

**STAFF EXIT CHECKLIST**

|  |
| --- |
| This form has been replaced with an online form accessed at: <https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUMTVDSjlBMVlRMEk5NllMUUVZODRZRlhUUi4u>  Please only complete and return this document if you cannot access the form above as you do not have access to a computer and/or internet. |

Dear colleagues,

As you are aware, there are a large number of issues that need to be addressed when staff leave University employment or move departments within the University. These include access to premises, retrieval of equipment or other items, appropriate handover/disposal of data and other materials etc.

In order to help line managers with this task we are introducing a formal exit process for ALL staff leaving University employment. This is in the form of a checklist which will allow line managers to confirm that all relevant issues have been addressed. The checklist is designed to act as an aide memoire to help line managers with the exit process and to formally record all relevant issues have been addressed.

Given the risks posed by a lack of a proper exit process, we are making the process mandatory. We are sure that you will understand why this is necessary and we would be most grateful for your help in implementing the process. The checklist is not exhaustive and if there are specific additional issues that need to be addressed in your area then you may wish to add them to the document.

Thank you in advance for your help with this.

**Adèle MacKinlay**

Director of People & Organisational Development

**Note on Completion**

It is recognised that not all sections of this form will be relevant to all staff, however, completion and submission is mandatory.

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

Once the form is completed, please return to People & OD Operations by email:

Email: People-od.operations@manchester.ac.uk

Tel: 0161 275 4499

**Staff Exit Checklist**

**Personal Information**

|  |  |
| --- | --- |
| **Leaver First Name** |  |
| **Leaver Surname** |  |
| **Leaver Employee ID** |  |
| **Post Title** |  |
| **Faculty/PS** |  |
| **School/Directorate** |  |
| **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 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 or supervisor.

You are reminded that failing to return University property that is in your possession upon leaving the University, may result in a deduction from your salary to the value of the item that you have failed to return, or which you have returned damaged, following a written request.

**Before you can officially leave the University/your current post, this form must be completed in collaboration with your line manager and a copy returned to People & OD Operations within one week of your contracted end-date.**

**Generic Details**

|  |  |  |
| --- | --- | --- |
| **Type of information** | **Response**  **(Yes/No/Not applicable)** | **Comments (i.e. method of disposal / name of person with responsibility)** |
| **Have all keys / swipe cards been returned to line manager or human resources?** |  |  |
| **Has all University equipment been returned to line manager or IT? (e.g. laptops, home PCs, data sticks, mobile phones, any additional equipment used for working at home such as chairs, specialist IT equipment). Please log a call with the IT Service desk to arrange the return of your University-owned equipment.** |  |  |
| **Have all items of uniform provided by the University, including name badges been returned to line manager?** |  |  |
| **Have University library books / other resources have been returned to the correct department?** |  |  |
| **Have relevant file or device passwords been passed on (NOTE you must not share your University account password)?** |  |  |
| **Have any outstanding online expense claims been submitted with enough time for payment?** |  |  |
| **Have any University credit cards been returned and direct debits/standing orders on them cancelled?** |  |  |
| **Have relevant departments been notified of staff leaving to remove access to systems? (e.g. Oracle Financials, Egencia, Campus Solutions) *Please contact*** [***finance.helpdesk@manchester.ac.uk***](mailto:finance.helpdesk@manchester.ac.uk) ***for support removing staff from Finance systems and the IT helpdesk for other centrally managed University IT systems*** |  |  |
| **Has Safety Services been informed of trained Fire Marshall staff leaving the University in order to maintain safe Fire Marshall numbers? Please email** [**safetyoffice@manchester.ac.uk**](mailto:safetyoffice@manchester.ac.uk) **with FEM in the subject line.** |  |  |
| **Have First Aid department been informed of First Aid trained staff leaving the University in order to keep First Aider lists and First Aid Building Notices up to date? Please email** [**firstaid@manchester.ac.uk**](mailto:firstaid@manchester.ac.uk) |  |  |

