**Offboarding Checklist for Line Managers**

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| **Managers Responsibilities** | | **Final Deadline:** | |
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|  | **Task** | | **To be completed by:** |
| **Equipment** | **For Line Managers of Academic/Research Staff:** Please follow your School/Unit’s standard process for retrieving IT equipment. The equipment remains the property of your School/Unit. If it will be reissued (now or later), we recommend raising a ticket via the Self-Service Portal [Log a ticket here - Self-Service Portal](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fuod-servicedesk.topdesk.net%2Ftas%2Fpublic%2Fssp%2Fcontent%2Fserviceflow%3Funid%3D237bc597cf9943d3ae7686085f4835be%26from%3D2f5d58bf-01ed-4a46-8ed6-160933a5f462&data=05%7C02%7Cd.l.robertson%40dundee.ac.uk%7C82452fba79a24361cc2108ddd9acb1ee%7Cae323139093a4d2a81a65d334bcd9019%7C0%7C0%7C638906057932567187%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=1uS2Lf0s05sqMzj4fdXbuUUAV7nfNg%2FCdTQ5ckECubs%3D&reserved=0) to request re-imaging. This ensures the device is wiped and rebuilt with the latest configuration for the new user.  **For Line Managers of All Other Staff:** You are responsible for ensuring all IT equipment is returned to DTS at Park Place, Dundee, **before the employee’s last working day**. Once the leaving date is confirmed, please log a call via the Self-Service Portal [Log a ticket here - Self-Service Portal](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fuod-servicedesk.topdesk.net%2Ftas%2Fpublic%2Fssp%2Fcontent%2Fserviceflow%3Funid%3D237bc597cf9943d3ae7686085f4835be%26from%3D2f5d58bf-01ed-4a46-8ed6-160933a5f462&data=05%7C02%7Cd.l.robertson%40dundee.ac.uk%7C82452fba79a24361cc2108ddd9acb1ee%7Cae323139093a4d2a81a65d334bcd9019%7C0%7C0%7C638906057932567187%7CUnknown%7CTWFpbGZsb3d8eyJFbXB0eU1hcGkiOnRydWUsIlYiOiIwLjAuMDAwMCIsIlAiOiJXaW4zMiIsIkFOIjoiTWFpbCIsIldUIjoyfQ%3D%3D%7C0%7C%7C%7C&sdata=1uS2Lf0s05sqMzj4fdXbuUUAV7nfNg%2FCdTQ5ckECubs%3D&reserved=0), including the employee’s full name, last day, and primary office location. If equipment is not returned, DTS will contact the employee directly. Returned equipment will be wiped and, if suitable, returned to stock. | | Leaving Date |
| **Documentation, Information and Data** | Review business critical paper and electronic documents, information and data files and pass to designated person(s) | | Leaving Date |
| Ensure leaver has downloaded any required payslips/P60s from the Employee Self Service system | | Leaving Date |
| **Systems Access** | Request via Help4you removal of access to user’s account and any additional logins to corporate systems at the end of the working day on the leaving day. Ensure that this stage is completed. | | Before last day of employment |
| **Email** | Ensure leaver has removed all personal details from email account | | Leaving Date |
| If required, ensure leaver has disabled designated access to email accounts | | Leaving Date |
| Ensure leaver has set up leaving notification signature and auto reply | | At earliest opportunity |
| Ensure leaver has set up leaver’s auto-reply | | At earliest opportunity |
| **Personal Data** | Ensure that leaver has removed all personal data from drives | | Leaving Date |
| Ensure that leaver has taken all personal items | | Leaving Date |
| **Access Control** | Receive leaver’s Staff University ID card | | Leaving Date |
| Receive all room keys from leaver | | Leaving Date |
| **Library** | Check with leaver to return any outstanding library loans | | Leaving Date |
| **Personal Records** | Ensure leaver has completed the [Personal Details form](https://www.dundee.ac.uk/guides/change-personal-details-form) with forwarding address, if applicable | | Leaving Date |
| **TASC** | Ensure the leaver informs [TASCgovernance@dundee.ac.uk](mailto:TASCgovernance@dundee.ac.uk) and [tay.tasc.Tayside@nhs.scot](mailto:tay.tasc.Tayside@nhs.scot) of their leaving if they are an investigator involved in clinical trials. | | Before last day of employment |