



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** which is linked below:

[Guide to Employment Separation](#)

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](#) 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](#) 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 at least 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 GH Dormant Process guidance within the [Guide to Guaranteed Hours](#) 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**. Select **Terminate Employment** under the **Employment** heading.
2. **Search** for and select the employee you wish to terminate.
3. In the **Info to include** screen, click on the slider in the **Comments and attachments** box so that it turns blue. If the Existing Reports box also appears and you wish to reassign the employee's direct reports ensure you click on the slider for this box as well.
4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.
6. Select the **Termination Date** (i.e., the employee's last day of employment).
7. Select the relevant **Termination Action** from the 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.
8. Select the relevant **Termination Reason** from the 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.
9. Then, click **Continue**.
10. Select the relevant **HESA Reason for End of Contract**, **HESA Location After Leaving** and **HESA Activity After Leaving** from the dropdown menus.
11. Add any other pay adjustments required, for example, to recover relocation payments, payments for balancing of annualised or fractional contracts etc.
12. Then, click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on **Submit** until you have reached and completed the **Comments and attachments section**.
13. In the **Existing Reports** section (if applicable), reassign the employee's direct reports to a new line manager.
14. In the **Comments and Attachments** section, confirm you are requesting a termination for the

whole employment relationship (i.e. they are leaving the university) in the **Comments** box.

15. Click on the **Save Comment** button.

16. Upload any relevant attachments.

17. Click on **Submit**.

18. 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

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.
3. In the **Info to include** screen, click on the slider in the **Comments and attachments** box so that it turns blue. If the Existing Reports box also appears and you wish to reassign the employee's direct reports ensure you click on the slider for this box as well.
4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.
6. Select the **Termination Date** (i.e., the employee's last day of employment).
7. Next, select the **Assignment** option under **What are you terminating?**.
8. Select the relevant **Termination Action** from the drop-down menu. Please use [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.
9. Select the relevant **Termination Reason** from the drop-down menu. Please use [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.
10. Then, click **Continue**. **Note:** if an error appears after clicking Continue, please see the [Primary Assignment Warning](#) section of this guide.
11. In the **Assignment termination info** section, select the relevant **HESA Reason for End of Contract**

from the drop-down menu.

12. Click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on **Submit** until you have reached and completed the **Comments and attachments section**.
13. In the **Existing Reports** section (if applicable), reassign the employee's direct reports to a new line manager.
14. In the **Comments and attachments** section, enter comments as appropriate.
15. Click on the **Save Comment** button.
16. Upload any relevant attachments.
17. Click on **Submit**.

18. 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

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.
3. In the **Info to include** screen, click on the slider in the **Comments and attachments** box so that it turns blue. If the Existing Reports box also appears and you wish to reassign the employee's direct reports ensure you click on the slider for this box as well.
4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.
6. Select the **Termination Date** (i.e., the employee's last day of employment).
7. Next, ensure the **Work Relationship** option is selected under **What are you terminating?**. This will terminate all of the employee's assignments.

8. Select the relevant **Termination Action** from the 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.
Select the relevant **Termination Reason** from the 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.
9. Then, click **Continue**.
10. Select the relevant **HESA Reason for End of Contract**, **HESA Location After Leaving** and **HESA Activity After Leaving** from the dropdown menus.
11. Then, click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on Submit until you have reached and completed the **Comments and attachments section**.
12. In the **Existing Reports** section (if applicable), reassign the employee's direct reports to a new line manager.
13. In the **Comments and Attachments** section, confirm you are requesting a termination for the whole employment relationship (i.e. they are leaving the university) in the **Comments** box.
14. Click on the **Save Comment** button.
15. Upload any relevant attachments.
16. Click on **Submit**.
17. 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](#) 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.

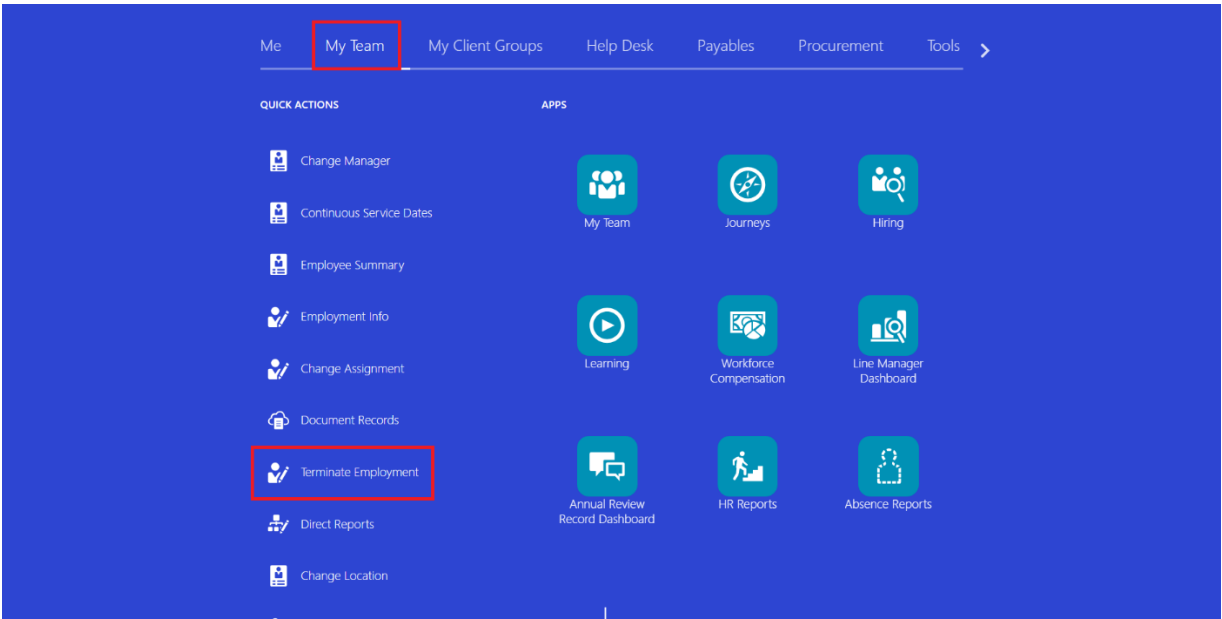
In Detail

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

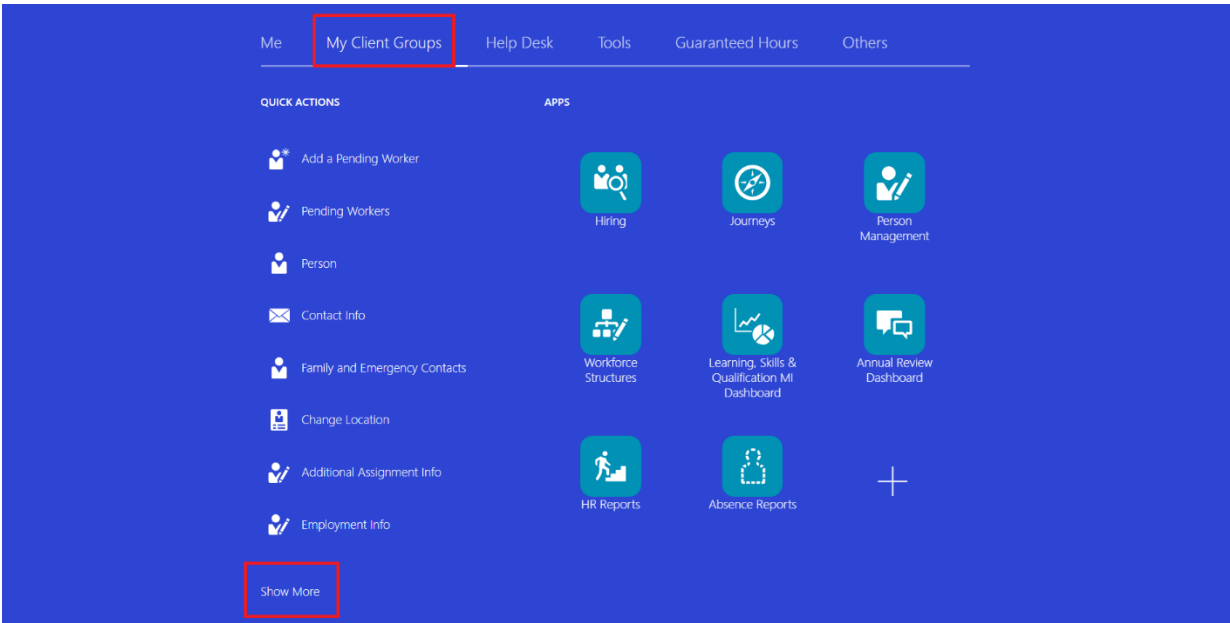
How to Process Terminations for Employees with One Assignment Only

