This policy is applicable to services provided by Heartlands, Good Hope and Solihull Hospitals Divisions

Heart of England NHS
NHS Foundation Trust

Leavers Policy

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Version:	7.1
Purpose:	This policy has been designed for managers and staff to ensure that when staff inform their manager of their intention to leave the Trust, all relevant processes are followed.
Responsible Directorate:	Human Resources
Executive Sponsor:	Hazel Gunter, Director of Workforce
Document Author:	Head of Operational HR
Approved by:	Chief Executive's Group
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Related Controlled documents	Retirement Procedure Fixed Term Contract Procedure Exit Questionnaire Honorary Contracts Overpayments Procedure
Relevant External Standards/ Legislation	N/A
Target Audience:	Human Resources Department Managers across Trust IT, Payroll, Finance, Workforce Information All staff
Further information:	Leavers process, leavers policy, exit policy, exit process, overpayment

Paper Copies of this Document

If you are reading a printed copy of this document you should check the Trust's Policy website (http://sharepoint/policies) to ensure that you are using the most current version.

Summary of changes from last version:

- Amalgamation of the Leaver's policy, Retirement Policy, Exit and On-line exit policy, Notice and Fixed Term Contracts Policy into one document.
- Guidance on exit interviews amended

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Version History:

Version No.	Date of Release	Document Author	Ratified by	Date Ratified
7.0	15/11/16	Head of Operational HR	JNCC Board/CEAG	15/11/16
7.1	31/08/17	Head of Operational HR (Minor changes to add responsibilities to hand over patient lists 4.2 and 5.6 and leaver's checklist)	Deputy Head of HR	

1. Introduction

This policy applies to all managers who are involved in the procedures when a staff member tells us of their intention to leave or retire from our organization. It is important that all the necessary forms are completed in a timely manner so that all associated departmental services can have closure, this relates to Finance, Human Resources, Security, Payroll, IT, etc.

2. Policy Statement

Heart of England NHS Foundation Trust whilst committed to the retention of staff, understands that staff will eventually leave the Trust. However the end of the employment relationship does require a number of processes to be followed in order to ensure that any risk to the Trust is minimised.

This document provides guidance to ensure that managers undertake all processes required for the employment relationship to be ended whilst ensuring that any exit is undertaken lawfully and with dignity. In addition the Trust needs to ensure that when a staff member leaves that all property is returned and that access to any Trust systems and information are closed and this document informs managers of these processes.

This policy has been developed to ensure that all managers and members of staff are aware of the Leavers process. The policy is mandatory to ensure a seamless process is undertaken.

All staff have the opportunity to complete an exit questionnaire, either online or a paper copy and that you, as a manager are aware of how to locate the questionnaire and have an understanding of the guidance that goes with it.

That any staff who exit our organisation are paid correctly for their time and the correct information is captured using the ESR3 form and all forms are submitted in a timely manner.

Staff who are recruited on an honorary contract are properly exited from our organisation, to ensure that they are removed from our IT systems and no longer have access to hospital and patient areas.

3. Definitions

This policy is to support managers and any staff member who has indicated their intention to leave the organization, this includes resignation, sickness, fixed term contracts and retirement.

4. Policy Requirements

The aims of this policy are to:

- Utilise the information to inform changes in practice
- Ensure that our hospital and patient areas are safe
- Ensure that correct information is provided to Payroll, IT Systems Development and Estates Management
- Ensure that IT Systems and information access is removed appropriately
- Monitor information, systems, and databases and make improvements to the organisation as necessary

4.1 Reasons for Leaving

Staff can exit the Trust by way of a number of reasons, these can include :

- Resignation or MARS
- Dismissal by reason of Conduct, Capability, end of Fixed Term Contract, Redundancy, Statutory Bar (a legal reason that an individual cannot be employed, ie, removal from NMC/GMS register), some other substantial reason
- Retirement
- Death in service

Heart of England NHS Trust is committed to ensuring that it attracts and retains the right staff with the right skills to deliver expert healthcare for our communities. Completing and actioning the questionnaires and forms contained within this process and policy guide will help HEFT understand why our staff choose to leave our organisation, while providing our own services with the correct data.

