

**This work instruction was last updated: 25th June 2007**

## **HR Leaver Process**

This Work Instruction describes the HR Leaver Process. Follow this instruction for both Visitors & Staff.

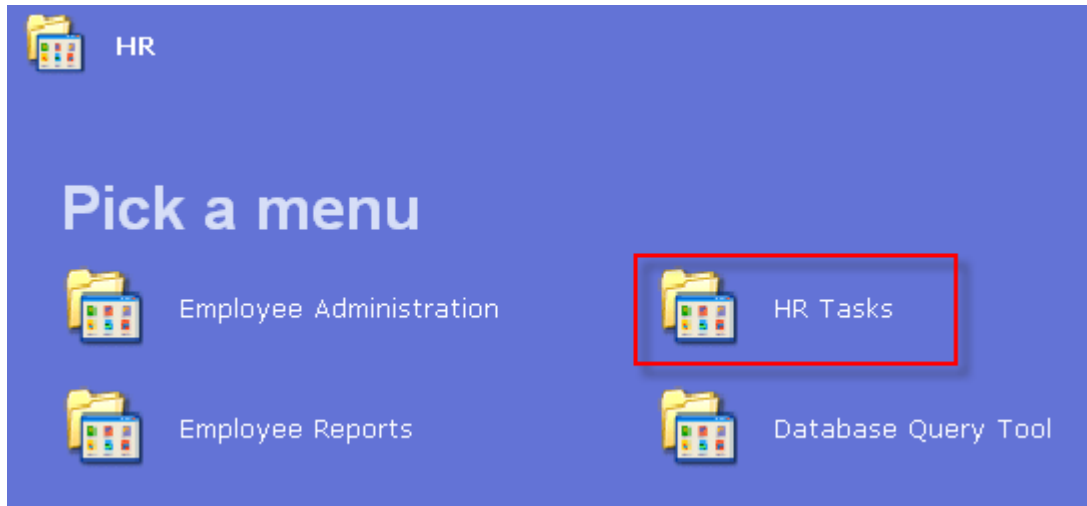
- ☛ If an employee is a **Multi Post Holder** and they are leaving **one** of their posts, please use the **Multi Post Leaver** work instruction
- ☛ If an employee is a **Multi Post Holder** and they are leaving all of their posts on the same date, please use the **Multi Post Leaver** work instruction to terminate each post individually but use this work instruction to terminate their very last post they hold.

With all of the data entry screens it is important to press the **ENTER** key to move between fields and until all of the fields have been accessed, whether you need to enter data into them or not.

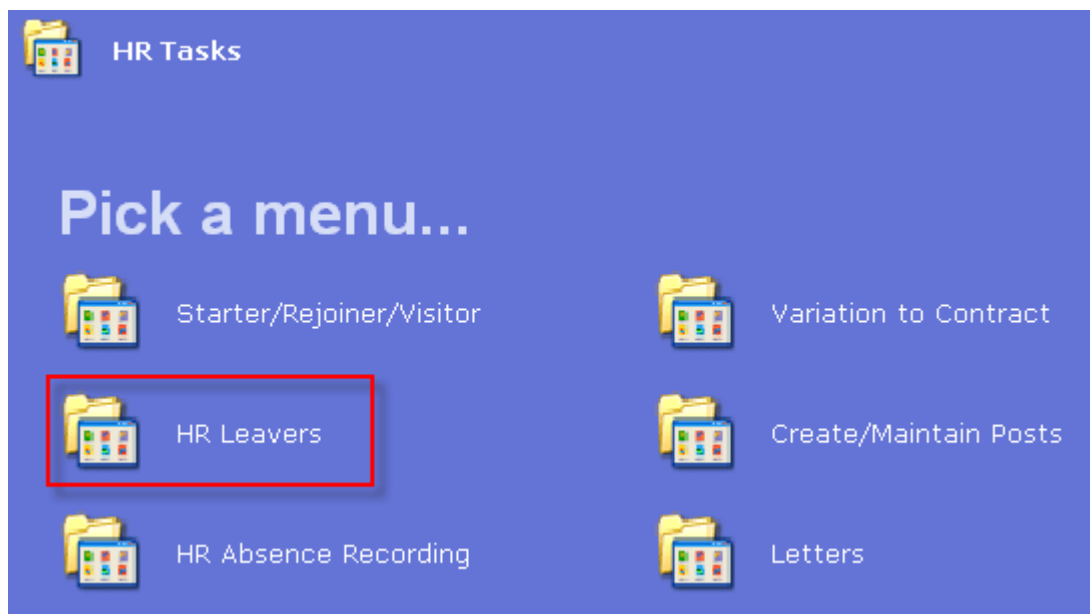
- 1 Entering a Leaver on ResourceLink
- 2 Personal Details data entry screen
- 3 Employment Detail data entry screen
- 4 Post Holding History data entry screen
- 5 Current Post Holding data entry screen
- 6 Temporary Pay Elements data entry screen
- 7 Holiday Entitlement data entry screen.
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## 1 Entering a Leaver on ResourceLink