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

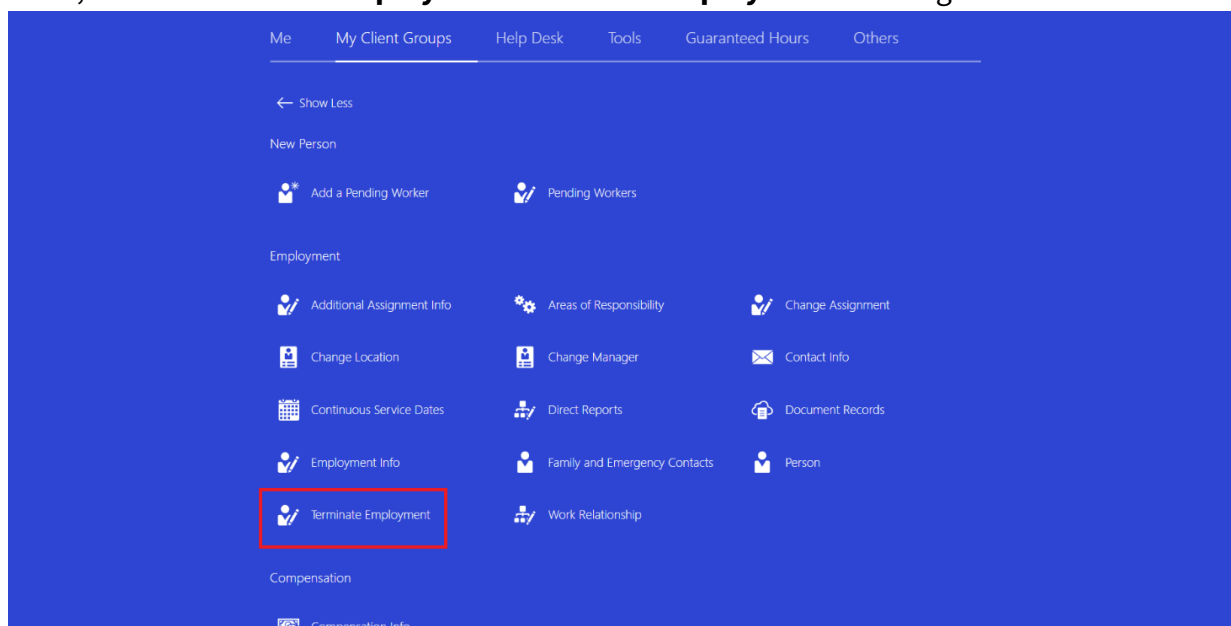
- 1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



- 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 the employee you wish to terminate by their Name or Person Number. Alternatively, you can select an employee from the list of employees 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.

Tip: Inactive assignments are visible and selectable. To hide inactive records, you can use the **Assignment Status** filter below the search bar.

The screenshot shows the 'Terminate Employment' page in the University of Edinburgh system. The search bar is highlighted with a red box. Below it are filters for 'Personal Job Title', 'Assignment Status', 'Effective As-of Date', 'Include Terminated Work Relationships', 'Termination Date', 'Worker Type', and 'Filters'. A table of employees is shown below the filters.

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type
Sam Strawberry	Research Publications & Systems Administrator	000000	E000000	Active - Payroll Eligible	En
Tommy Tomato	Teaching Fellow (C1) (ACAD - Teacher)	000001	E000001	Inactive - Payroll Eligible	En
Rosie Raspberry	Teaching Fellow (C1) (ACAD - Teacher)	000002	E000002	Inactive - Payroll Eligible	En
Ben Blueberry	Demonstrator	000003	E000003	Inactive - Payroll Eligible	En

3. In the **Info to include** screen, click on the slider in the **Comments and attachments** box so that it turns blue.

Terminate Employment

Info to include

Ben Blueberry, Research Publications & Systems Administrator

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 5

- Info to include
- When and why
- Work relationship termination info
- Comments and attachments
- Continuous Service dates

If the employee you're terminating is currently a line manager, a second box called '**Existing Reports**' will also appear. If you want to reassign the employee's direct reports at this stage, click on the slider in this box so that it turns blue.

If the new line manager is not known at this stage, the direct reports may be reassigned at a later date by following the [How to change direct reports guide](#) (under Human Resources > Job Changes). However, it is essential that the direct reports are reassigned **before** the line manager leaves their assignment/the university.

Terminate Employment

Info to include

Sam Strawberry, Finance Manager

Existing reports
Reassign a manager's direct reports and other report types.

☐

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 6

- Info to include
- When and why
- Work relationship termination info
- Existing reports
- Comments and attachments
- Continuous Service dates

4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.

Terminate Employment

When and why

Ben Blueberry, Research Publications & Systems Administrator

Termination Notification Date

<
July 2026
>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Termination Date

2 | 5

- Info to include
- When and why
- Work relationship termination info
- Comments and attachments
- Continuous Service dates

6. Select the **Termination Date** (i.e., the employee's last day of employment).

Note: this field will be prepopulated with the same date you selected for the Termination Notification Date so please ensure you change it to the correct termination date.

Information
X

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

Termination Notification Date
17/07/2026

Termination Date
31/07/2026

What are you terminating?

☒ Work relationship

University of Edinburgh

> Research Publications & Systems Admin

Termination Action
Cancellation of Hire

<
July 2026
>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

required

Cancel Continue Submit

2 | 5

- Info to include
- When and why
- Work relationship termination info
- Comments and attachments
- Continuous Service dates

7. As the employee only has one assignment, **Work Relationship** will already be selected under **What are you terminating?**.

Information

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

Termination Notification Date

17/07/2026

Termination Date

31/07/2026

What are you terminating?

Work relationship

University of Edinburgh

Research Publications & Systems Administrator

Termination Action

Cancellation of Hire

Termination Reason

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

8. Click on the arrow next to the employee's job title to expand the section. If there is more than one assignment listed, please follow the [How to Process a Termination for Employees with Multiple Assignments](#) section of this guide instead.

If the employee only has **one** assignment, please proceed to the next step.

Work relationship

University of Edinburgh

Research Publications & Systems Administrator

Location

Blueberry Building

Department

Fruit Department

Job

Administrator (B1) (PAO - Administration)

Business Unit

University of Edinburgh

Position

Administrator (B1) (PAO - Administration)

Assignment Status

Active - Payroll Eligible

Assignment Number

E000000

Manager Name

Barbara Banana

Termination Action

Cancellation of Hire

Termination Reason

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

9. Select the relevant **Termination Action** from the drop-down menu. Scroll through the list or start typing the name of the Termination Action to find the correct one. Please use the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

The screenshot shows the 'Work relationship' section for the University of Edinburgh. A red box highlights a table of Termination Actions. Below the table, a dropdown menu is open, showing 'Cancellation of Hire' as the selected option. To the right, a sidebar contains sections for 'Info to include', 'When and why', 'Work relationship termination info', 'Comments and attachments', and 'Continuous Service dates'.

Action Name	Action Code
Abandon Contract	ABANDON_CONTRACT
Cancellation of Hire	TERMINATION
Death in Service	DEATH
Death of UOE Pensioner	DEATH_PENSIONER
Dismissal	INVOLUNTARY_TERMINATION

Termination Action: Cancellation of Hire

Termination Reason: [Required]

Buttons: Cancel, Continue, Submit

10. Select the relevant **Termination Reason** from the drop-down menu. Scroll through the list or start typing the name of the Termination Reason to find the correct one. Please see the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

The screenshot shows the 'Work relationship' section for the University of Edinburgh. A red box highlights a table of Termination Reasons. Below the table, a dropdown menu is open, showing 'Resignation' as the selected option. To the right, a sidebar contains sections for 'Info to include', 'When and why', 'Work relationship termination info', 'Comments and attachments', and 'Continuous Service dates'.

