



People and Money system

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Line Manager Guide- How to Process Terminations

Line Manager

Estimated time to complete: 12 minutes

Before you start

1. Familiarise yourself with the [Guide to Employment Separation](#).
2. Discuss and agree on the final date of employment and when any accrued annual leave will be taken. If the employee has outstanding annual leave to take, they should be encouraged to take this during their notice period. However, where, for operational reasons, it is not feasible for all of the annual leave to be taken during the notice period, the employee's outstanding annual leave will be paid to them in their final salary.
3. Approve any agreed annual leave. Unused annual leave will automatically be paid out with the final salary, so it is vital that all annual leave taken in the year is booked and approved to avoid a financial impact. Employees should only be paid for leave if there are operational reasons why leave can't be taken.
4. If the employee is leaving your team to take on another assignment at the University **(transferring) do not process this as a termination**, typically the school or department where the employee is taking on the new post will process the transfer as part of the recruitment process.
5. If the employee is intending to retire, they should contact the pensions team 3 months before their planned retirement date.

6. If any relocation costs are to be recovered follow the guidance within the policy and information on the [Relocation Assistance](#) webpage and add the amount, if applicable, to the pay adjustments field.
7. In the event of an employee's death, **do not process this as a termination** in People and Money. Refer to the [Death in Service Guidance](#) and follow the actions outlined in the Manager Responsibilities section.
8. Contingent Worker records should be terminated when their period of engagement comes to an end using the action 'End Contingent Worker'.
9. Read the [guidance available on leaving the University](#) webpages.

Assumed Knowledge:

1. If the employee is resigning, you should process the termination as soon as you are notified of their resignation in writing. If the employee is on a fixed term contract, you should process the termination at least 3 months before their confirmed end date.
2. If there is a future dated change on the employee's record, you must contact HR Operations to query this before you can submit the termination to HR Operations for approval.
3. Once a termination has been approved by HR Operations an Offboarding (Leaver) Journey will be assigned automatically, in most cases this will be assigned to the Employee, Line Manager and SDA. Further information regarding Journeys can be found in the [Line Manager or SDA Guide to Journeys](#).
4. It is **important you select the correct termination action** (reason for leaving) to ensure the correct Journey and correspondence are issued when the termination is approved. See the [appendix for details](#). Please note in some instances HR Partners or HR Operations will be responsible for processing the termination, this is outlined in the appendix.
5. If the employee has more than one assignment, a warning message will be displayed advising that all assignments will be terminated. For now, you must continue with the termination adding a note in the comments box to clarify which assignment you want to terminate.
6. If an employee has multiple assignments and you are terminating them from an assignment that is not their primary assignment (i.e. their main assignment), the leavers' Journey will be assigned to the Line Manager and School/Department


Administrator of the primary assignment once approved. Follow the guidance in the [Line Manager or SDA Guide to Journeys](#) to have the tasks reassigned to the area in which the employee is leaving.

7. Resignations of sponsored workers must be reported to HR Operations immediately by raising a Service Request.

8. To amend or cancel a termination raise the 'Amend or cancel a termination' service request form via the Help Desk
9. For **Cancellation of Hire** (i.e. a pending worker is being terminated before they've gone through payroll even once or for new hire no show), you need to raise a service request as HR will review and process this. Line Managers/SDA's **must not** terminate a Pending Worker record or use the action reason cancellation of hire.
10. For **Guaranteed Hours staff** the termination **Date** entered should be the last day in employment. For any GH staff who have not worked any hours offered for more than 12 months please follow the guidance within the [Guide to Guaranteed Hours](#) (GH Dormant Process) and attach copies of the GH Dormant letters to the termination. Where the termination reason is 'Dormant' the date of termination should be the last working day in the month that the final letter is sent as per the guide to Guaranteed Hours above.
11. Contingent workers should be terminated in all cases using the 'End Contingent Worker' action.

In Brief...

This is a simple overview of the process.

