

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](#).

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.

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

Line Manager Responsibility		
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 ○ 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. ▪ Ensure that member of staff leaving is asked to delete University data safely from personal or work email accounts 	

	at www.gla.ac.uk/services/it/helpdesk or by email at IThelpdesk@glasgow.ac.uk N.B. IT Access is closed down up to 24 hours after the leaving date	
IT and Access Equipment	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. <u>N.B. IT Access is closed down up to 24 hours after the leaving date</u>	
Recruitment	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 .	
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"> i. stored securely before leaving the University and that arrangements have been made for the data to be 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 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 	

	<p>(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	