



Use the checklist to make sure everything has been covered off when an employee leaves along with reassigning assets, job docs, tasks and key roles.

From Administration/Staff open the staff member who is leaving.

From the tabs select Employee Separation Checklist.

Home / Administration / Staff / (Kermit Frog) / Edit

PERSONAL DETAILS ▾

- Appraisal History
- Certificates
- Employee Induction Checklist
- Employee Separation Checklist**
- Leave Requests

1. Select the Departure Date
2. Tick off each item as required.
3. Add any applicable comments.
4. Type in any comments the staff member would like to make.
5. Type in Manager's comments as required.
6. Attach any relevant documents by clicking **+ADD FILE** e.g. resignation letter.
7. If a hard copy is required click **PRINT**.
8. Click **SAVE**.

Below documents are tasks & items allocated to this staff member to reassign or return.

Home / Administration / Staff / (Kermit Frog) / EmployeeLeaving

**7** **PRINT** **SAVE**

**8**

EMPLOYEE SEPARATION CHECKLIST ▾

Departure Date

**1** 8/04/2021 × 📅

### Employee Separation Checklist

Employee      Manager      Not Applicable      Comments

All service reports and invoices handed in to service administrator

**3**  
[Empty text box]

Last timesheet inc petty cash forms handed in

HR has them

Staff Member- Leaving comments

**4** [Empty text box]

Manager's Comments on Staff Member leaving

**5** [Empty text box]

Documents

**6** **+ ADD FILE**

Last Modified Time	Title	Description

## A. Plant & Equipment

1. Tick the item you wish to reassign.
2. Click **REASSIGN**.  
For Plant & Equipment select either Staff or Location.  
a. Select the staff member to reassign the item to or,  
b. Select the location it will be stored in.  
c. Click **SAVE**.

If there are multiple items moving to a new person tick these or click **SELECT ALL**.

Reassign

Assigned To  Staff  Location Stored

George Foreman **a**

**c** **SAVE** **CANCEL**

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Reassign

Assigned To  Staff  Location Stored

Rear Shed

**c** **SAVE** **CANCEL**

Plant & Equipment							<b>1</b> REASSIGN
Asset Type	Asset No	Registration/Serial No	Photo	Description	Asset Status	Assigned To	SELECT ALL
Plant	5623	JD5623		John Deer 310SK Blackhoe Loader	Current	Staff : Kermit Frog	<b>2</b> <input checked="" type="checkbox"/>

## B. Key Roles

1. Click **SELECT ALL** to reassign all the items in that section to the same person or
2. Tick the individual roles you want to change.
3. Click **REASSIGN** in the pop Up:
  - a. Select the Staff to reassign to.
  - b. Click **SAVE**.

Reassign

Staff

**a** Mobile Craig

**b** **SAVE** **CANCEL**

Key Roles		<b>3</b> REASSIGN
Role Name		<b>1</b> SELECT ALL
Return To Work Coordinator		<b>2</b> <input checked="" type="checkbox"/>
Fire & Emergency Warden(s)		<input type="checkbox"/>

## C. Job Docs

1. Click **SELECT ALL** to reassign all the items in that section to the same person or
2. Tick the individual roles you want to change.
3. Click **REASSIGN** in the pop Up:
  - a. Select the Staff to reassign to.
  - b. Click **SAVE**.

Reassign

Staff

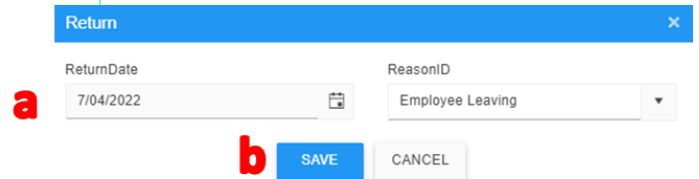
**a** Mobile Craig

**b** **SAVE** **CANCEL**

Job Docs								<b>3</b> REASSIGN
Doc No	Job No	Project/Description	Template Type	Customer	Work site	CreationDate	Status	<b>1</b> SELECT ALL
149	1510HT	Grass Test	SWMS	Clarson Ltd	Default	02/03/2021	Signed Off	<b>2</b> <input checked="" type="checkbox"/>
145	2909ht	other testing	Other	Purple Submarine Ltd	Growing Fish	22/02/2021	Signed Off	<input checked="" type="checkbox"/>

## D. PPE & Clothing Issued

1. Click **SELECT ALL** to reassign all the items in that section to the same person or
2. Tick the individual items you want to return.
3. Click **RETURN ITEMS** in the pop up:
  - a. Check the Date, the Reason will automatically select Employee Leaving.
  - b. Click **SAVE**.



The image shows a 'Return' pop-up window. It has a title bar with 'Return' and a close button. Below the title bar, there are two input fields: 'ReturnDate' with the value '7/04/2022' and a calendar icon, and 'ReasonID' with a dropdown menu showing 'Employee Leaving'. At the bottom of the form, there are two buttons: 'SAVE' (highlighted with a red 'b') and 'CANCEL'.

PPE & Clothing Issued							3 RETURN ITEMS
PPE Type	Item	Person Receiving	QTY	Date Last Revised	Expiry Date	Signed Off	1 SELECT ALL
Clothing	Safety Vest	Kermit Frog	1	13/10/2020 10:36	13/10/2022	<input checked="" type="checkbox"/>	2 <input checked="" type="checkbox"/>
PPE	Safety Goggles	Kermit Frog	1	29/04/2020 18:51	29/01/2020	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## E. Tasks

In the Tasks list you will need to reassign each task individually as the fields are different for each type. Clicking Reassign will open each task for you to make the appropriate changes.

Remember to scroll back up and click  **SAVE**.

Tasks		
Title	Expire Date	Reassign
Internal Audit Reports / Internal Audit Reports - zzHSEQ-F-014 - INTERNAL AUDIT FORM & REPORT	09/04/2021	Reassign
Warehouse/Office inspection Register / Warehouse/Office Inspection Register - Chemical Storage Shed	12/04/2021	Reassign
First Aid Kit Register / First Aid Kit Register - General Large	21/04/2021	Reassign

## F. Document Distribution

This section will remove staff from Document Distribution tasks that they have not yet signed off:

1. Click on **SELECT ALL** or
2. Tick the boxes as required.
3. Click to remove the staff member from these tasks.

Document Distribution Register						3 DELETE FROM LIST
Report Type	Title	Issue Time	Signed Off	Reviewed By	Review D:	1 SELECT ALL
Safety Memo	V25 test Task on IOS	03/03/2023	<input type="checkbox"/>			2 <input checked="" type="checkbox"/>
Safe Work Method Statement	E27-V2-WORKING WITH BATTERIES	27/02/2023	<input type="checkbox"/>		30/09/2025	<input checked="" type="checkbox"/>