1. From the Dashboard, select **My Team**
Note: If you're a School/Dept admin, please select **My Client Groups**.
2. Click on **Show More** under Quick Actions
3. Then select **Termination**  under Employment
4. **Search** for the employee you wish to Terminate
5. Enter the termination details into the **When and Why** display box:
 - a. **Date** the termination takes effect (Last date of employment)
 - b. Relevant **Action Name** from the dropdown menu under 'What's the way to terminate the employee?'
 - c. Relevant **Action Reason** from the dropdown menu under 'Why are you terminating [employee name]?'

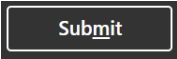
Then, click **Continue**

Continue

6. Enter the termination information into the **Termination Info** display box:
 - a. Relevant **HESA Reason for end of Contract** from the dropdown menu
 - b. Relevant **HESA location after leaving** from the dropdown menu
 - c. Relevant **HESA activity after leaving** from the dropdown menu
 - d. **Pay Adjustments Required**
Note: You must provide details of any pay adjustments required. Final salary includes payment for unused annual leave or deduction for overtaken leave. This field should not be used to request pay in lieu of holidays except in exceptional circumstances. Please see the [Guide to Employee Separation](#) for more details.

Then, click **Continue**

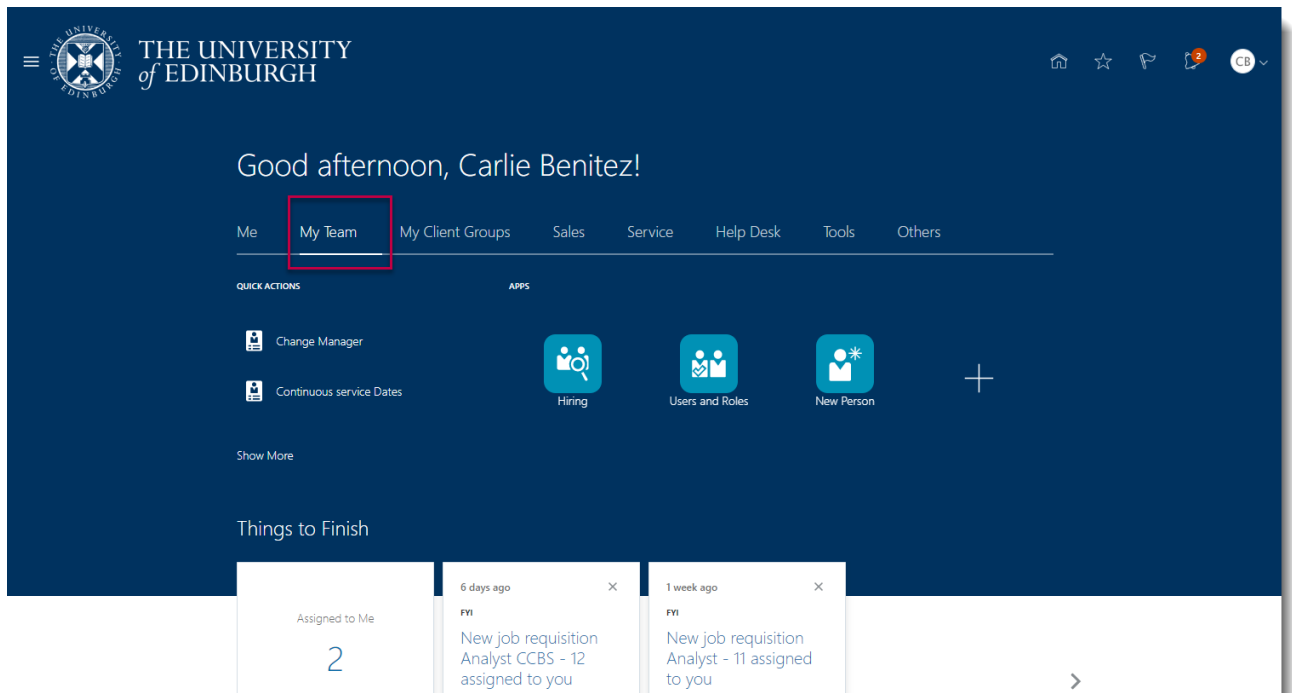
Continue

7. Enter comments as appropriate and upload any relevant attachments (such as resignation letters / GH Dormant Letters) in the **Comments and Attachments** display box
8. Click on **Submit**  on the top right corner
9. If it's a resignation, **upload** resignation letter to Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

For more detail, see the next section.

