### This work instruction was last updated: 04 May 2010

### HR Leaver Process – Multi Post Leaver

This Work Instruction describes the HR Leaver Process for employees who are multi post holders and are leaving one of their posts.

● If a multi post holder is leaving all of their posts on the same date, follow this work instruction to end each post until 1 post is remaining. Use the HR Leaver Process work instruction to terminate their last post.

- 1 Entering a Leaver on ResourceLink
- 2 Personal Details data entry screen
- 3 Employment Detail data entry screen
- 4 Current Post Holding data entry screen
- 5 Asset Management data entry screen
- 6 Fixed Pay Elements data entry screen
- 7 Standard Letters



#### 1 Entering a Leaver on ResourceLink

ResourceLink Home Page > **HR Tasks** 



ResourceLink Home Page > HR Tasks > HR Leavers

🛗 HR Tasks			
Pick a men	u		
Starter/Rejoine	r/Visitor	<b>i</b>	Variation to Contract
HR Leavers		<b>i</b>	Create/Maintain Posts
HR Absence Re	cording	<b>i</b>	Letters

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



### 2 Personal Details data entry screen

Task - Leaver/Undo Leaver -	Employee Personal Detail	<u>- 0 ×</u>
Employee threads	55852 B 2 B3 5551 TT	
Title Details		
Legislation Type		
Surname Title		
First Forename	EHANNIN -	
Other Forenames Prev. Surname		
Known As		
Honours Generation		
Dersonal Dataila		
Gender	F	
Date of Birth	28/03/1979 Age: 31 Years 1 Month	
Nat. Ins. No.	JH962953B Case Number	
😺 Home Address	💓 Cont. Addresses 🧵 Passport/Visa 🛛 💓 Contact Tel	
💓 Email Address	🥪 Marital Status 🛛 😼 User Fields 🛛 💋 Notes	
Enter the person's Sumame		

- 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**. <sup>I Home Address</sup>
- 2.3 Check details and update where necessary.

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a transfer of the	_
45.124	
🧹 View Postal	
Evit	٦
<b>Tel</b> and undate where necessary	
	Image: Control of the second seco

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

### 3 Employment Detail data entry screen

• Do not complete this screen. If this screen is completed you will terminate the employee from all their posts.

Employee in care a	59 M 1, M 2, M 1, M 1, T 7
Dates Original Start Current Start Termination To Staff Probation	03/01/2006         SG006         Conversion           03/01/2006         SG006         Conversion           03/01/2006         SG006         Conversion
Additional Service Employee Type Self Service Unit Willing to Job Share Notice Period No Of Current Posts	4 Years 4 Months 2 Days
🧔 Service Breaks	🧔 User Fields 🛛 🧔 Notes 🛛 🥪 Empl. History

3.1 Click on **Next**

-

4	4 Current Post Holding data entry screen										
2	Task - Leaver/Undo Leaver - Employee Post Holding History										
Se	Session Edit View Process Tools Display Help										
L	🔁 🗲 📉 🗅 🚅 🖬 👗 🛍 🖻 🗛 🛋 🖃 👘 🖄 📾 📾 😵 💽 💽 🚫 🚫 🔘										
	Employ	ee terrera	SPRIME INT S	Succ.							
		nin and an and a second se									
	Seq	Start	End Date	Post	M Statu	is N Dtls	Summary				
	001	01/01/2010		DD01003391	PS002	N Y					
	002	03/01/2006		JF07002066	Y PS002	NY					
	Add	Change	Delete	xpand							

Pseudo-Sequence Number for Index Paging

- 4.1 The screen will list all the posts that the employee is attached to.
- 4.2 Click on the post that the employee is leaving
- 4.3 To look at more detail on a post, window in on Summary for that post



ND47L3A Employe	e Post Holding Summary	×
General		
Post	DD01003391	Clerical Assistant
Job	MSA1B&2	Manag, Spec and Admin 1B & 2
Employee Grade		
Post Grade	GRADE 1B	Level 1b
Service Cond ID	MSA1B&2	Management Specialist & Administrative 1
Emp Post Hold.	Reason	Description
Start	01/01/2010 SG001	New Appointment
End		
Service In Post	4 Months 4 Day	rs Projected End
Post Main Flag		Suspended
Contract Numbe	er	Bank Time - Bannarat
Position Status	P5002	Part Time - Permanent
Location		Highfield Campus, Southampton
Wk Dattern		SOM4T4W4T4F4SO
Contract Hours	20.00	Weekly Hours 20.00
Source	CONTRACT	ETE
Pay Grade	GRADE 1B	Level 1b
· -,		
道 User Fields	🥖 Notes	
		<b>Exit</b>
		Evit
4.4 Check the	e details of the pos	st and click on Exit
		N Detail Sum