ResourceLink Home Page > **HR Tasks**




ResourceLink Home Page > HR Tasks > **HR Leavers**




ResourceLink Home Page > HR Tasks > HR Leavers > **Leaver Process**

 HR Leavers

**Pick a task**

 Leaver/Undo Leaver

 Redundancy Leaver

## 2 Personal Details data entry screen

The screenshot shows the 'Employee' data entry screen with the 'Personal Details' tab selected. The 'Title Details' section includes fields for Legislation Type, Surname, Title, First Forename, Other Forenames, Prev. Surname, Known As, Honours, and Generation. The 'Personal Details' section includes fields for Gender (M), Date of Birth (30/05/1976), Age (33 Years 11 Months), Nat. Ins. No. (SJ200151D), and Case Number. Below these sections are icons for Home Address, Cont. Addresses, Passport/Visa, Contact Tel, Email Address, Marital Status, User Fields, and Notes.


2.1 Ensure that the correct employee has been entered by verifying the contact details within the employee's **Personal Details** tab.

2.2 Click on **Home Address**.  Home Address

2.3 Check details and update where necessary.

The screenshot shows the 'MD00G4 Maintain Address Details' window. The 'Address' section includes fields for Country (UK), United Kingdom, Address (three lines), and Post Code (SO15 2TH). At the bottom, there are icons for Clear, Auto Complete, View Postal, and an Exit button.

2.4 Click on **Contact Tel** and update where necessary.

2.5 Click on  to move to the **Employment Detail** tab.

### 3 Employment Detail data entry screen

**Employee** 01/06/2007 01/06/2007 01/06/2007

**Dates**

Original Start	01/06/2007	SG001	...	New Appointment
Current Start	01/06/2007	SG001	...	New Appointment
Termination			...	
To Staff				
Probation				

**Additional**

Service	2 Years 11 Months
Employee Type	
Self Service Unit	
Willing to Job Share	
Notice Period	
No Of Current Posts	1

Service Breaks User Fields Notes Empl. History

3.1 In the **Employment Detail** data entry screen, enter the date of the employee's last working day in the **Termination** field.

- ☛ Dates MUST be entered in the format **ddmmyyyy**. For example 16031975 for 16 March 1975.

