

## Leavers' Checklist for Managers

This checklist is to remind you of the processes to be completed when a member of staff decides to leave or is dismissed from the UHB. It should also be used when staff move departments or go on secondment.

Please note, as members of staff leave for a variety of reasons, certain items may not apply. You and the employee are responsible for ensuring all relevant actions identified on this form are carried out. The **shaded sections**, however, must be completed for all staff.

<b>Name:</b>	<b>Employee Number:</b>
<b>Leaving date:</b>	<b>Department:</b>

### To be completed on receiving resignation/giving notice:

Area	Item	Action required	When	Initials	Date	n/a
<b>Notification</b>	1. Correspondence	Resignation/retirement notice received and acknowledged ( <a href="#">standard letters</a> available) <b>OR</b> Notice given	Immediate			
	2. Date of leaving	Agree date of leaving – ensure that all annual leave is used before their last day whenever possible	Immediate			
	3. Employee checklist	Signpost the member of staff to the employee <a href="#">leavers' Checklist</a>	Immediate			
<b>Financial</b>	1. Termination	Notify Payroll using the <a href="#">termination form</a> (n.b. please use <a href="#">changes form</a> (PIF) where the move is internal)	Immediate			

	2. Childcare vouchers	Remind employee to give one months notice to stop childcare vouchers (email <a href="mailto:Janice.Pitt@wales.nhs.uk">Janice.Pitt@wales.nhs.uk</a> )	Immediate			
	3. Other salary sacrifice schemes	Remind staff to find out what their obligations are if they are involved in any salary sacrifice schemes (e.g. make arrangements for continuing repayments)	Immediate			
	4. Relocation expenses	Advise Payroll if the employee has received relocation expenses from the UHB and is leaving after less than 2 years	Immediate			
<b>Security</b>	1. Computer access	Notify IT department of termination via <a href="#">termination form</a> (if leaving NHS) <b>OR</b> arrange for existing staff account to transfer to other NHS organisation via the <a href="#">online IT helpdesk</a>	Immediate			
	2. Clinical Portal	Deactivate leavers account via <a href="#">termination form</a>	Immediate			
	3. Authorised prescriber	Notify pharmacy of date leaving	Immediate			
<b>Retirement</b>	1. Pre-retirement course	Make employee aware of pre-retirement course and arrange for them to attend (attendance optional) (For more information or to book a place contact <a href="mailto:LED@wales.nhs.uk">LED@wales.nhs.uk</a> or phone 02921 847834.)	Immediate			
	2. Retire and return	Ensure that <a href="#">Retire and Return Contract Proforma</a> is completed and sent to Senior Team for approval and then <a href="#">HR Advisory Team</a> for processing	Immediate			
	3. Chair's letter	Complete <a href="#">proforma</a> and email to <a href="mailto:Janice.Pitt@wales.nhs.uk">Janice.Pitt@wales.nhs.uk</a>	Immediate			
	4. Retirement fellowship	Make employee aware of retirement fellowship and events (details on internet )	Immediate			
<b>Miscellaneous</b>	1. Right to work	Advise <a href="#">HR Advisory Team</a> if employee has a Certificate of Sponsorship so they can advise Home Office employment is ending	Immediate			

	2.Exit questionnaire	Ask employee to complete the <a href="#">Exit Questionnaire</a> , there are two ways this can be completed: 1) <a href="#">Via the online form</a> (also accessible via the <a href="#">internet web page</a> ) 2) Via ESR (The leaver will receive a notification once you have completed the termination form)  Explain the importance of completing the exit interview as it helps us improve services for staff and patients.	Immediate			
	3. Recruitment	If you now have a vacancy and plan to fill it, begin recruitment process – guidance is available on the <a href="#">Recruitment Toolkit</a>	Immediate			
	4. Nursery services	Remind employee that one months notice must be given if they wish to stop using the UHB nurseries	Immediate			

**To be carried out one week before the employee leaves/on last day (as appropriate):**

Area	Item	Action required	When	Initials	Date
<b>Finance</b>	1. Authorised signatories	Complete Authorised Signatory Deletion Form (available from Finance)	On last day		
	2. Oracle	Complete Oracle Financials Users Form to end date account (available from NWSSP Procurement Enablement Service Desk, 02920903880)	On last day		
<b>Security</b>	1. Keys (doors, safe, filing cabinet, cashboxes)	Check returned	On last day		
	2. ID Badge	Check returned and inform security that staff member has left UHB	On last day		

	3. Door access codes	Consider need to change access codes to entry doors	After leaving		
<b>Equipment</b>	1. Home computer / laptop	Agree arrangements for return and confirm when received	1 week prior to leaving		
	2. Mobile phone / pager	Agree arrangements for return and confirm when received. Inform Telecoms of any re-assignment of handsets so it is recorded centrally	1 week prior to leaving		
	3. Uniform	Agree arrangements for return and confirm when received	1 week prior to leaving		
	4. Other equipment (state)	Agree arrangements for return and confirm when received	1 week prior to leaving		
	5. Work telephones	Ensure voicemail/answer machine message is changed	On last day		
<b>Miscellaneous</b>	1. Car park permit	Remind employee to return car park permit	On last day		
	2. Handover	Ensure handover of work conducted, files/paperwork returned etc	1 week before leaving		

<b>Completed by:</b>		<b>(print name)</b>
		<b>(signature)</b>
		<b>(designation)</b>
		<b>(date completed)</b>