

## Checklist

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<i>Document Name:</i>	Employee Pre-Leave Handover Checklist
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<i>Endorsed By:</i>	Directors
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### 02. OVERVIEW

When an employee is applying for leave or tendering resignation, they must consider the workflow and contemplate various team members as contacts for various responsibilities.

When approaching the period of leave (annual leave, parental leave, leaving the business or other), the employee must complete a handover checklist containing a list of all ongoing and upcoming tasks to be completed.

The handover document is created by staff members who are about to leave their positions, either temporarily or permanently, to assist their successor to carry out their duties.

### 03. PROCESS

#### ➤ UPON APPLYING FOR LEAVE OR TENDERING RESIGNATION

When an employee is completing the application for leave or resigning, they must nominate an employee or multiple employees to allocate various open or ongoing tasks that will continue during the period of leave. If there is no available resource and a replacement has not yet been arranged, the employee must complete a comprehensive document outlining detailed procedures and explaining any complexities involved in their role.

#### **EXAMPLE:**

Jeremy is a project manager working on a 3 month fitout project. Jeremy is applying to take 3 weeks leave during the project. Upon completing the application for leave, he has nominated various colleagues to be responsible for multiple areas of the project.

Jeremy has requested that Anna (a designer) be responsible for completing all outstanding sample approvals and changes to a shopfront detail onsite. Anna must follow up the client to close out the above tasks while Jeremy is on leave. He has also requested that John (an estimator) is responsible for seeking approval on outstanding variations issued to the client subsequent to the project cost approval. John must follow up on the client to seek approval while Jeremy is on leave.

#### ➤ 2 WEEKS PRIOR TO LEAVE

Each employee should start by having a detailed discussion with their manager to determine exactly how they want to handle the handover. This could include a new person starting or an existing colleague shadowing the employee for a few days or longer.

Once you have a clear idea of your manager's expectations, you can start by drawing up a draft handover document. This will help you to organise yourself, and catalogue all the various tasks and pieces of information that you will need to pass on during the handover period. This document should include:

- Detailed information on your day-to-day activities, tasks and priorities.
- Key points of the role including documents such as a contract, RFI document, budget or work programme.
- A clear outline of what is expected of your successor / temp replacement.

## 04. CHECKLIST

*Employee Name:*

*Position:*

*Start Date of Handover:*

*Completion Date of Handover:*

*Period of Leave:*

**1. Brief description of duties:**

○

**2. Manager and reporting procedures:**

○

○

**3. Regular or re-occurring meetings:**

○

○

**4. Key documents/ reference material to read (attach when possible):**

○

**5. Status of recent and current projects:**

- Name of Project: *[repeat section as many times as the number of projects require]*
  - i. Status:
  - ii. Action Required:
  - iii. Budget
  - iv. Critical Issues/ Challenges / Priorities

6. Where to find files:

- 

7. Calendar of major activities / milestones:

- 

8. Relevant contacts (Internal and External):

- 

9. Your contact information after departure or on leave:

- Phone:
- Email:

10. Out of Office (Email Auto Reply):

- Please refer to *“POL016 – Office Communication Policy (Internet Use)”* for further details
- Discuss relevant contacts and appropriate wording with direct manager or RJA Director
  - i. The employee must discuss with direct manager who the point of contact will be in their absence
  - ii. The employee must discuss with direct manager who should advise the client of the change of contact in the employees absence and set up an appropriate introduction.

### Related Resources, Tools and Links

- POL016 – Office Communication Policy (Internet Use)

### Contact & Further Information

For further assistance please contact your direct manager.

### Checklist Owner

Directors – RJA

Note: This Checklist does not form part of any contract between you and RJA. It summarises the company requirements when completing a handover with a new employee or an existing colleague in accordance with applicable legislation, and is not intended to create any additional legal rights or obligations. Any reference to obligations or requirements of the Company in this Checklist is not intended to give rise to contractual obligations binding on the Company. This Checklist may be varied from time to time.