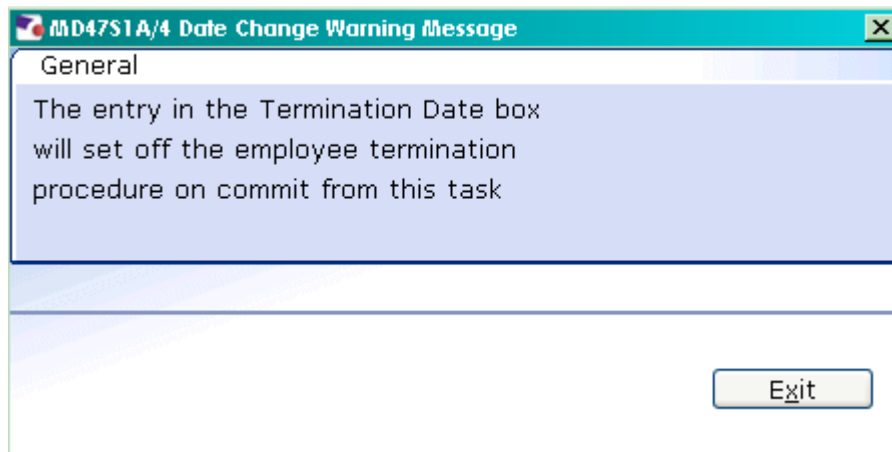
3.2 Press **Enter**.

**Northgate HR Client**

Warning - This Employee has more than one Post which will be closed.

OK

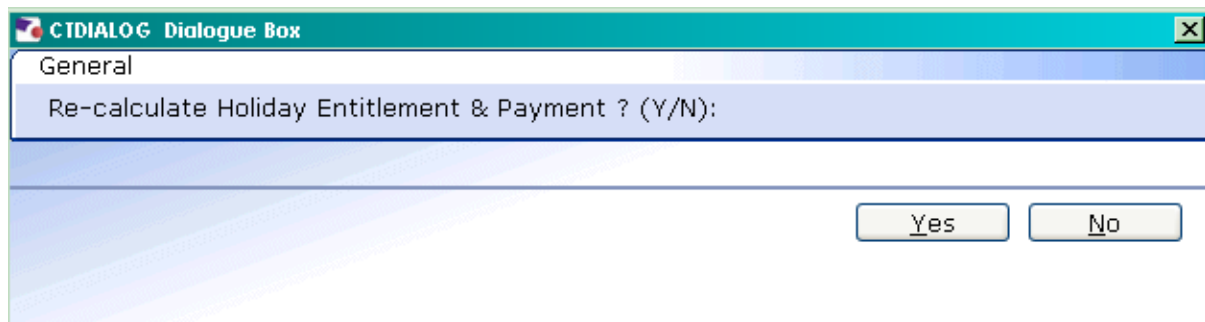
☛ If you receive the message above and the employee is a multi post holder and they are only leaving one of their posts – do not complete this task, click on OK, exit out of all screens that follow and cancel out of the task. Follow work instruction **Multi Post Leaver**.



3.3 A warning prompt will appear confirming that the employee termination procedure has been triggered.

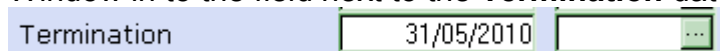
3.4 Click **Exit**.

3.5 A second **Dialogue Box** will appear.



3.6 Click **No**. Payroll will enter any payments or deductions regarding Holiday Entitlement.

3.7 Window in to the field next to the **Termination** date.



3.8 Click on a reason for leaving from the **Dependency Selection**.

Seq	Code	Description	Score
001	CB001	Career Break	
002	LG001	End of Fixed Term Contract	
003	LG002	End of FTC - End of Specialist Expertise	
004	LG003	End of FTC - Substantive Post Holder Ret	
005	LG0037	Retirement	
006	LG004	End of FTC - No Longer a Business Demand	
007	LG005	End of FTC - No Further Funding	
008	LG006	End of FTC - Completion of Project	
009	LG007	End of FTC - End of Training period	
010	LG008	No Confirmation of Probation	
011	LG009	Death in Service	
012	LG010	Dismissal - Conduct	

Buttons: Add, Select, Delete, Exit

3.9 The following screen will appear

General

Leaving Destination: [Dropdown Menu]