This is particularly important as there are financial and time based costs involved when any staff member leaves an organisation. It is also important that we understand and identify what individual and professional skills we are losing.

4.2 Resignation

When a member of staff decides to leave the Trust, they should submit their intention to leave the Trust, i.e. their resignation, in writing to their line manager; the notice period will commence on receipt of the resignation letter.

At this point, the manager should arrange to meet with the staff member to agree their last day of service; this is usually the last day of the notice period. The calculation of any

outstanding annual leave and a schedule of work, to be completed by their leaving date, should also be determined at this point. Following this meeting, the manager should confirm the details in writing which should include an acknowledgment and acceptance of the resignation (Appendix 2 – example letter).

When a clinician has identified their intention to cease employment with the Trust, it is imperative that a formal handover process of patients is put in place. The clinical Director / Head of Department is responsible for ensuring this takes place prior to the individual leaving the Trust.

4.3 Dismissal from employment

Dismissal from employment is usually the end result of other Trust Policies and Procedures and managers must involve Human Resources before any decision regarding ending the employment relationship in this way.

4.4 End of Fixed Term Contract

The expiry of a fixed-term contract is classed as a dismissal. It is therefore essential that the termination of fixed-term contracts is dealt with in a fair and reasonable manner.

There are 3 steps which should be followed to terminate a fixed term contract:

- Letter (Appendix 3) - Write to the staff member setting out the reason, why the contract will not be renewed. Invite the staff member to a meeting.

- Meeting - Discuss the reason for non renewal and any other options with the individual. The staff member may be accompanied by a trade union representative or workplace colleague.

- Appeal - Allow the staff member to appeal against the decision within 10 working days of the decision, for full details refer to the supporting documents on the Policies site for the Fixed Term Contract Procedure.

4.5 Retirement

Please see the Retirement Procedure

The Trust recognises that the change from work to retirement is one of the most significant events encountered during a person's life. It is the intention of this policy to provide the best support and practical information to enable our staff to experience as smooth a transition from work to leisure as possible. These procedures apply to staff who are either approaching the end of their NHS careers or are wishing to take early retirement voluntarily.

There is no Default Retirement Age, therefore it is for the individual to decide when they wish to retire.

For those staff who wish to retire and are members of the NHS Pension Scheme, advice should be taken from either the Pensions Department within Payroll or the NHS Pensions directly (www.nhsbsa.nhs.uk). There are currently 3 NHS Pension schemes as below dependent on the date the scheme was joined, there is a varying criteria applicable to each scheme, therefore it is advisable to contact the NHS Pensions Agency or Pensions Department within Payroll for advice before making any formal decision :

- 1995 Scheme
- 2008 Scheme
- 2015 Scheme

When an individual is retiring, including early retirement or ill health grounds, a discussion should take place with the Trust's Pensions Officer to determine the appropriate forms to be completed and the timescales in which the pension will be paid.

For quotes on the amount of pension and lump sum which will be paid, members of staff should contact the Trust's Pensions Department.

For ill health retirement, a decision from the NHS Pensions Agency is required prior to completing the pension forms. The Trust will be notified via the Pensions department.

For further details of NHS Pensions please use links below :

Pensions Department - : 295Pensions@uhb.nhs.uk

NHS Pensions Agency : www.nhsbsa.nhs.uk

Planning Retirement

Pre-Retirement Training and other help

All staff wishing to retire should attend a pre-retirement course, ideally between 6 months and 18 months prior to their retirement. Details of planned courses are available from the Education Department.

DEFINITIONS

Flexible Retirement Options

There are varying options staff can choose when looking at flexible retirement, this is dependent upon which NHS Pension scheme the staff member is in. Therefore it is advisable they speak with the Pensions Department at UHB or the NHS Pensions Agency before reaching a decision.

