



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.
2. Please do not submit a termination request over 3 months in advance of the projected end date for those on a **Fixed term contract**.
3. 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.
4. Once a termination has been approved by HR Operations an Offboarding (Leaver) Journey will be assigned automatically, in most cases this will be to assigned to the Employee, Line Manager and SDA. Further information regarding Journeys can be found in the [Line Manager or SDA Guide to Journeys](#).
5. 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.
6. 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.

7. 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.
- 8. Resignations of sponsored workers must be reported to HR Operations immediately by raising a Service Request.**
9. To amend or cancel a termination raise the 'Amend or cancel a termination' service request form via the Help Desk
10. 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.
11. 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.
12. 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**



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**



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

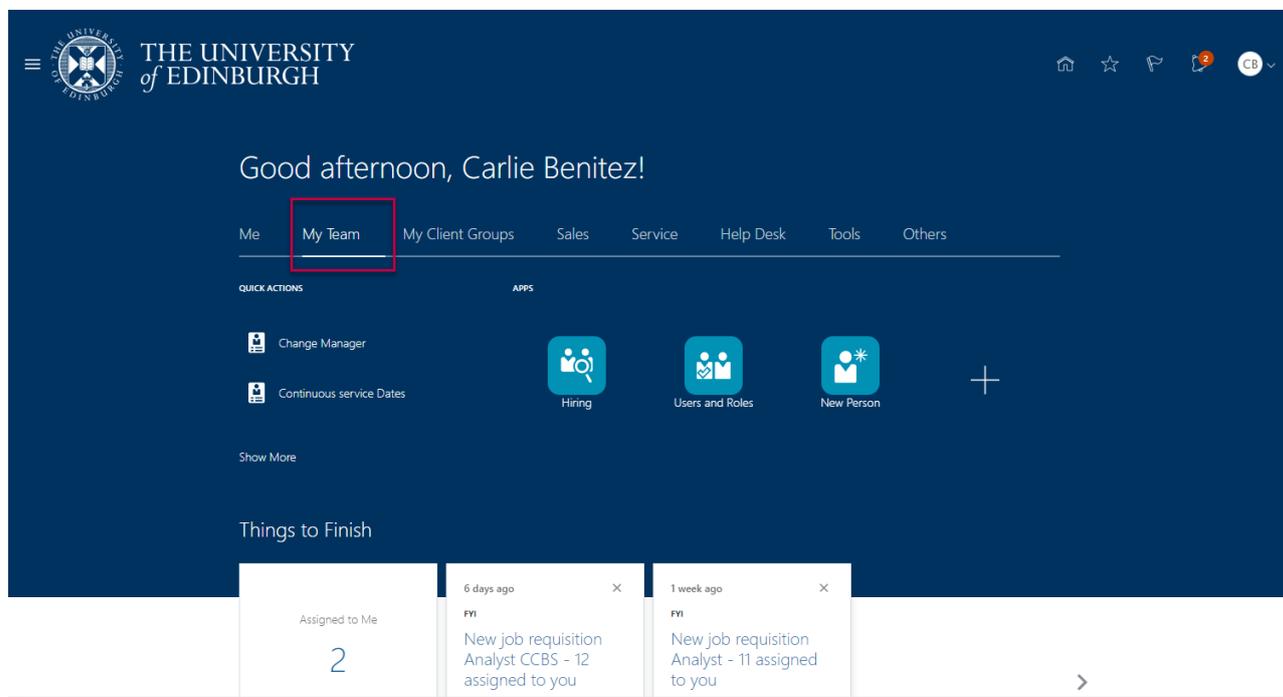
8. Click on **Submit**  on the top right corner

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.