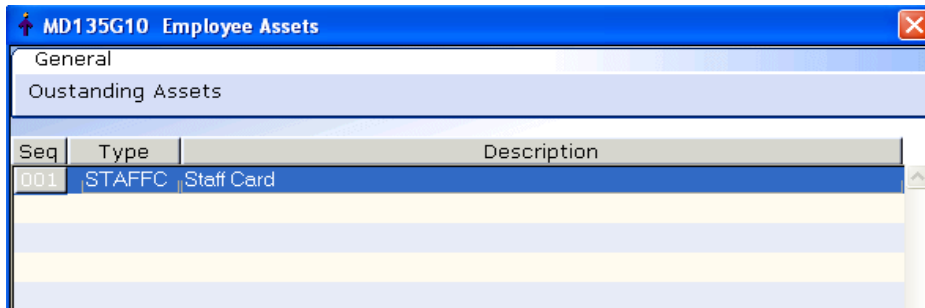
Exit

3.10 Window in to select the appropriate leaving destination, if known:

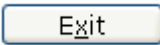
Code	Desc	Long Description
01	Ano HEI UK	Another HEI in UK
02	HEIOversea	HEI Overseas
03	Other EI	Other Education Institution in UK
04	Other EI	Other Education institution in overseas
05	ResInstit	Research Institution in the UK
06	Res Instit	Research institution Overseas
07	Student Uk	Student in UK
08	Stdnt Over	Student in an overseas country

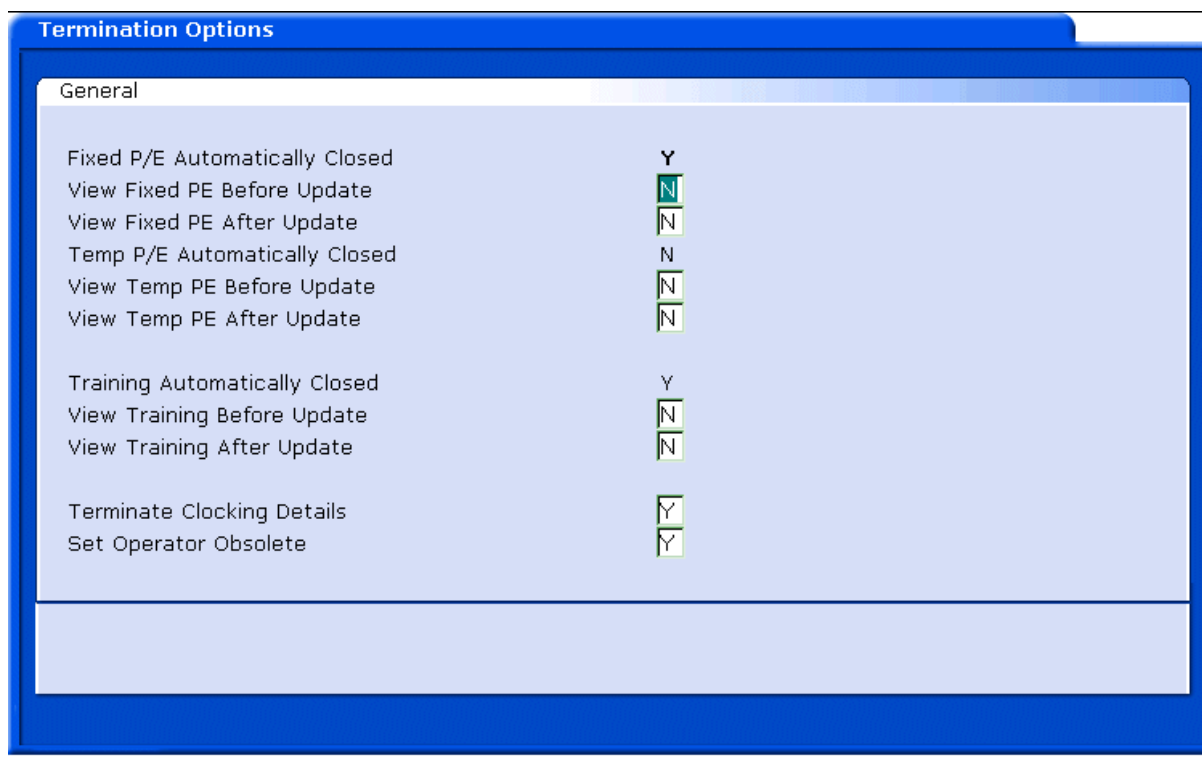
3.11 Enter through **all** the remaining fields on the **Employment Detail** screen.