Action Reason	Action Reason Code
Better Pay and Benefits Package	RESIGN_PAY_BENEFITS
Better Work-Life Balance	RESIGN_WORK_BALANCE
Better Working Environment	RESIGN_WORK_ENV
Career Change	RESIGN_CHANGE_CAREER
Career Progression	RESIGN_NEXT_STEP_CAREER

Termination Action: Resignation

Termination Reason: [Required]

Buttons: Cancel, Continue, Submit

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/department 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, please **do not process** the termination via the Terminate Employment app. Instead, please raise a Service Request under the 'Leaving the University' category.
- In the case of **Contingent Workers** ending their period of engagement, please use the action name '**End Contingent Worker**' in all cases.

11. Then, click **Continue**.

Work relationship

University of Edinburgh

Research Publications & Systems Administrator

Location	Department
Blueberry Building	Fruit Department
Job	Business Unit
Administrator (B1) (PAO - Administration)	University of Edinburgh
Position	Assignment Status
Administrator (B1) (PAO - Administration)	Active - Payroll Eligible
Assignment Number	Manager Name
E000000	Barbara Banana

Termination Action
Resignation

Termination Reason
Career Change

Cancel **Continue** Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

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

- Select the relevant **HESA Reason for End of Contract** from the dropdown menu.
To see the different HESA Reason for End of Contract drop-down options, go to [Appendix C](#).
- Select the relevant **HESA Location After Leaving** from the drop-down menu. To see the different HESA Location after Leaving dropdown options and when to use them, go to the [Appendix D](#).
- Select the relevant **HESA Activity After Leaving** from the drop-down menu. To see the different HESA Activity After Leaving dropdown options and when to use them, go to [Appendix E](#).

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract

Required

HESA Location After Leaving

Required

HESA Activity After Leaving

Required

Pay Adjustments Required

Cancel

Continue

Submit

3 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

13. **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.

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract

Required

HESA Location After Leaving

Required

HESA Activity After Leaving

Required

Pay Adjustments Required

Cancel

Continue

Submit

3 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

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](#).

14. Then, click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on **Submit** until you have reached and completed the **Comments and attachments** section.

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract ▼
Required

HESA Location After Leaving ▼
Required

HESA Activity After Leaving ▼
Required

Pay Adjustments Required

Cancel **Continue** Submit

3 | 4

- Info to include
- When and why
- Work relationship termination info**
- Comments and attachments

15. If the employee you are terminating is a line manager and you enabled the Existing Reports toggle in the Info to Include section, please move on to [Step 16](#) below.

If the employee you are terminating is not a line manager or you have chosen not to reassign their direct reports at this time, please move on to [Step 19](#).

16. In the **Existing Reports** section:

- a. If you want to move all direct reports to the same manager, tick the **Select All** box.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☐

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

Cancel

Continue

Submit

- b. If you want to move some direct reports to one manager and others to a different manager, tick the boxes next to the employee(s) you want to move first.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☒

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

Cancel

Continue

Submit

- Rosie Raspberry
Knowledge Exchange and Impact Administrator
Administrator (B1) (PAO - Academic Support)

4 | 5

Name	Personal Job Title	Work Email	Person Number
Linda Lime	Library Collections Assistant		
Penelope Pear	Post Graduate Student Requestor		
Fenella Fig	Post Graduate Student Requestor		
Oscar Orange	Head of School		
Larry Lemon	Demonstrator		
Gerald Grapefruit	Tutor		

Search for proposed manager

Required

Cancel

Continue

Submit

Work relationship termination info

Existing reports

Comments and attachments

- | Proposed Managers | |
|--|--|
| <div></div> <div>Oscar Orange</div> <div>Head of School</div> | |
| <div></div> <div>Carrie Cantaloup</div> <div>Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)</div> | <div></div> |
| <div></div> <div>Ralph Raspberry</div> <div>Knowledge Exchange and Impact Manager
Manager (C1) (PAO - Administration)</div> | <div></div> |
| <div></div> <div>Katie Kiwi</div> <div>Marketing and Communications
Coordinator
Administrator (C1) (PAO - Marketing and Communications)</div> | <div></div> |

The direct reports will be reassigned to their new line manager the day after the current line manager leaves the university/their assignment.

19. In the **Comments and Attachments** section, confirm you are requesting a termination for the whole employment relationship (i.e. they are leaving the university) in the **Comments** box.

You **must** select **Save Comment** otherwise your comment **will not** appear in the notification for HR Operations to see.

Terminate Employment

Comments and attachments

Ben Blueberry , Research Publications & Systems Administrator

Comments

Save Comment

Drag and Drop
Select or drop files here.

URL Add URL

Cancel Submit

4 | 4

- Info to include
- When and why
- Work relationship termination info
- Comments and attachments**

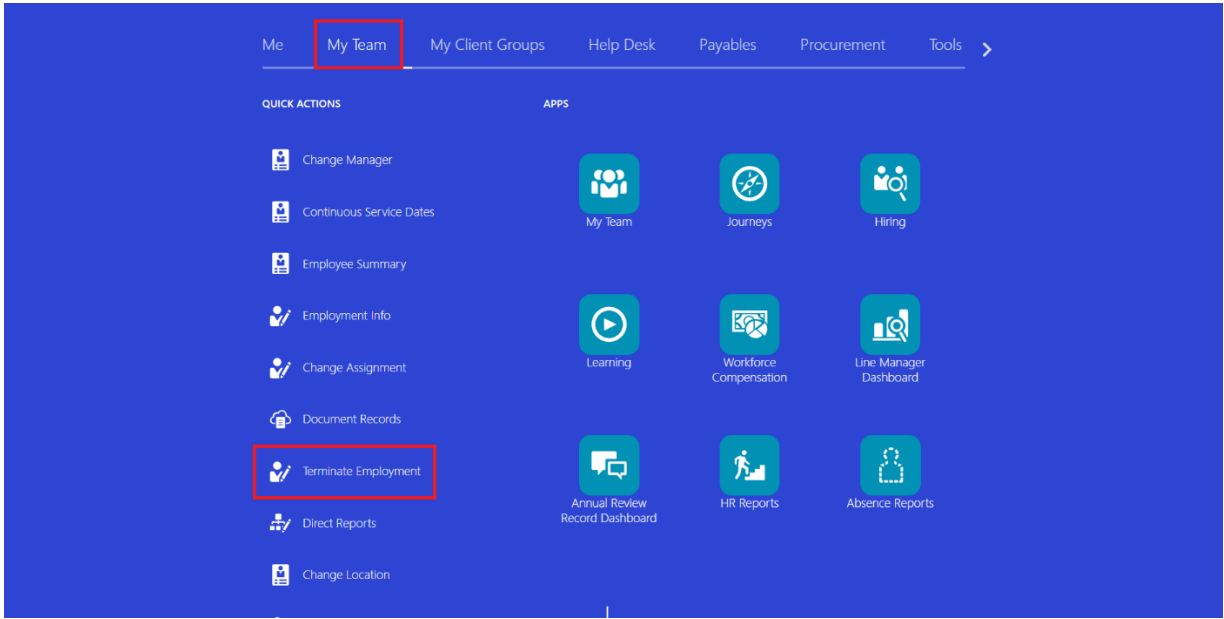
20. Upload any relevant attachments. **The following termination action names require an attachment:**
- Resignation** – please attach a copy of the resignation letter/notification.
 - Dormant** – to be used for the Guaranteed Hours Dormant process. Please attach copies of both letters issued to the 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.

