

Leavers Checklist for Managers and Leaders

This checklist provides an overview of some of the things that need to be considered when a team member is leaving WCC. The individual's line manager is responsible for ensuring everything within the checklist is considered and that appropriate action is taken.

Things that must be completed before the team member leaves:

<input type="checkbox"/>	<p>Process your team member as a leaver on Your HR as soon as you are aware, as this can be completed any time up to the payroll deadline. Failure to do so by the payroll deadline, will result in an overpayment which will incur £100 administration fee.</p> <p>Please refer to the How To... Make your employee a leaver for more information on completing this in Your HR.</p>
<input type="checkbox"/>	<p>Agree annual leave to be taken before leaving date. If any annual leave is to be paid or deducted from their final pay, then enter this on to Your HR as a leavers holiday pay adjustment time and expense claim.</p> <p>Please refer to the How To... Make your employee a leaver for more information on completing this in Your HR.</p>
<input type="checkbox"/>	<p>If your team member is a people manager, then reassign their direct reports on Your HR to another manager and if they are registered on Occupational Health Portal advise healthandsafety@warwickshire.gov.uk that access is to be removed.</p> <p>Please refer to the How To... Update position details for an employee for more information on completing this in Your HR.</p>
<input type="checkbox"/>	<p>Ensure all outstanding time and expense claims have been submitted and approved or rejected on Your HR, before the payroll deadline.</p> <p>Please refer to the How To... Submit a time & expense claim and How To... Approve a new time & expense claim for more information on completing this in Your HR.</p>
<input type="checkbox"/>	<p>In order to minimise the loss of specialist knowledge when someone leaves managers are encouraged to talk through the Knowledge Exchange questions with their team member and implement the suggested actions.</p> <p>More information about Knowledge Exchange is available here</p>
<input type="checkbox"/>	<p>Encourage your team member to complete the online exit interview questionnaire when they receive the link.</p>
<input type="checkbox"/>	<p>Complete the 'Leavers information management procedure' which can be found on the following page of the intranet: http://www.warwickshire.gov.uk/immanagers.</p>
<input type="checkbox"/>	<p>Liaise with your team member to arrange for the return of all company equipment – laptop, surface pro, mobile phone, keys and ID badge/carpark pass and any equipment purchased or borrowed to enable working from home.</p>

	<p>All ICT equipment must be returned, Surface Pro/Laptop including all accessories and mobile phone if issued. To do this a call needs to be logged on Hornbill: Go to ICT Procurement, existing user and returns process.</p> <p>ICT Self-Service. ICT will discuss the options and agree the most suitable one for each case. Prior agreement will need to be obtained when returning to ICT.</p> <p>Furniture should only be returned when it is safe to do so by contacting facilitiesupportmanagers@warwickshire.gov.uk. Please note, you will need to give line manager approval (as a minimum) before any items are returned to a WCC office base.</p>
<input type="checkbox"/>	If applicable ensure team members p-card (purchasing card) is returned to Exchequer Services and all receipts/invoices are submitted and retained for audit purposes.
<input type="checkbox"/>	Ensure your team member undertakes the appropriate housekeeping requirements for the safe storage and disposal of paper files, records or documents. NB. Your team member must also ensure that no WCC-related data remains stored on their device - it must be stored on corporate systems. (see "Leavers information management procedure and checklist" for more information) Managers-and-information-asset-owners .
<input type="checkbox"/>	If they are an applicant manager or primary contact on E-bulk, please complete a change details form https://warwickshirehr.formstack.com/forms/vetting_change_details .
<input type="checkbox"/>	Advise Democratic Services if your team member uses Modern.Gov. Please email: democraticservices@warwickshire.gov.uk .
<input type="checkbox"/>	If appropriate signpost to Fostering Opportunities and Volunteering .
<input type="checkbox"/>	Advise Contract Management & Quality Assurance if your team member uses InTend (CSW-jets) by emailing: strategicprocurement@warwickshire.gov.uk with the details of your leaver.
<input type="checkbox"/>	Upload resignation email/letter to HRER, along with any other personnel documents you have onto the individual's record as soon as possible.