



System User Guide

Line Manager and School/Department Administrator (SDA) Guide – How to Process Terminations

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Introduction

This guide covers key tasks for Line Managers and School/Department Administrators in the termination system process. It is related to the Process User Guide for Employment Separation and the demo video on How to Process Terminations in People and Money which are linked below:

[Guide to Employment Separation](#)

[Demo Video: How to Process Terminations in People and Money](#)

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. In exceptional circumstances, where an employee holds more than one assignment and is transferring to one, full time assignment, only one of the assignments will be used to transfer the employee. The assignments that remain will need to be terminated. Please follow the [Terminate One Assignment Only \(Partial Termination\)](#) section of this guide.
5. If the employee is ending their **partial secondment** and returning to their substantive post in full please follow the [Terminate One Assignment Only \(Partial Termination\)](#) section of this guide. If the employee is ending their full secondment do not process as a termination, instead submit the [Return from Secondment form](#) and submit to HR via Service Request.
6. If the employee is intending to **retire**, they should contact the pensions team 3 months before their planned retirement date.
7. 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.
8. 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.

9. **Contingent Worker** records should be terminated when their period of engagement comes to an end using the action 'End Contingent Worker'.
10. Read the [guidance available on leaving the University](#) webpages.
11. Before submitting the termination in People and Money, you must **ask the employee whether they have any other assignments at the university**. If they have more than one assignment at the university, you must ask them whether they are leaving one assignment or all assignments. Based on the employee's answer, please follow the correct section of this guide.

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 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 A](#) and [Appendix B](#) for details. Please note in some instances HR Partners or HR Operations will be responsible for processing the termination, this is outlined in the appendices.
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.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

How to Process Terminations for Employees with One Assignment Only

This section should be followed if you are terminating an employee who only has **one assignment** at the University.

1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.
 - b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**. Then, select **Terminate Employment** under the **Employment** heading.
2. **Search** for and select the employee you wish to terminate. Alternatively, if you are a line manager, you can select an employee from the list of **Direct Reports** below the search bar.
3. Select both the **Termination Info** and **Comments and Attachments** boxes. If the **Reassign Existing Reports** box also appears, ensure you select this box as well.
4. Click **Continue**.
5. In the **When and Why** section, click on **Show Assignment Details** (blue text). Check whether the employee has **one** or **multiple** assignments.
 - a. If the employee only has **one** assignment, please proceed to the next step.
 - b. If the employee has **more than one** assignment, please follow the [How to Process a Termination for Employees with Multiple Assignments](#) section of this guide instead.
6. In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment).
7. The **What are you terminating?** field will be defaulted to the **All Assignments** option.
8. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu.
9. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu.
10. Then, click **Continue**.
11. In the Work Relationship Info section, complete the following:
 - a. Select the relevant **HESA Reason for End of Contract** from the dropdown menu.
 - b. Select the relevant **HESA Location After Leaving** from the dropdown menu.
 - c. Select the relevant **HESA Activity After Leaving** from the dropdown menu.

12. Add any other pay adjustments required.
13. Then, click **Continue**.
14. In the **Comments and Attachments** section, enter comments as appropriate and upload any relevant attachments.
15. Scroll to the top of the page and click on **Submit** on the top right corner.
16. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

How to Process a Termination for Employees with Multiple Assignments

Terminate One Assignment Only (Partial Termination)

This section should be followed if the employee has **multiple assignments** at the university but are only leaving **one** of their assignments.

1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.
 - b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**. Then, select **Terminate Employment** under the **Employment** heading.
2. **Search** for and select the employee you wish to terminate. As you are terminating a specific assignment you **must** ensure you select the correct assignment.
3. Select both the **Termination Info** and **Comments and Attachments** boxes. If the **Reassign Existing Reports** box also appears, ensure you select this box as well.
4. Click **Continue**.
5. In the **When and Why** section:
 - a. In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment).
 - b. In the **What are you terminating?** field select the specific assignment option.
 - c. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu.
 - d. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu.
6. To view the details of the employee's other assignments, click on **Show Assignment Details** (blue text).
7. Then, click **Continue**.
8. In the **Comments and Attachments** section, enter comments as appropriate:
 - a. Add any other pay adjustments required.
 - b. If any relocation costs are to be recovered.
 - c. Immigration Fee Assistance Repayment.

- d. Electric Vehicle salary sacrifice.
9. Upload any relevant attachments.
10. Scroll to the top of the page and click on **Submit** on the top right corner.
11. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

Terminate All Assignments (Full Termination)

This section should be followed when an employee has **multiple assignments** and is leaving the university **entirely** (i.e. they are leaving **ALL** assignments).

1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.
 - b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**. Then, select **Terminate Employment** under the **Employment** heading.
2. **Search** for and **select** the employee you wish to terminate.
3. Select both the **Termination Info** and **Comments and Attachments** boxes. If the **Reassign Existing Reports** box also appears, ensure you select this box as well.
4. Click **Continue**.
5. In the **When and Why** section:
 - a. In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment).
 - b. In the **What are you terminating?** field ensure the **All Assignments** option is selected.
 - c. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu.
 - d. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu.
6. Then, click **Continue**.
7. In the Work Relationship Info section, complete the following:
 - a. Select the relevant **HESA Reason for End of Contract** from the dropdown menu.
 - b. Select the relevant **HESA Location After Leaving** from the dropdown menu.
 - c. Select the relevant **HESA Activity After Leaving** from the dropdown menu.
 - d. **Pay Adjustments Required** field – Add any other pay adjustments required
8. Click **Continue**.
9. In the **Comments and Attachments** section, enter comments as appropriate and upload any relevant attachments.
10. Scroll to the top of the page and click on **Submit** on the top right corner.
11. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

Troubleshooting

Primary Assignment Warning

1. Raise a Service Request with HR using the **Switch Primary Assignment before Termination** category and provide the following information:
 - a. The assignment number you're trying to terminate
 - b. The effective date of the termination
2. HR Operations will confirm when the Primary Status has been moved and will confirm which assignment is now Primary.

Please note: The Offboarding (Leaver) journey will be automatically assigned to the line manager of the primary assignment. You should contact that line manager and ask them to reassign the tasks in the journey to you, or to the relevant line manager.

3. You can now return to the Terminate Employment App and process the termination. Please follow the [Terminate One Assignment Only \(Partial Termination\)](#) section of this guide.

When a Change is Already in Progress

If you see a warning message in the Terminate Employment app that says 'We are submitting your changes for approval', this means that a change (e.g. a termination for another assignment or a change assignment request) has already been submitted for this employee and it is pending approval.

You must wait until this change has been approved before you can proceed with the termination. Please follow the steps below:

1. Check the **Worklist** (notification bell in P&M > Show All > Worklist). If you submitted the pending change, the progress will be shown in here.
2. If you didn't submit the pending change, you can raise a service request with the HR Helpline under the 'leaving the university' category to find out more information.

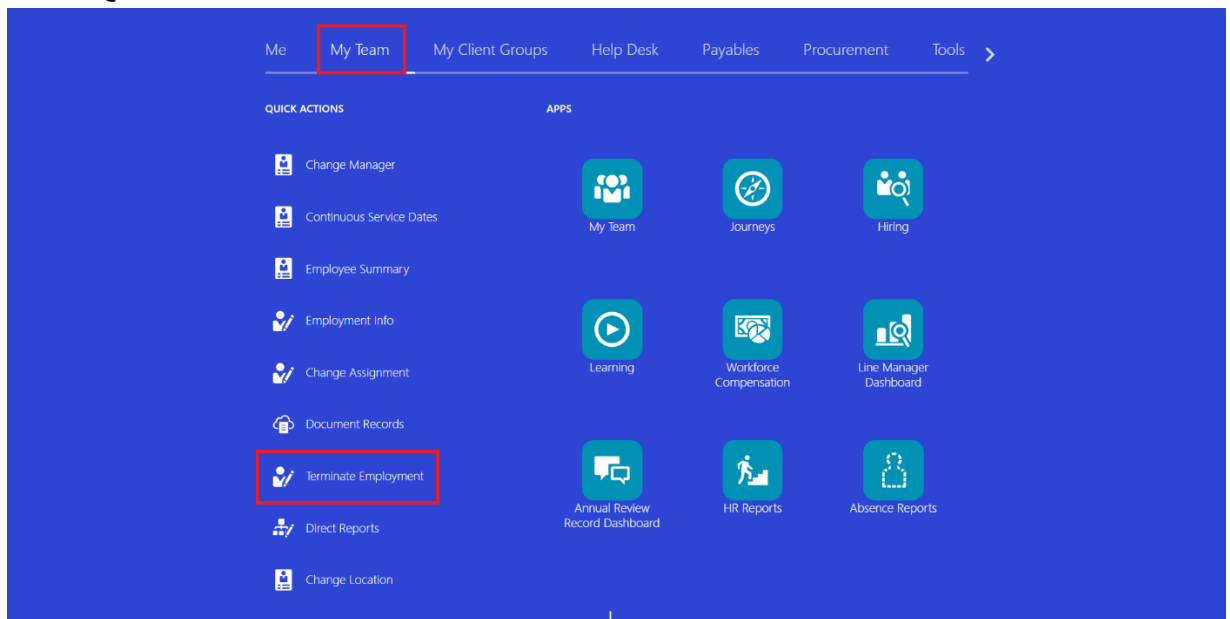
In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

