**Appendix C – Managers checklist for leavers**

This checklist is to be completed for all leaver’s including those on fixed term or temporary contracts, secondment to the Trust or contracted workers e.g. locums or temporary staff. The check list should be completed in all cases whether due to resignation, retirement, redundancy, end of contract or dismissal. For any exceptional cases please seek advice from a member of the HR Department via e-mail

A signed copy of the form will be retained on the personal file.

|  |  |
| --- | --- |
| **Leaver Name:** | **Department:** |
| **Date of Leaving/****Date of Dept Transfer:** | **Current Line Manager:****New Manager (if applicable):** |

***NB: Please mark end column N/A if the listed item is not applicable to the post.***

|  | **Action** | **Date** | **Manager’s Initials / Comments** |
| --- | --- | --- | --- |
| **Leavers Procedure** | Manager acknowledges resignation or retirement in writing and arranges a date to conduct an exit interview using Appendix A. |  |  |
| Manager completes leaver’s form (ESR3) with employee, including calculating annual leave allowance. |  |  |
| Manager completes exit interview with employee, places a copy on the personal file and returns the original to HR. . |  |  |
| **Equipment** | **Remote Access (Fob or Pin Access Codes)** – Agree arrangements for handover and return and sign when all received. Notify IT Department to disable pin code access with effect from leaving date. |  |  |
| **Laptops/Computers** – Agree arrangements for handover and return and sign when all received. |  |  |
| **IT Hard and Software -** USB stick, removable media, SD cards, information storage devices, copies of programmes and Trust issue devices. Agree arrangements for handover and return and sign when all received. |  |  |
| **Mobile Phone, Blackberry, pager, charger, headphones and any accessories** - Agree arrangements for handover and return and sign when all received. |  |  |
|  | **Equipment supplied by the Trust to carry out role – please list.**Agree arrangements for handover and return and sign when all received. |  |  |
| **Office/Desk telephone** – Arrange to amend telephone lists and update any voicemail messages. |  |  |
| **Trust Issued Uniform** - Agree arrangements for handover and return and sign when all received. |  |  |
| **Property** | **Car Park Permit** - Agree arrangements for handover and return and sign when all received. |  |  |
| **Computer Access** – e-mail, login, system access. Manager to notify IMST Department to ensure all accounts are expired from leaving date. |  |  |
| **Security** | **Keys, entry cards and fobs and door access codes** - Confirm return of security access resources and arrange for reprogramming of door codes if applicable. |  |  |
| **Smartcards** - Confirm process detailed in section 5.8. has been followed. |  |  |
| **Prescribing/Prescription Pads** - confirm return of pads and notify medicines manager to remove authorised prescriber rights in this Trust. |  |  |
| **ID Badge** - Agree arrangements for handover and return and sign when all received. |  |  |
| **Official Trust Branded Ink Stamps** - Agree arrangements for handover and return and sign when all received. |  |  |
| **Files, papers, manuals, paper diaries, library items** - Agree arrangements for handover and return and sign when all received. |  |  |
| **Governance** | **Caseload Handover** – Manager to arrange to meet with employee to arrange full handover of all outstanding caseloads and to ensure where appropriate cases are closed. |  |  |
| **Appointments** - confirm all patient related notes have outcomes completed on RIO, SADIE or other related systems. |  |  |
| **Progress notes** - confirm all progress notes are complete and up to date. |  |  |
| **Relocation Expenses** - If employee is leaving after less than 3 years and has received relocation expenses, manager to notify payroll immediately. |  |  |
| **Training Expenses** – If the employee has received training fees which require recovery if the employee leaves within an agreed minimum period of service, the manager will notify payroll to arrange deduction from the employee’s final salary. |  |  |
| **Authorised Signatories** – Manager to notify Finance Manager of leaver. |  |  |
| **Lease Car Holder** - Manager to notify Finance Manager of leaver and lease car management company. |  |  |
| **Cycle Saver Scheme** – Manager to notify the Payroll Manager of leaver if the employee is in Cycle to Work Scheme to arrange payment of outstanding balance. |  |  |