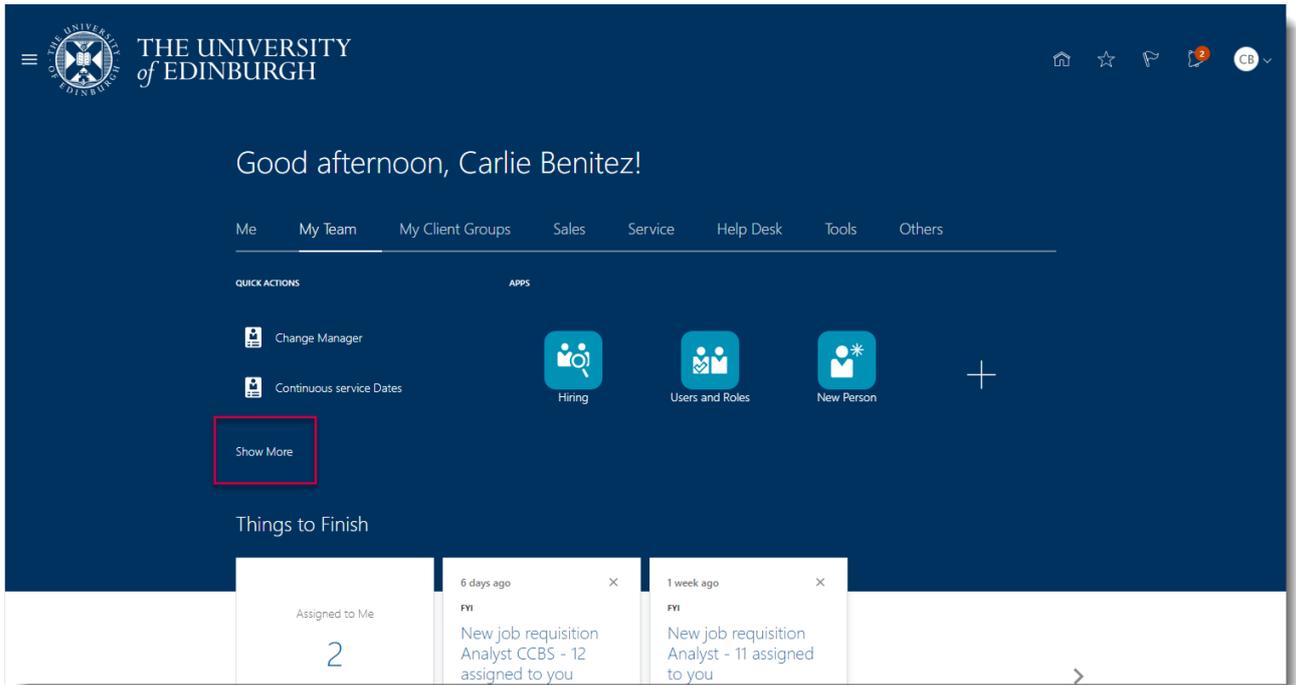
In Detail...