How to Process a Termination for Employees with Multiple Assignments

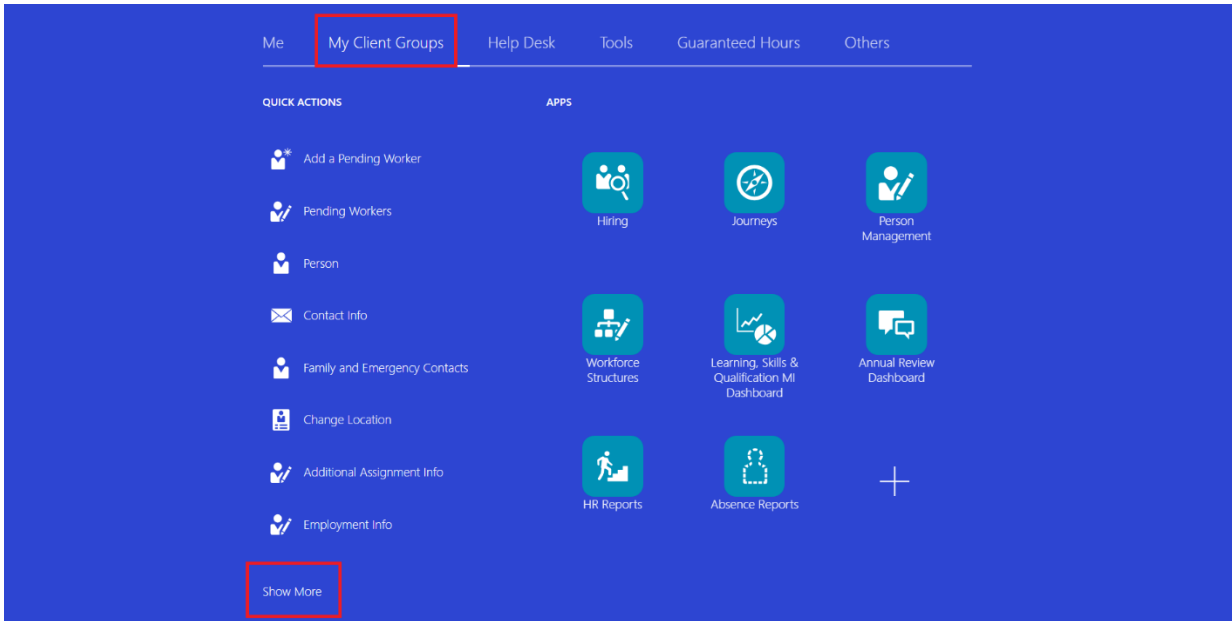
Terminate One Assignment Only

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**.

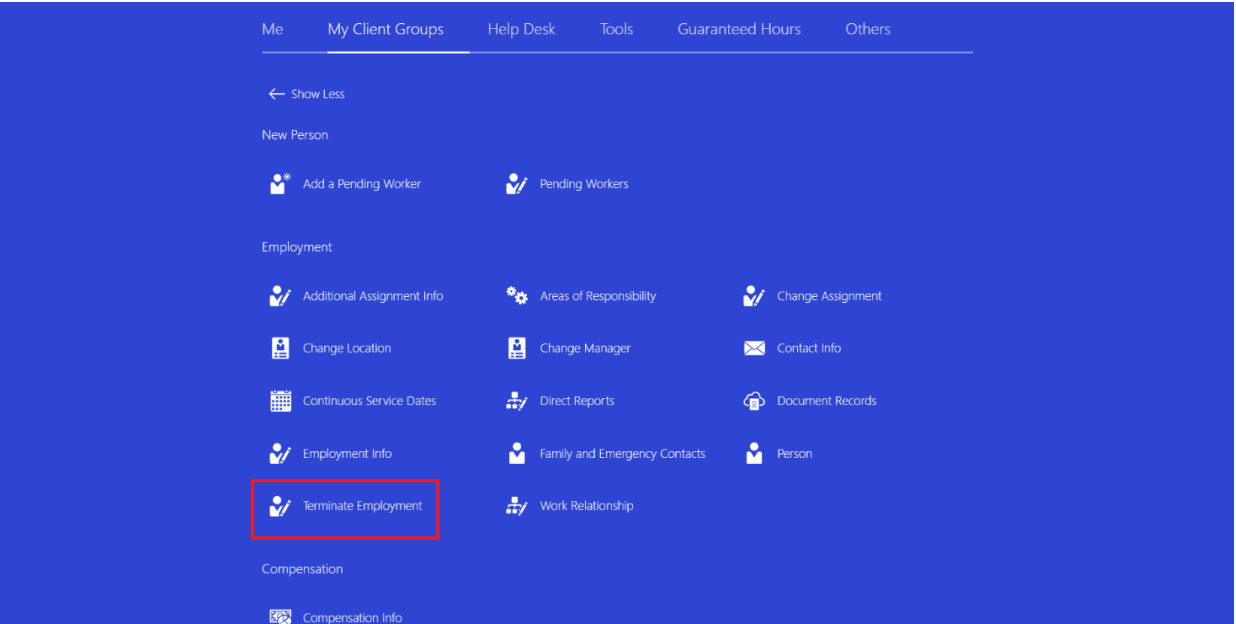
- 1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



- 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 by their **Name** or **Person Number**. Alternatively, you can select an employee from the list of employees below the search bar.

As you are terminating a specific assignment you **must** ensure you select the correct assignment.

Tip: Inactive assignments are visible and selectable. To hide inactive records, you can use the **Assignment Status** filter below the search bar.

THE UNIVERSITY
of EDINBURGH

< Terminate Employment

Search by Name, Personal Job Title, Work Email, or Person Number

Personal Job Title

Assignment Status

Effective As-of Date

Include Terminated Work Relationships

Termination Date

Worker Type

Filters

Sort By Relevance

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	W Ty
Sam Strawberry	Research Publications & Systems Administrator	000000	E000000	Active - Payroll Eligible	En
Tommy Tomato	Teaching Fellow (C1) (ACAD - Teacher)	000001	E000001	Inactive - Payroll Eligible	En
Rosie Raspberry	Teaching Fellow (C1) (ACAD - Teacher)	000002	E000002	Inactive - Payroll Eligible	En
Ben Blueberry	Demonstrator	000003	E000003	Inactive - Payroll Eligible	En

3. In the **Info to include** screen, select the slider in the **Comments and attachments** box so that it turns blue.

Terminate Employment

Info to include

Ben Blueberry, Research Publications & Systems Administrator

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

If the employee you're terminating is currently a line manager, a second box called '**Existing Reports**' will also appear. If you want to reassign the employee's direct reports at this stage, click on the slider in this box so that it turns blue.

If the new line manager is not known at this stage, the direct reports may be reassigned at a later date by following the [How to change direct reports guide](#) (under Human Resources > Job Changes). However, it is essential that the direct reports are reassigned **before** the line manager leaves their assignment/the university.

Terminate Employment

Info to include

Sam Strawberry, Finance Manager

Existing reports
Reassign a manager's direct reports and other report types.

☐

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 6

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

Continuous Service dates

4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.

Terminate Employment

When and why

Ben Blueberry, Research Publications & Systems Administrator

Termination Notification Date

<
July 2026
>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Termination Date

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

6. Select the **Termination Date** (i.e., the employee's last day of employment).

Note: this field will be prepopulated with the same date you selected for the Termination Notification Date so please ensure you change it to the correct termination date.

Information X

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

Termination Notification Date
20/07/2026

Termination Date
31/07/2026

What are you terminating?

☒ Work relationship ☐ Assignment

University of Edinburgh

> Tutor

> Tutor

Termination Action
Cancellation of Hire

Termination Reason

Required

Cancel Continue Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

7. Before you continue with completing the details of the termination, you can view the details of the employee's other assignments if you wish to do so. To do this, click on the arrow next to each job title to expand the sections.

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

What are you terminating?

☒ Work relationship

☐ Assignment

University of Edinburgh

▼

Tutor

Location

Fruit Building

Job

Tutor (C1) (ACAD - Tutors and Demonstrators)

Position

Tutor (C1) (ACAD - Tutors and Demonstrators)

Assignment Number

E000001

Department

Fruit Department

Business Unit

University of Edinburgh

Assignment Status

Active - Payroll Eligible

Manager Name

Penelope Pear

>

Tutor

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

8. Next, select the **Assignment** option under **What are you terminating?**.

Termination Notification Date

20/07/2026

Termination Date

31/07/2026

What are you terminating?

☐ Work relationship

☒ Assignment

University of Edinburgh

Tutor

Location

Fruit Building

Job

Tutor (C1) (ACAD - Tutors and Demonstrators)

Position

Tutor (C1) (ACAD - Tutors and Demonstrators)

Assignment Number

E000001

Department

Fruit Department

Business Unit

University of Edinburgh

Assignment Status

Active - Payroll Eligible

Manager Name

Penelope Pear

Termination Action

Termination Reason

2 | 5

Info to include

When and why

Assignment termination info

Comments and attachments

Continuous Service dates

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9. The details of the assignment you selected in Step 2 will appear. Check the details to ensure that this is the assignment you wish you terminate.