Seq	Type	Description
001	STAFFC	Staff Card

3.12 If the screen above appears, this is a warning that the employee has assets on their record, click on **Exit** .



Fixed P/E Automatically Closed	Y
View Fixed PE Before Update	N
View Fixed PE After Update	N
Temp P/E Automatically Closed	N
View Temp PE Before Update	N
View Temp PE After Update	N
Training Automatically Closed	Y
View Training Before Update	N
View Training After Update	N
Terminate Clocking Details	Y
Set Operator Obsolete	Y

3.13 Click **Continue**  to move through the **Termination Options** screen (there is no need to tab through the screen's fields).

**Employee** 01/06/2007 10:00 AM 01/06/2007 10:00 AM


Dates			
Original Start	01/06/2007	SG001	New Appointment
Current Start	01/06/2007	SG001	New Appointment
Termination	31/05/2010	LG001	End of Fixed Term Contra
To Staff			
Probation			

Additional			
Service	3 Years		
Employee Type			
Self Service Unit			
Willing to Job Share		TUPE	N
Notice Period			
No Of Current Posts	1		

Service Breaks
 User Fields
 Notes
 Empl. History

3.14 You will be returned to the **Employment Detail** screen.

3.15 Click on **Next**

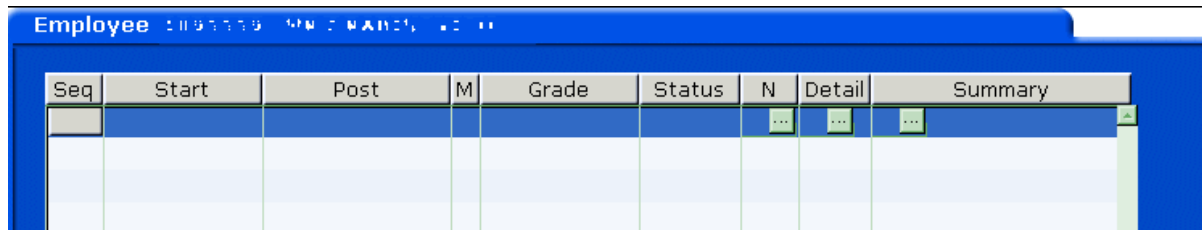
 This screen will display the previous posts that this person has occupied in past employments at the University. If the termination date that you have entered in the **Employment Detail** screen has elapsed then all of the employee's posts will appear in this screen and they will have been removed from the **Current Post Holding Screen**.

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## 5 Current Post Holding data entry screen

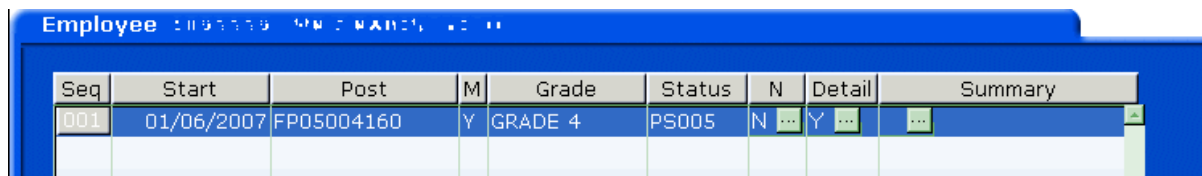
- 5.1 Check the **Current Post Holding** screen. If you have set up a leaver whose leaving date was in the past, the employee's post should have been removed from this screen. If you have set up a leaver whose leaving date is in the future, the post (s) will remain until this date has elapsed.

e.g. Leaving date in the past ...