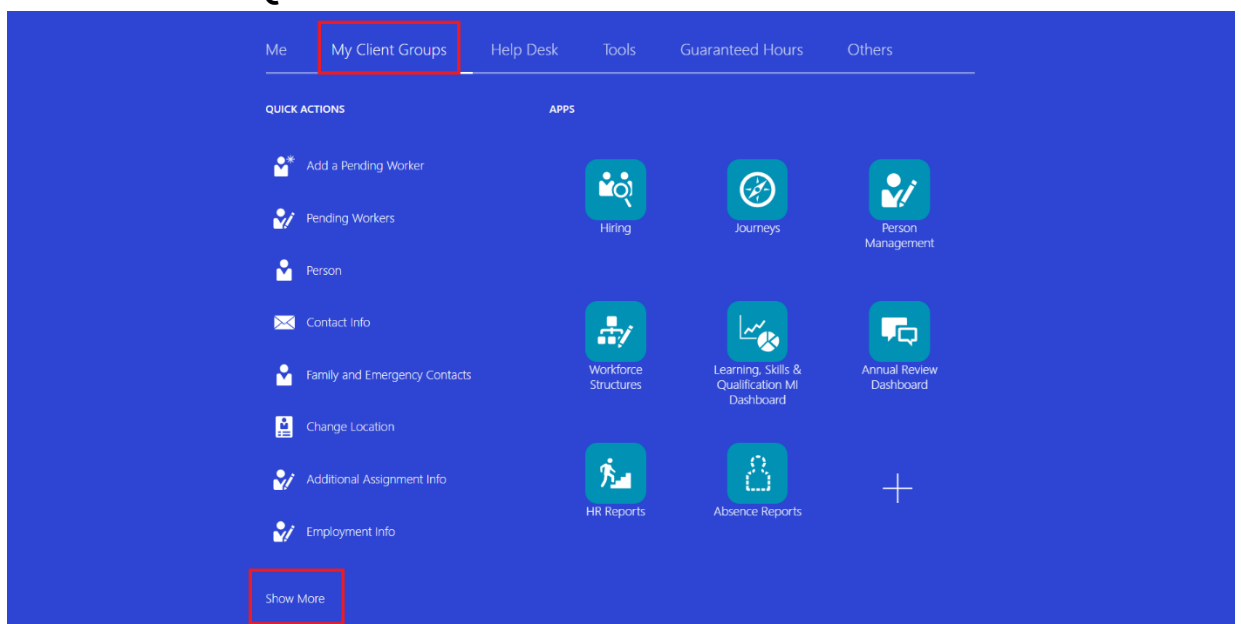
How to Process Terminations for Employees with One Assignment Only

This section should be followed if you are terminating an employee who only has **one assignment** at the University.

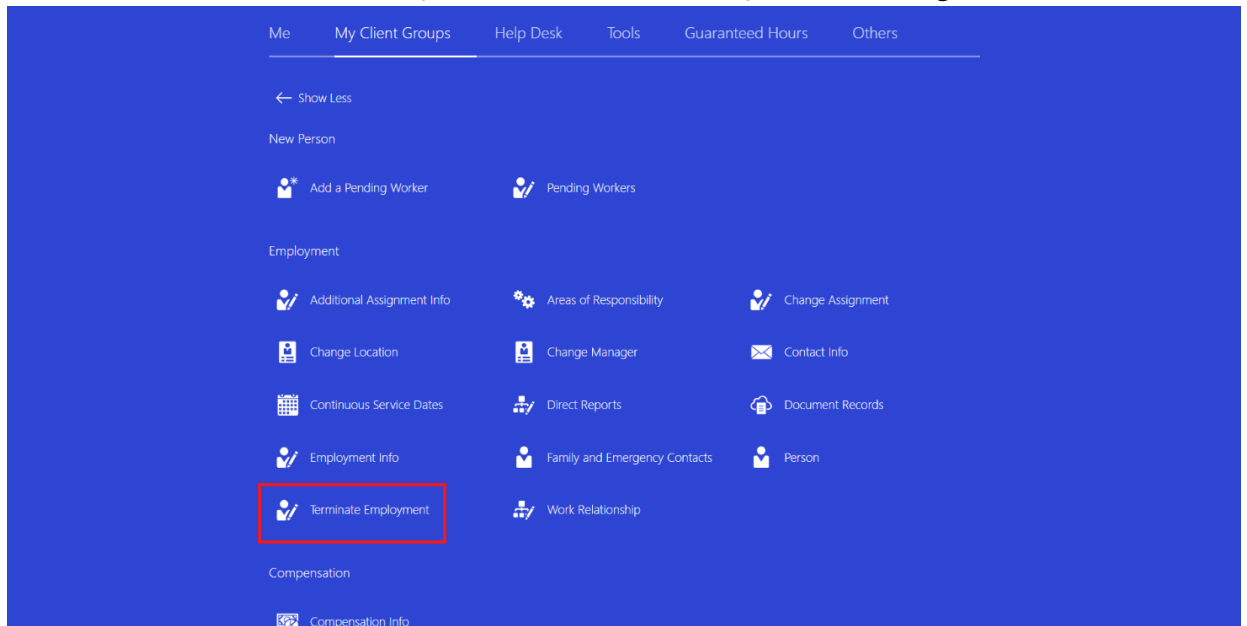
1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



- b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**.

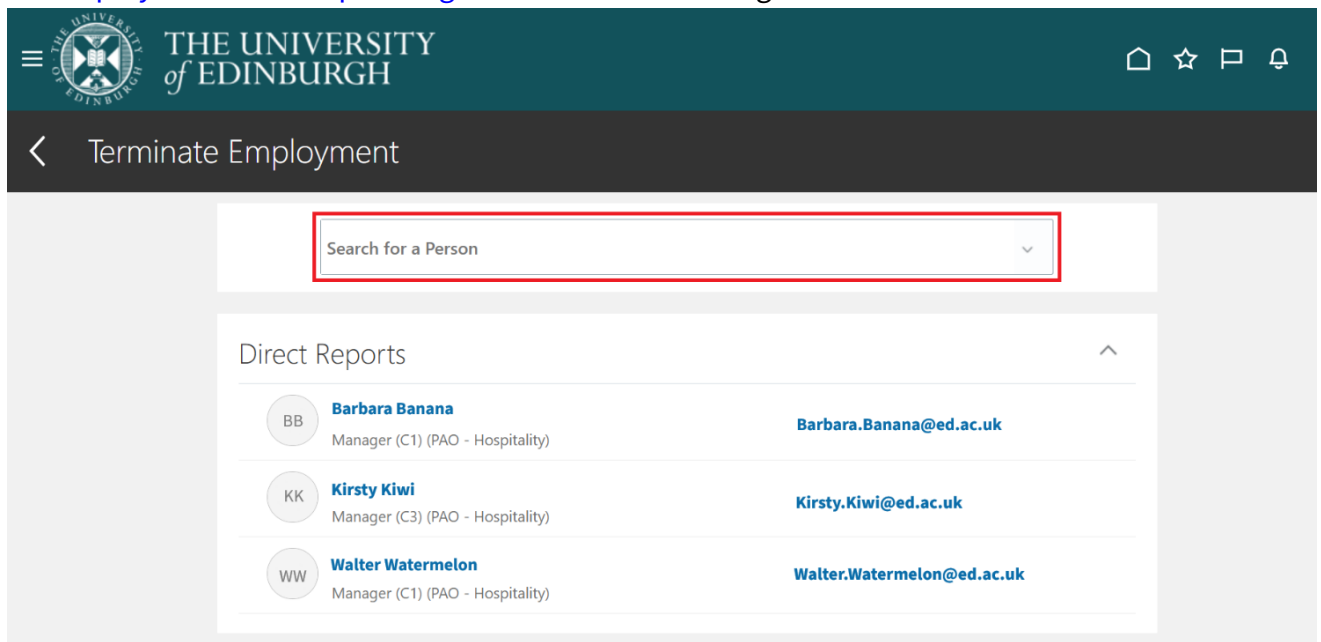


Then, select **Terminate Employment** under the **Employment** heading.



2. **Search** for and select the employee you wish to terminate. Alternatively, if you are a line manager, you can select an employee from the list of **Direct Reports** below the search bar.

If the employee has more than one assignment, please follow the [How to Process a Termination for Employees with Multiple Assignments](#) section of this guide instead.



3. You will be presented with a screen that contains two boxes: **Termination Info** and **Comments and Attachments** and Attachments. You **must** select **both** boxes before clicking Continue to ensure that all of the relevant fields appear in the next screen.

BB Terminate Employment
Barbara Banana

Continue Cancel

Termination Info Comments and Attachments

If the employee you're terminating is currently a line manager, a third box called '**Reassign Existing Reports**' will also appear. You must also select this box before clicking **Continue** to allow you to reassign the employees direct reports in the next screen at the same time as the termination.

CC Terminate Employment
Cathy Clementine

Continue Cancel

Termination Info Reassign Existing Reports Comments and Attachments

4. In the **When and Why** section, click on **Show Assignment Details** (blue text). Check whether the employee has **one** or **multiple** assignments.
 - a. If the employee only has **one** assignment, please proceed to the next step.
 - b. If the employee has **more than one** assignment, please follow the [How to Process a Termination for Employees with Multiple Assignments](#) section of this guide instead.

1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
 Tutor - Skills Centre
 Tutor

*What's the way to terminate the employee?
End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

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

5. In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment). Alternatively, you can type in the effective date manually.

1 When and Why

! The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Catering Systems Manager
 All Assignments in University of Edinburgh
 Catering Systems Manager

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Barbara Banana?
Select a value

Show Assignment Details

Continue

| April 2026 | | | | | | |
|------------|-----|-----|-----|-----|-----|-----|
| SUN | MON | TUE | WED | THU | FRI | SAT |
| 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 | 1 | 2 |
| Today | | | | | | |

6. As the employee only has one assignment, the **What are you terminating?** field will default to the **All Assignments** option.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Catering Systems Manager
 All Assignments in University of Edinburgh
Catering Systems Manager

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Barbara Banana?
Select a value

Show Assignment Details

Continue

7. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu. Please use the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Catering Systems Manager
 All Assignments in University of Edinburgh
Catering Systems Manager

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Barbara Banana?
Select a value

Show Assignment Details

Continue

8. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu. Please see the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Catering Systems Manager
 All Assignments in University of Edinburgh
Catering Systems Manager

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Barbara Banana?
Select a value

Show Assignment Details

Continue

Notes:

- Please be aware that each termination action name 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 [Appendix A](#) at the end of this document.
- In the case of **non-workers** who are on a Tier 5/Temporary Worker visa, the Action Name '**Non Worker**' and Action Reason '**Tier 5 Sponsored Researcher**' should always be used.
- In the case of **Contingent Workers** ending their period of engagement, please use the action name '**End Contingent Worker**' in all cases.

