

## LEAVERS CHECKLIST



The leavers checklist should be completed and signed by the leaver and their manager and retained locally on their personnel file. **Any payments owed to the Trust must be discussed with the HR team immediately.**

ACTION	RESPONSIBILITY	DATE COMPLETED
Leaver form completed	Manager	
Acknowledge resignation form employee and send letter to confirm receipt	Manager	
Arrange handover meeting with manager or replacement	Staff member	
Ensure that forwarding address held by HR is current	Staff member	
Discuss if staff loan reimbursement outstanding	Manager/Staff member	
Training expenses to be recovered notified to Finance	Manager	
Discuss if childcare vouchers in place, inform HR	Manager/Staff member	
Outstanding salary overpayments notified to Finance/Payroll Departments	Manager	
Outstanding annual leave established and either booked or agreed to be added to/deducted from final pay as appropriate	Manager/Staff member	
Final travel and expenses forms submitted	Staff member	
Exit interview arranged	Manager	
Check payroll deadline for submission of leaver form	Manager	
Update systems if the employee has access to Trust Systems (e.g. PS Financials)	Manager	
<b>ON LAST DAY</b>		
Return parking permit to manager, if applicable	Staff member/ Manager	
Return keys, if applicable	Staff member/ Manager	
Return mobile phone, if applicable	Staff member/ Manager	
Return laptop and associated equipment, if applicable	Staff member/Manager	
Return ID badge / access cards	Staff member/ Manager	
Inform IT helpdesk to ensure leaver is removed from IT user email account closed/suspended (same days as leaving the Trust)	Manager	
Staff member to complete exit survey	Staff member	

LINE MANAGER SIGNATORY			
<b>Full Name:</b>		<b>Signature:</b>	
<b>Job Title:</b>		<b>Date:</b>	

EMPLOYEES SIGNATORY			
<b>Full Name:</b>		<b>Signature:</b>	
<b>Job Title:</b>		<b>Date:</b>	

Once completed and signed this form should accompany the leavers form and sent to [payroll-pensions@reachsouth.org](mailto:payroll-pensions@reachsouth.org)