Termination Notification Date
20/07/2026

Termination Date
31/07/2026

What are you terminating?
☐ Work relationship ☒ Assignment

University of Edinburgh

Tutor

Location Fruit Building	Department Fruit Department
Job Tutor (C1) (ACAD - Tutors and Demonstrators)	Business Unit University of Edinburgh
Position Tutor (C1) (ACAD - Tutors and Demonstrators)	Assignment Status Active - Payroll Eligible
Assignment Number E000001	Manager Name Penelope Pear

Termination Action

2 | 5

Info to include

When and why

Assignment termination info

Comments and attachments

Continuous Service dates

10. Select the relevant **Termination Action** from the drop-down menu. Please use [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.

University of Edinburgh

Tutor

Action Name

Action Code

End Assignment (Resignation) END_ASG_RES

End Assignment (Not Resignation) END_ASG

Termination Action

End Assignment (Resignation)

Termination Reason

Required

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Assignment termination info

Comments and attachments

Continuous Service dates

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11. Select the relevant **Termination Reason** from the drop-down menu. Scroll through the list or start typing the name of the Termination Action to find the correct one. Please use [Appendix B](#) to help you select the appropriate option, note that some actions must only be used by HR.

The screenshot shows a web form for the University of Edinburgh. On the left, under the 'Tutor' section, the following details are listed: Location (Fruit Building), Job (Tutor (C1) (ACAD - Tutors and Demonstrators)), Position (Tutor (C1) (ACAD - Tutors and Demonstrators)), and Assignment Number (E000001). Below this, the 'Termination Action' is set to 'End Assignment (Resignation)'. A red box highlights the 'Termination Reason' dropdown menu, which is open and shows a list of options with their corresponding 'Action Reason Code'. The options are: 'Better Pay and Benefits Package' (END_ASG_PAY_BENEFITS), 'Better Work-Life Balance' (END_ASG_WORK_BALANCE), 'Better Working Environment' (END_ASG_WORK_ENV), 'Career Change' (END_ASG_CHANGE_CAREER), and 'Career Progression' (END_ASG_NEXT_STEP_CAREER). The 'Career Change' option is selected. To the right of the dropdown, the text 'Required' is visible. At the bottom of the form, there are 'Cancel', 'Continue', and 'Submit' buttons. On the far right, a dark sidebar contains a progress indicator '2 | 5' and a list of sections: 'Continuous Service dates', 'Info to include', 'When and why', 'Assignment termination info', 'Comments and attachments', and 'Continuous Service dates'.

Action Reason	Action Reason Code
Better Pay and Benefits Package	END_ASG_PAY_BENEFITS
Better Work-Life Balance	END_ASG_WORK_BALANCE
Better Working Environment	END_ASG_WORK_ENV
Career Change	END_ASG_CHANGE_CAREER
Career Progression	END_ASG_NEXT_STEP_CAREER

Note: Please be aware that each termination action and termination reason has differing Leaver Journeys tasks and correspondence attached to it. If you would like to check what the employee, line manager and school/department administrator will receive, see [Appendix B](#) at the end of this document.

12. Then, click **Continue**.

Note: if an error appears after clicking Continue, please see the [Primary Assignment Warning](#) section of this guide.

The screenshot shows the same web form as before, but now the 'Termination Reason' is set to 'Career Change'. The 'Continue' button is highlighted with a red box. The 'Assignment' radio button is selected at the top left. The 'Tutor' section details remain the same. The 'Termination Action' is still 'End Assignment (Resignation)'. The 'Manager Name' is now listed as 'Penelope Pear'. The 'Continue' button is highlighted. The sidebar on the right is the same as in the previous screenshot.

13. In the **Assignment termination info** section, select the relevant **HESA Reason for End of Contract** from the drop-down menu. **This field may take up to 5 seconds to appear.** Scroll through the list or start typing the name of the HESA Reason for End of Contract to find the correct one.

Note: once the HESA reason has been selected, the field will disappear.

The screenshot shows a web form titled "Terminate Employment" with a sub-header "Assignment termination info" and the user "Molly Melon, Administrator". A dropdown menu labeled "HESA Reason for End of Contract" is open, displaying a list of reasons: "Continued employment, new HESA contract record generated", "Atypical contract issued", "End of fixed-term contract", "Voluntary redundancy", "Other redundancy", "Resignation", and "Retirement (excluding ill-health)". Below the list are "Continue" and "Submit" buttons. On the right, a sidebar shows a progress indicator "3 | 4" and a list of sections: "Info to include", "When and why", "Assignment termination info" (which is highlighted), and "Comments and attachments".

14. Click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on **Submit** until you have reached and completed the **Comments and attachments** section.

This screenshot is similar to the previous one, but the dropdown menu is closed. At the bottom of the form, there are three buttons: "Cancel", "Continue" (which is highlighted with a red box), and "Submit". The sidebar on the right remains the same, with "Assignment termination info" highlighted in the progress list.

15. If the employee you are terminating is a line manager and you enabled the **Existing Reports** toggle in the **Info to Include** section, please move on to [Step 16](#) below.

If the employee you are terminating is not a line manager or you have chosen not to reassign their direct reports at this time, please move on to [Step 19](#).

16. In the **Existing Reports** section:

- a. If you want to move all direct reports to the same manager, tick the **Select All** box.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☐

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

Cancel

Continue

Submit

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

- b. If you want to move some direct reports to one manager and others to a different manager, tick the boxes next to the employee(s) you want to move first.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☒

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

Cancel

Continue

Submit

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

- Rosie Raspberry
Knowledge Exchange and Impact Administrator
Administrator (B1) (PAO - Academic Support)

4 | 5

Name	Personal Job Title	Work Email	Person Number
Linda Lime	Library Collections Assistant		
Penelope Pear	Post Graduate Student Requestor		
Fenella Fig	Post Graduate Student Requestor		
Oscar Orange	Head of School		
Larry Lemon	Demonstrator		
Gerald Grapefruit	Tutor		

Search for proposed manager

Required

Cancel

Continue

Submit

Work relationship termination info

Existing reports

Comments and attachments

- | Proposed Managers | |
|--|--|
| <div></div> <div>Oscar Orange</div> <div>Head of School</div> | |
| <div></div> <div>Carrie Cantaloup</div> <div>Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)</div> | <div></div> |
| <div></div> <div>Ralph Raspberry</div> <div>Knowledge Exchange and Impact Manager
Manager (C1) (PAO - Administration)</div> | <div></div> |
| <div></div> <div>Katie Kiwi</div> <div>Marketing and Communications
Coordinator
Administrator (C1) (PAO - Marketing and Communications)</div> | <div></div> |

The direct reports will be reassigned to their new line manager the day after the current line manager leaves the university/their assignment.

19. In the **Comments and attachments** section, enter comments as appropriate (**Note:** You **must** select **Save Comment** otherwise your comment **will not** appear in the notification for HR Operations to see):
- 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](#).

Terminate Employment



Comments and attachments

Molly Melon, Administrator

Comments

Save Comment

Drag and Drop

Select or drop files here.

Cancel

Submit

4 | 4

Info to include

When and why

Assignment termination info

Comments and attachments

20. Click on **Save Comment**.

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

- End Assignment (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.



Comments and attachments

Molly Melon, Administrator

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Submit

4 | 4

Info to include

When and why

Assignment termination info

Comments and attachments

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22. Click on **Submit**.

The screenshot shows a web interface for 'Comments and attachments'. At the top left is a brown square profile picture. To its right is the title 'Comments and attachments' and the name 'Molly Melon, Administrator'. Below this is a large text area labeled 'Comments'. Underneath the text area is a 'Save Comment' button. Below that is a 'Drag and Drop' section with the text 'Select or drop files here.' and a dashed border. Below the drag and drop section is a 'URL' input field and an 'Add URL' button. At the bottom right are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red rectangle. On the right side of the form is a dark sidebar with a breadcrumb trail: '4 | 4', 'Info to include', 'When and why', 'Assignment termination info', and 'Comments and attachments'.