**Paper / Electronic Data**

|  |  |  |
| --- | --- | --- |
| **Type of information** | **Response (Yes/No/Not applicable)** | **Comments (i.e. method of disposal / name of person with responsibility)** |
| Do you hold any **Personal Data** (e.g. accident books, job applications, research participant identifiable data, student records, wages or salary information)?  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| Do you hold any **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)?  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| Do you hold any **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 UoM member of staff in order to comply with UoM and funding bodies’ policies)  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| Do you hold any **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)?  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| Do you hold any **Information provided by others in confidence** (e.g. legal professional privilege, personal details not disclosed in a formal manner)?  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| Do you hold any **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)?  *This data must be either deleted or handed to an appropriate person within your department.  Please conform below whether such data is held in a personal space e.g. P Drive/One drive/personal email, and whether it has been deleted or handed to someone responsible for retention.  Please provide the name of the person you have handed to, where applicable.* |  |  |
| **Have you saved all important emails to an appropriately secure network folder and/or forwarded to your line manager?** |  |  |
| **Have you set an out of office message indicating who should be contacted in your absence?** |  |  |
| **Has all relevant data on shared drives been moved to an appropriately secure network folder which is accessible by your line manager? Please log a call with the IT Service desk to arrange the removal of your access to shared drives that you no longer require access to.** |  |  |
| **Has any data in emails, on P drives, OneDrive, Teams chats, PCs or other University-owned storage devices for which there might be a future requirement been passed on securely to relevant colleagues or saved to a University shared area? Have you deleted any information which relates to your private (non-University) use?** |  |  |
| **Has all relevant data on Dropbox for Business or other cloud storage been moved to an appropriately secure network folder which is accessible by your line manager? Your Dropbox for Business account and information will be deleted when you leave.** |  |  |
| **Are you an Information Store Owner or responsible for other systems/environments?** |  |  |

**Hazardous Substances / Research Materials**

|  |  |  |
| --- | --- | --- |
|  | **Response (Yes/No/Not applicable)** | **Comments (i.e. method of disposal / name of person with responsibility / where it is stored / expiry dates)** |
| **Has responsibility for all substances hazardous to health that have been acquired or generated in connection to the project been transferred or otherwise dealt with as appropriate?** |  |  |
| **Has responsibility for all GMOs and other biological agents used in the project been transferred or dealt with as appropriate?** |  |  |
| **Has responsibility for all radioactive substances used in the project been transferred or dealt with as appropriate?** |  |  |
| **Has all human or animal tissue used or stored been correctly dealt with in line with guidance, policy and legislation?** |  |  |
| **Have all final Home Office records for animal license holders been updated / completed and, where appropriate, have the BSF (Biomedical Service Facility) been made aware of your departure?** |  |  |
| **Have all laboratory notebooks and reference to other information sources been transferred or otherwise dealt with as appropriate.** |  |  |
| **Have all fridges / freezers / cold rooms / cabinets / shelves / personal workspace been cleared and cleaned? If material is to be kept, please label clearly the contents and the duration it should be kept for.** |  |  |

**Research Projects, Awards and Costs**

|  |  |  |
| --- | --- | --- |
|  | **Response (Yes/No/Not applicable )** | **Notes** |
| **Have all final grant reports been submitted to funding body (or timescales for doing so have been agreed with line manager)?** |  |  |
| **Has a data management plan been updated and either finalised or ownership transferred to a UoM member of staff?** |  |  |
| **Have all internal charges relating to BSF (if applicable) and other research facilities been settled?** |  |  |
| **Have appropriate arrangements been made for the continuation of research projects and/or the supervision of students?** |  |  |

**Information, technology and goods subject to export control restrictions**

|  |  |
| --- | --- |
| **You should ensure that, if continuing to work with information, technology or goods that are subject to export control restrictions you acquire relevant export licences, whether you are continuing to collaborate with the University of Manchester or not, for you as an individual or for the new legal entity that you are leaving to join** | Please tick as appropriate:  🞏 I confirm this is not applicable to me  🞏 I confirm I have read and understand the requirement upon me |

**Any additional notes from leaver or their manager:**

|  |
| --- |
|  |

**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.

**Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Counter signatory**

(Line Manger / Head of Section) **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Print Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**