Document Owner: Line Manager

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| Line Manager: |  |
| Member of staff starting / exiting: |  |

The line manager is accountable for ensuring the new starter has completed this form. The CHI on-boarding manager will guide the new staff member through the process. The new starter/leaver will be responsible for making sure all items are complete working with the on-boarding manager and their line manager. The target is to complete all induction activities within five weeks of the start date. The completed document should be attached to the staff member’s record in the Q-Pulse Person module.

**New Starter Form:**

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| Start Date: |  | Date Completed: |  |

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| **Item** | **Action status (action completed/account created/access granted/asset assigned)** | | **Comments** |
| **Orientation carried out** |  | |  |
| **All Inductions completed:** | **UoM**  **Division**  **CHI**  **ISMS-01-04 – guidance for new staff**  **Vaughan House**  **JMcFarlane (if applicable)**  **(tick once completed)** |  |  |

| **Item** | **Action status (action completed/account created/access granted/asset assigned)** | **Comments** |
| --- | --- | --- |
| If your Line manger states that you need one, advise the Q-Pulse team you are a new starter xxxxxxxxxxx  advising you need a Q-Pulse account and Person record set up\* |  | \*Please confirm with your line manager whether you require this first.  \*\*Please cc your line manager and provide your job title |
| Q-Pulse document acknowledgements (via electronic signatures) provided for the applicable information security documents |  | You will need a Q-Pulse login to do this |
| Discuss with your line manager which Dropbox folders you will need access to |  | You may need to set up a Dropbox for Business account. The Folder owners will need to give you access. Owners vary depending on the folder |
| If your Line manger states that you need one, advise the eLab team you are a new starter xxxxxxxxxx |  | Discuss with your line manager if you need access to certain areas within eLab |
| If your Line manger states that you need one, advise TRE team you are a new starter  xxxxxxxxxxxxxxxx |  | Discuss with your line manager if you need access to certain areas within TRE |
| Advise CHI Staff Administration that you are a starter xxxxxxxx |  | Cc your line manager, where you are sitting (desk and room number) and your job title |
| If you require access to CHI sites - complete Access to VH FORM-005 for Vaughan House only. |  | Complete the online access to Vaughan House request form (FORM-005) from Q-Pulse and send to xxxxxxxxx. If you are based in JMF you will need to liaise with your line manager on the security processes – keys to offices etc. |
| Discuss with your line manager if you need a Laptop/ wearable/ mobile if so contact xxxxxxxx to help arrange this if needed |  |  |
| Email xxxxxxxxxxxxx to be added to relevant Listserv(s)/ distribution lists |  | If you are working on a new project/ grant you can discuss this with the comms. team so they can look at adding it to our online research portfolio and help with any social media campaigns.  This mailing list is also used to notify of Research Group Meetings, which are mandatory, and Journal Club meetings, which are mandatory for PhD students, but all are welcome and encouraged to attend |
| Email xxxxxxxxx to update/ create your Website profile |  |  |
| Speak to your line manager to discuss if you will need to be able to book travel and then email xxxxxxxxxxx (travel administrator for the group) to request access to Key Travel. |  | Following an access request you will receive an email with instructions on how to access the system and create a login. Training videos are also available: [Travel - Getting Started](http://www.finance.manchester.ac.uk/buyingexpenses/buyinggoodsandservices/bookingtravel/gettingstarted/)  Travel bookings must include a justification and a reason for the travel. Travel under £250 will be booked immediately so please make sure you check everything before you book as any changes to bookings may incur additional charges.  If you have any issues, you can contact the University’s travel team on xxxxxxxxx or email the Travel Helpdesk |
| Speak to your line manager to discuss if you will need to be able to raise requisitions (through iProcurement). Email xxxxxxxx from our finance team to request a link to the training. |  | You will need to complete all of the training before being granted access to the system. Once all the training modules have been completed, you will receive an email with your login details. |
| Other IT Systems access\* |  | This needs to be discussed with your line manager and relevance will be based on your role/ project |

**Exit form:**

The line manager is responsible and accountable for completing this process working with the staff member.

Complete the table, with the staff member. The target is to complete all activities within 1 week of the exit date. The completed document should be attached to the staff member’s record in the Q-Pulse Person module.

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| --- | --- | --- | --- |
| Exit Date: |  | Date Completed: |  |

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| --- | --- | --- |
| **Item** | **Exit (action completed/account deleted/access revoked/asset returned)** | **Comments** |
| Dropbox folder - access revoked |  | Contact folder owners for access to be removed |
| Advise the eLab team of the end date xxxxxxxxxxx |  | If the leaver needs access to eLab after their end date the eLab team need to be made aware |
| Advise TRE team of the end date  xxxxxxxxxx |  | If the leaver needs access to TRE after their end date the eLab team need to be made aware |
| Contact xxxxxxxxxxx All relevant Building(s) access revoked |  | Please provide the end date. |
| Portable computer equipment (laptop/mobile/tablet) returned to line manager. |  | Spare items should be returned to the CHI asset pool managed by xxxxxxxxxx |
| TRE assets re-assigned. |  | Ownership of any TRE Assets should be re-assigned. This will be completed by xxxxxxxxxxx |
| Desk drawer keys returned |  | Leave them in the desk |
| Email xxxxxxxxxx to be removed from the Q-Pulse document distribution lists, for ISMS responsibilities to be re-assigned and access to be revoked\*\* |  | Please provide the end date. |
| Email xxxxxxxxxxxx to be removed from Listserv(s) / distribution lists |  | Please provide the end date. |
| Email xxxxxxxxxxx for your website profile to be removed |  | Please provide the end date. |
| Email the owners of: Other IT Systems access i.e. JIRA\* revoked |  | If the leaver needs access to any systems after their end date the relevant team will need to be made aware |
| Contact xxxxxxxxxxxx to ask them to cancel any mobile/ IPAD contract |  | Mobile/ IPAD contracts take 1 month to cancel so this should be done as soon as possible |
| If leaver is a fire marshall or first aider contact Estates (xxxxxxx) to advise of the change. |  |  |

\*Line Managers should list all relevant systems for which access has been given or revoked

\*\* Q-Pulse account should not be archived until after Exit checklist has been attached