9. Then, click **Continue**.

The screenshot shows a form titled "1 When and Why". At the top, there is a green warning banner with a yellow triangle icon and the text: "The employee can see their termination details when the termination type is voluntary." Below this, the form contains several fields: a date field for "When does the termination take effect?" with the value "30/04/2026"; a radio button group for "What are you terminating?" with "All Assignments in University of Edinburgh Catering Systems Manager" selected; a dropdown menu for "What's the way to terminate the employee?" with "Cancellation of Hire" selected; and another dropdown menu for "Why are you terminating Barbara Banana?" with "Select a value" selected. A link "Show Assignment Details" is located below the "Why" dropdown. At the bottom center, a "Continue" button is highlighted with a red rectangular border.

10. In the Work Relationship Info section, complete the following:

- a. Select the 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 [Appendix C](#) (not applicable for end contingent worker).
- b. Select the relevant **HESA Location After Leaving** from the dropdown menu. To see the different HESA Location after Leaving dropdown options and when to use them, go to the [Appendix D](#) (not applicable for end contingent worker).
- c. Select the relevant **HESA Activity After Leaving** from the dropdown menu. To see the different HESA Activity After Leaving dropdown options and when to use them, go to [Appendix E](#) (not applicable for end contingent worker).

The screenshot shows a form titled "2 Work Relationship Info". At the top right, there is an "Edit" button with a pencil icon. The form contains three dropdown menus, each with a red rectangular border around it: "*HESA Reason for end of contract", "*HESA Location After Leaving", and "*HESA Activity After Leaving". Below these is a text area for "Pay Adjustments Required". At the bottom center, a "Continue" button is visible.

11. **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). If the employee is leaving due to Voluntary Redundancy or a Retirement Offer, you must include any payment details in this field.

The screenshot shows a web form interface. At the top, there is a tab labeled '1 When and Why' with an 'Edit' button. Below this is a sub-section titled '2 Work Relationship Info'. Inside this sub-section, there are three dropdown menus: '*HESA Reason for end of contract', '*HESA Location After Leaving', and '*HESA Activity After Leaving'. Below these dropdowns is a text area labeled 'Pay Adjustments Required', which is highlighted with a red border. At the bottom of the sub-section is a 'Continue' button.

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](#).

12. Then, click **Continue**.

1 When and Why Edit

2 Work Relationship Info

*HESA Reason for end of contract

*HESA Location After Leaving

*HESA Activity After Leaving

Pay Adjustments Required

Continue

13. In the **Comments and Attachments** section, enter comments as appropriate and upload any relevant attachments. **The following termination action names require an attachment:**
- Resignation** – please attach a copy of the resignation letter/notification.
 - Dormant** – to be used for the Guaranteed Hours Dormant process. Please attach copies of both letters issued to the employee.
 - Dismissal** – please attach a copy of the HR Partner’s/Case Management Team’s approval
 - Abandon Contract without Following Resignation Procedure** – to be used in exceptional circumstances only. Please attach a copy of your HR Partner’s approval.

1 When and Why Edit

2 Work Relationship Info Edit

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

Comments

Attachments

Drag files here or click to add attachment

14. Scroll to the top of the page and click on **Submit** on the top right corner.

BB
Barbara Banana

Submit Cancel

1 When and Why Edit

2 Work Relationship Info Edit

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

Comments

Attachments

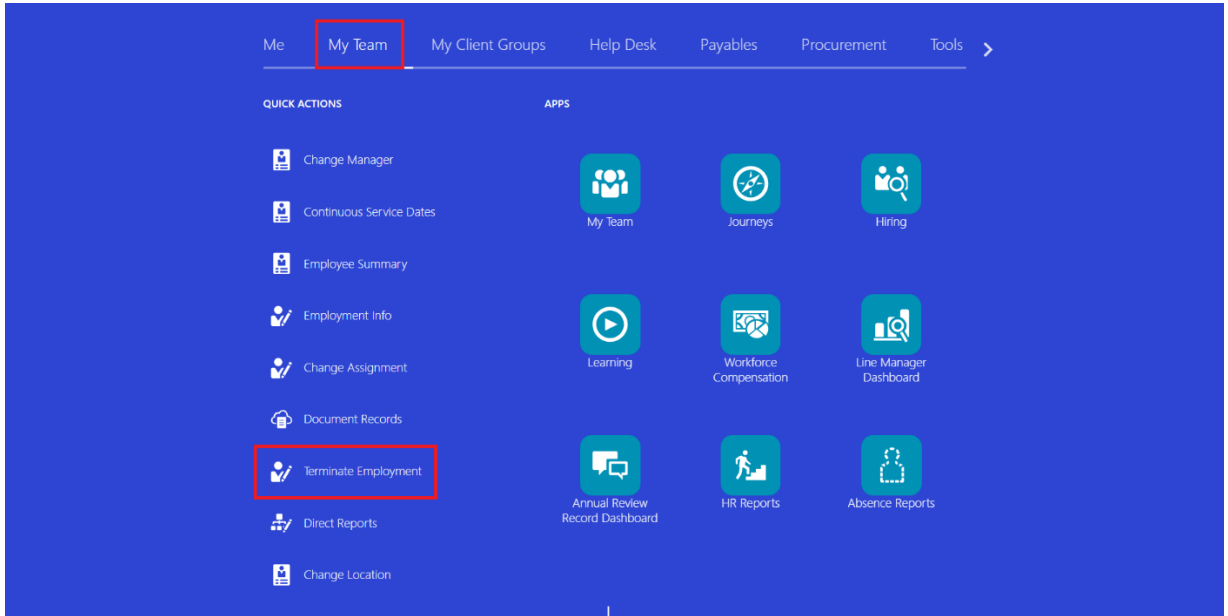
15. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

How to Process a Termination for Employees with Multiple Assignments

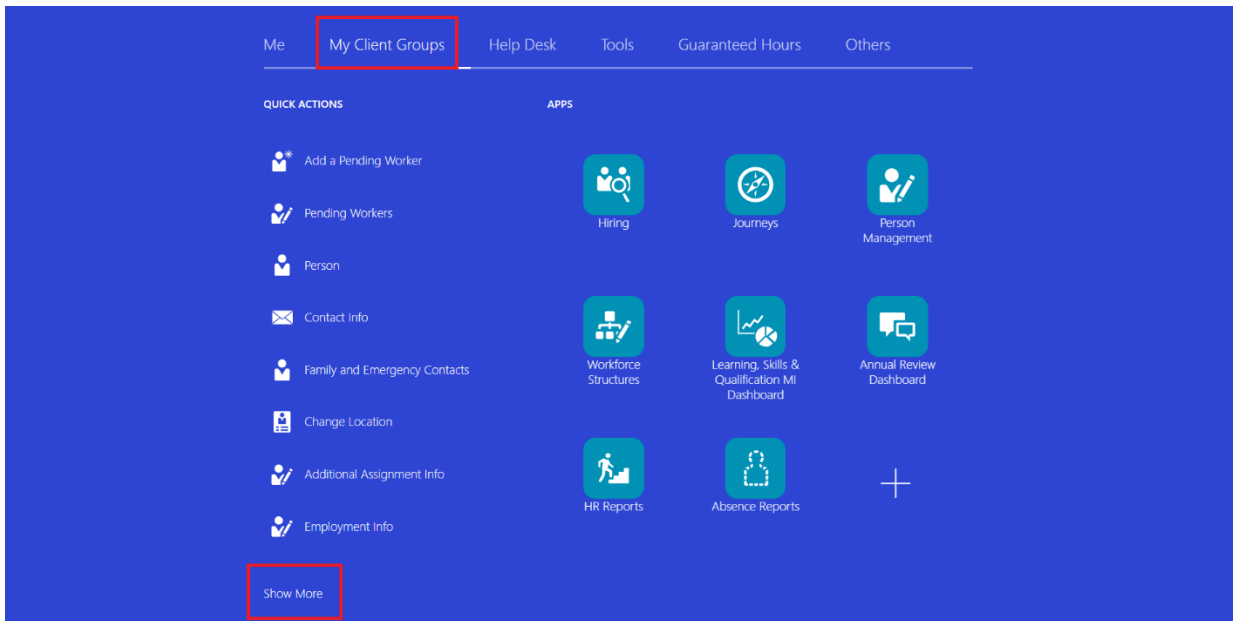
Terminate One Assignment Only (Partial Termination)

This section should be followed if the employee has **multiple assignments** at the university but are only leaving **one** of their assignments. This includes end of **partial secondments**.

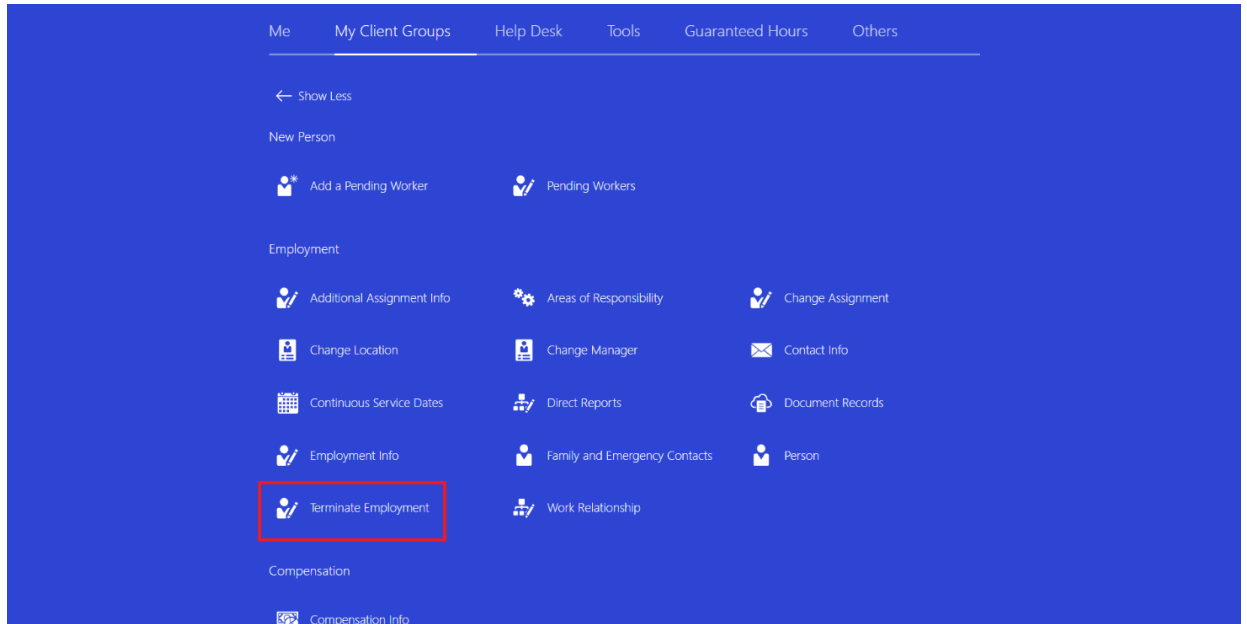
1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