4.5 Click on the **Detail** field of the Post the employee is leaving

MD4713 Employee Po	st Holding Details	<u>×</u>
Post Job Employee Grade	JF07002066 MSA3	Senior Service Desk & Reporting Analyst Management Specialist & Administrative 3
Post Grade	GRADE 3	Level 3
<u>G</u> eneral	<u>C</u> onditions	Misc G <u>r</u> ade Co <u>n</u> tract
Start 03/01, End Service In Post Projected End	/2006 SG006	Conversion Conversion A Months 2 Days
Post Main Flag	M	Suspended
Exc. from attract	ting Ee's Costs	
🧔 T/S Template 🧔 Salary Planning	道 Perf Man	nagement 🧾 User Fields 🛛 🧔 Notes 📃 E <u>x</u> it

• Check the Post Main Flag field – if there is a Y in this field, you must remember to enter a Y in the Post Main Flag field of their remaining post after you've completed the required entry fields on the post the employee is leaving.

- 4.6 Enter the last day of their employment in the End field
- 4.7 Press Enter
- 4.8 Click on the drop down of the adjacent field and enter the reason for leaving that post.



Seq	Code	Description	Score	1
001 GC	0001	Regrading of Post		-
002 LG	6001	End of Fixed Term Contract		1
003 LG	6002	End of FTC - End of Specialist Expertise		
004 LG	6003	End of FTC - Substantive Post Holder Ret		
005 LG	60037	Retirement		
006 LG	6004	End of FTC - No Longer a Business Demand		
007 LG	6005	End of FTC - No Further Funding		
008 LG	6006	End of FTC - Completion of Project		
009 LG	6007	End of FTC - End of Training period		
010 LG	6008	No Confirmation of Probation		
011 LG	6009	Death in Service		
012 LG	6010	Dismissal - Conduct		-
Add		Gelect Delete		

- 4.9 Press Enter.
- 4.10 If this is the employee's Main Post and the **Post Main Flag** field has a **Y** in it delete the **Y** from the field. You must remember to enter the Post Main Flag on one of their remaining posts when you exit this screen.
- 4.11 Click on Exit.

Termination Options	
General	
Fixed P/E Automatically Closed	<u>Y</u>
View Fixed PE Before Update	N
View Fixed PE After Update	N
View Temp PE Before Undate	N
View Temp PE After Update	N
	-
Training Automatically Closed	<u>Y</u>
View Training Before Update	N
View Training After Update	N
Terminate Clocking Details	
Set Operator Obsolete	Y
Enter "V" to view fixed pay elements prior to update	

4.12 Click on **Continue** 



<b>Task - Le</b> Session E	aver/Undo Leaver dit View Proce	- <mark>Employee Post H</mark> ss Tools Displa	o <b>lding History</b> y Help							<u>_     ×</u>
<b>&gt;</b> 🖻	🔌 🖹 🖆 🛛	<b>.</b>   % 🖻 💼	A A   =	1	ə 🎽 Gə	8	? (	) 🕄		
Emplo	yee 1832824	: MRS RJ BEN	NETT							
Seq	Start	End Date	Post	M	Status	N	Dtls		Summary	
001	01/01/2010		DD01003391		PS002	N	Υ	••••		<u> </u>
002	03/01/2006	30/04/2010	JF07002066	Y	PS002	N	Y			
A	d Change	Delete	xpand							_
-										
Pseudo-Se	equence Number fo	or Index Paging								

• You must ensure that one of the remaining posts the employee is still attached too is selected as their **Main Post**, check the **M** column and ensure that one of the other posts has a **Y** in that column. If not, window into **Details** on the new Main Post and enter **Y** in the **Main Post Flag** field.

4.13 Click on Screens 🧕.



🎦 ст	TASKVW View Cur	rent Screens in Task		×
Seq	Screen	Screen Name	Status	
001	MD55S3	Personal Details	Y	-
002	MD47S1	Employment Detail	Υ	
003	MD47S71	Employee Contract Details	γ	
004	MD47S7	Employee Post Holding History	<	
005	MD49S2	Employee Basic Pay Details		
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		•
4	Add <u>S</u> elect	Delete		
			E <u>x</u> it	

4.14 Click on Asset Management.

🛉 CTDIALOG Dialogue Box	
General	
Re-calculate Holiday Entitlement ? (Y/N):	
	🕗 Yes 🕗 No

4.15 If the dialogue box above appears, click on **No**, Payroll will enter any payments or deductions regarding Holiday Entitlement.