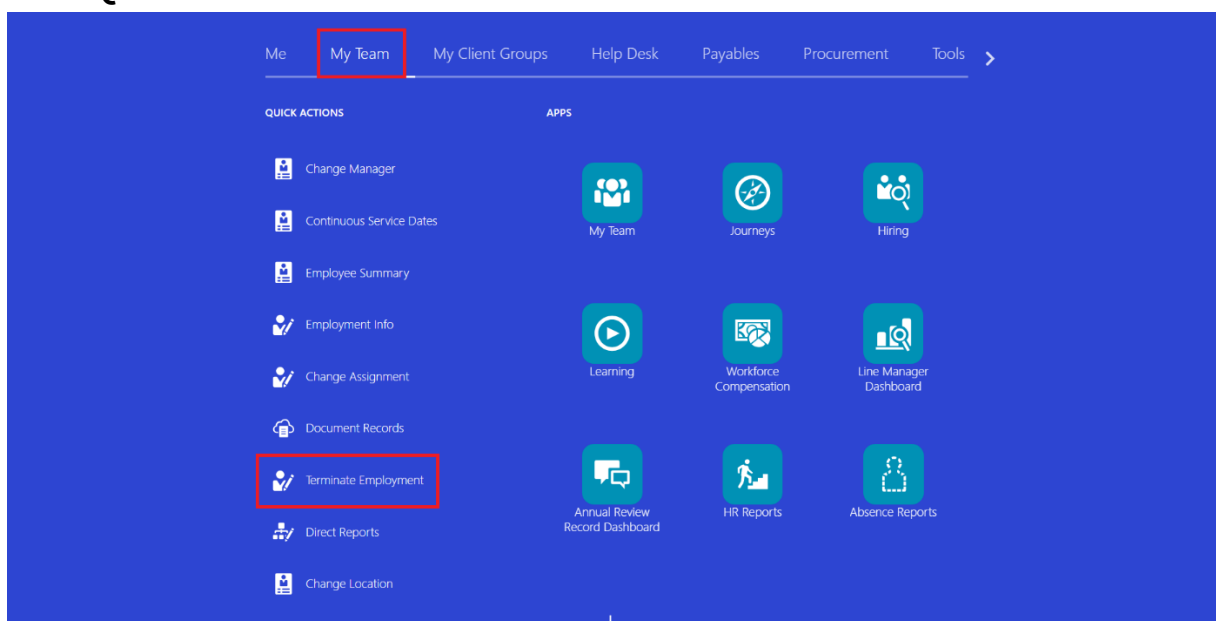
23. If the termination was due to a resignation, upload a copy of the resignation letter to the Employee File SharePoint. GH Dormant Letters should also be uploaded here too.

Terminate All Assignments

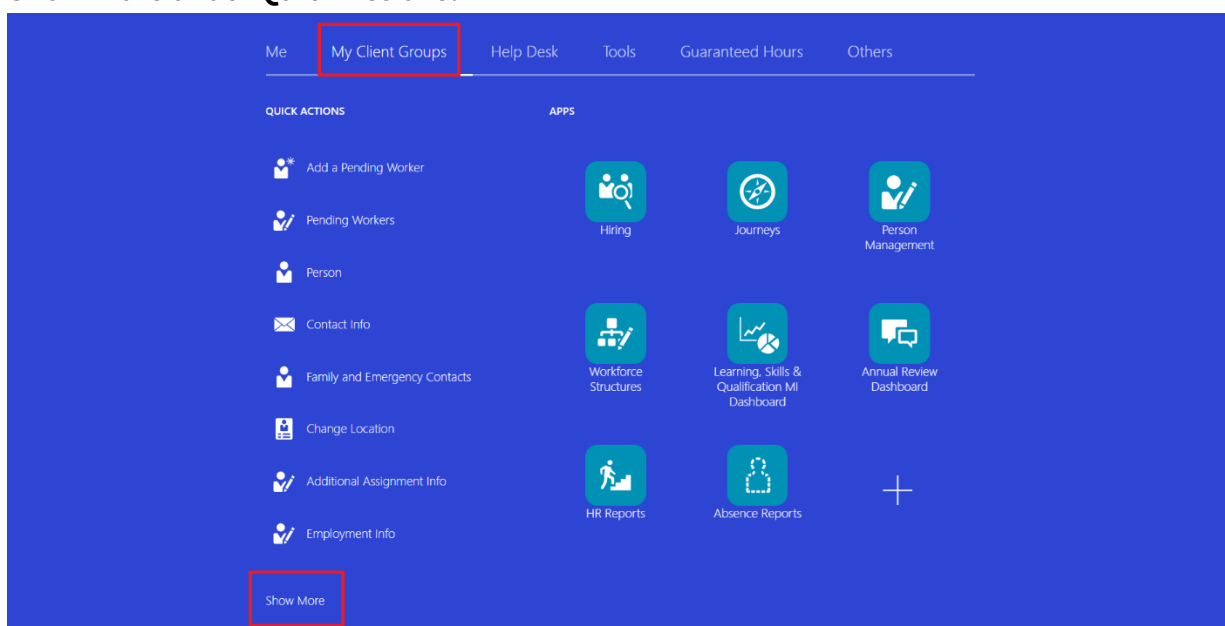
This section should be followed when an employee has **multiple assignments** and is leaving the university **entirely** (i.e. they are leaving **ALL** assignments).

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.

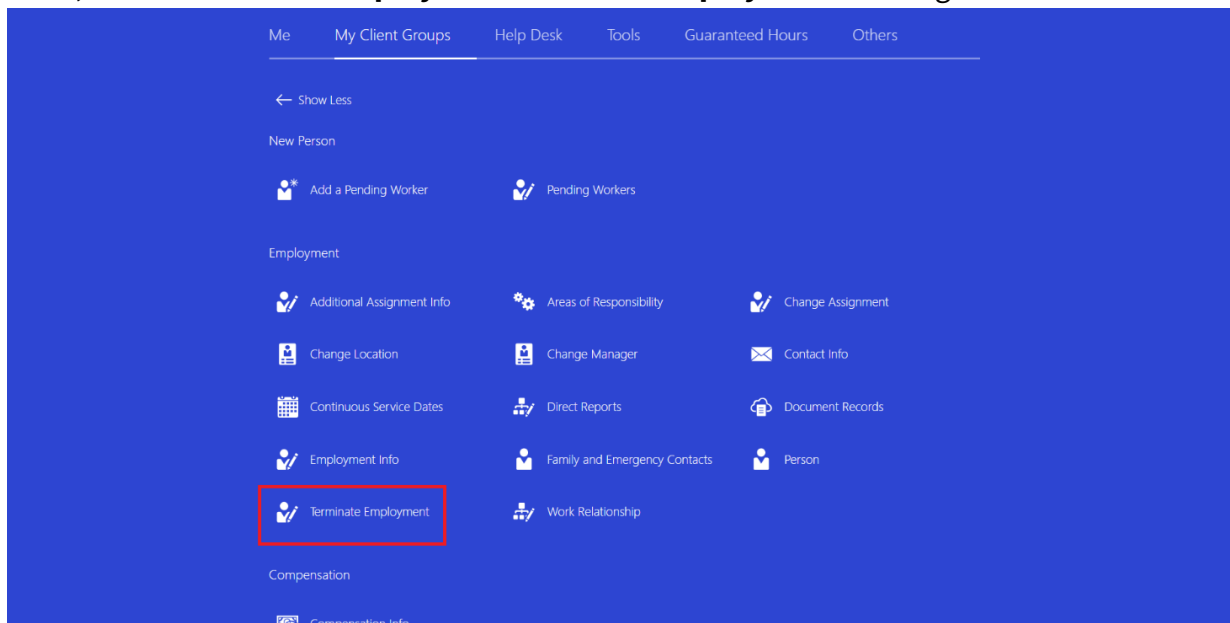
1. From the People and Money homepage:
 - a. If you are a **Line Manager**, select the **My Team Tab** then select **Terminate Employment** under **Quick Actions**.



- 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 the employee you wish to terminate by their Name or Person Number. Alternatively, you can select an employee from the list of employees 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.

Tip: Inactive assignments are visible and selectable. To hide inactive records, you can use the **Assignment Status** filter below the search bar.