Pensions Department - : : 295Pensions@uhb.nhs.uk

NHS Pensions Agency : www.nhsbsa.nhs.uk

“Wind Down”

This provides an alternative to conventional retirement. It allows staff to wind down by reducing their contracted hours of employment, subject to agreement from their manager. Pensions for part-time staff in the NHS Pension Scheme are calculated on whole time equivalent salary, so if staff “wind down” rather than retire, this should not reduce their eventual pension. In the meantime, pension entitlement will continue to build up.

“Step Down”

It could be the case that the pressure and responsibilities of the job are becoming too great and members of staff wish to relinquish some of this - but do not want to leave work altogether. If so, staff who are members of the NHS Pension Scheme could look to “step down” into a less demanding job on lower pay but which still makes good use of their skills, knowledge and experience, as long as it is also in line with the needs of the service.

Voluntary Pay Protection

This allows members to choose to voluntarily protect their pay dependent upon which scheme they are in. The intention is to support members wishing to 'step down' to a less demanding job in the run up to retirement.

Retire and Come Back

Staff who choose to retire and wish to return to work whilst taking their pension can do so, however this option is subject to submitting a written request which must be confirmed in writing by the manager. Once agreement has been given, the process is subject to the following conditions :

- There must be a least at 14 day break from the end of the substantive contract and the commencement of the new post and the member of staff must not work more than 16 hours per week in the first month of retirement.

- This restriction is for the first month only. Thereafter an individual can request to increase their hours of employment with the agreement of their line manager.

- Advice should also be sought from Pensions Department at Payroll in relation to the maximum hours an individual can work without an impact to their pension.

- That the arrangement is subject to 12 monthly annual review.

Any variations of retirement must be agreed with the line manager prior to the retirement date.

For futher information please see the procedures section of the Policies webpage for the Retirement Procedure.

4.6 Voluntary Early Retirement

Voluntary Early Retirement is available to all staff who are members of the NHS Pension Scheme providing they meet the defined criteria. For all NHS pension advice please use links below :

Pensions Department - : 295Pensions@uhb.nhs.uk

NHS Pensions Agency : www.nhsbsa.nhs.uk

4.7 Ill Health Retirement

Under the NHS Pension Scheme, if a member of staff is terminated on the grounds of incapability due to ill health and they have 2 years' service a member of staff may qualify for early payment.

The member of staff must make a written application for ill health retirement and either the Occupational Health Physician or the member of staff's GP will need to certify that they are unfit to perform the duties for which they were appointed and unfit to undertake any work.

When considering making an application for ill health retirement, it remains the member of staff's decision. The NHS Pension Agency has stated that it will only consider this where all treatment options have been exhausted and the condition is permanent up to an individual's normal retirement age.

The decision to award or not award an ill health pension is a matter for the NHS Pensions Agency, which is independent of the Trust.

Further information on this area can be located in the Trust Sickness Absence Policy and Procedure or by contacting Pensions Department in Payroll or NHS Pensions Agency.

Pensions Department - : 295Pensions@uhb.nhs.uk

NHS Pensions Agency : www.nhsbsa.nhs.uk

Any staff member who is retiring should be presented with a letter from the Chairman thanking them for their service (Appendix 4), this is also documented on the Managers checklist. The letter should be completed by the Manager and sent to the Chairman's office for Signature.

4.8 Death in Service

Where a member of staff dies in service, and is a member of the NHS Pension Scheme, the scheme provides benefits for their next of kin. For more details, please contact the Pensions Department or go to the following link

http://www.nhsbsa.nhs.uk/Pensions/Documents/Pensions/Life_Assurance_and_Family_Benefits_Factsheet_1995_Section.pdf

Pensions Department - : 295Pensions@uhb.nhs.uk

NHS Pensions Agency : www.nhsbsa.nhs.uk

4.9 Notice Periods

Band	Contractual Notice
AfC Band 1 to 4	4 weeks
AfC Band 5 to 7	8 weeks
AfC Band 8 to 9	12 weeks
Other i.e. SMP	As per contract
Medical Staff	As per contract

In order to give the Trust time to prepare for an individual leaving the Trust, a period of notice is usually applicable. Although the notice periods are usually set for each band/grade, a manager is permitted to allow an early release dependent on the needs of the service.