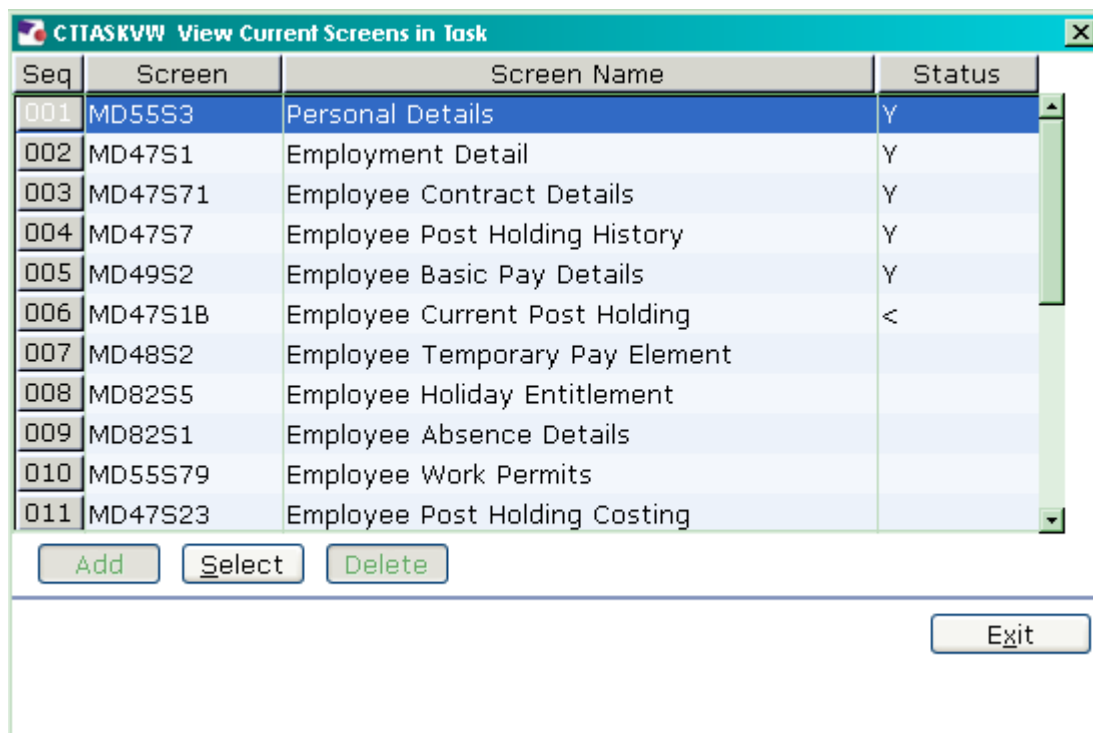
Seq	Start	Post	M	Grade	Status	N	Detail	Summary

e.g. Leaving date in the future...



Seq	Start	Post	M	Grade	Status	N	Detail	Summary
001	01/06/2007	FP05004160	Y	GRADE 4	PS005	N	Y	...

- 5.2 Click on **Screens** .



Seq	Screen	Screen Name	Status
001	MD55S3	Personal Details	Y
002	MD47S1	Employment Detail	Y
003	MD47S71	Employee Contract Details	Y
004	MD47S7	Employee Post Holding History	Y
005	MD49S2	Employee Basic Pay Details	Y
006	MD47S1B	Employee Current Post Holding	<
007	MD48S2	Employee Temporary Pay Element	
008	MD82S5	Employee Holiday Entitlement	
009	MD82S1	Employee Absence Details	
010	MD55S79	Employee Work Permits	
011	MD47S23	Employee Post Holding Costing	

Buttons: Add, Select, Delete, Exit

- 5.3 Click on **Asset Management**.