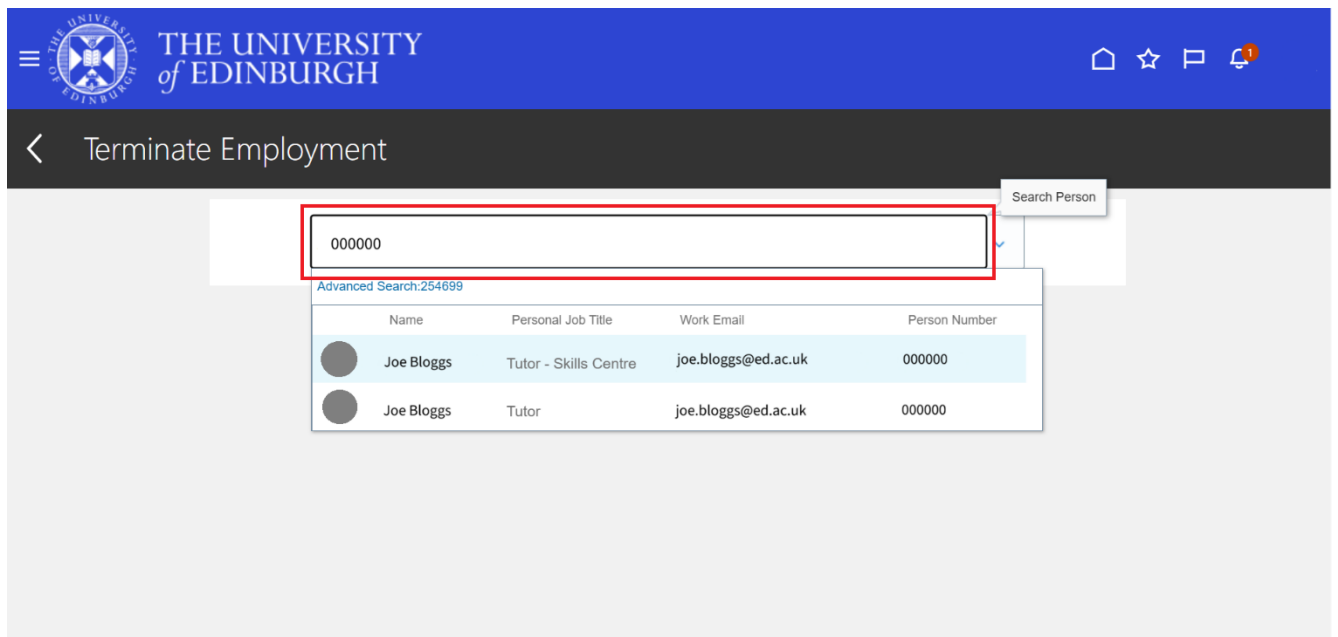
- b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**.



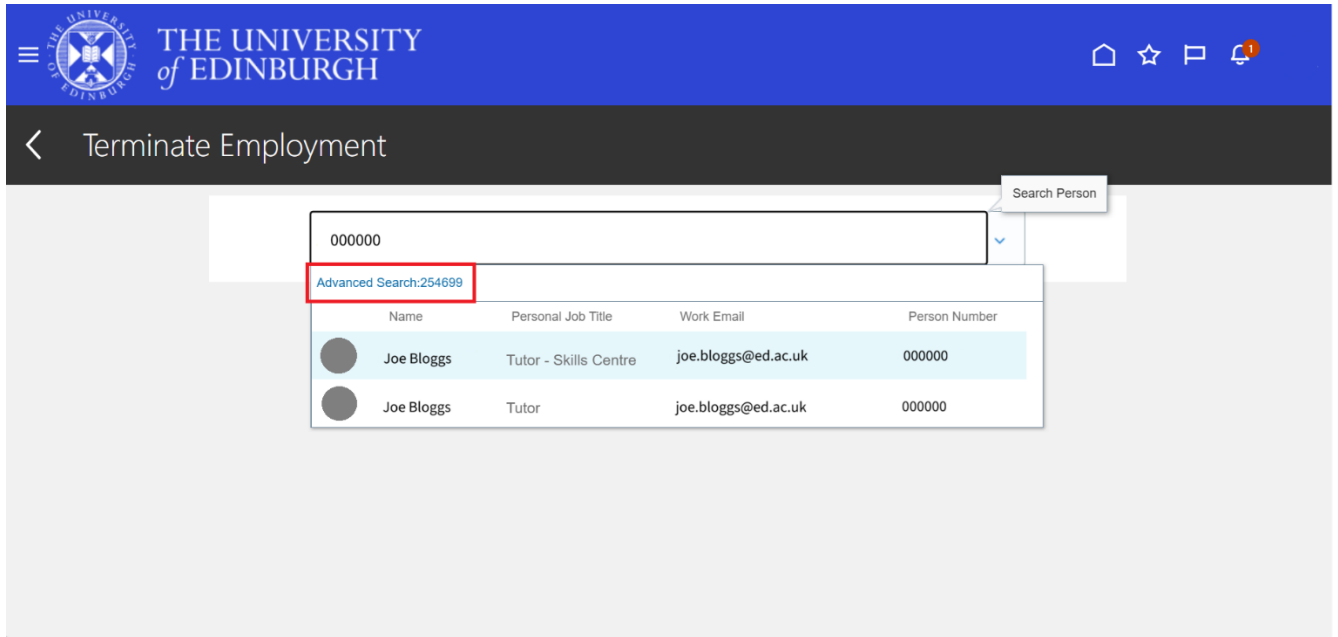
Then, select **Terminate Employment** under the **Employment** heading.



2. **Search** for the employee you wish to terminate. As you are terminating a specific assignment you **must** ensure you select the correct assignment.

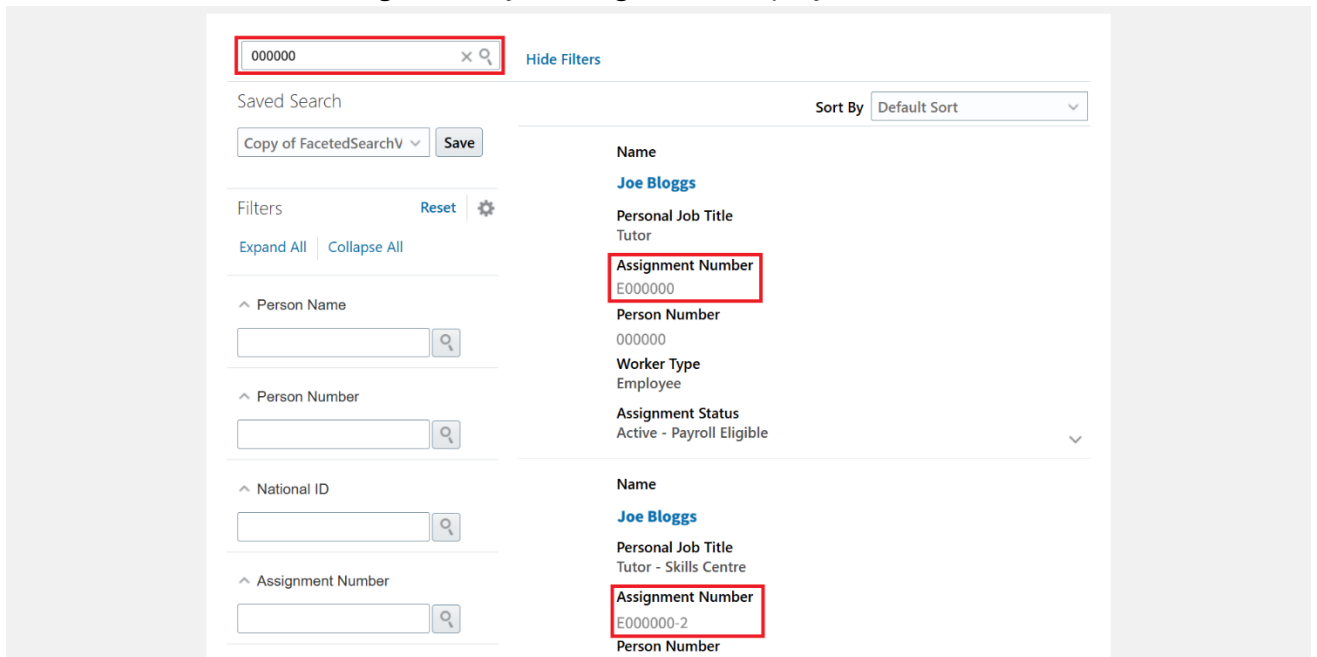


If you are unsure which assignment is the correct one, click on **Advanced Search** (blue text).



Enter the **Person Number** in the search box at the top of the page. Scroll down to until you see the **Assignment Status** filter on the left hand side and untick the **Inactive** box.

Then, select the correct assignment by clicking on the employee's name (blue text).



3. You will be presented with a screen that contains two boxes: **Termination Info** and **Comments and Attachments**. You **must** select **both** boxes before clicking **Continue** to ensure that all of the relevant fields appear in the next screen.

BB Terminate Employment
Barbara Banana

Continue Cancel

Termination Info Comments and Attachments

If the employee you're terminating is currently a line manager, a third box called '**Reassign Existing Reports**' will also appear. You must also select this box before clicking **Continue** to allow you to reassign the employees direct reports in the next screen at the same time as the termination.

CC Terminate Employment
Cathy Clementine

Continue Cancel

Termination Info Reassign Existing Reports Comments and Attachments

4. In the **When and Why** section:

- a. In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment). Alternatively, you can type in the effective date manually.

