

Leaver Checklist for Managers & Employees

This checklist provides guidance on the process that should be followed when a member of staff is leaving the University, and it should be read and used in conjunction with the [Leaver Guidance for Managers](#). Line managers are required to complete this form and to retain a copy locally.

Please note, as members of staff leave the University for a variety of reasons, certain items may not apply. The line manager and the employee are responsible for ensuring that all relevant actions identified on this form are carried out.

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| Employee Name | | Agreed Leave/ Retirement Date | |
| School/RI/Service | | Staff Number | |

| Line Manager Responsibility | | |
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| Area | Action | Completed |
| Notification | Confirm resignation/retirement correspondence received | |
| Resignation | <ul style="list-style-type: none"> ▪ Agree date of leaving/retirement date ▪ Discuss annual leave and ensure employee takes outstanding leave before their last day ▪ Advise College/US HR of resignation/retirement and agreed end date by completing a Manager's Request on CoreHR and upload the resignation correspondence to the system ▪ Advise employee HR will confirm retirement/ resignation in writing ▪ Advise employee Pension and Benefits Plus Administrators will write to them separately (if relevant) | |
| Contract End/ Funding End | <ul style="list-style-type: none"> ▪ Follow Contract End Management process: <ul style="list-style-type: none"> ○ Manager consults with Employee (tick opposite to confirm this has taken place) ○ Finalise leaving date ○ Inform HR via CoreHR Manager request ○ HR issue notice of termination in line with contractual notice period | |
| Handover | Arrange handover of work with employee if applicable. | |
| HR Payroll System Approvers | If an employee is listed as an approver on the HR payroll system, you will need to notify interim arrangements to HR/Payroll System Team at hssystemhelp@glasgow.ac.uk | |
| Exit Questionnaire | Advise employee of exit questionnaire. Encourage completion before leave date. This will be issued to all leavers when HR process their end date. | |
| Retirement (if applicable) | Signpost to the Retired Staff Association | |
| Agresso (if applicable) | Email finsup@glasgow.ac.uk to request revocation of user privileges | |
| Purchasing Cards | Cancel purchasing cards by contacting procurement 0141 330 4113 | |
| Email Accounts | <ul style="list-style-type: none"> ▪ Agree an appropriate 'Out of Office' message, if required. ▪ Reallocate access to any shared mailboxes. | |

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| | <ul style="list-style-type: none"> Ensure that member of staff leaving is asked to delete University data safely from personal or work email accounts <p>at www.gla.ac.uk/services/it/helpdesk or by email at IThelpdesk@glasgow.ac.uk <u>N.B. IT Access is closed down up to 24 hours after the leaving date</u></p> | |
| IT and Access Equipment | <p>Ensure that the staff card, keys/fobs (e.g. for Tay House entrance security), IT equipment (e.g. tablets, phones, laptops) or other University property is returned and data is removed appropriately prior to reassigning.</p> <p><u>N.B. IT Access is closed down up to 24 hours after the leaving date</u></p> | |
| Recruitment | <p>If you now have a vacancy and plan to fill it you will need to raise a staff request through your Local Resourcing Coordinator. Further guidance is available on the Recruitment web pages.</p> | |
| Employee Responsibility | | |
| Car Parking Permit (n/a if internal move) | Return parking permit and swipe card to the Security Gatehouse on the last day of work | |
| School/RI/US Dept. keys | Return to line manager | |
| Staff Card (card deactivation automatically) | Return to your local HR Team | |
| IT and Access Equipment | Ensure that all keys/fobs (e.g. for Tay House entrance security), IT equipment e.g. tablets, phones, laptops (ensure personal data is deleted from all portable devices before returning) or other University property is returned to your School/RI/US Service. | |
| Union Membership | If you are a member of a Union it would help them if you could inform them of your leaving date. | |
| Employee and Line Manager | | |
| File/ Data Review | <ul style="list-style-type: none"> Review and close files (digital and paper) Destroy all duplicate and time expired information Retain substantive information created about your post or work undertaken Liaise with Line Manager and the University's Records and Information Management Service (RIMS) to ensure that all essential information is retained and Intellectual Property Rights (IPR) are identified Destroy any published or reference materials received from external organisations which are not required for 'record' purposes Discuss/agree whether an honorary position is appropriate following departure <p>In addition, liaise with Line Manager to ensure that any research data of long term value which has been generated using University resources has been:</p> <ol style="list-style-type: none"> stored securely before leaving the University and that arrangements have been made for the data to be | |

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| | <p>retained for a period of at least ten years from the completion of the research project (or for longer if specified by the research funder or sponsor) and</p> <p>ii. if necessary, destroyed in a confidential and timely manner, in accordance with an appropriate data retention schedule. The retained research data should also be accompanied by sufficient metadata (information about the data) to enable it to be put into context. Data of long-term value includes, for example, data that underpin a publication or thesis, or that will form the basis of a future funding application. A description of the data and its storage location should be communicated to the Research Data Management Service who should also be contacted for any further advice and guidance</p> <p>Please refer to departmental retention policies in relation to other data and files.</p> | | |
| All actions should be completed by the employee's departure date. | | | |
| Line Manager Signature | | Employee Signature | |

Form last reviewed – January 2023

HR - Employee Relations