When a member of staff resigns or retires, they are required to complete a notice period dependent on their position within the Trust and their contract of employment. The table above shows the amount of notice they should give.

NB. Any Band 5 non-clinical staff recruited before 01.11.15 should refer to their employment contract for the required notice period.

Any notice to be paid should be specified on the ESR.

Staff are required to provide the Trust, in writing, with their intention to terminate their contract of employment in accordance with the notice periods identified above.
Notice period provided by the Trust to a member of staff

It should be noted that the minimum length of notice the Trust must give to a member of staff to terminate their contract of employment is determined by statute rather than local policy;

Period of Continuous Employment	Minimum Notice
One month or more but less than 2 years	1 week
Two years or more but less than 12 years	1 week for every year of continuous employment
Twelve years or more	12 weeks

4.10 Checklist for Leavers

The leaver's checklist (Appendix 5) should be used when a staff member is leaving the organisation and includes those staff members that are on a temporary, seconded or honorary contract.

As the individuals line manager you have responsibility for completing this activity and to ensure that any items are returned to the trust. Once completed this documentation should be held within the staff member's personal file.

4.11 Return of Trust Property

During employment, all staff are supplied with a number of items to support them in their role or to identify them as Trust staff. On the termination of their employment, all Trust property should be returned; this includes any ID badges, data or documents.

All Trust equipment such as mobile phones and laptops etc should be returned during the staff member's final week of employment and returned to the relevant service departments.

4.12 Exit Interviews

When a member of staff leaves via reason of resignation it is recommended that feedback on their employment is gained; this can be via an online questionnaire or by way of an exit interview.

The purpose of the interview is to understand why the staff member is leaving, to seek constructive feedback from their experience with the Trust and it provides an opportunity to seek suggestions for retention of staff in the future. Face to face interviews generally provide more beneficial information than written feedback. A suggested structure is shown (Appendix 6).

Once they have submitted their written resignation, the staff member should be offered an exit interview appointment with their line manager. This appointment should be included in the acknowledgement letter (Appendix 2).

If the staff member does not wish to undertake the exit interview with their line manager then they should be offered the opportunity to undertake the interview with a third party, if preferred, such as another appropriate manager within the Division or Human Resources.

The interview should take place in a room that is private and free from interruptions. It is suggested that the format for the interview is based on the Exit Questionnaire. This should be completed jointly by the staff member and the interviewing manager during the meeting.

Should the staff member not take up the offer of an exit interview prior to leaving the Trust, they should be referred to the On Line Exit Questionnaire which they can complete, a template of the Online Exit Interview can be found as Appendix 7.

4.13 Termination from Payroll

To terminate a member of staff from the Trust's payroll system (Electronic Staff Record) an ESR 3 (Termination form) should be completed on the ESR system and, once authorised, this will automatically be forwarded to the Payroll Department for action (Appendix 6). This form should only be used for members of staff leaving the Trust. Members of staff who are moving / transferring to another service or department within the Trust are not classed as leavers. In those cases, the 'receiving manager', i.e. the manager of the department or service the staff member is taking up a position within, is responsible for submitting an ESR 2 notifying Payroll of the change.

The ESR form should include details of the last day of employment with the Trust, reason for leaving and the balance of annual leave owed or outstanding. If there are any other outstanding monies owed to the Trust by the staff member on leaving, then this information should also be recorded in the notes section of the ESR form so that payroll can recover outstanding monies at the point of termination date. The member of staff should be made aware of any deductions from their final salary, further information on this can be found in the Overpayments Procedure.

4.14 Annual Leave

When members of staff leave part way through a financial year they are only entitled to accrue annual leave for the last complete month they work i.e. up to the last available working day on their normal working pattern. When the member of staff's last working day is known, their annual leave should be re-calculated to take into account the part year that the staff member has worked. Please see the Trust's Annual Leave Policy for calculation details.

