Guidance

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# Movers Procedure

When a colleague moves to a different role and/or department within the organisation there are various procedures that must be followed to ensure appropriate closure of matters relating to their existing role/department.

The line manager, People Team (PT) and the colleague all have responsibility for completing the relevant tasks by the date they move.

The table below summarises the relevant responsibilities for each of the above groups, including links to the associated documentation.

**Summary of Responsibilities**

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| **Line Manager – Current (CLM), New (NLM), Both** | |
| 1 | When a colleague is appointed to a new internal post role or moves location, if they are not already aware, advise the PT immediately **(CLM unless new role is in a different region/nation in which case Both must notify their PT)** |
| 2 | Whilst it is no longer permissible for managers services to keep shadow staff files, CLM should use this opportunity to ensure they no longer have any locally saved supervision notes, training records, other documents etc that should have been amalgamated into the colleague’s electronic staff file (ESF) **(CLM)**. If you are unsure whether to delete or pass on any data to the NLM or PT, please check with the PT first. |
| 3 | Discuss return of Barnardo’s car, if applicable, with the colleague and Transport Team to agree date **(CLM)**. Alternatively, discuss arrangements with the colleague and Transport Team for them to retain Barnardo’s car for the new role, if applicable **(NLM)** |
| 4 | If applicable request return of corporate credit card from individual by no later than day before move date and forward to the Payments Manager in Finance at Barnardo House **(CLM).** If corporate credit card is to be retained by staff member for new role **NLM** to advise Finance of change in cost code/line manager, as appropriate, for future billing approval |
| 5 | CLM to consider whether any allowances (such as office at home or London Weighting currently being paid to the individual still remain applicable to the new role. CLM to seek support and guidance from PT where needed to avoid overpayment of salary. |
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| 6 | Request colleague returns any Barnardo’s equipment that will no longer be required by no later than move date e.g. security pass/ID cards, keys, equipment such as mobile phone\*, tablet, laptop, desktop PC, and any furniture/equipment provided for homeworking.  **Please note** that any equipment provided as reasonable adjustments should remain with the colleague.  \*If Smartphones and/or other devices are not required in new role ensure that the colleague clears them of their pin number, Google / iTunes accounts and Secure Hub/Authenticator/Okta Verify apps before returning; see point 6 of the colleague checklist.  If applicable, also ensure the colleague returns or securely destroys/deletes any confidential electronic or paper files, case notes, papers or personal data that they may hold that is no longer needed and/or is in duplicate, including any data saved onto laptop hard drives **(CLM)** |
| 7 | Submit a request via [Firstpoint](https://barnardos-ip-proxy.herokuapp.com/domains/1a7a64fa-287e-4a7c-9448-94038af53eb6) to either cancel or amend cost code for related charges, where applicable, for , mobile phone, tablet and business telephone line (**Both, as applicable).** Advise Facilities team of change in cost code/work location, where applicable, with regard to security pass/ID cards, keys and any furniture/equipment provided for homeworking if retained for new role **(NLM).** |
| 8 | Ensure that any access to confidential areas on Content Server, or access to any other systems, or records are revoked/amended as appropriate **(CLM)** |
| 9 | Using the manager’s induction checklist as a guide, ensure that the colleague has all the information/training/access to systems etc that they need in order to be able to work effectively in their new role **(NLM)** |
| 10 | Ensure the colleague fully actions, completes, and returns their Movers Checklist at least the day before the move **(CLM)** |

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| **People Team – N.B. if the colleague is moving between PTs, at the start of the process the two PTs must agree between them who will take responsibility for which actions.** | |
| 1 | On receipt of confirmation of new appointment from relevant Recruitment Team, or on redeployment following redundancy consultation, forward movers procedure and checklist to colleague, CLM and NLM. |
| 2 | Contact Policy team if you need any advice about the transfer of any sensitive data on the colleague’s ESF from the CLM to the NLM. |
| 3 | Ensure the CLM is aware of their obligations under data protection to delete, or forward on any other data they hold on the colleague to the People Team. |
| 4 | Raise a ticket via the Business Services Hub to ensure that any D365 access is revoked/amended as appropriate. If the colleague is moving between PTs, the relevant PTs should liaise to ensure that one clear instruction is sent to the hub |
| 5 | If the colleague was/is a line manager, ensure that they have appropriate access to their direct report’s ESFs only following their move. |
| 6 | New PT to ensure the NLM sets up an appropriate induction for the colleague’s new role and they are aware of their obligations under the probation and transition period policy to agree and monitor new objectives. |
| 7 | Ensure appropriate actions are carried out via D365 to end the old role and move the colleague into the new role within payroll deadlines to avoid incorrect salary payments. If the colleague is moving between PTs, the relevant PTs should liaise to ensure that it is clear who is doing what and when. |
| 8 | Current PT to liaise with new PT to ensure the ESF is assigned to the appropriate PT file room[[1]](#footnote-1). New PT to ensure the correct Line Manager and Grandparent Manager is assigned to the colleague. |
| 9 | In cases of redeployment on a fixed term basis discuss with managers any liabilities for potential redundancy costs and agree process to follow at the end of the arrangement |

