UCL HUMAN RESOURCES A picture containing text

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**June 2023**

**LEAVERS CHECKLIST**

If you have any feedback on this form, please contact [employmentpolicy@ucl.ac.uk](mailto:employmentpolicy@ucl.ac.uk)

# This checklist should be used for any worker leaving your team or UCL.

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| **Leaver’s Name:** |
| **Job title:** |
| **Leaving date:** |
| **Line Manager’s Name:** |

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| Notification of Leaving |  |  |
| **Task** | **Responsibility** | **Date Completed** |
| Email resignation to line manager, giving the appropriate notice and confirming the last day of service. | Leaver |  |
| Forward resignation or other termination paperwork to local HR administrator / Departmental Administrator / BOS team and confirm last day of service. | Line manager |  |
| Inform team of departure and last day of service | Line manager |  |

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| Personal information/HR |  |  |
| Task | **Responsibility** | **Date Completed** |
| If they are leaving UCL, agree how outstanding leave entitlement will be dealt with i.e., taken before the leaving date or paid in lieu with final salary payment. Please find information on calculating leave entitlement [here](https://www.ucl.ac.uk/human-resources/policies/2018/oct/annual-leave). Inform local HR administrator / Departmental Administrator / BOS team.  If they are staying at UCL their annual leave entitlement will transfer with them. | Leaver & Line manager |  |
| If UCL sponsors your member of staff under a Skilled Worker or Temporary Work – Government Authorised Exchange Visa certificate of sponsorship, please advise HR Services at the earliest opportunity. | Line manager & Leaver |  |
| If they are leaving UCL, update home and personal email address details on MyHR Self Service, to ensure P45 & [pension benefit statemen](https://www.ucl.ac.uk/human-resources/pay-benefits/pension-services/pension-schemes)t is sent to the correct address | Leaver |  |
| Reassign any designated roles such as Computer Representative, First Aider, Fire Evacuation Marshal to an appropriate colleague. | Line manager |  |

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| Actions on Benefits |  |  |
| Task | **Responsibility** | **Date Completed** |
| If you have a lease car from NHS Fleet Solutions, contact NHS Fleet Solutions on 0344 811 8228 to discuss your options. You may need to pay Early Termination Charge to stop your lease. | Leaver |  |
| If you have a house loan from UCL, pay back the outstanding loan immediately. | Leaver |  |
| If you are paying back a season ticket loan, note that the outstanding balance will be recovered from your final salary payment. | Leaver |  |
| If you are paying for a bicycle via UCL’s Cycle Scheme and leaving before the end of your Hire Agreement, note that the outstanding balance will be recovered from your final net salary payment. | Leaver |  |

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| Systems/Access |  |  |
| Task | **Responsibility** | **Date Completed** |
| *Where a system uses single sign on, access will be automatically removed for staff leaving UCL.  Where the leaver is transferring to another UCL department OR the system requires a licence or other form of sign on, consider which systems they should no longer have access to and request removal for their last day.*  Examples may include:  Worktribe  DAM  SITS  Talentlink  Portico  CMIS  MyFinance: request removal from any budget/project codes | Line manager |  |
| *Where the leaver is transferring to another UCL department contact* [*ISD Service Desk*](https://www.ucl.ac.uk/isd/help-support) *or local ISD rep to request the following for their last day:*  • Removal from any shared drives, shared mailboxes, distribution lists or any other accounts  Include the leavers last day. | Line manager |  |
| Request removal from any locally procured systems on the last day by notifying local IT team in advance. | Line manager |  |

# During last week and on last day

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| Outlook, MS Teams and Sharepoint |  |  |
| Task | **Responsibility** | **Date completed** |
| Disable delegated access to any shared email accounts and calendars. Transfer ownership of reoccurring room bookings, recurring meetings, Sharepoints sites and MS Teams team sites. | Line manager |  |
| Set up an out of office for future leaving date informing you have left and detailing an alternate contact. | Leaver |  |
| Important emails must be saved to an appropriately secure network folder accessible to leaver's line manager | Leaver |  |