Where more annual leave has been taken than the staff member is entitled to, this will be deducted from their final salary. This should be indicated on the ESR form.

Where there is annual leave outstanding, the member of staff can be paid for this or their last day of service extended beyond their last working day to accommodate the annual leave.

4.15 Personal files

A copy of any documentation relating to the member of staff's employment including all termination documentation should be placed onto the member of staff's personal file.

In accordance with legislation for retention periods, a leavers' personal file should be held securely for 6 years after their leaving date.

It is recommended that the file is kept for at least 6 months within the department prior to archiving. Please see the Trust's Retention Policy which can be accessed from the Policy site on the Trust intranet.

5 Responsibilities

5.1 Manager

It is the responsibility of Line Managers to ensure that the following actions are completed and passed to the relevant departments.

- It is your responsibility to meet with the staff member at the earliest opportunity to talk through their reasons for choosing to leave and discuss any possible options, alternatives, issues that may have contributed to the decision.
- It is your responsibility to Invite the leaver to complete the on-line exit interview questionnaire
- It is your responsibility to complete an ESR3 for any individual who leaves your team
- It is your responsibility to also complete an ESR3 form to terminate any staff member who was appointed on an honorary contract
- Complete the leavers checklist, this can be found in appendix B of this document
- Ensure all dates, work load, annual leave, notice dates, etc are agreed
- Ensure that all property belonging to the Trust is accounted for.
- If your staff member is retiring, you should ensure the correct process is followed
- When a clinician has identified their intention to cease employment with the Trust, it is imperative that a formal handover process of patients is put in place. The clinical Director / Head of Department is responsible for ensuring this takes place prior to the individual leaving the Trust.

5.2 Workforce Information Team

The workforce information team has responsibilities as follows:

- Produce monthly scorecards highlighting staff who have the potential to retire and distribute these to agreed key managers in the organisation
- Produce monthly leavers reports
- The Workforce Information Team will provide leaver information to the relevant IT Systems Managers, Estates Management and Switchboard Team

5.3 Members of Staff

Members of staff have responsibility as follows:

- Submit your resignation in a timely and written manner
- Attend an exit discussion meeting to ensure dates, outstanding payments, workload and Trust property is clarified.
- Attend pre-retirement discussions with their manager if necessary
- Attend a pre-retirement training course
- Contact their manager within 6 months of retirement date if they wish to retire.
- Complete an Exit Questionnaire

- When a clinician has identified their intention to cease employment with the Trust, it is imperative that a formal handover process of patients is put in place. The clinical Director / Head of Department is responsible for ensuring this takes place prior to the individual leaving the Trust.

5.4 Payroll

The Payroll Department team has responsibilities as follows:

- Act as a point of contact for all retirement queries
- Advise on all aspects of the pension scheme
- Process ESR forms in a timely manner

5.5 Operational HR

The Operational HR service has responsibilities as follows:

- Analyse data following receipt of monthly leavers reports, highlighting any trends within areas and take action as appropriate
- Advise individuals on ill health retirement
- Attend meetings to discuss flexible retirement appeals as necessary

5.6 Other staff

- The IT Systems Team will remove all leavers from their systems
- Estates Management will be responsible for ensuring that access is removed from various hospital and patient areas
- Switchboard Team will be responsible for ensuring that the individuals name is removed from the intranet
- It is the responsibility of the Clinical Director / Head of Department to ensure a formal process is in place for the handover of patients prior to a clinician leaving the Trust.

6 Training

All managers should familiarise themselves with this Policy and Process and have a responsibility to carry out the steps.