#### 5 Asset Management data entry screen

Emplo	yee intract	н — 59 мли містіма Лулу -				
Seq	Туре	Requested	Asset Number	Alloc Date	Notes	
001	KEYS-A 📃	04/05/2010	-			<u> </u>
						10000

- 5.1 Check the **Asset Management** screen for any outstanding assets that may be held by the employee for the post they are leaving.
- 5.2 Use the **Notes** field to record information relating to the return of the employee's remaining assets.

Notes	
	×
Change Delete Insert	_
	E <u>x</u> it
	Change Delete Insert

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

### 6 Fixed Pay Elements data entry screen

<mark>Task - Le</mark> sion Ee	<mark>aver/Undo Leaver</mark> dit View Othe	- Employ r Proc	<mark>yee Pay Elements - Detail</mark> ess Tools Display Hel	p			
) <b>C</b>	🗙 🗋 🖻	<b>-</b>   %	₽ E   A * I = •	=   '	to t		
Emplo	yee thready	92 M 1.	NONESSEE				
Seq	Post	Code	Desc	E	Start	Period Amt A D M S	
001	DD01003391	1000	Basic Pay		01/01/2010	691.76 N	
002	JF07002066	1000	Basic Pay	*	01/08/2009	1839.36 N	
							- 1
							-
Ac	id Change	) Del	ete Expand				
	-						
	Currency						
eudo-Se	equence Number f	or Index	Paaina				

- 6.1 Ensure that an asterisk appears in the 1000 **Pay Element** row for the Post the employee is leaving. This indicates that there is an end date against that **Basic Pay**.
  - All other Fixed Pay Elements attached to the post the employee is leaving

should also have an against that Pay Element.

6.2 Click on Save

M CTCONFRM C	onfirm Action		×
General			
Are	you sure you v	vant to Save?	
	and the second se		
	<u>Y</u> es	<u>N</u> o	

6.3 Click on Yes.

### 7 Standard Letters

🛂 M C	)103G2 Standard L	etters A	Whached 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	NOACT	1
006	RETIREE	001	Retiree	NOACT	1
007	RETIREPL	001	Retirement Planning Letter	NOACT	1
008	VSACCEPT	001	Voluntary Severance - acceptance	NOACT	1
009	VSCL	001	Voluntary Severance - letter with CA	NOACT	1
010	VSHOLD	001	Voluntary Severance - pending	NOACT	1
011	VSREJ	001	Voluntary Severance - Rejected	NOACT	1 🖵
-	\dd Chang		Delete Expand		
					E <u>x</u> it



- 7.1 Click in the Let Opts field of the letter you want to produce.
- 7.2 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	~

- 7.3 Click on MERGE Immediate print with manual changes.
- 7.4 Click on **Exit**  $E_{\underline{X}it}$

Ma DR	T125EW Employee	Post Holding				×
Ger	neral					
		Select E	mployee Post H	lolding		
		and the second second				
Seq	Post	Start Date	End Date	Осс Туре	Main	
001	EMPLOYEE	19/10/2009				<b>_</b>
002	EW06003139	19/10/2009	30/04/2010			_
003	EK00007743	08/04/2010			Y	
004						
005						
006						
007						
008						
009						•
	Add <u>S</u> elect	Delete				
						E <u>x</u> it

7.5 Click on the post the employee is leaving (this will be the post with an end date)

7.6 Click on Select Select

M DR TS 3	3EW Complex P	ost Structure Selection			×
Gener	ral				
		Select Post	t Structure Unit		
Seq	Hierarchy		Eff Date		
001 HF	RMAIN08	01/01/1940		<u> </u>	
Add	<u>S</u> elect	Delete		×	
					E <u>x</u> it

77	Click on Select	<u>S</u> elect
1.1		

1

Ma DR	1043CW Complex I	imployee Post Selec	rtion			×
Ger	heral					
Sele	ect Course Emp	loyee Post Holdi	ing			
Can	didate : MISS	H ZHENG (Emp	loyee: 2054035)	)		
Seq	Post	Start Date	End Date	Осс Туре	Main	
001	EW06003139	19/10/2009	30/04/2010			<u> </u>
002	ЕКОООО7743	08/04/2010			Y	
_						M
L A	Add <u>S</u> elect	Delete				
						E <u>x</u> it

7.8 Click on the post the employee is leaving (this will be the post with an end date).

MD 10	19G3 Enter Pop Up Field Contents	×
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	
Ad	d Change Delete	¥
	Exit	

- 7.9 Click in the first row and enter the signatory's job title
- 7.10 Click in the second row and enter the signatory's name
- 7.11 Click in the third row and enter the signatory's telephone number.

12 CI	lick on Exit	
	MD111U3A - Mail Merge for Word	2
	Mail Merge In Progress	

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