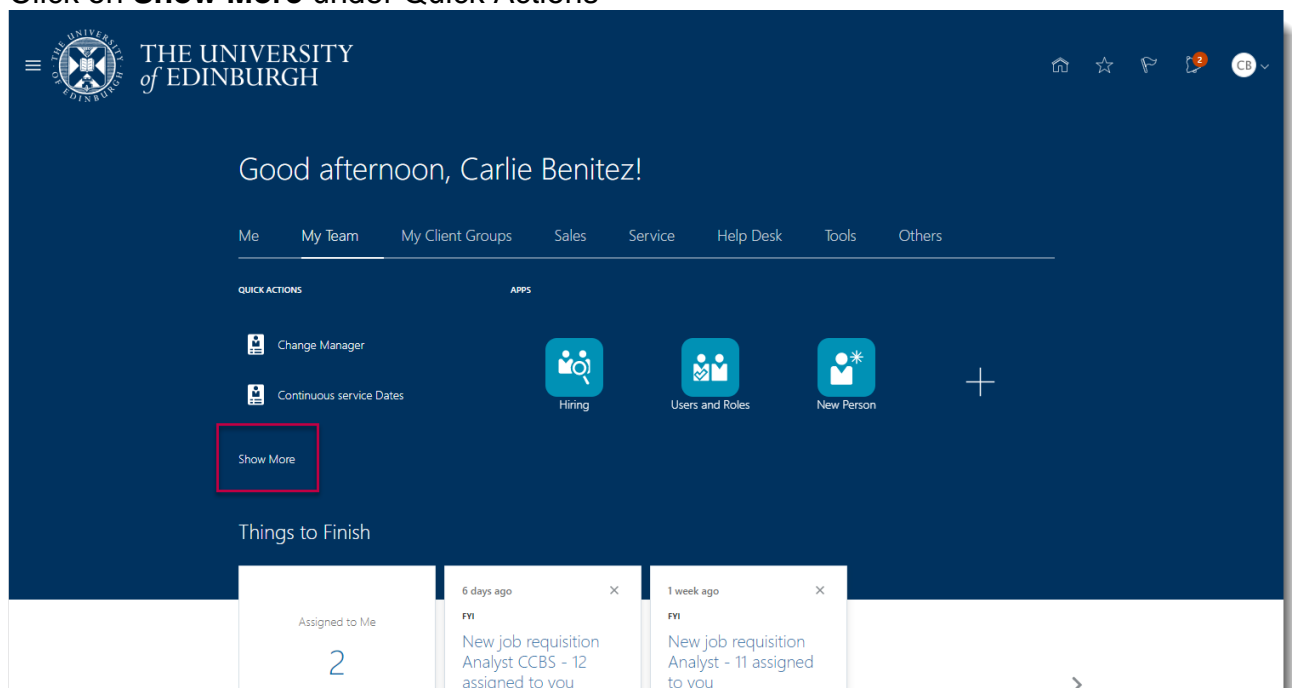
In Detail...