7 Monitoring and Compliance

See **Appendix 1**

8 Appendices

Appendix 1 Monitoring and Compliance
Appendix 2 Resignation Acknowledgement template

Appendix 3 Fixed Term Contract Letter
Appendix 4 Retirement letter from Chairman
Appendix 5 Leavers Checklist
Appendix 6 Exit Interview Structure
Appendix 7 On Line Exit Interview Template
Appendix 8 ESR3 – Leavers Form Guidance Notes

Appendix 1 Monitoring Matrix

MONITORING OF IMPLEMENTATION	MONITORING LEAD	REPORTED TO PERSON/GROUP	MONITORING PROCESS	MONITORING FREQUENCY
Annual Workforce Report	Workforce Information	Trust Board	The information obtained from the Exit Questionnaires/Interviews will form the report which will: Monitor the effectiveness of employment practices and procedures • Analyse the reasons why staff leave the Trust in order to address any retention issues. • Where appropriate information exists, will be compared to local and national labour market trends and statistics. • Contains breakdowns of losses by staff group and diversity, identifying reasons for leaving and where staff are moving to, if known.	Annual

Appendix 2 Resignation Acknowledgement template
Date

Private and Confidential
Name
Address

Dear

I acknowledge receipt of your letter of resignation dated (date) from the post of (job title) in (Name of Department/Ward) Department/Ward. I confirm that your last date of employment with the Trust will be (date).

I can confirm that you have x number of days annual leave outstanding and these can be paid to you in your final salary **or** you have overtaken your entitlement to annual leave and hence the number of days will be deducted from your final salary. (**Please delete as necessary**)

It is important to the Trust that members of staff who are leaving the Trust are given the opportunity to discuss their reasons for leaving. In order to undertake this, we offer an Exit Interview to all staff leaving the Trust. The information provided will be treated as confidential and the HR Department will use this information to analyse the key trends in relation to reasons for leaving and where possible to address any issues.

I have therefore arranged for us to meet on xxxx to complete the necessary paperwork and if appropriate discuss your reasons for leaving. However, should you prefer to complete the on-line Exit questionnaire, this can be accessed via the Internet.

If you would prefer a third party interview (that is with someone other than myself), this can be arranged through Human Resources.

Should you wish to have, or retain a bank nursing contract with the Trust, please contact the Temporary staffing office.

I look forward to meeting with you and should you have any queries prior to the meeting then please do not hesitate to raise these with me.

Yours sincerely

Line Manager's Name
Job Title

Appendix 3 Fixed Term Contract letter
Date

Strictly Private & Confidential
Name
Address

Dear

Re: Expiry of Fixed Term Contract

I am writing to inform you that your fixed term contract will expire on **insert date**.

If you would like the opportunity to discuss this matter further please contact me **insert contact details** so that a mutually convenient time can be set up. During the meeting you may be accompanied by a colleague or Trade Union representative.

As you know, all vacancies are available on NHS Jobs and I would encourage you to browse this site if you are interested in applying for a substantive post within the Trust.

I would like to take this opportunity to thank you for all your hard work at the Trust and to wish you every success in your future career.

Yours sincerely,

(Line Manager).

Appendix 4 Retirement Letter
Date

Private and Confidential
Name
Address

Dear

RE: RETIREMENT

Having heard of your forthcoming retirement, I did not want the occasion to pass without thanking you personally for the considerable contribution that you have made over the many years to the work for the Heart of England NHS Foundation Trust as a whole and the population served by our health care provision.

Your length of service of a total of over … years speaks for itself as regards to your commitment and conscientiousness. I know that you will be greatly missed by your friends and colleagues at the Trust.

In leaving us I add my own wishes to those of the Trust Board that you have a happy retirement.

With best wishes,

Yours sincerely

Chairman

Appendix 5 Leavers Checklist

This leaver's checklist should be used for all leavers (Including temporary, seconded and honorary contract holders. The appropriate line manager or equivalent has responsibility for the completion of this checklist, each action point must be completed and all equipment listed returned to the appropriate department.

The leavers' process must be initiated upon resignation so the activities below are completed by the agreed leave date.

