

Finance Leavers Checklist

Introduction

When a member of staff leaves the department it is important to consider any tasks which need to be carried out before they go and allow time to make any adjustments before new staff arrive.

The aim of this guide is to provide a comprehensive list of things to do for you to refer to when a staff member leaves.



Leavers Checklist

- Clear outstanding requisitions/orders
- Set vacation rules
- Submit timesheets
- Remove from mailing lists
- Return borrowed assets
- Disable CUFS account
- Cancel university credit card
- End date scheduled reports

Cambridge University Finance System (CUFS) iProcurement

Vacation Rules

If the leaver is an approver they should set up a vacation rule so any future requisitions which are forwarded to them will alert the requester that they should forward the requisition to someone else.

Purchase Requisition Status Report

Requisitions which the leaver has started but not finished cannot be deleted by other members of staff. Therefore these need to be identified and removed before the leaver goes. To do this they should run the **Purchase Requisition Status Report** and remove any of the identified requisitions which belong to them.

Check for incomplete orders

Using the buyers work centre they should review their orders and make sure that none are incomplete (which still reserves funds against a grant) and need to be cancelled or deleted.

Open Purchase Order Report

Finally confirm whether any services that have been ordered have been received/performed and receipted on CUFS. Any orders which have not been receipted will appear in the **Open Purchase Order Report**.

Tip: If there are any favourite items others will need after the staff member has left, they can be added to a shared basket for others to pick from.

Fixed Assets

Responsible officer

If the leaver is assigned the responsible officer for an asset, update the record to show who is now responsible.

If they were the default responsible person for the department then let the fixed asset helpdesk know UFS_FA@admin.cam.ac.uk

Reclaim any borrowed assets

Double check they don't mistakenly take any University assets with them (such as tablets and laptops).

Equipment Sharing Database

If they were named as the contact person for a piece of equipment included on the equipment sharing database inform the ROO at equipment_sharing@admin.cam.ac.uk

Grants

Timesheets

Completed and submit any timesheets relating to the leaver as required.

Remove named leavers

If the leaving member of staff is named on a grant (which is not moving with them) contact your department's Research Support Advisor/Administrator.

Fund Check Failures Mailing List

If they are currently on the Fund Check Failures mailing list, they will need to contact Central and Research Accounting to confirm who should be receiving the report going forward.



CUFS General

Disable CUFS account

Disable the leavers CUFS account by completing the responsibility amendment form found on the UFS key contact page.

End date scheduled reports

If the account is set up to have reports scheduled to run at regular intervals have the leaver delete/end date the schedule.

Non CUFS items

Mobile phones

If they have use of a University mobile phone then contact Telecoms Office and make sure it gets cancelled.

Credit cards

If they have a University credit card make sure that you get all the receipts and the card is cancelled.

Key contacts

If the leaver was a key contact for the department they should contact the helpdesk with details of who is to be their replacement.

Supplier database access

Also if they can request new/amendments to suppliers they should contact the helpdesk with details of their replacement.

UTBS access

If they are someone who has been given access to book others onto Finance Training courses or run the Bribery or PCI course reports themselves then let finance.training@admin.cam.ac.uk know.

Burst reports

If the person receives any sort of regular burst report from the Finance Division then let the sender of that report know.

Departmental certificate

If the leaver is responsible for signing off the Departmental Certificate they must contact Central and Research accounting to inform them of their replacement.