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

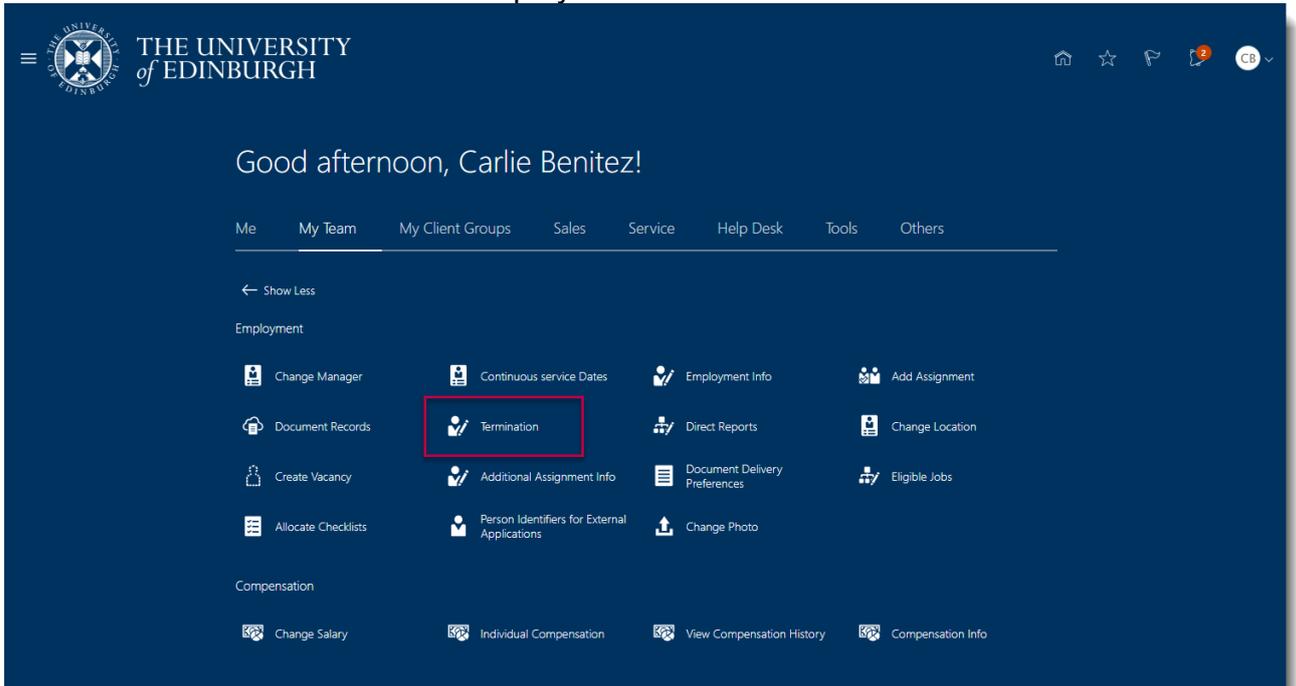


Note: If you're a school/department admin, please select **My Client Groups**.

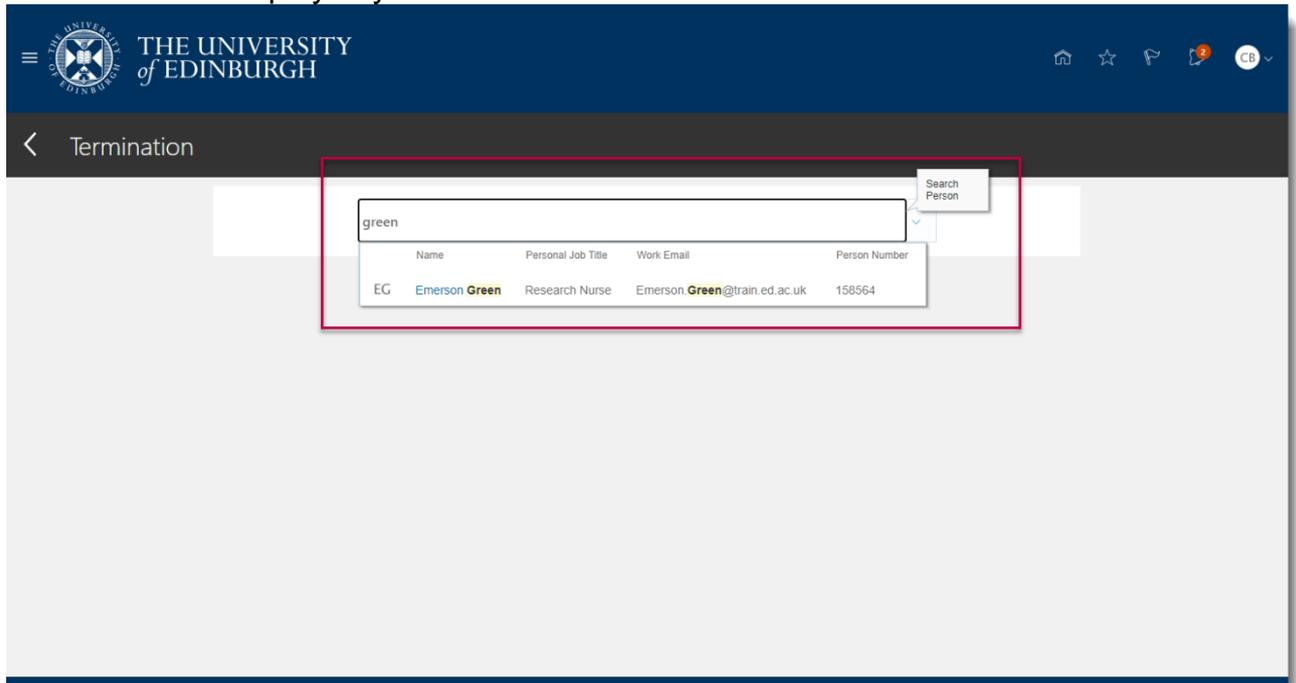
2. Click on **Show More** under Quick Actions