Leavers Name:		**Department:**	
Managers Name:		**Date of Leaving:**	
Section 1 – Administration	**Yes/No/NA**	**Date**	**Comments**
Letter of resignation received			
Resignation acknowledgement letter sent to individual			
Last working day confirmed?			
ESR3 Leavers form Complete			
Ensure individual has been directed to on-line exit questionnaire			
Arrange handover of work/folders/documents – paper and/or electronic records including e-mail			
Confirm that a formal handover of patients is in place			
Remove member of staff's name from any active lists e.g. medical lists, authorised signatories list			
Review post and arrangements for replacements			
Section 2 – Property Returned	**Yes/No/NA**	**Date**	**Comments**
Car parking pass			
Door swipe cards			
Fuel card			

IT Equipment e.g. laptop, portable devices, VPN, storage media, memory sticks, USB flash cards, DVD. Library card.			
Key(s) Office & desk, lockers or Trust accommodation			
Mobile phones/pagers/mobile wifi/USB including sim card & chargers			
Smartcard			
Uniform			
Staff ID Badge			
If staff member is retiring they should receive a personal letter from the Chairman, this should be prepared by the manager and sent to the Chairmans office for signature.			

Appendix 6 Structure for Exit Interview

STRUCTURE	GUIDELINES
BEFORE THE INTERVIEW	
Plan the interview	Considerations should be made as to where and when the interview is to be held. It is better to conduct the interview as soon as possible after the staff member has informed you of their decision.
Identify the appropriate person to conduct the interview	Usually the Line Manager or someone reasonably senior, but not held with someone to whom the individual would not feel able to talk freely. Be able to assess the value of the information gained and how it can be used. The staff member may request that they wish to conduct the interview with a third party / HR Representative.
THE INTERVIEW	
At the beginning of the interview	Explain to the staff member why you are conducting the exit interview and that you will be asking questions that are detailed on the exit interview questionnaire. Describe the structure of the interview and give an estimate of how long the interview will last (around 30 mins is an appropriate length unless any problems arise). Ensure that you will not be disturbed by diverting any phones and putting “do not disturb” signs on the door etc.
Ask a set of pre-prepared questions (Base on the exit questionnaire)	Before the interview you should prepare a set of questions to ask. These should be open ended questions that allow for discussion These questions should focus on the following areas • Reasons for leaving • What are they doing after they leave • What did they like most (and least) about their role • Induction and training opportunities and quality of training • Job description • Organisation policy, procedures or conditions • Personal relationships with staff • Benefits • Would they work for the Trust again if the opportunity arose
Give the staff member an opportunity to ask any questions or discuss anything that they may wish to discuss	
Inform them that they will have to return the following (If applicable) on their last day and refer to	• ID Badge • Uniform • Any equipment e.g. Laptop, Mobile, Pager, etc

the Leavers checklist for completeness	
Close the interview	Thank them for their work within the department and wish them success in their future role.

Appendix 7 Exit interview questionnaire

The Exit questionnaire can be found by clicking this link. Save the document so you can amend it and then email it to Exitinterviews@heartofengland.nhs.uk.

You can also return it by post, to the HR Department, Devon House, Heartlands Hospital

Appendix 8 ESR3 – Leavers Form Guidance Notes

1. Ensure you complete all the relevant fields and do not leave any outstanding – if you are unsure of anything please speak to Payroll for confirmation.

2. You will need to enter the individual's assignment number; this can be found on their pay slip, name, title and any previous surname that they have had while working in the trust. It is imperative that the **address field** is also completed as Individuals do not always advise Payroll when they move address.

3. **Destination on Leaving:**

   These fields will only need to be completed if the individual is leaving to take up employment outside the NHS.

4. Has the individual got any leave outstanding or has overtaken leave ? Payroll will need this information to be calculated in hours.

5. The date of the notice given will need to be entered.

6. The last working date will need to be entered – it is quite possible that the last working date and the leaving date will be different.

7. Enter the reason for leaving – there is a drop down menu for you to choose from.

8. If an employee is retiring, please note the "additional information" box of the ESR3 form with the retirement date and type of retirement, (early, voluntary or compulsory). The ESR3 needs to be completed and sent to Payroll **AT LEAST 6 MONTHS** prior to the retirement date as the Pensions Agency's lead time to process the payment.

   If the individual is returning to work for the Trust then this should form a new contract and an ESR1 form will need to be completed and sent to Payroll to set up the "new starter".