1 When and Why

The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

- b. In the **What are you terminating?** field select the specific assignment option. In the example below the specific assignment is the 'Tutor' assignment. This is the assignment we selected in Step 3 of this guide.

1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

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

- c. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu. Please use the [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.

1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
 Tutor - Skills Centre
 Tutor

*What's the way to terminate the employee?
 End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
 Select a value

Show Assignment Details

Continue

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

- d. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu. Please see the [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.

1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
 Tutor - Skills Centre
 Tutor

*What's the way to terminate the employee?
 End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
 Select a value

Show Assignment Details

Continue

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

Note:

- Please be aware that each termination action name 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 [Appendix B](#) at the end of this document.

5. To view the details of the employee's other assignments, click on **Show Assignment Details** (blue text).

1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
 Tutor - Skills Centre
 Tutor

*What's the way to terminate the employee?
End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

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

The details of each assignment will appear regardless of whether the assignment sits in your area of responsibility or in another college/department.

Tutor - Skills Centre
Tutor

Hide Assignment Details

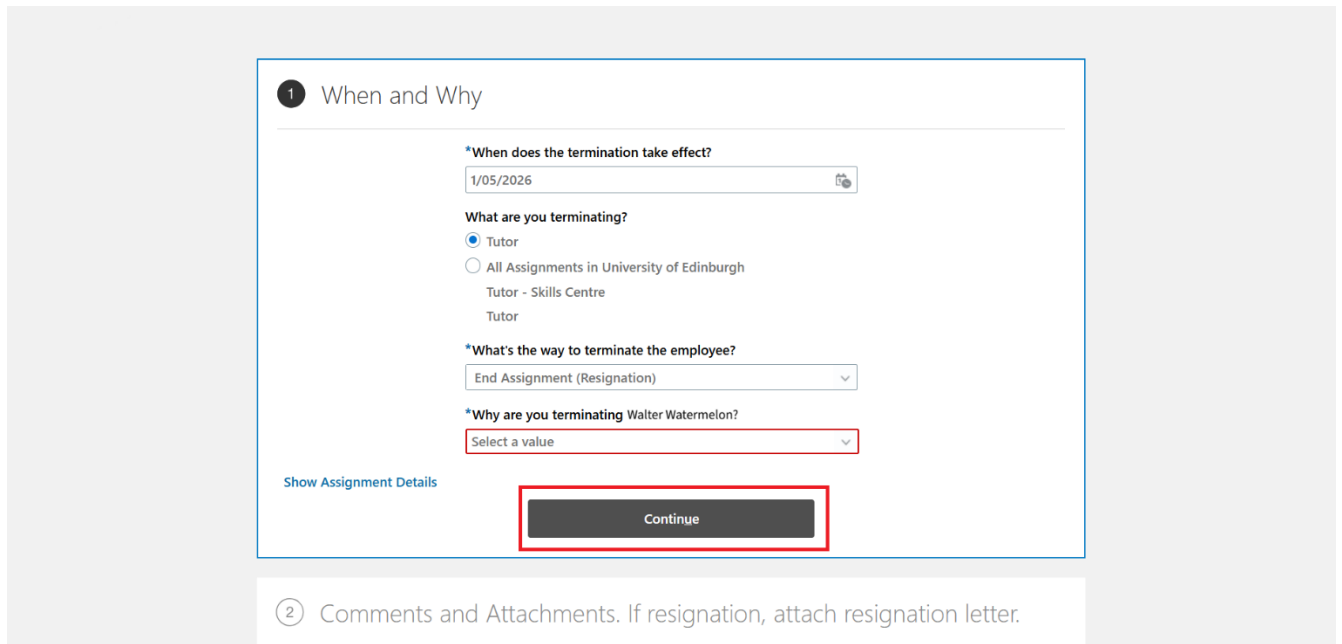
| | |
|---|---|
| Tutor - Skills Centre | |
| Location Dugald Stewart Building | Position Tutor (CI) (ACAD - Tutors and Demonstrators) |
| Department Philosophy, Psychology and Language Sciences | Assignment Status Active - Payroll Eligible |
| Job Tutor (CI) (ACAD - Tutors and Demonstrators) | Assignment Number E123456789 |
| Business Unit University of Edinburgh | Manager Penelope Peach |

| | |
|--|---|
| Tutor | |
| Location Grant Institute | Position Tutor (CI) (ACAD - Tutors and Demonstrators) |
| Department GeoSciences | Assignment Status Active - Payroll Eligible |
| Job Tutor (CI) (ACAD - Tutors and Demonstrators) | Assignment Number E987654321 |
| Business Unit University of Edinburgh | Manager Sally Sweetcorn |

Continue

Click on **Hide Assignment Details** (blue text) once you've finished viewing the information.

6. Then, click **Continue**.



1 When and Why

*When does the termination take effect?
1/05/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
End Assignment (Resignation)

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

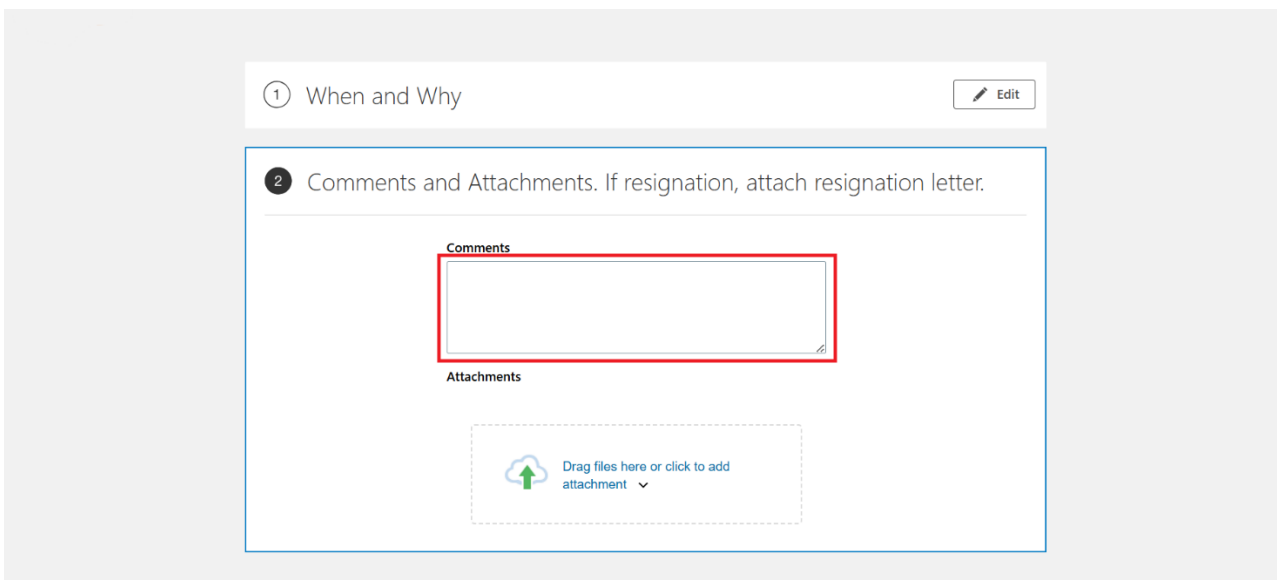
Continue

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

7. In the **Comments and Attachments** section, enter comments as appropriate:

- a. **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. The **Comments** 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 the employee is leaving due to Voluntary Redundancy or a Retirement Offer, you must include any payment details in the **Comments** field.
- b. 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 **Comments** field.
- c. **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 **Comments** field. Further guidance is available on the [Immigration Fee Assistance](#) webpage within the Immigration Fee Financial Assistance Guidelines.
- d. **Electric Vehicle salary sacrifice** – Payroll will check whether any additional payments e.g.

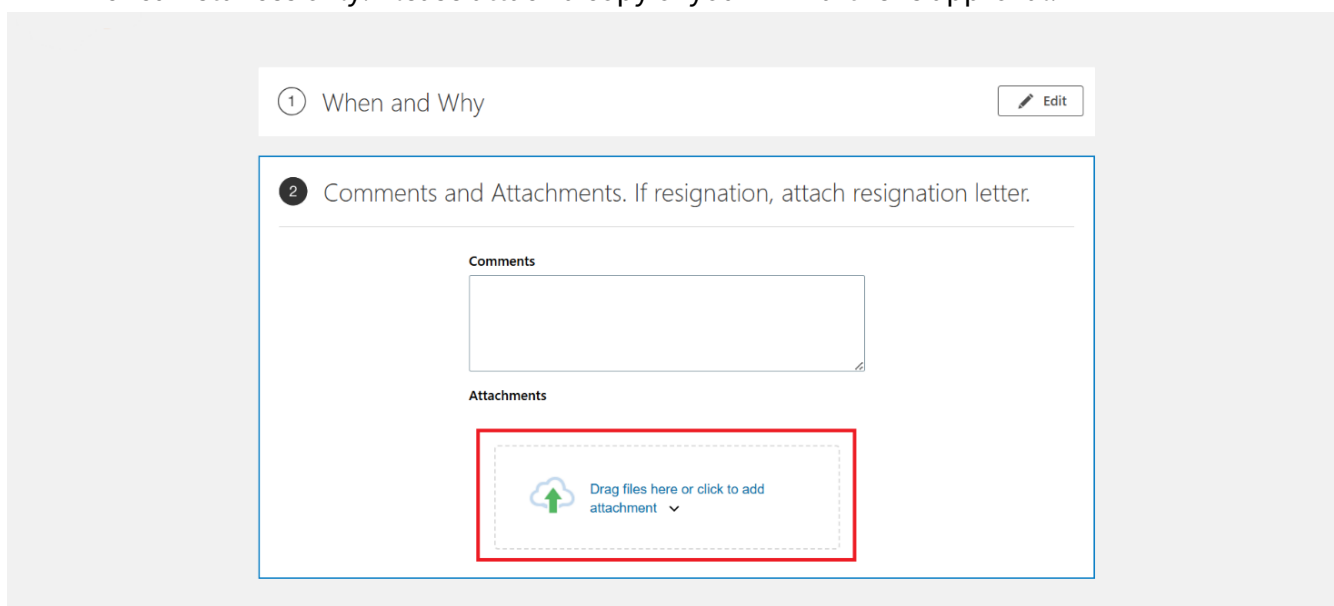
early termination charge, are required upon receipt of the termination notification in People and Money. However, if you are aware that the employee has an electric vehicle and may have an additional payment to make, you can make Payroll aware of this by adding a comment to the **Comments** field. Further guidance is available on the [Pay & Reward SharePoint](#).