## 6 Holiday Entitlement data entry screen.

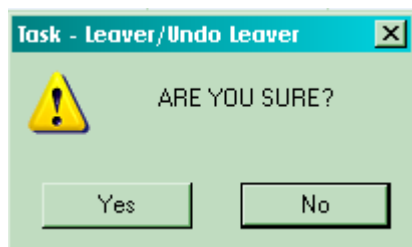
Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
001	01/10/2009	31/05/2010	20.0	0.00	0.0	0.00	20.00
002	01/10/2008	30/09/2009	30.0	0.00	0.0	0.00	30.00
003	01/10/2007	30/09/2008	30.0	0.00	0.0	0.00	30.00
004	01/06/2007	30/09/2007	10.0	0.00	0.0	0.00	10.00

Buttons: Add, Change, Delete, Expand

Work Pattern

6.1 Make a note of the **Start Date**, **Entitlement** and **Taken** fields for the current holiday entitlement.

6.2 **Delete** the current holiday entitlement row.



6.3 Click on **Yes**.

6.4 Click on **Add**.

6.5 Enter the **Start Date**, noted in step 7.1 (this will normally be 01.10.XXXX).

6.6 Press **Enter**.

6.7 In the **End Date** field, enter the employee last working day (their leaving date)

6.8 Press **Enter**.

- 6.12 The **Remain** field will calculate how much entitlement is remaining/overspent.

Seq	Start Date	End date	Entlmnt	B/F	Extra	Taken	Remain
0001	01/10/2009	31/05/2010	20.0	0.00	0.0	0.00	20.00

- ☼ If there are any payment of deductions that need to be made relating to holiday entitlement, these will be entered onto the system by Payroll. Please email Payroll to inform them.

## 7 Asset Management data entry screen


Seq	Type	Requested	Asset Number	Alloc Date	Notes
001	KEYS-A	30/04/2010			

7.1 Check the **Asset Management** screen for any outstanding assets.

7.2 Use the **Notes** field to record information relating to the return of the employee's remaining assets.


Line	Notes
01	


Add Change Delete Insert Exit

7.3 Click on **Next**  to move to the **Fixed Pay Elements** screen.

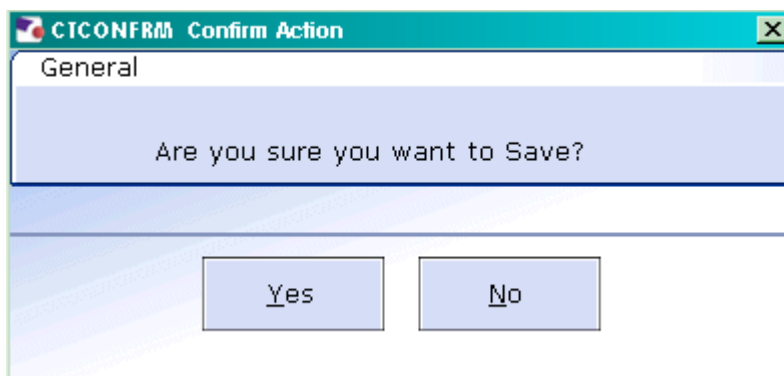
## 8 Fixed Pay Elements data entry screen

Employee 01955555 NEW PAYMENT									
Seq	Post	Code	Desc	E	Start	End	Period	Amt	A D M S
001	FP05004160	1000	Basic Pay	*	01/08/2009			2639.25	N

8.1 Ensure that an asterisk appears in the 1000 **Pay Element** row . This indicates that there is an end date against the **Basic Pay** for when the employee leaves.

☛ All other Fixed Pay Elements in this screen should also have an  against that Pay Element.