1. From the Dashboard, select **My Team**

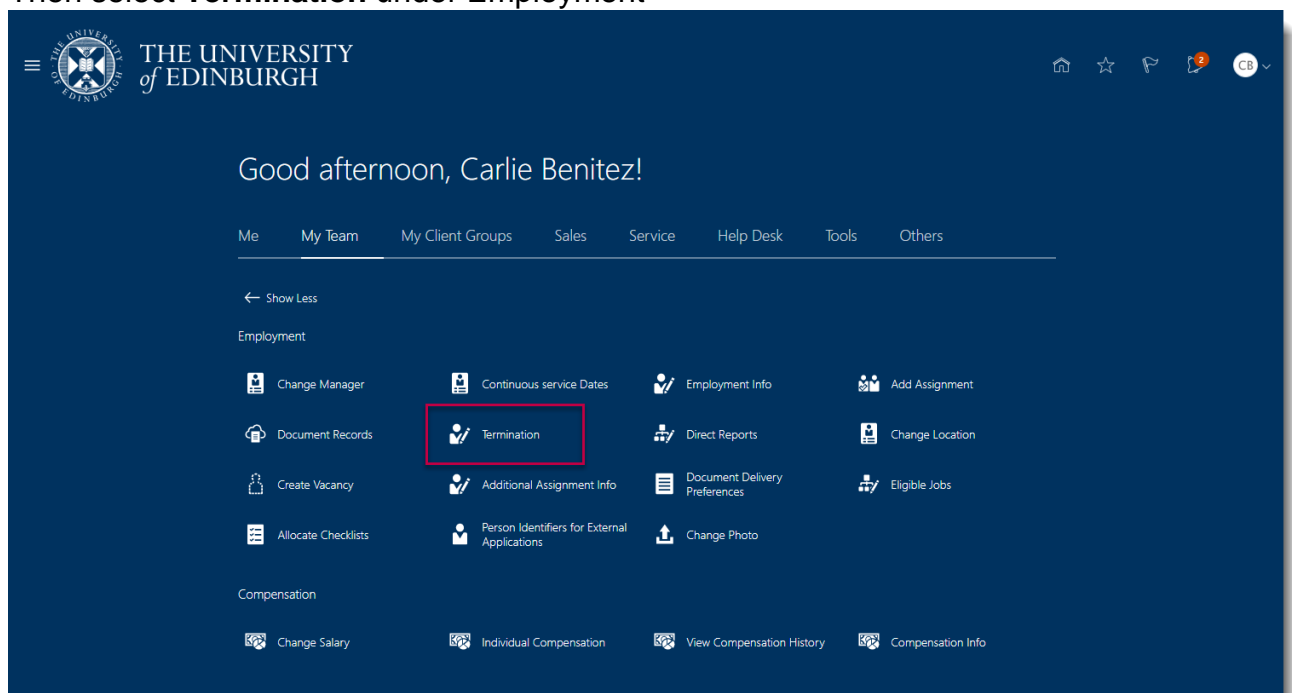


Note: If you're a school/department admin, please select **My Client Groups**.

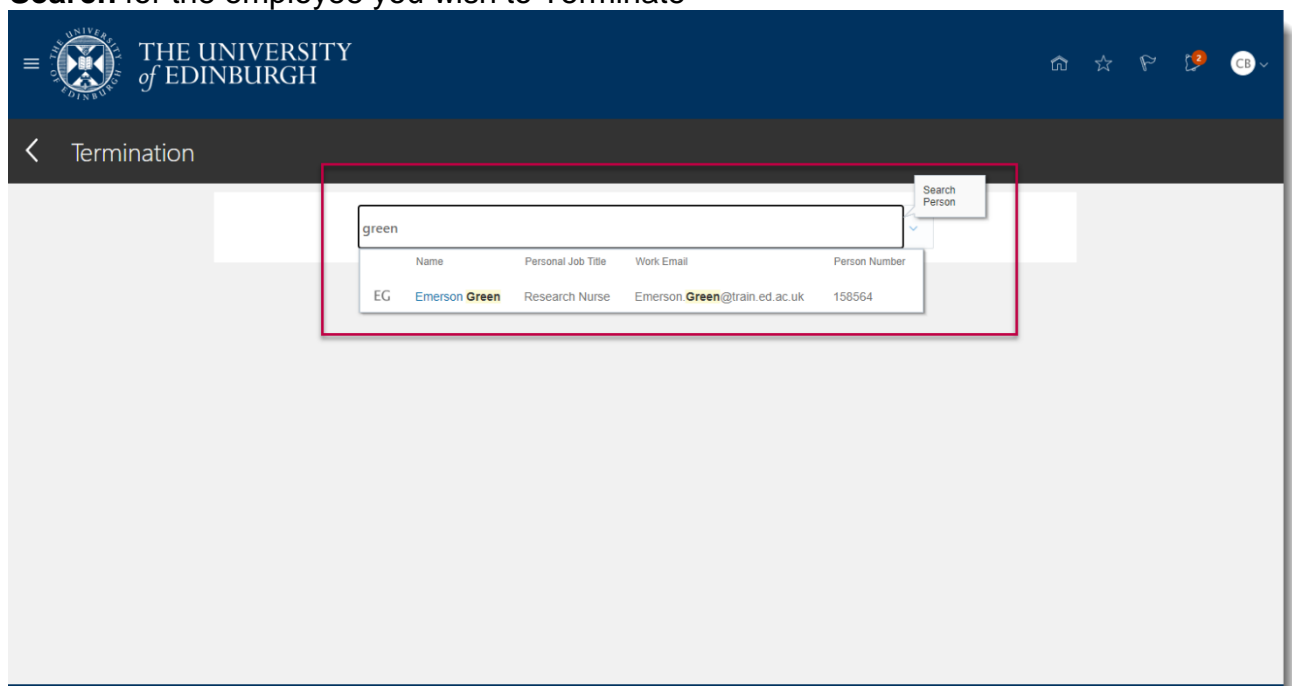
2. Click on **Show More** under Quick Actions