THE UNIVERSITY of EDINBURGH

< Terminate Employment

Personal Job Title
Assignment Status
Effective As-of Date
Include Terminated Work Relationships
Termination Date
Worker Type
Filters

Sort By Relevance

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	W Ty
Sam Strawberry	Research Publications & Systems Administrator	000000	E000000	Active - Payroll Eligible	En
Tommy Tomato	Teaching Fellow (C1) (ACAD - Teacher)	000001	E000001	Inactive - Payroll Eligible	En
Rosie Raspberry	Teaching Fellow (C1) (ACAD - Teacher)	000002	E000002	Inactive - Payroll Eligible	En
Ben Blueberry	Demonstrator	000003	E000003	Inactive - Payroll Eligible	En

3. In the **Info to include** screen, select the slider in the **Comments and attachments** box so that it turns blue.

Terminate Employment

Info to include

Ben Blueberry, Research Publications & Systems Administrator

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

If the employee you're terminating is currently a line manager, a second box called '**Existing Reports**' will also appear. If you want to reassign the employee's direct reports at this stage, click on the slider in this box so that it turns blue.

If the new line manager is not known at this stage, the direct reports may be reassigned at a later date by following the [How to change direct reports guide](#) (under Human Resources > Job Changes). However, it is essential that the direct reports are reassigned **before** the line manager leaves their assignment/the university.

Terminate Employment

Info to include

Sam Strawberry, Finance Manager

Existing reports
Reassign a manager's direct reports and other report types.

☐

Comments and attachments
Add additional comments and attachments for approver.

☐

Cancel Continue Submit

1 | 6

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

Continuous Service dates

4. Click **Continue**.
5. In the **When and why** section, select the relevant **Termination Notification Date**.
 - a. If the termination is a date in the future, select the day you received the termination (e.g. today's date).
 - b. If the termination is backdated, the **Termination Notification Date** must match the **Termination Date**.

Terminate Employment

When and why

Ben Blueberry, Research Publications & Systems Administrator

Termination Notification Date

July 2026

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Termination Date

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

6. Select the **Termination Date** (i.e., the employee's last day of employment).

Note: this field will be prepopulated with the same date you selected for the Termination Notification Date so please ensure you change it to the correct termination date.

Information

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

Termination Notification Date
20/07/2026

Termination Date
31/07/2026

What are you terminating?

☒ Work relationship ☐ Assignment

University of Edinburgh

> Tutor

> Tutor

Termination Action
Cancellation of Hire

Termination Reason
Required

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

7. Before you continue with completing the details of the termination, you can view the details of the employee's other assignments if you wish to do so. To do this, click on the arrow next to each job title to expand the sections.

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

What are you terminating?

☒ Work relationship ☐ Assignment

University of Edinburgh

▼ Tutor

Location

Fruit Building

Job

Tutor (C1) (ACAD - Tutors and Demonstrators)

Position

Tutor (C1) (ACAD - Tutors and Demonstrators)

Assignment Number

E000001

Department

Fruit Department

Business Unit

University of Edinburgh

Assignment Status

Active - Payroll Eligible

Manager Name

Penelope Pear

> Tutor

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

8. Next, ensure the **Work Relationship** option is selected under **What are you terminating?**. This will terminate all of the employee's assignments.

What are you terminating?

☒ Work relationship ☐ Assignment

University of Edinburgh

▼ Tutor

Location

Fruit Building

Job

Tutor (C1) (ACAD - Tutors and Demonstrators)

Position

Tutor (C1) (ACAD - Tutors and Demonstrators)

Assignment Number

E000001

Department

Fruit Department

Business Unit

University of Edinburgh

Assignment Status

Active - Payroll Eligible

Manager Name

Penelope Pear

> Tutor

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

9. Select the relevant **Termination Action** from the drop-down menu. Scroll through the list or start typing the name of the Termination Action to find the correct one. Please use the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

Work relationship

University of Edinburgh

Research Publications & Systems Administrator

Action Name	Action Code
Abandon Contract	ABANDON_CONTRACT
Cancellation of Hire	TERMINATION
Death in Service	DEATH
Death of UOE Pensioner	DEATH_PENSIONER
Dismissal	INVOLUNTARY_TERMINATION

Termination Action

Cancellation of Hire

Termination Reason

Required

Cancel

Continue

Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

10. Select the relevant **Termination Reason** from the drop-down menu. Scroll through the list or start typing the name of the Termination Action to find the correct one. Please see the [Appendix A](#) to help you select the appropriate option, note that some actions must only be used by HR.

Information

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

Termination Notification Date

20/07/2026

Termination Date

31/07/2026

What are you terminating?

Work relationship

Assignment

University of Edinburgh

Tutor

Tutor

Termination Action

Resignation

Termination Reason

Required

Cancel

Continue

Submit

2 | 5

Action Reason	Action Reason Code
Better Pay and Benefits Package	RESIGN_PAY_BENEFITS
Better Work-Life Balance	RESIGN_WORK_BALANCE
Better Working Environment	RESIGN_WORK_ENV
Career Change	RESIGN_CHANGE_CAREER
Career Progression	RESIGN_NEXT_STEP_CAREER

Termination Reason

Continuous Service dates

Notes:

- Please be aware that each termination action and termination 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, please **do not process** the termination via the Terminate Employment app. Instead, please raise a Service Request under the 'Leaving the University' category.
- In the case of **Contingent Workers** ending their period of engagement, please use the action name '**End Contingent Worker**' in all cases.

11. Then, click **Continue**.

Information X

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

Termination Notification Date
20/07/2026

Termination Date
31/07/2026

What are you terminating?

☒ Work relationship ☐ Assignment

University of Edinburgh

> Tutor

> Tutor

Termination Action
Resignation

Termination Reason
Career Change

Cancel **Continue** Submit

2 | 5

Info to include

When and why

Work relationship termination info

Comments and attachments

Continuous Service dates

12. In the **Work relationship and termination info** section, complete the following:

- a. Select the relevant **HESA Reason for End of Contract** from the drop-down 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 drop-down 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 drop-down 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).

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract

Required

HESA Location After Leaving

Required

HESA Activity After Leaving

Required

Pay Adjustments Required

Cancel

Continue

Submit

3 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

13. **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.

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract

Required

HESA Location After Leaving

Required

HESA Activity After Leaving

Required

Pay Adjustments Required

Cancel

Continue

Submit

3 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

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](#).

14. Then, click **Continue**. **Note:** The **Submit** button is now enabled for selection, you **must not** click on **Submit** until you have reached and completed the **Comments and attachments** section.

Terminate Employment

Work relationship termination info

Ben Blueberry, Research Publications & Systems Administrator

HESA Reason for end of contract
Required

HESA Location After Leaving
Required

HESA Activity After Leaving
Required

Pay Adjustments Required

Cancel **Continue** Submit

3 | 4

- Info to include
- When and why
- Work relationship termination info**
- Comments and attachments

15. If the employee you are terminating is a line manager and you enabled the **Existing Reports** toggle in the **Info to Include** section, please move on to [Step 15](#) below.

If the employee you are terminating is not a line manager or you have chosen not to reassign their direct reports at this time, please move on to [Step 18](#).

16. In the **Existing Reports** section:

- a. If you want to move all direct reports to the same manager, tick the **Select All** box.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☐

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

Cancel

Continue

Submit

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

- b. If you want to move some direct reports to one manager and others to a different manager, tick the boxes next to the employee(s) you want to move first.

BB

Existing reports

Ben Blueberry, Head of Operations

☐ Select All

Head of Operations

☒

Carrie Cantaloup

Finance Business Support Coordinator
Administrator (C3) (PAO - Administration)
Food Science

1 directs, 1 total

☐

Susan Strawberry

Business Manager
Manager (C4) (PAO - Administration)
Food Science

2 directs, 4 total

☐

Gary Guava

Finance Manager
Manager (C1) (PAO - Administration)
Food Science

Cancel

Continue

Submit

4 | 5

Info to include

When and why

Work relationship termination info

Existing reports

Comments and attachments

- Rosie Raspberry

Knowledge Exchange and Impact Administrator
Administrator (B1) (PAO - Academic Support)

4|5

Name	Personal Job Title	Work Email	Person Number
Linda Lime	Library Collections Assistant		
Penelope Pear	Post Graduate Student Requestor		
Fenella Fig	Post Graduate Student Requestor		
Oscar Orange	Head of School		
Larry Lemon	Demonstrator		
Gerald Grapefruit	Tutor		

Search for proposed manager

required

Cancel

Continue

Submit

work relationship termination info

Existing reports

Comments and attachments

- | Proposed Managers | |
|--|---|
|  Oscar Orange
Head of School | |
|  Carrie Cantaloup
Finance Business Support Coordinator
Administrator (C3) (PAO - Administration) |  |
|  1 direct, 1 total | |
|  Ralph Raspberry
Knowledge Exchange and Impact Manager
Manager (C1) (PAO - Administration) |  |
|  Katie Kiwi
Marketing and Communications
Coordinator
Administrator (C1) (PAO - Marketing and
Communications) |  |

The direct reports will be reassigned to their new line manager the day after the current line manager leaves the university/their assignment.