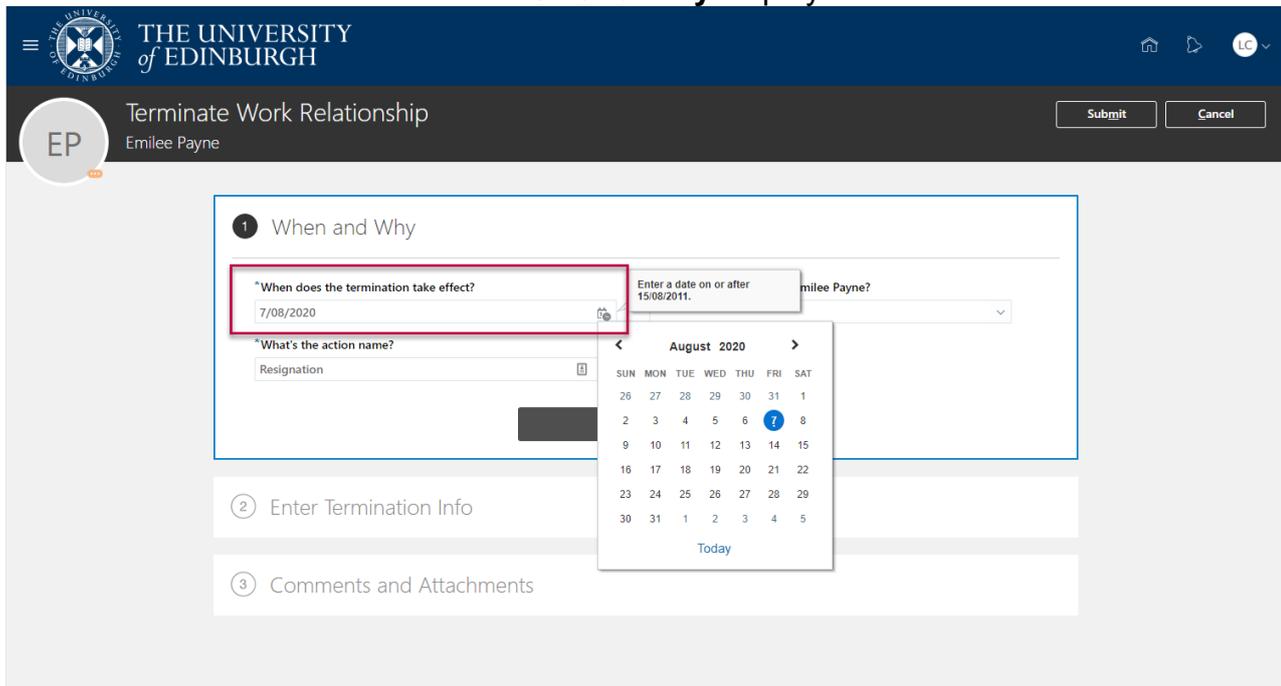
3. Then select **Termination** under Employment



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



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



- 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/Temporary Worker visa, the reason 'Non Worker -> Tier 5 Sponsored Researcher' should always be used.
- Contingent Workers ending their period of engagement - please use the action 'End Contingent Worker' in all cases.

The screenshot shows a web interface for terminating a work relationship. At the top, there is a header for 'THE UNIVERSITY of EDINBURGH' and a user profile for 'EP Emilee Payne'. The main heading is 'Terminate Work Relationship'. The form is divided into three steps: '1 When and Why', '2', and '3 Comments and Attachments'. The 'When and Why' step includes a date field for 'When does the termination take effect?' set to 28/08/2020, a dropdown for 'Why are you terminating Emilee Payne?', and another dropdown for 'What's the action name?' with a list of options including 'Action', 'Abandon Contract', 'Cancellation of Hire', 'Death in Service', 'Dismissal', and 'Dormant'. A 'Length of Service' field shows '9 Years 0 Months 14 Days'. There are 'Submit' and 'Cancel' buttons at the top right and a 'Continue' button below the form.