3. Then select **Termination** under Employment



4. **Search** for the employee you wish to Terminate



5. Enter the termination details into the **When and Why** display box:

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EP Terminate Work Relationship Emilee Payne

Submit Cancel

1 When and Why

*When does the termination take effect?
7/08/2020

Enter a date on or after 15/08/2011.

Emilee Payne?

*What's the action name?
Resignation

2 Enter Termination Info

3 Comments and Attachments

August 2020


| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |

Today




- Date** the termination takes effect (employee's last day of employment)
- Relevant **Action Name** from the dropdown menu. Please use the Appendix to help you select the appropriate option, note that some actions must only be used by HR.


Notes:

- Please be aware that each termination action and action reason has differing Leaver Journeys tasks and correspondence attached to it. If you would like to check what the employee, line manager and school/dept administrator will receive, see the [appendix](#) at the end of this document.
- In the case of non-workers who are on a Tier 5 visa, the reason 'Employment Terminated Due to Immigration Restrictions' should always be used.
- Contingent Workers ending their period of engagement - please use the action 'End Contingent Worker' in all cases.



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Terminate Work Relationship
Emilee Payne

Submit

Cancel

1 When and Why

*When does the termination take effect?

28/08/2020

*Why are you terminating Emilee Payne?

*What's the action name?

Resignation

Length of Service

9 Years 0 Months 14 Days

Continue

2

3 Comments and Attachments

c. Relevant **Action Reason** from the dropdown menu

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Terminate Work Relationship
Emilee Payne

1 When and Why

*When does the termination take effect?
28/08/2020

*What's the action name?
Dismissal

*Why are you terminating Emilee Payne?
Reason
Capability
Conduct
Ill-health
Some Other Substantial Reason

Error: A value is required.
You must enter a value.

2 Enter Termination Info

3 Comments and Attachments. If resignation, attach resignation letter.

Then, click **Continue**.

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Terminate Work Relationship
Emilee Payne

1 When and Why

*When does the termination take effect?
28/08/2020

*What's the action name?
Dismissal

*Why are you terminating Emilee Payne?
Capability

Length of Service
9 Years 0 Months 14 Days

Continue

2 Enter Termination Info

3 Comments and Attachments. If resignation, attach resignation letter.

To see the different Action Name and Action Reason dropdown options and when to use them, go to the [Appendix](#)

6. Enter the termination information into the **Termination Info** display box:

a. Relevant **HESA Reason for End of Contract** from the dropdown menu.
To see the different HESA Reason for End of Contract dropdown options, go to

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The 'Enter Termination Info' section is active, and the 'HESA Reason for end of contract' dropdown menu is open, displaying the following options:

- Continued employment, new HESA contract record generated
- Atypical contract issued
- End of fixed-term contract
- Voluntary redundancy
- Other redundancy
- Resignation
- Retirement (excluding ill-health)
- Death
- Other (includes dismissal and ill-health)

[Appendix](#) (not applicable for end contingent worker)

b. Relevant **HESA Location After Leaving** from the dropdown menu

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The 'Enter Termination Info' section is active, and the 'HESA Location After Leaving' dropdown menu is open, displaying the following options:

- England
- Wales
- Scotland
- Northern Ireland
- UK (not otherwise specified)
- Other EU
- Non EU
- Not Known
- Information Refused

To see the different HESA Location after Leaving dropdown options and when to use them, go to the [Appendix](#) (not applicable for end contingent worker)

c. Relevant HESA Activity After Leaving from the dropdown menu

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The 'Enter Termination Info' section is active, with the 'HESA Activity After Leaving' dropdown menu open. The dropdown list includes the following options: Working in a higher education institution, Working in another education institution, Working in a research institute (private), Working in a research institute (public), NHS/General medical practice/General dental practice, Working in another public sector organisation, Working in the voluntary sector, Working in the private sector, Self employed, Registered as a student, Retired, Not in regular employment, and Not Known. The 'HESA Reason for end of contract' is set to 'Other (includes dismissal and ill-health)' and the 'HESA Location After Leaving' is set to 'Wales'.

To see the different HESA Activity After Leaving dropdown options and when to use them, go to [Appendix](#) (not applicable for end contingent worker)

Pay Adjustments Required – Add any other pay adjustments required, for example, to recover relocation payments, payments for balancing of annualised or

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The 'Enter Termination Info' section is active, with the 'Pay Adjustments Required' dropdown menu open. The dropdown list includes the following option: Payments for balancing annual leave. The 'HESA Reason for end of contract' is set to 'Other (includes dismissal and ill-health)' and the 'HESA Location After Leaving' is set to 'Wales'. The 'HESA Activity After Leaving' is set to 'Working in a higher education institution'.

fractional contracts etc. Final salary includes payment for unused annual leave or deduction for overtaken leave. This field should not be used to request pay in lieu of holidays except in exceptional circumstances. Please see the [Guide to Employee Separation](#) for more details. Any outstanding annual leave will automatically be paid with the final salary, so it's vital that leavers use their annual leave entitlement by the date their employment ends, to avoid a financial impact, (not applicable for end contingent worker).

If any **relocation costs** are to be recovered follow the guidance within the policy and information on the [Relocation Assistance](#) webpage and add the amount, if applicable, to the pay adjustments field.

Immigration Fee Assistance Repayment - HR Operations will check whether any repayment is required upon receipt of the termination notification in People and Money. However, if you are aware that the employee has been in receipt of reimbursement and may be due to pay back some of this, you can make HR Operations aware of this by adding a comment to the Pay Adjustments field. Further guidance is available on the [Immigration Fee Assistance](#) webpage within the Immigration Fee Financial Assistance Guidelines.

a.

EP Terminate Work Relationship Emilee Payne

1 When and Why Edit

2 Enter Termination Info

*HESA Reason for end of contract
Other (includes dismissal and ill-health)

*HESA Activity After Leaving
Working in a higher education institution

*HESA Location After Leaving
Wales

Pay Adjustments Required
Payments for balancing annual leave

Continue

3 Comments and Attachments. If resignation, attach resignation letter.

Then, click **Continue**.

7. Enter comments as appropriate and upload any relevant attachments (such as resignation letters/ GH Dormant letters) in the **Comments and Attachments** display box.

8. Click on **Submit** on the top right corner

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The form has three steps: 1. When and Why, 2. Enter Termination Info, and 3. Comments and Attachments. The third step is currently active and highlighted with a blue border. It contains a 'Comments' text area and an 'Attachments' section with a dashed box and a green upload icon. The 'Submit' button is highlighted with a red box in the top right corner.

This screenshot is identical to the one above, showing the 'Terminate Work Relationship' form for Emilee Payne. The 'Submit' button in the top right corner is highlighted with a red box, indicating the next step in the process.