19. In the **Comments and Attachments** section, confirm you are requesting a termination for the whole employment relationship (i.e. they are leaving the university) in the **Comments** box.

You **must** select **Save Comment** otherwise your comment **will not** appear in the notification for HR Operations to see.

Terminate Employment

Comments and attachments

Ben Blueberry , Research Publications & Systems Administrator

Comments

Save Comment

Drag and Drop
Select or drop files here.

URL Add URL

Cancel Submit

4 | 4

- Info to include
- When and why
- Work relationship termination info
- Comments and attachments

20. 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.

Terminate Employment

Comments and attachments

Ben Blueberry , Research Publications & Systems Administrator

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Submit

4 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

21. Click on **Submit**.

Terminate Employment

Comments and attachments

Ben Blueberry , Research Publications & Systems Administrator

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Submit

4 | 4

Info to include

When and why

Work relationship termination info

Comments and attachments

22. 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.

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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:

The screenshot shows the 'Terminate Employment' app interface. The main section is titled 'When and why' and contains a red-bordered box with an error message: 'Errors: You need to make one of the secondary assignments as primary before you terminate the assignment. The assignment is primary from 2/09/2019 to 31/12/4712.' Below this, there are two date pickers: 'Termination Notification Date' set to '20/07/2026' and 'Termination Date' set to '31/07/2026'. At the bottom, there is a text field labeled 'What are you terminating?' and three buttons: 'Cancel', 'Continue', and 'Submit'. On the right side, there is a dark sidebar with a progress indicator '2 | 5' and several menu items: 'Info to include', 'When and why' (which is highlighted), 'Assignment termination info', 'Comments and attachments', and 'Continuous Service dates'.

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

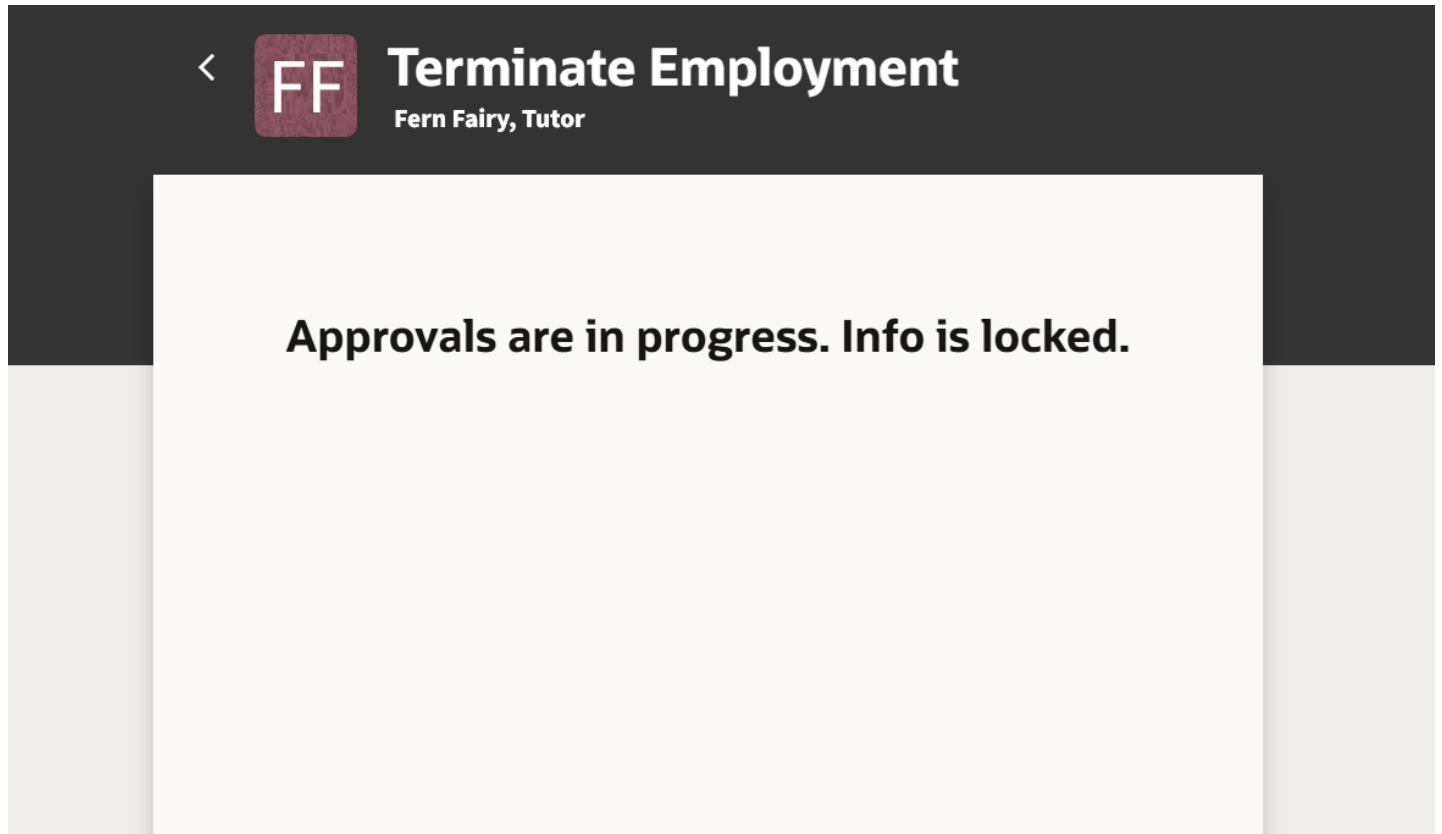
HR Operations will move the Primary Status to an assignment that is not being terminated. **Before raising a Service Request**, you must confirm with the employee whether they are leaving the University entirely or only leaving one assignment.

If the employee is leaving the University completely, meaning they are ending all assignments, please follow the [Terminate All Assignments](#) 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.

3. 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.
4. You can now return to the Terminate Employment App and process the termination. Please follow the [Terminate One Assignment Only](#) 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:

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.

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 redundancy payment, and	Employee receives confirmation that their fixed term contract is ending as expected. Employee, Line Manager and

		they have over two years of service, then the action reason ‘Redundancy from Expiry of FTC applies.	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 employee is on a student	Line Manager and SDA receive ‘Leaving the University for an involuntary reason’ Journey and Tasks.

		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.	No Journey to Employee. No correspondence.
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 Redundancy	For use by HR Only in the circumstance the employee opts for voluntary redundancy.	
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 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 or Correspondence
Abandon Contract	Abandon Contract	Employee is dismissed following due process where employee has abandoned contract and no resignation or notice has been provided. You should only use this action reason following advice from your HR Partner.	Line Manager and SDA receive 'Leaving the University for an involuntary reason' Journey and Tasks. No Journey to Employee
Dormant	Dormant	This applies to Guaranteed Hours employees who have not worked any hours offered for more than 12 months. See the Guide to Guaranteed Hours for further details. Please attach copies of the letters to the termination. The termination date should be the last date in the month that the final letter is sent (e.g. letter sent 12th July, termination date 31st July).	No Journey or Correspondence
Non Worker	Tier 5 Sponsored Worker	For HR use only. To terminate the record of a	No Journey or Correspondence

		Tier 5/Temporary Sponsored Worker	
	Scholarship	For HR use only. 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 or 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
3.0	3 August 2026	- Updated screenshots to reflect updated Redwood screens. - Included guidance on reassigning direct reports as part of the termination. - Added more guidance around non-worker terminations following issue that appeared in V2 to V3.	HH/RM
3.1	11 August 2026	Change to notification date field guidance and added reference to Appendices A & B to the 'In Brief' section.	HH

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.