The screenshot shows a form with two steps. Step 1 is 'When and Why' with an 'Edit' button. Step 2 is 'Comments and Attachments. If resignation, attach resignation letter.' It contains a 'Comments' text area (highlighted with a red box) and an 'Attachments' section with a dashed box and the text 'Drag files here or click to add attachment'.

8. Upload any relevant attachments. **The following termination action names require an attachment:**

- a. **End Assignment (Resignation)** – please attach a copy of the resignation letter/notification.
- b. **Dormant** – to be used for the Guaranteed Hours Dormant process. Please attach copies of both letters issued to the employee.
- c. **Dismissal** – please attach a copy of the HR Partner’s/Case Management Team’s approval
- d. **Abandon Contract without Following Resignation Procedure** – to be used in exceptional circumstances only. Please attach a copy of your HR Partner’s approval.



The screenshot shows the same form as above, but with a red box around the 'Attachments' section, which includes a dashed box and the text 'Drag files here or click to add attachment'.

Terminate Employment
Walter Watermelon

Submit Cancel

1 When and Why Edit

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

Comments

Attachments

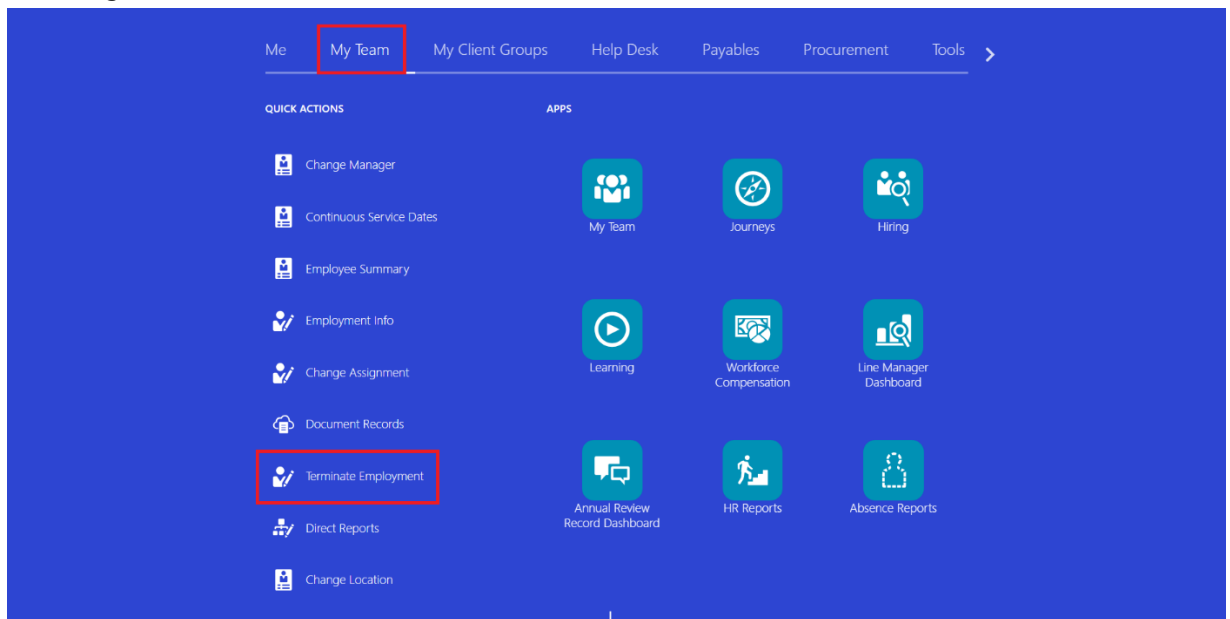
9. Scroll to the top of the page and click on **Submit** on the top right corner.
10. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

Terminate All Assignments (Full Termination)

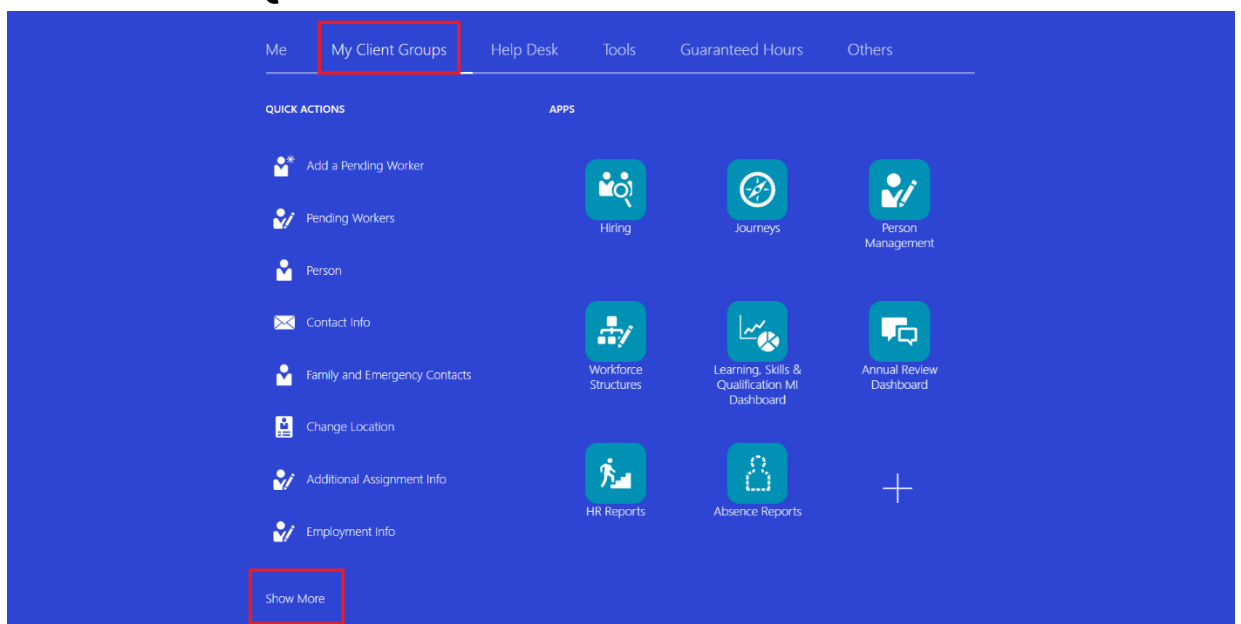
This section should be followed when an employee has **multiple assignments** and is leaving the university **entirely** (i.e. they are leaving **ALL** assignments).

You must discuss and agree with the line manager(s)/SDA(s) of the other posts who is processing the termination in People and Money.

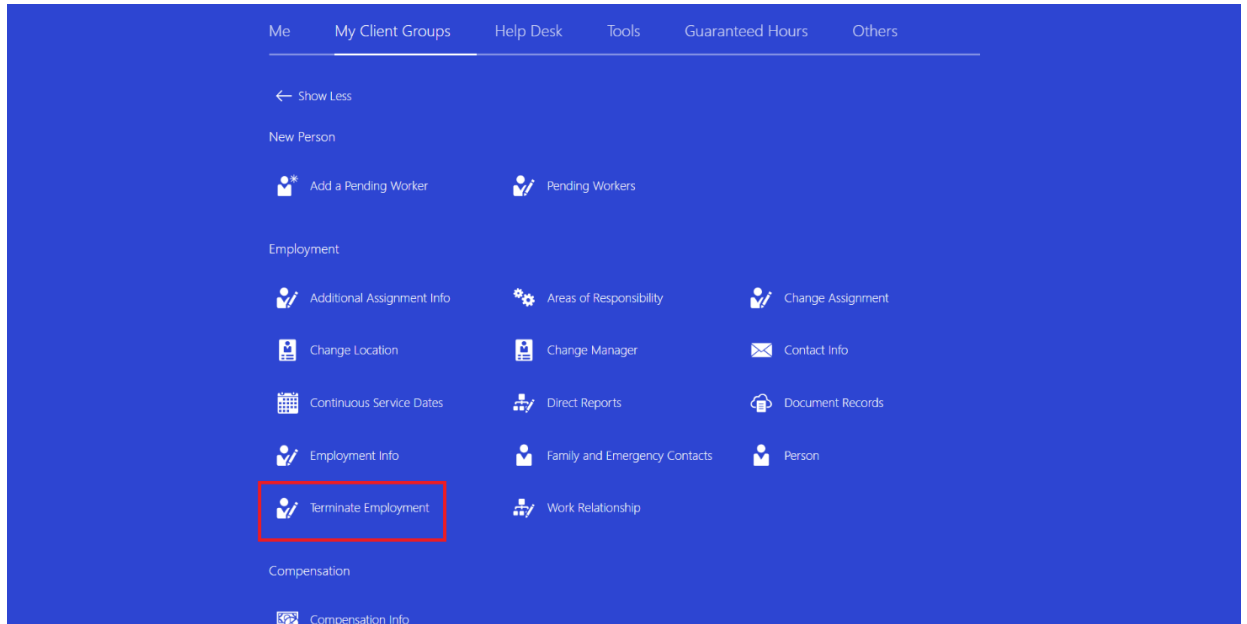
1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



- b. If you are a **School/Department Administrator**, select the **My Client Groups** tab then select **Show More** under **Quick Actions**.