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| **Recruitment Centre/Local Recruitment Team (as applicable)** | |
|  | Complete the necessary D365 actions to effect the change in role |
|  | Notify the relevant PT (old and new if changing region/nation) of any internal applicants recruited to new vacancies |

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| **Colleague** | |
| 1 | Read through Movers Procedure and checklist on receipt from People Team/Recruitment Centre. |
| 2 | If no longer applicable to new role, advise current line manager and training provider of any training courses due to take place after moving date to ensure they are cancelled or reallocated to a colleague if appropriate. If the training remains applicable ensure you discuss the dates with new line manager. |
| 3 | Return corporate credit card, if applicable, to current line manager no later than last working day prior to move unless agreement has been made with new line manager to retain it |
| 4 | Complete final expenses claim for existing role via D365 Expenses management, if applicable. |
| 5 | Ensure any leave requests for the period up until the move date are submitted via D365 employee self-service for approval. Any leave requests relating to the period after the move should be submitted once the move has taken place to ensure they go to the appropriate manager for approval. If forward leave has already been agreed, please discuss and agree these dates with your new line manager prior to your transfer date. |
| 6 | Ensure return of all Barnardo’s equipment, where applicable, to current line manager by no later than last working day e.g. security pass, keys (if moving to a different location), \*mobile phone/tablet/, laptop\*\* and any furniture/equipment provided for homeworking (where applicable). Also ensure return of any Barnardo’s files, case notes, papers etc. if not relevant/required for new role.  \*If Smartphones and/or other devices are not required in the new role they must be cleared of the pin number, any Google / iTunes accounts and Secure Hub/Authenticator/Okta Verify apps before they are returned and the charger must be returned with the device. If this doesn’t happen the device cannot be re-issued to another colleague resulting in unnecessary cost to Barnardo’s. See guidance at bottom of [this page](https://inside.barnardos.org.uk/resources-and-guidance/our-it/it-equipment/returning-equipment) on how to remove your iTunes or Google account and uninstall Secure Hub/Authenticator/Okta Verify apps from smart devices before returning them.  \*\*all confidential or personal data must be moved or deleted from laptop hard drives as appropriate. |
| 7 | Review your personal details on D365 employee self-service to ensure they remain up to date. |
| 8 | Ensure checklist (Appendix 1) is completed and returned to your current line manager by last day before move. |

**APPENDIX 1**

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| **MOVERS CHECKLIST** | |
| **TASK** | **DATE COMPLETED** |
| Ensure any leave requests for the period up until the move date are submitted via D365 employee self-service for approval |  |
| Review personal details on D365 employee self-service and update if necessary |  |
| Training courses cancelled or reallocated |  |
| Outstanding Loans/Float to be repaid |  |
| Outstanding Car Loan to be repaid |  |
| Complete final expenses claim for existing role via D365 Expenses management, if applicable (no later than last working day) |  |
| Return Barnardo’s corporate credit card with receipts (if applicable) |  |
| Return Barnardo’s car (no later than last working day) |  |
| Return Barnardo’s IS equipment (no later than last working day) |  |
| Return other Barnardo’s property (no later than last working day) including any homeworking equipment provided and any Barnardo’s files, case notes, papers etc. |  |
| Return security pass/ ID cards, keys etc (no later than last working day) |  |

**PLEASE ACTION, COMPLETE AND RETURN TO YOUR CURRENT LINE MANAGER BY THE LAST DAY BEFORE YOUR CHANGE IN ROLE**

**I confirm that I have completed the mover’s checklist as appropriate**

**Signed:** **Date:** *Colleague*

1. In Scotland this may be done by the Recruitment Team in certain circumstances [↑](#footnote-ref-1)