

Dear Colleague,

**Re: Leaver Checklist**

I understand you will either be leaving Brunel University London soon, or changing your role within the University. To help ensure that both you and your current line manager / supervisor / Department Administrator are able to have a smooth handover, we have put together a Leaver Checklist which will help to make sure that all the right steps have been taken before you leave your existing role.

The checklist has been designed to act as an aide memoire to help with the exit / change of post process and to formally record relevant concerns that have been discussed and addressed with your line manager / supervisor / Department Administrator. Given the risks posed by a lack of a proper exit process, I hope that you will understand that we are making the process mandatory.

The checklist is not exhaustive and so if there are specific additional issues that you feel need to be addressed in your area then you might wish to add them to the document.

Lastly, may I take this moment to point you to our separate confidential Brunel Exit Questionnaire. Your feedback is valuable to the University and I would appreciate if you could take some time to complete our online survey. To access the survey and find out more please click [here.](https://brunelhr.qualtrics.com/jfe/form/SV_1yMsgPr108WeRiC?Q_TS_ID=TS_6AkGxnmUcU7jAvs&Q_TS_RS=Self&Q_EE_ANON=1&_=1)

Thank you in advance for your help with this, good luck with the transition out of your current position.

**Gemma Bailey**

Director of Human Resources

**Note on Completion of Leaver Checklist**

This Leaver Checklist is to be completed with your Line Manager / Supervisor / Department Administrator.

**Completion and submission of the form is mandatory** although we acknowledge that not all sections of the form will require completion by staff if these are not relevant.

Where a section is not relevant, please indicate in the box provided and move on to the next point.

Once the form is completed this should be returned to your Line Manager / Supervisor / Department Administrator as it will be retained in the local area.

If you have any questions regarding this process please do not hesitate to contact your HR Business Partner or your Line Manager / Supervisor / Department Administrator.

**Leaver Checklist**

|  |  |
| --- | --- |
| **NAME** |  |
| **POSITION** |  |
| **DIRECTORATE /COLLEGE/INSTITUTE** |  |
| **DEPARTMENT** |  |
| **DATE OF LEAVING** |  |
| **START DATE OF NEW POST** |  |
| **DATE OF COMPLETION** |  |

As you are due to leave the University or your current role, you must ensure that any sensitive materials you have access to, or responsibility for, are either correctly disposed of or responsibility is delegated, and accepted, by another member of staff.

In order to comply with legal obligations, the University must ensure that all sensitive data, hazardous substances and research components are securely monitored and accounted for by a member of staff. This includes the completion and transfer of ownership of a research data management plan outlining the ownership, storage etc. of research outputs.

All data of a sensitive nature **must** be left in the sole possession of the University via your line manager / supervisor or departmental administrator.

**Before you can officially leave the University or move to a new post, this form must be completed and signed by you and all relevant parties. A completed, signed copy should be retained in the local area.**

**Generic Details / University Property**

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of information** | **Applicable (Yes/No )** | **Kept by University (Yes/No)** | **Outcome (i.e. method of disposal / name and position of person with responsibility)** |
| Please be advised that after your last day of service you will **no longer have access to CHIME** therefore, you may wish to **print your payslips for future reference**. Following your final day of service historic payslips and P60’s can be provided on request but please note that there will be a charge for this service.  | **Yes** | **No** |  |
| **All keys / swipe-cards returned to line manager / department administrator** |  |  |  |
| **Any University equipment returned to line manager or department administrator** (e.g. laptops, home PCs, data sticks and mobile-phones) |  |  |  |
| **All University library books / other resources have been returned to the correct department** |  |  |  |
| **Ensure that any file or device passwords are passed on to the department administrator (but you must not share your University account password)** |  |  |  |
| **If a line manager substitute actioned in CHIME** |  |  |  |
| **Ensure any University credit cards are returned to the department administrator and direct debits/standing orders on them cancelled** |  |  |  |
| **Inform the appropriate Travel provider that your account should be closed as you are leaving Brunel University London (if applicable).** |  |  |  |
| **The department administrator will ensure that all relevant areas are notified of staff changes whether leaving our employ or moving to new posts within the University to ensure removal of any access to buildings / rooms / systems where necessary** (i.e. ITservicedesk@brunel.ac.uk) |  |  |  |