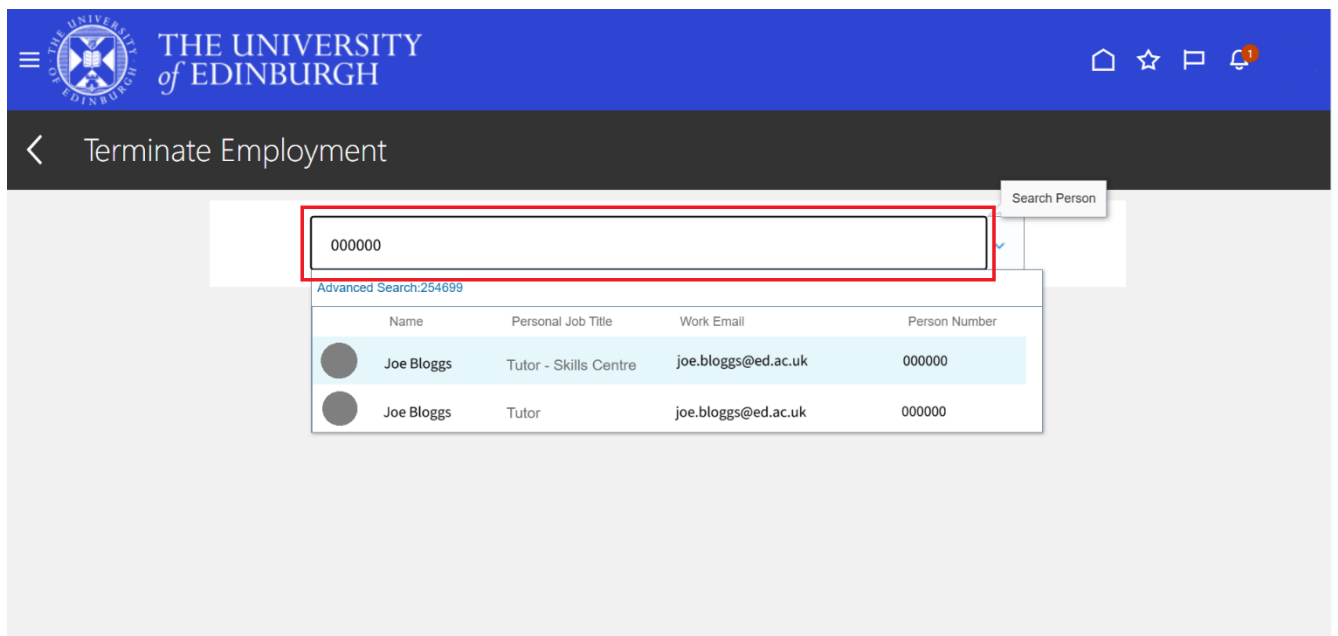


Then, select **Terminate Employment** under the **Employment** heading.



2. **Search** for and **select** the employee you wish to terminate. Alternatively, if you are a line manager, you can select an employee from the list of **Direct Reports** below the search bar.

Note: As you are terminating **all of the employee's assignments**, it doesn't matter which assignment you pick at this stage.



3. You will be presented with a screen that contains two boxes: **Termination Info** and **Comments** and Attachments. You **must** select **both** boxes before clicking **Continue** to ensure that all of the relevant fields appear in the next screen.

If the employee you're terminating is currently a line manager, a third box called '**Reassign Existing Reports**' will also appear. You must also select this box before clicking **Continue** to allow you to reassign the employees direct reports in the next screen at the same time as the termination.

BB Terminate Employment
Barbara Banana

Continue Cancel

Termination Info Comments and Attachments

4. In the **When and Why** section:
- In the **When does the termination take effect?** field select the effective date of the termination (i.e., the employee's last day of employment). Alternatively, you can type in the effective date manually.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

April 2026

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
| 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 | 1 | 2 |

Today

- b. In the **What are you terminating?** field ensure the **All Assignments** option is selected.

The screenshot shows a form titled "1 When and Why". At the top, there is a green warning banner that reads: "The employee can see their termination details when the termination type is voluntary." Below this, the form contains several fields:

- *When does the termination take effect? (Date field): 30/04/2026
- What are you terminating? (Radio button selection):
 - Tutor
 - All Assignments in University of Edinburgh
 - Tutor - Skills Centre
 - Tutor
- *What's the way to terminate the employee? (Dropdown menu): Cancellation of Hire
- *Why are you terminating Walter Watermelon? (Dropdown menu): Select a value

At the bottom left, there is a link "Show Assignment Details". At the bottom center, there is a "Continue" button.

- c. Select the relevant **Action Name** from the **What's the way to terminate the employee?** drop down menu. Please use the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

This screenshot is identical to the one above, but with a red box highlighting the "What's the way to terminate the employee?" dropdown menu. The selected option is "Cancellation of Hire".

- d. Select the relevant **Action Reason** from the **Why are you terminating [employee's name]?** drop down menu. Please see the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

Notes:

- Please be aware that each termination action name 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 [Appendix A](#) at the end of this document.
- In the case of **non-workers** who are on a Tier 5/Temporary Worker visa, the Action Name '**Non Worker**' and Action Reason '**Tier 5 Sponsored Researcher**' should always be used.
- In the case of **Contingent Workers** ending their period of engagement, please use the action name '**End Contingent Worker**' in all cases.

5. To view the details of the employee's other assignments, click on **Show Assignment Details**.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

6. Then, click **Continue**.

1 When and Why

⚠ The employee can see their termination details when the termination type is voluntary.

*When does the termination take effect?
30/04/2026

What are you terminating?
 Tutor
 All Assignments in University of Edinburgh
Tutor - Skills Centre
Tutor

*What's the way to terminate the employee?
Cancellation of Hire

*Why are you terminating Walter Watermelon?
Select a value

Show Assignment Details

Continue

7. In the Work Relationship Info section, complete the following:

- a. Select the 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 [Appendix C](#) (not applicable for end contingent worker).
- b. Select the relevant **HESA Location After Leaving** from the dropdown menu. To see the different HESA Location after Leaving dropdown options and when to use them, go to the [Appendix D](#) (not applicable for end contingent worker).
- c. Select the relevant **HESA Activity After Leaving** from the dropdown menu. To see the different HESA Activity After Leaving dropdown options and when to use them, go to [Appendix E](#) (not applicable for end contingent worker).

1 When and Why Edit

2 Work Relationship Info

*HESA Reason for end of contract

*HESA Location After Leaving

*HESA Activity After Leaving

Pay Adjustments Required

Continue

8. **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). If the employee is leaving due to Voluntary Redundancy or a Retirement Offer, you must include any payment details in this field.

The screenshot shows a web form interface. At the top, there is a tab labeled '1 When and Why' and an 'Edit' button. Below this is a sub-section titled '2 Work Relationship Info'. Inside this sub-section, there are three dropdown menus: '*HESA Reason for end of contract', '*HESA Location After Leaving', and '*HESA Activity After Leaving'. Below these dropdowns is a text area labeled 'Pay Adjustments Required', which is highlighted with a red border. At the bottom of the sub-section is a 'Continue' button.

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](#).

9. Then, click **Continue**.

1 When and Why Edit

2 Work Relationship Info

*HESA Reason for end of contract

*HESA Location After Leaving

*HESA Activity After Leaving

Pay Adjustments Required

Continue

10. In the **Comments and Attachments** section, enter comments as appropriate and upload any relevant attachments. **The following termination action names require an attachment:**
- Resignation** – please attach a copy of the resignation letter/notification.
 - Dormant** – to be used for the Guaranteed Hours Dormant process. Please attach copies of both letters issued to the employee.
 - Dismissal** – please attach a copy of the HR Partner’s/Case Management Team’s approval
 - Abandon Contract without Following Resignation Procedure** – to be used in exceptional circumstances only. Please attach a copy of your HR Partner’s approval.

1 When and Why Edit

2 Work Relationship Info Edit

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

Comments

Attachments

Drag files here or click to add attachment

11. Scroll to the top of the page and click on **Submit** on the top right corner.

The screenshot shows a web interface for terminating employment. At the top left, there is a circular profile picture with the initials 'BB' and the name 'Barbara Banana'. The title 'Terminate Employment' is centered at the top. On the top right, there are two buttons: 'Submit' (highlighted with a red box) and 'Cancel'. Below the header, there are three numbered sections:

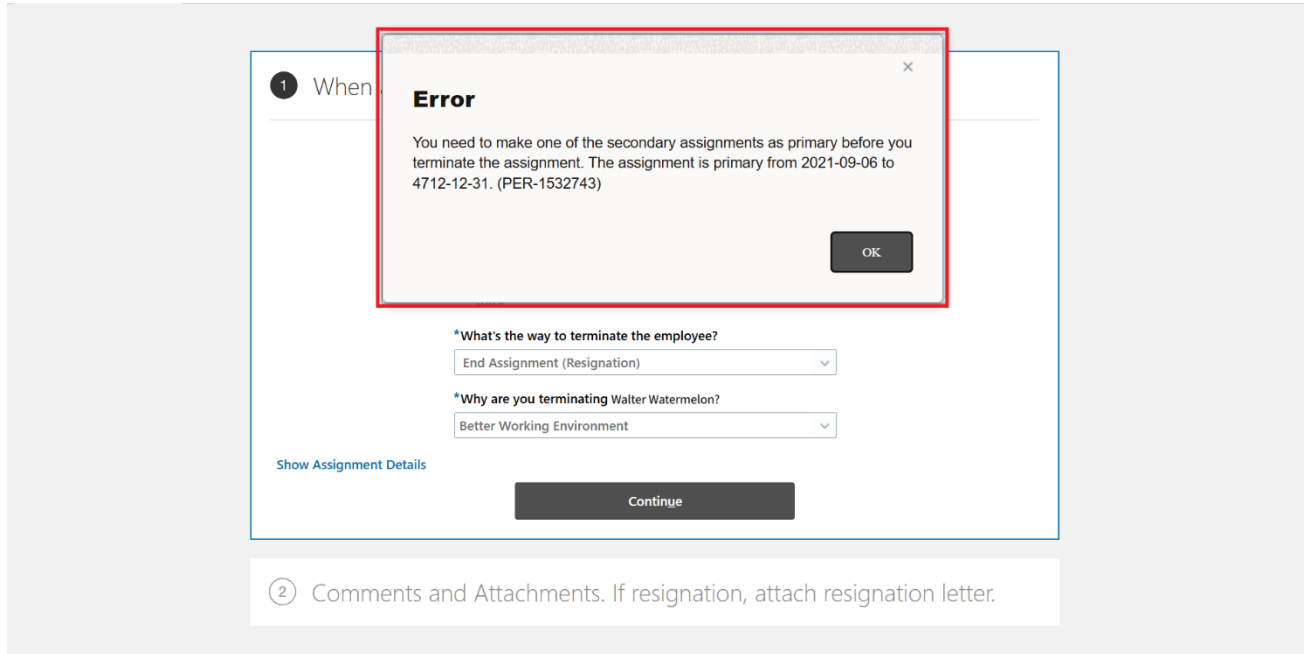
- 1. When and Why (with an 'Edit' button)
- 2. Work Relationship Info (with an 'Edit' button)
- 3. Comments and Attachments. If resignation, attach resignation letter. (This section is highlighted with a blue border and contains a 'Comments' text area and an 'Attachments' label below it.)