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

THE UNIVERSITY of EDINBURGH

Terminate Work Relationship
Emilee Payne

Submit Cancel

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**.

THE UNIVERSITY of EDINBURGH

Terminate Work Relationship
Emilee Payne

Submit Cancel

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

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.

The screenshot shows a web interface for terminating a work relationship. At the top, it says 'Terminate Work Relationship' for 'Emilee Payne'. The main section is titled '2 Enter Termination Info'. A dropdown menu is open for 'HESA Reason for end of contract', listing various reasons. To the right, there is another dropdown for 'HESA Reason for end of contract' and a 'Pay Adjustments Required' section. A 'Continue' button is visible at the bottom of the form.

To see the different HESA Reason for End of Contract dropdown options, go to [Appendix](#) (not applicable for end contingent worker)

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

EP Terminate Work Relationship Emilee Payne Submit Cancel

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

*HESA Location After Leaving

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

Continue

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

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

EP Terminate Work Relationship Emilee Payne Submit Cancel

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

*HESA Location After Leaving Wales

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
Not Known

Continue

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

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 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).

EP Terminate Work Relationship Emilee Payne

1 When and Why

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.

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.

Electric Vehicle salary sacrifice - Payroll will check whether any additional payments e.g. early termination charge, are required upon receipt of the termination notification in People and Money. However, if you are aware that the employee has an electric vehicle and may have an additional payment to make, you can make Payroll aware of this by adding a comment to the Pay Adjustments field. Further guidance is available on the [Pay & Reward SharePoint](#).

Then, click **Continue**.

The screenshot shows the 'Terminate Work Relationship' form for Emilee Payne. The header includes the user's initials 'EP' and the name 'Emilee Payne'. The form is divided into three steps: 1. When and Why, 2. Enter Termination Info, and 3. Comments and Attachments. Step 2 is currently active and contains several dropdown menus: 'HESA Reason for end of contract' (set to 'Other (includes dismissal and ill-health)'), 'HESA Activity After Leaving' (set to 'Working in a higher education institution'), and 'HESA Location After Leaving' (set to 'Wales'). There is also a 'Pay Adjustments Required' section with a dropdown set to 'Payments for balancing annual leave'. A 'Continue' button is highlighted with a red box. A tooltip for 'Pay Adjustments Required' is visible. Step 3 is partially visible below, indicating where to enter comments and attachments.

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

The screenshot shows the 'Comments and Attachments' section of the 'Terminate Work Relationship' form. It features a large text area for entering comments, with a 'Comments' label above it. Below the text area is an 'Attachments' section, which includes a dashed box for uploading files and a green arrow icon with the text 'Drag files here or click to add attachment'. The form is titled 'Terminate Work Relationship' for Emilee Payne, and the user's initials 'EP' are visible in the top left corner. The 'Submit' and 'Cancel' buttons are in the top right corner. The form is divided into three steps: 1. When and Why, 2. Enter Termination Info, and 3. Comments and Attachments. Step 3 is currently active.

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

The screenshot shows a web interface for terminating a work relationship. At the top left, there is a circular profile picture with the initials 'EP' and the name 'Emilee Payne'. The title of the page is 'Terminate Work Relationship'. In the top right corner, there are two buttons: 'Submit' (highlighted with a red box) and 'Cancel'. The main content area is divided into three numbered steps:

- ① When and Why (with an 'Edit' button)
- ② Enter Termination Info (with an 'Edit' button)
- ③ Comments and Attachments. If resignation, attach resignation letter. (highlighted with a blue border)

Step 3 contains a 'Comments' text area and an 'Attachments' section with a dashed border and a green upload icon. Below the attachments section, there is a prompt: 'Drag files here or click to add attachment' with a dropdown arrow.

8. 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. If the employee is due a redundancy payment, and they have over two years of service, then the action reason 'Redundancy from Expiry of FTC applies.	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. This includes if an employee is on a student experience contract and this ends earlier than anticipated due to their studies coming to an end earlier than expected. 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.	No Journey / Correspondence

		unsatisfactory references, issues with right to work etc.) or the individual decided not to accept an offer of employment.	
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/Temporary 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