Employee Separation Checklist

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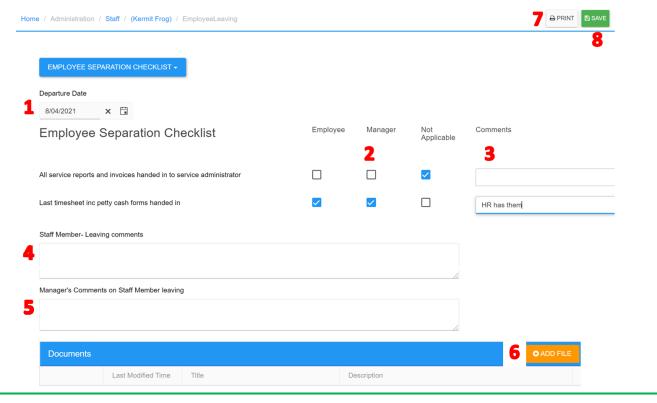
From Administration/Staff open the staff member who is leaving.

From the tabs select Employee Separation Checklist.

PERSONAL DETAILS ▾

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

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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**.

7 🖨 PRINT   💾 SAVE

8

EMPLOYEE SEPARATION CHECKLIST ▾

Departure Date

1 | 8/04/2021 | × | 📅

Employee Separation Checklist

	Employee	Manager	Not Applicable	Comments
		2		**3**
All service reports and invoices handed in to service administrator	☐	☐	☑	
Last timesheet inc petty cash forms handed in	☑	☑	☐	HR has them

Staff Member- Leaving comments

4

Manager's Comments on Staff Member leaving

5

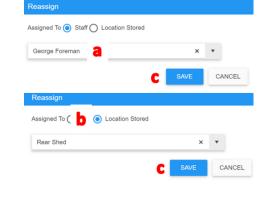| Documents	**6** ⊕ ADD FILE
Last Modified Time	Title	Description

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

9. Tick the item you wish to reassign.

10. 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**.

Reassign

Assigned To ◉ Staff ◯ Location Stored

George Foreman **a** | × | ▾

c SAVE   CANCEL

Reassign

Assigned To ◯ **b** ◉ Location Stored

Rear Shed | × | ▾

c SAVE   CANCEL

Plant & Equipment						**10** REASSIGN
						SELECT ALL
Asset Type	Asset No	Registration/Serial No	Photo	Description	Asset Status	Assigned To	
Plant	5623	JD5623		John Deer 310SK Blackhoe Loader	Current	Staff : Kermit Frog	**9** ☑

11. For P&E, Key Roles and Job Docs you can click **SELECT ALL** to reassign all the items in that section to the same person or place.

NOTE: Each section needs to be done separately.
For Key Roles & Job Docs you will only have the option to select staff.

Reassign ✕

Staff

a Mobile Craig ▼

b SAVE   CANCEL

Key Roles		REASSIGN
Role Name		SELECT ALL
Return To Work Coordinator	**9**	☑
Fire & Emergency Warden(s)		☐

Job Docs							**10** REASSIGN
						11	SELECT ALL
Doc No	Job No	Project/Description	Template Type	Customer	Work site	CreationDate	Status
149	1510HT	Grass Test	SWMS	Clarson Ltd	Default	02/03/2021	Signed Off ☑
145	2909ht	other testing	Other	Purple Submarine Ltd	Growing Fish	22/02/2021	Signed Off ☑
142	091001	INCA Footer header	Other	Sunshine Holiday Park	Pool Updgrade	10/02/2021	Signed Off ☑

12. In the Tasks list you will need to reassign each one individually as the fields for each one are different. 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/(**12**	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