9. If resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

Appendices

Action Name and Action Reason

The table below shows the action name and action reason dropdown options and associated correspondence Journeys.

| Action Name | Action Reason | When to use this Action Reason | Journey and correspondence triggered |
|-------------|--|---|---|
| Resignation | Better Pay and Benefits Package | Employee resigns for better pay and benefits package. | Employee receives an acceptance of resignation letter |
| | Better Working Environment | Employee resigns for a better working environment. | |
| | Better Work-Life Balance | Employee resigns for a better work-life balance. | Employee, Line Manager and SDA receives 'Leaving the University' Journey and Tasks. |
| | Career Change | Employee resigns to make a career change. | |
| | Career Progression | Employee resigns in want of career progression. | |
| | Discrimination, Harassment or Bullying | Employee resigns due to discrimination, harassment or bullying. You should only use this action reason following | |

| | | | |
|----------------------------|--|--|--|
| | | advice from your HR Partner. | |
| | Health Reasons | Employee resigns due to health reasons. | |
| | Job Insecurity or Effects of Organisational Change | Employee resigns as a result of job insecurity or organisational change. | |
| | Maternity (Before Childbirth) | Employee resigns before going on maternity leave. | |
| | Maternity Leave (Three Months After) | Employee resigns after being on maternity leave for more than 3 months. | |
| | Non-Return from Maternity Leave | Employee resigns after deciding not to return from maternity leave. | |
| | Personal Reasons | Employee resigns for personal reasons. | |
| | Prior to Conduct or Capability Procedures | Employee resigns prior to conduct or capability procedures commencing. | |
| | Relocating | Employee resigns due to relocation. | |
| | Returning to Education | Employee resigns due to a return to education. | |
| | Not Known | Employee resigns without providing a reason. | |
| Resignation - Retirement | Standard Retirement | Employee resigns because they intend to retire. | Employee receives an acceptance of resignation letter. Employee, Line Manager and SDA receive 'Leaving the University' Journey and Tasks. |
| | Ill Health Retirement | Employee retires due to ill health. This action reason should only be used by HR. | Line Manager and SDA receive 'Leaving the University for an involuntary reason' Journey and Tasks. No Journey to Employee. |
| End of Fixed Term Contract | End of Fixed Term Contract | Employee's fixed term contract has reached its end date and they have been in post for less than 2 years. If they have more than 2 years' service check with your HR Partner before terminating their employment. 'Redundancy' action may apply i.e. 'Redundancy from Expiry of FTC' | Employee receives confirmation that their fixed term contract is ending as expected. Employee, Line Manager and SDA receive 'Leaving the University' Journey and Tasks. |
| End of Casual Contract | End of Casual Contract | HR Operations use only | No Journey or Correspondence. |

| | | | |
|-----------------------------|---|---|--|
| End Contingent Worker | | When a Contingent Worker's period of engagement is ending | No Journey or Correspondence. |
| Death In Service | Death In Service | Employee dies in service. This action reason should only be used by HR Partners. | No Journey or correspondence. Line Managers should follow the Death in Service guidance available from the HR A-Z Policies webpage. Payroll and Pensions receive a notification. |
| Dismissal | Capability | Employee is dismissed due to capability. You should only use this action reason following advice from your HR Partner. | Line Manager and SDA receive 'Leaving the University for an involuntary reason' Journey and Tasks. No Journey to Employee |
| | Conduct | Employee is dismissed due to conduct. You should only use this action reason following advice from your HR Partner. | |
| | Ill-health | Employee is dismissed due to ill-health. You should only use this action reason following advice from your HR Partner. | |
| | Some Other Substantial Reason | Employee is dismissed due to some other substantial reason. You should only use this action reason following advice from HR. | |
| Redundancy | Redundancy from Expiry of FTC (Fixed Term Contract) | Employee is made redundant due to the expiry of their Fixed Term Contract. | Employee, Line Manager and SDA receive 'Leaving the University Journey' and Tasks |
| | Redundancy from OE (Open Ended) contract | Employee is made redundant from their Open-Ended Contract. You should only use this action reason following advice from your HR Partner. | |
| Voluntary Severance | Voluntary Severance | For use by HR Only in the circumstance the employee opts for voluntary severance. | Employee, Line Manager and SDA receive 'Leaving the University' Journey and Tasks |
| Mutually Agreed Termination | Mutually Agreed Termination | For use by HR Only in the circumstance the employee is terminated based on a mutual agreement with the University. | Employee, Line Manager and SDA receive 'Leaving the University' Journey and Tasks |
| TUPE Out | TUPE Out | Employee transfers from the University to another organisation under transfer of undertakings regulations. | Employee, Line Manager and SDA receive 'Leaving the University Journey' and Tasks |