**Paper / Electronic Data**

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of information** | **Applicable (Yes/No )** | **Kept by University (Yes/No)** | **Outcome (i.e. method of disposal / name and position of person with responsibility)** |
| **Personal Data** (e.g. accident books, job applications, patient identifiable data, student records, wages or salary information) |  |  |  |
| **Sensitive Data** (e.g. anything that contains a person’s racial or ethnic origin, political opinions, religious belief, health details, sexual life, criminal offences, information about the use of animals) |  |  |  |
| **Research Data** (e.g.,any outputs of research undertaken, and data in external repositories/websites etc. It is important that such outputs are made known and responsibility passed on to a BUL member of staff in order to comply with BUL and funding bodies’ policies.)  |  |  |  |
| **Information which may breach commercial confidentiality, copyright or prejudice outcomes** (e.g. contracts, insurance records, details of ongoing investigations, research or funding applications, student coursework or examination scripts, tenders, unpublished research material) |  |  |  |
| **Information provided by others in confidence** (e.g. legal professional privilege, personal details not disclosed in a formal manner) |  |  |  |
| **Information which may increase risk to University assets or jeopardize health and safety / security arrangements** (e.g. audit reports, detailed building plans, minutes of meetings discussing sensitive matters, password information) |  |  |  |
| **Email:** Important emails must be saved to an appropriately secure network folder or forwarded to your line manager copied to the department administrator |  |  |  |
| **Email:** You should set an out of office message indicating who should be contacted in your absence |  |  |  |
| **Department Administrator / Line Manager:** Confirm to ITservicedesk@brunel.ac.uk who the leaver has approved as the designated person to receive the leaver’s emails and for any other accounts of which they are a sponsor (if applicable) |  |  |  |
| **Shared Drives:** All relevant data on shared drives must be moved to an appropriately secure network folder which is accessible by your line manager. The department administrator will instruct the computer centre to remove your access to shared drives with effect from your day of service. |  |  |  |
| **G Drive:** Any data in emails, on H drives, PCs or other University-owned storage devices which relate to your private (non-University) use must be deleted |  |  |  |

**CHIME**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Applicable (Yes/No )** | **Completed****(Yes/No)** |  |
| If you are an approver in CHIME please ensure all tasks are approved by your last working day. |  |  | If this not possible the line manager MUST inform the ERP team for the task to be re-assigned CHIMEsupport@brunel.ac.uk  |

**Teaching and student-related**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Applicable (Yes/No )** | **Kept by University (Yes/No)** | **Outcome (i.e. method of disposal / name and position of person with responsibility) / where it is stored / expiry dates)** |
| Handover of personal tutee information and notification to tutees (including PhD students who may require alternative supervisor arrangements) |  |  |  |
| Draft references for final year tutees |  |  |  |
| Handover of role-related tasks/material: Specify role(s) e.g. Level/Year lead, Admissions, Programme lead, block lead, moderator etc.: |  |  |  |
| Moderation reports of assessments completed this academic year: Specify blocks |  |  |  |
| Block evaluation reports for completed study/modular/assessment blocks this academic year: specify blocks |  |  |  |
| Other |  |  |  |

**Research Projects, Awards and Costs**

|  |  |  |
| --- | --- | --- |
|  | **Applicable (Yes/No )** | **Notes** |
| All final grant reports have been submitted to funding body (or timescales for doing so have been agreed with line manager) |  |  |
| A data management plan has been updated and either finalised or ownership transferred to another member of staff |  |  |
| All internal charges for a project (if applicable) and other research facilities have been settled. |  |  |
| Have appropriate arrangements been made for the continuation of research projects and/or the supervision of students? Line Manager to confirm. |  |  |

**Declaration**

I confirm that all aspects of this form have been completed truthfully and accurately. I also confirm that I will not remove any item of University property or intellectual property without authorised consent.

**Employee Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Line Manager / Head of Section** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Supervisor \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Department Administrator \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*\*Form to be completed and retained in the local area*



***Please complete, scan and email this page to*** ITservicedesk@brunel.ac.uk

Name of employee leaving: …………………………………………………….……

I understand that my network account will be formally disabled when I leave the service of the University.

However, this may not be with immediate effect and therefore following my last day of working, whilst my e-mail account remains open (up to a maximum of 3 months), should there be a need to access to my email account for the sole purpose of actioning university business I agree to the following:

Name of designated person: ………………………………………………………………….

My last day of Service: ……………………………………………………..… DD/MM/YYYY

Signed………………………………………………………………………….……... (Leaver)

Name of Department Administrator / Line Manager: ………..………………………………

Date signed: …..………….……………………………………………………. DD/MM/YYYY