have access to one-to-one documentation for 3 months prior to the transfer. This will allow the line manager to be aware of any present non-role-related issues that are affecting the employee.  |
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| **6.**  |  | **ISR documentation**If a line manager transfers during their ISR period, the new line manager should be made aware by the previous line manager of the induction that took place and any records of ISR meetings, informal or formal. The new line manager has the authority to consider whether the ISR should continue as normal or whether a new ISR is required. This decision will be based on how similar the new role is to the previous one and will be discussed with the local HRBP before the decision is taken.  |
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| **6.** |  | **Annual Leave**If an employee has annual leave booked prior to transfer, they should make the new line manager aware of this as soon as possible. In most circumstances, the leave will be honoured but if there are operational reasons for the leave to be canceled, then the new line manager will give appropriate notice. Notice would normally be double the amount of leave being asked so if the employee has two weeks booked, they should receive 4 weeks notice of cancellation.  |
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| **7.** |  | **Development Reviews**The line manager can ask their new staff member to share the PDF copy of their previous review. In [Develop](https://develop.bristol.ac.uk/ilp/pages/mentored-ojt.jsf?role=EMPLOYEE&menuId=1405&locale=en-GB&showbundlekeys=false), they can use the 'Print' button in the top right corner of their form, to export it to PDF.  |
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| **8.** |  | **RR2 review documentation**Records of live RR2 review periods and associate documentation should be transferred to the new line manager.  |
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