

## Leaver's Checklist

When an employee knows that they intend to leave one or all of their roles at the University there are a number of requirements that should be fulfilled prior to, or on, their last day of work. The checklist below can be used by employees, line managers and those processing leaver's details to ensure that the key employee obligations are met.

Action Required	Further Information	Responsibility	Required for University Leaver	Required for Multiple Post Resignation (employee leaving one or more (but not all) of multiple posts)	Deadline/ Timeframe	Complete (tick as appropriate)?
<b>Identify Contractual Notice</b> Required	Check contract of employment or relevant Conditions of Service ( <a href="http://www.ed.ac.uk/schools-departments/human-resources/policies-guidance/conditions-service">http://www.ed.ac.uk/schools-departments/human-resources/policies-guidance/conditions-service</a> )	Employee	Yes	Yes	As soon as possible after deciding to resign	
<p><b>Contractual Notice to be put in writing</b> OR, where available, specific departmental resignation procedures followed with line manager.</p> <p>There may be some circumstances where written notice is not required.</p> <p>Where written notice is required, letter of resignation should be forwarded to School/Support Group Department administration team to be actioned.</p> <p>If in receipt of a student scholarship, you must inform your School/Support Group Department administration team if your Scholarship payments will be continuing once your employment ends.</p>	<p>Check with HR Advisor whether written notice is required</p> <p>Check HR contact pages of University website</p> <p>Contact your School/Support Group Department administration team</p>	<p>Employee</p> <p>Line manager</p> <p>Employee</p>	<p>Yes</p> <p>Yes</p> <p>Yes</p>	<p>Yes</p> <p>Yes</p> <p>Yes (if scholarship relates to role(s) you are leaving)</p>	<p>One month or three months prior to leaving date (depending on notice period)</p> <p>As soon as possible on receipt of resignation</p> <p>One month or three months prior to leaving date (depending on notice period)</p>	

<p><b>Pension:</b> You must ensure that the University is made aware of whether or not you intend to access your Pension when you leave. Pensions check this via Oracle, the HR/Payroll system.</p> <p>If you do wish to access your pension, your pension provider normally requires three months' notice from the University.</p> <p>If you wish to transfer accrued pension benefits to another scheme you should go to your scheme's website in the first instance.</p>	<p>You must advise your School/Support Group Department administrative team or Local HR of your intentions re accessing pension so that this can be recorded on the system.</p> <p>If you require any further information in relation to accessing your pension, contact the Pensions Department: Email <a href="mailto:pensions@ed.ac.uk">pensions@ed.ac.uk</a> Tel. No. 0131 650 2284</p>	Employee	Yes	No	<p>As early as possible once you have decided to leave University employment</p> <p>At least three months prior to leaving date</p>	
<p><b>Annual Leave:</b> You should ensure that your annual leave record is up to date, including approval of any planned holidays between giving notice and date of leaving. Outstanding annual leave needs to be recorded by your School/Support Group Department administrative team/Local HR team.</p>	In liaison with your line manager	Employee Line Manager Admin. team	Yes	Yes	Payroll cut off in month leaving (for further details please contact Payroll)	
<p><b>Forwarding Address:</b> You should ensure that your forwarding address is recorded by your School administrative team/Local HR team.</p>	This can be done yourself via Employee Self-Service or in liaison with your line manager	Employee	Yes	No	Payroll cut off in month leaving (for further details please contact Payroll)	
<p><b>Outstanding Finance Matters:</b></p> <ol style="list-style-type: none"> <li>Expenses claims should be finalised before your leaving date.</li> <li>Any sums due to the University e.g. library fines, should be settled before your leaving date.</li> </ol>	<p>In liaison with the relevant department/area</p> <p>In liaison with the relevant department/area</p>	Employee  Employee	Yes  Yes	<p>Yes (if expenses relate to role(s) you are leaving)</p> <p>No</p>	<p>All outstanding Finance matters should be dealt with by Payroll cut off in month leaving (for further details please contact Payroll)</p>	

<p>3. If you are a member of the Childcare Voucher scheme, you should request to leave the scheme (University Leavers) or amend your voucher amount, as appropriate (Multiple Post Resignations).</p>	<p>This should be completed via your online Sodexo account</p>	<p>Employee</p>	<p>Yes</p>	<p>Yes (as appropriate)</p>		
<p>4. Your Local HR team will identify whether you are a member of any other salary sacrifice schemes e.g. Bicycles Plus, Interest Free Public Transport Loan and any outstanding balance will be recovered from your final salary payment.</p>		<p>Local HR Team</p>	<p>Yes</p>	<p>No</p>		
<p>5. You must cancel any paid employee benefits e.g. Centre for Sport and Exercise membership, Car Parking.</p>	<p>In liaison with the relevant department/area</p>	<p>Employee</p>	<p>Yes</p>	<p>No</p>		
<p>6. If your leaving date is within 3 months of return from maternity leave you must make arrangements for the repayment of University Maternity Pay.</p>	<p>Contact your Local HR team</p>	<p>Employee Local HR Team</p>	<p>Yes</p>	<p>No</p>		
<p>7. Where an agreement between yourself and the University has been put in place with regards to the repayment of fees/incurred costs for a specific staff development activity (if you leave the role/University within a specific time period), discussion needs to take place regarding the recovery of payment.</p>	<p>Contact your Local HR team or central University training provider (UHRS or IAD)</p>	<p>Employee</p>	<p>Yes</p>	<p>Yes (if agreement relates to role you are leaving)</p>		
<p>8. Where an agreement between yourself and the University has been put in place with regards to Relocation Assistance, you must check whether you are required to repay funds – and if so, make arrangements for this.</p>	<p>Contact your Local HR team and Payroll</p>	<p>Employee</p>	<p>Yes</p>	<p>No</p>		

<p><b>Removal of IT Access:</b> You should ensure that Your Local Computing Representative is aware that you are leaving the University/your role(s)</p>	<p>In liaison with your line manager</p>	<p>Employee  Line manager</p>	<p>Yes</p>	<p>Yes (for removal of access specifically relating to role you are leaving)</p>		
<p><b>Recovery of University Property:</b> Arrangements for the return of all items provided to you or purchased by the University for your use as an employee must be made before your final pay can be processed. This could include (but would not be limited to) the following:</p> <ul style="list-style-type: none"> <li>- Laptops and other IT equipment</li> <li>- Mobile telephone</li> <li>- Books</li> <li>- Car parking fob or key</li> <li>- Security pass/office keys</li> </ul>	<p>In liaison with your line manager or relevant department</p>	<p>Employee  Line manager</p>	<p>Yes</p>	<p>Yes (if items were specifically for use in role you are leaving)</p>		