8.2 Click on **Save** 



8.3 Click on **Yes**.



## 9 Standard Letters

MD103G2 Standard Letters Attached to the Task

Seq	Letter	Ver	Description	Let Opts	Copies
001	ACAPEND	001	ACAP - end of FTC	NOACT	1
002	ACAPNRED	001	ACAP - end of FTC no red	NOACT	1
003	ERLYRET	001	Early Retirement	NOACT	1
004	LEAVER	001	Expiry of contract - FTC no redundancy	NOACT	1
005	RESIGN	001	Resignation		
006	RETIREE	001	Retiree		
007	RETIREPL	001	Retirement Planning Letter		
008	VSACCEPT	001	Voluntary Severance - accept		
009	VSCL	001	Voluntary Severance - letter		
010	VSHOLD	001	Voluntary Severance - pending		
011	VSREJ	001	Voluntary Severance - Rejected	NOACT	1

Code Desc Long Description

MERGE Manual Immediate print with manual changes

NOACT No Request No action to be taken (no request)

PRINT Print Immediate request and print

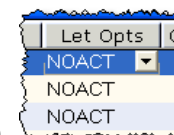
PROMPT Prompt Prompt on commit for user action

QUEUE Request Request letter only

SAVE Save Save the merged letter

Add Change Delete Expand

Exit



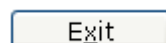
9.1 Click in the **Let Opts** field of the letter you want to produce.

9.2 Click on the drop down.

Code	Desc	Long Description
MERGE	Manual	Immediate print with manual changes
NOACT	No Request	No action to be taken (no request)
PRINT	Print	Immediate request and print
PROMPT	Prompt	Prompt on commit for user action
QUEUE	Request	Request letter only
SAVE	Save	Save the merged letter

9.3 Click on **MERGE Immediate print with manual changes**.

9.4 Click on **Exit**



**DRT125EW Employee Post Holding**

General

Select Employee Post Holding

Seq	Post	Start Date	End Date	Occ Type	Main
001	EMPLOYEE	01/06/2007			
002	FP05004160	01/06/2007			Y
003					
004					
005					
006					
007					
008					
009					

Add Select Delete

Exit

9.5 If there is more than 1 Post Holding ending on the same day, ensure you select the post for which a letter has not yet been produced.

9.6 Click on **Select**

Select

**DRT533EW Complex Post Structure Selection**

General

Select Post Structure Unit

Seq	Hierarchy	Eff Date
010	HRMAIN04	01/08/2008
011	HRMAIN05	01/09/2008
012	HRMAIN06	01/11/2008
013	HRMAIN07	01/05/2009
014	HRMAIN08	01/01/1940

Add Select Delete

Exit

9.7 Click on **Select**

Select

Seq	Hierarchy	Post Start Date
001	HR MAIN	01/06/2007
002	HRMAIN01	01/06/2007
003	HRMAIN02	01/06/2007
004	HRMAIN03	01/06/2007
005	HRMAIN04	01/06/2007
006	HRMAIN05	01/06/2007
007	HRMAIN06	01/06/2007
008	HRMAIN07	01/06/2007

Add Select Delete

Exit

9.8 If there is more than 1 Post Holding ending on the same day, ensure you select the post for which a letter has not yet been produced.

9.9 Click on **Select**

Select

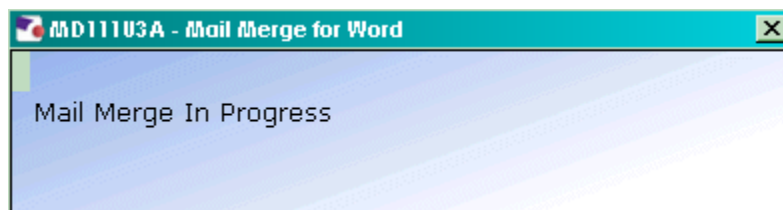
Seq	Pop Up Prompt
001	Enter whether this is a Sch/ Dept/Div
002	Please insert signatory's name
003	Please enter RA/PA's tel number

9.10 Click in the first row and enter the signatory's job title

9.11 Click in the second row and enter the signatory's name

9.12 Click in the third row and enter the signatory's telephone number.

9.13 Click on **Exit**



9.14 The letter will generate in Word and can be update where required then printed.