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

Troubleshooting

Primary Assignment Warning

1. If you are trying to terminate one assignment for an employee who has multiple assignments at the university, the warning below may appear:



2. Raise a Service Request with HR using the **Switch Primary Assignment before Termination** category and provide the following information:
 - a. The assignment number you're trying to terminate
 - b. The effective date of the termination

HR Operations will move the Primary Status to an assignment that is not being terminated. **Before raising a Service Request**, you must confirm with the employee whether they are leaving the University entirely or only leaving one assignment.

If the employee is leaving the University completely, meaning they are ending all assignments, please follow the [Terminate All Assignments \(Full Termination\)](#) section of this guide. Additionally, if the employee has assignments outside your school/department, please ensure you have spoken with the relevant Line Managers/SDAs in those areas before terminating all assignments.

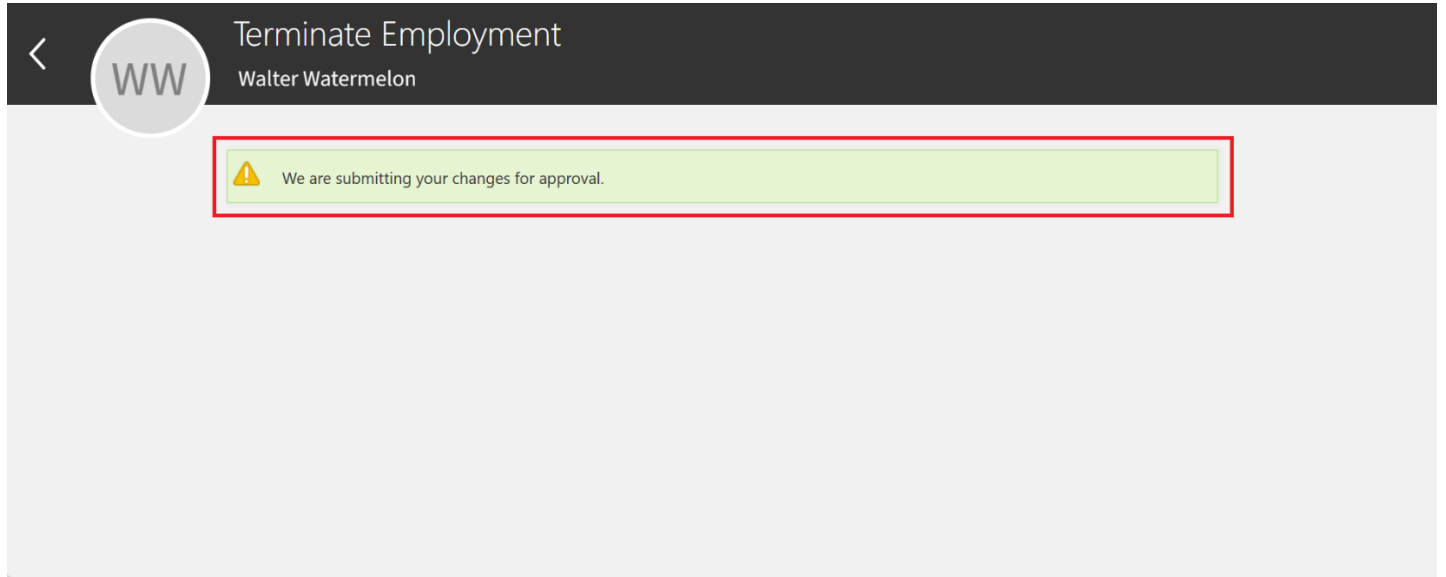
4. HR Operations will confirm when the Primary Status has been moved and will confirm which assignment is now Primary.

Please note: The Offboarding (Leaver) journey will be automatically assigned to the line manager of the primary assignment. You should contact that line manager and ask them to reassign the tasks in the journey to you, or to the relevant line manager.

5. You can now return to the Terminate Employment App and process the termination. Please follow the [Terminate One Assignment Only \(Partial Termination\)](#) section of this guide.

When a Change is Already in Progress

When you go in to the Terminate Employment app, you may see the following warning message:



This message means that a change (e.g. a termination for another assignment or a change assignment request) has already been submitted for this employee and it is pending approval.

You must wait until this change has been approved before you can proceed with the termination. Please follow the steps below:

3. Check the **Worklist** (notification bell in P&M > Show All > Worklist). If you submitted the pending change, the progress will be shown in here.
4. If you didn't submit the pending change, you can raise a service request with the HR Helpline under the 'leaving the university' category to find out more information.

Appendix

Appendix A – Action Names and Action Reasons – Employee is Leaving University Entirely

The table below shows the action name and action reason dropdown options, together with the associated correspondence journeys. These actions and action reasons will appear in the Terminate Employment app when you are terminating either:

- an employee who has one assignment, or
- an employee with multiple assignments where all assignments are being terminated.

| 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. Employee, Line Manager and SDA receives 'Leaving the University' Journey and Tasks. |
| | Better Working Environment | Employee resigns for a better working environment. | |
| | Better Work-Life Balance | Employee resigns for a better work-life balance. | |
| | 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. |
| | Retirement Offer | For use by HR Only in the circumstance the employee opts for a retirement offer. | 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 | Employee receives confirmation that their fixed term contract is ending as expected. |

| | | | |
|------------------------|-------------------------------|--|---|
| | | redundancy payment, and they have over two years of service, then the action reason ‘Redundancy from Expiry of FTC applies. | 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 Operations. | No Journey or correspondence. Line Managers should follow the <u>Death in Service guidance</u> 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 | |

| | | | |
|-----------------------------|---|---|---|
| | | <p>employee is on a student experience contract and this ends earlier than anticipated due to their studies coming to an end earlier than expected.</p> <p>You should only use this action reason following advice from HR.</p> | <p>reason' Journey and Tasks. No Journey to Employee.</p> <p>No correspondence.</p> |
| 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 | <p>Employee is made redundant from their Open-Ended Contract.</p> <p>You should only use this action reason following advice from your HR Partner.</p> | |
| | Voluntary Redundancy | For use by HR Only in the circumstance the employee opts for voluntary redundancy. | |
| 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 | Employment Terminated Due to | Employment is terminated due to immigration | Employee, Line Manager and SDA receive Leaving the |

| | | | |
|-----------------------------|--------------------------|---|--|
| to Immigration Restrictions | Immigration Restrictions | restrictions. You should only use this action reason following advice from the immigration team. | University Journey and Tasks |
| Cancellation of Hire | Cancellation of Hire | For HR 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 | No Journey/Correspondence |

| | | | |
|------------|-------------------------|--|---------------------------|
| | | 12th July, termination date 31st July). | |
| 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 | |

Appendix B – Action Names and Action Reasons – Partial Termination (Multiple Assignment Holders)

The following Actions and Action Reasons can only be used in People and Money when you are following the [Terminate One Assignment Only](#) section of this guide:

| Action Name | Action Reason | When to use this Action Reason | Journey and correspondence triggered |
|------------------------------|---|--|---|
| End Assignment (Resignation) | Better Pay and Benefits package | Employee resigns for better pay and benefits package. | Employee receives an acceptance of resignation letter. Employee, Line Manager and SDA receives 'Leaving the University' Journey and Tasks. |
| | Better work life balance | Employee resigns for a better working environment. | |
| | Better working environment | Employee resigns for a better work-life balance. | |
| | 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 Effect 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. | |

| | | | |
|-------------------------------------|--|--|---|
| | Not Known | Employee resigns without providing a reason. | |
| | 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. | |
| End Assignment (Not Resignation) | Abandon contract without following resignation procedure | 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 |
| | 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 |
| | 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. |

| | | | |
|--|---|--|--|
| | Dismissal – Conduct | Employee is dismissed due to conduct. You should only use this action reason following advice from your HR Partner. | |
| | Dismissal – Ill health | Employee is dismissed due to ill-health. You should only use this action reason following advice from your HR Partner. | |
| | Dismissal – 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. | Line Manager and SDA receive ‘Leaving the University for an involuntary reason’ Journey and Tasks. No Journey to Employee. No correspondence. |
| | 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 ‘End of assignment but continuing at the university’ Journey and Tasks. |
| | End of Secondment | Employee is leaving their partial secondment assignment. If the hours in the remaining assignment | Employee, Line Manager and SDA receive ‘End of assignment but continuing at the university’ Journey and |

| | | | |
|--|-------------------------------|--|--|
| | | are to be increased, remember to submit a Change of Hours request. If the employee is leaving their full secondment do not process a termination. Instead, please complete the Return from Secondment Form on the A-Z of Forms . | Tasks. No correspondence. |
| | 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 |
| | Redundancy from Expiry of FTC | 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 Contract | Employee is made redundant from their Open-Ended Contract. You should only use this action reason following advice from your HR Partner. | Employee, Line Manager and SDA receive 'Leaving the University Journey' and Tasks. |
| | 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 |
| | Voluntary Redundancy | For use by HR Only in the circumstance the employee opts for voluntary redundancy. | Employee, Line Manager and SDA receive 'Leaving the University Journey' and Tasks. |
| | 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 |

Appendix C – 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 |

Appendix D – 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 |

Appendix E – 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 |

Version History

| Version | Date | Description | Approved By |
|----------------|-----------------|--|----------------------|
| 1.0 | 23 October 2025 | Updated guide to new format. Added information on new termination action reasons: 'Voluntary Redundancy' and 'Enhanced Retirement'. | M. Easton / P. Banks |
| 2.0 | 25 May 2026 | Updated screenshots and process to reflect move to V3 of Terminations. | SK |

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.