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| Data |  |  |
| Task | **Responsibility** | **Date completed** |
| Ensure that all own personal data and documents are removed from any laptops, PCs or devices such as tablets and mobile phones. | Leaver |  |
| Meet to review records and information leaver holds in electronic and paper filing systems, including email. Use records retention schedules to determine what should be destroyed securely, transferred to archive, or retained by manager.  Leaver must then transfer all relevant data stored on file sharing applications such as Dropbox and SharePoint to an appropriately secure network folder accessible by your manager. Access to any file storage accounts will be removed on leave date. | Leaver & Line manager |  |

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| Personal information/HR |  |  |
| Task | **Responsibility** | **Date completed** |
| If they are a line manager, reassign staff to a new line manager on MyHR. | Line manager |  |
| Complete the online exit survey. The link is provided in your leaver letter from HR Services. | Leaver |  |
| Carry out exit interview if this is local practice. See [Exit Survey Guidance](https://www.ucl.ac.uk/human-resources/exit-survey-policy) | Leaver & Line manager |  |

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| Systems/Access |  |  |
| Task | **Responsibility** | **Date completed** |
| Request removal from SharePoint, DropBox, OneDrive, Teams, blogs, vlogs, LastPass, social media accounts etc. For systems not managed locally contact ISD Service Desk [servicedesk@ucl.ac.uk](file:///\\ad.ucl.ac.uk\homee\sejjhie\DesktopSettings\Desktop\Lana\Checklists\Leavers\servicedesk@ucl.ac.uk)  Change passwords and access codes for shared applications not managed by ISD. | Line manager |  |

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| Property/Devices |  |  |
| Task | **Responsibility** | **Completed?** |
| Empty locker (if applicable) and reset code to zero. | Leaver & Line manager |  |
| Ensure that all UCL property is returned. • Keys (Pedestal Keys, Buildings/Offices/Desks etc.)  • Fobs • Handbooks/Paperwork • Car parking permits  • Any other Tools/equipment | Leaver & Line manager |  |
| Ensure that all equipment (UCL owned/issued) is collected from leaver and returned to local IT team. • Laptops • Tablets • Mobile phones • Any portable Devices/Media (Camera, Memory sticks, Data Safe Haven Safe ID access token etc.)  Refer to the [UCL IT Disposal Policy](https://www.ucl.ac.uk/isd/services/software-hardware/hardware-purchasing/isd-services/ucl-it-disposal-policy). | Line manager |  |
| Where the leaver is leaving UCL Manager to collect staff ID card and return to the UCL security office.  If they are remaining at UCL consider if access to certain labs or buildings needs to be removed. | Line manager |  |
| Change codes to key safe cabinets and inform any remaining authorised staff. | Line manager |  |
| Arrange for leaver to remove any UCL licenced software from any personally owned devices (e.g., Microsoft Office etc. on home computers). | Leaver & Line manager |  |

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| Other |  |  |
| Task | **Responsibility** | **Completed?** |
| Confirm the status of any outstanding work and regular tasks, including any handover requirements/notes. | Line manager |  |
| Any University credit cards should be returned and direct debits/standing orders on them cancelled. | Line manager |  |

# After leaving

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| Personal information/MyHR |  |  |
| Task | **Responsibility** | **Date completed** |
| Determine what contents of the personnel file should be destroyed confidentially, transferred to EDRM, or transferred to new UCL line manager. Refer to [UCL records retention schedules](https://www.ucl.ac.uk/library/sites/library/files/retention-schedule.pdf). | Line manager |  |

Please email this document to [hr-services@ucl.ac.uk](mailto:hr-services@ucl.ac.uk) to be stored on EDRM. It is not necessary for the leaver or the leaver’s line manager to retain duplicate copies of this form.