| | | | |
|---|---|---|--|
| Employment Terminated Due to Immigration Restrictions | Employment Terminated Due to Immigration Restrictions | Employment is terminated due to immigration restrictions. You should only use this action reason following advice from the immigration team. | Employee, Line Manager and SDA receive Leaving the University Journey and Tasks |
| Cancellation of Hire | Cancellation of Hire | For HR Operations use only An offer of employment was revoked because certain conditions were not met (i.e. unsatisfactory references, issues with right to work etc.) or the individual decided not to accept an offer of employment. | No Journey / Correspondence |
| Abandon Contract | Abandon Contract | Employee is dismissed following due process where employee has abandoned contract and no resignation or notice has been provided. You should only use this action reason following advice from your HR Partner | Line Manager and SDA receive 'Leaving the University for an involuntary reason' Journey and Tasks. No Journey to Employee |
| Dormant | Dormant | This applies to Guaranteed Hours employees who have not worked any hours offered for more than 12 months. See the Guide to Guaranteed Hours for further details. Please attach copies of the letters to the termination. The termination date should be the last date in the month that the final letter is sent (e.g. letter sent 12th July, termination date 31st July). | No Journey/Correspondence |
| Non-Worker | Tier 5 Sponsored Worker | To terminate the record of a Tier 5 Sponsored Worker | No Journey/Correspondence |
| | Scholarship | To end the payment of a scholarship for a non-worker | |

HESA Reason for End of Contract dropdown options:

| Dropdown Options | When to use this HESA Reason for End of Contract |
|--|---|
| Continued employment, new HESA contract record generated | Employee continues their employment with the University but on a different contract |
| Atypical contract issued | Atypical contract issued |
| End of fixed-term contract | Employee is made redundant due to the expiry of their Fixed Term Contract |
| Voluntary redundancy | Employee opts for voluntary redundancy |
| Other redundancy | Employee is made redundant on an involuntary basis |
| Resignation | Employee resigns |
| Retirement (excluding ill-health) | Employee retires |
| Death | Employee dies in service |
| Other (includes dismissal and ill-health) | Employee is dismissed |

HESA Location After Leaving dropdown options

| Dropdown Options | When to use this HESA Location After Leaving |
|------------------------------|--|
| England | Employee moves to England after leaving the University |
| Wales | Employee moves to Wales after leaving the University |
| Scotland | Employee stays in Scotland after leaving the University |
| Northern Ireland | Employee moves to Northern Ireland after leaving the University |
| UK (not otherwise specified) | Employee stays in the UK after leaving the University but does not specify where |
| Other EU | Employee moves to another country in the EU after leaving the University |
| Non EU | Employee moves to a non EU country after leaving the University |
| Not Known | The status of the employee's location is unknown |
| Information Refused | Employee refuses to share information on their location after leaving the University |

HESA Activity After Leaving dropdown options:

| Dropdown Options | When to use this HESA Activity After Leaving |
|---|--|
| Working in a higher education institution | Employee leaves the University to work in another higher education institution |
| Working in another education institution | Employee leaves the University to work in another education institution |
| Working in a research institute (private) | Employee leaves the University to work in a private research institute |
| Working in a research institute (public) | Employee leaves the University to work in a public research institute |

| | |
|--|--|
| NHS/General medical practice/General dental practice | Employee leaves the University to work in the NHS/General Medical Practice/General dental practice |
| Working in another public sector organisation | Employee leaves the University to work in another public sector organisation |
| Working in the voluntary sector | Employee leaves the University to work in the voluntary sector |
| Working in the private sector | Employee leaves the University to work in the private sector |
| Self employed | Employee leaves the University to be self-employed |
| Registered as a student | Employee leaves the University to return to education |
| Retired | Employee retires from the University |
| Not in regular employment | Employee leaves the University and does not return to regular employment |
| Not known | Employee does not share information on their activity after leaving the University |