THE UNIVERSITY of EDINBURGH

People and Money system

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Line Manager Guide- How to Process Terminations

Line Manager

Estimated time to complete: 12 minutes

Before you start, make sure you …

1. Familiarise yourself with the Guide to Employment Separation.
2. Discuss and agree on the final date of employment and when any accrued annual leave will be taken. If the employee has outstanding annual leave to take, they should be encouraged to take this during their notice period. However, where, for operational reasons, it is not feasible for all of the annual leave to be taken during the notice period, the employee's outstanding annual leave will be paid to them in their final salary.
3. Approve any agreed annual leave. Unused annual leave will automatically be paid out with the final salary, so it is vital that all annual leave taken in the year is booked and approved to avoid a financial impact. Employees should only be paid for leave if there are operational reasons why leave can't be taken.
4. If the employee is leaving your team to take on another assignment at the University (transferring) **do not process this as a termination**, typically the school or department where the employee is taking on the new post will process the transfer as part of the recruitment process.
5. If the employee is intending to retire they should contact the pensions team 3 months' before their planned retirement date.

6. 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.
7. Contingent Worker records should be terminated when their period of engagement comes to an end using the action 'End Contingent Worker'.
8. Read the guidance available on leaving the University webpages.

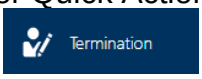
Assumed Knowledge:

1. If the employee is resigning, you should process the termination as soon as you are notified of their resignation in writing. If the employee is on a fixed term contract, you should process the termination at least 3 months before their confirmed end date.
2. 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.
3. When the termination is approved by HR Operations in most cases a leavers checklist will be issued to you, the employee and your local school/department administrator. However, this is not required if the employee is transferring.
4. It is important you select the correct termination action (i.e. leaving reason) to ensure the correct checklists and correspondence are issued when the termination is approved. See appendix 5 for details.
5. If the employee has more than one assignment, a warning message will be displayed advising that all assignments will be terminated. For now, you must continue with the termination adding a note in the comments box to clarify which assignment you want to terminate.
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' checklists will be sent to the Line Manager and School/Department Administrator of the primary assignment once approved.
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

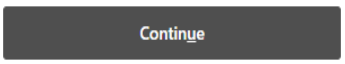
9. For **Cancellation of Hire** (i.e. a pending worker is being terminated before they've gone through payroll even once), you need to raise a service request as HR Operations will need to cancel the work relationship. You must not terminate a Pending Worker record.
10. For **Guaranteed Hours staff** the termination **Date** entered should be the last day in employment
11. Contingent workers should be terminated in all cases using the 'End Contingent Worker' action.

In Brief...

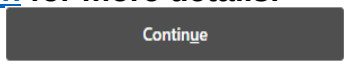
This is a simple overview of the process.

1. From the Dashboard, select **My Team**
   Note: If you're a School/Dept admin, please select **My Client Groups**.
2. Click on **Show More** under Quick Actions
3. Then select **Termination** 

under Employment
4. **Search** for the employee you wish to Terminate
5. Enter the termination details into the **When and Why** display box:
   a. **Date** the termination takes effect (Last date of employment)
   b. Relevant **Action Name** from the dropdown menu under 'What's the way to terminate the employee?'
   c. Relevant **Action Reason** from the dropdown menu under 'Why are you terminating [employee name]?'

   Then, click **Continue** 

6. Enter the termination information into the **Termination Info** display box:
   a. Relevant **HESA Reason for end of Contract** from the dropdown menu
   b. Relevant **HESA location after leaving** from the dropdown menu
   c. Relevant **HESA activity after leaving** from the dropdown menu
   d. **Pay Adjustments Required**
   Note: You must provide details of any pay adjustments required. Final salary includes payment for unused annual leave or deduction for overtaken leave. This field should not be used to request pay in lieu of holidays except in exceptional circumstances. Please see the Guide to Employee Separation for more details.

   Then, click **Continue** 

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

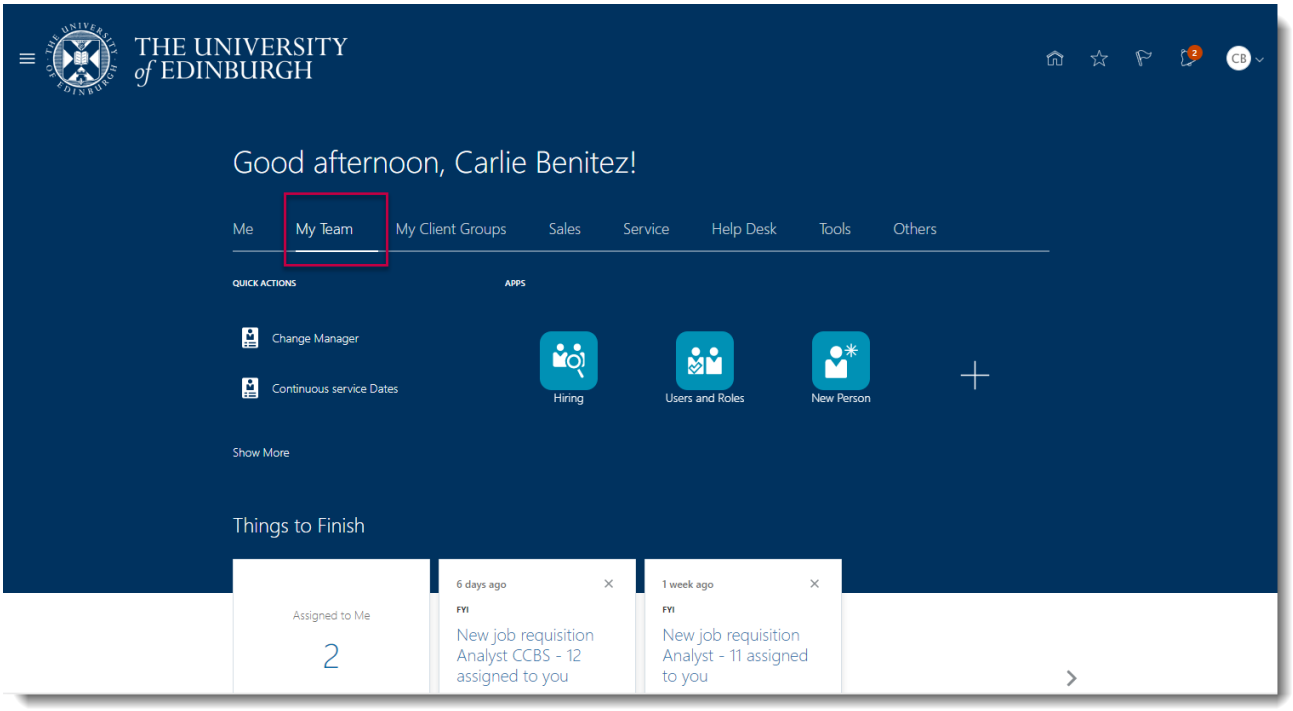
8. Click on **Submit** on the top right corner

9. If it's a resignation, **upload** resignation letter to Document Records.

For more detail, see the next section.

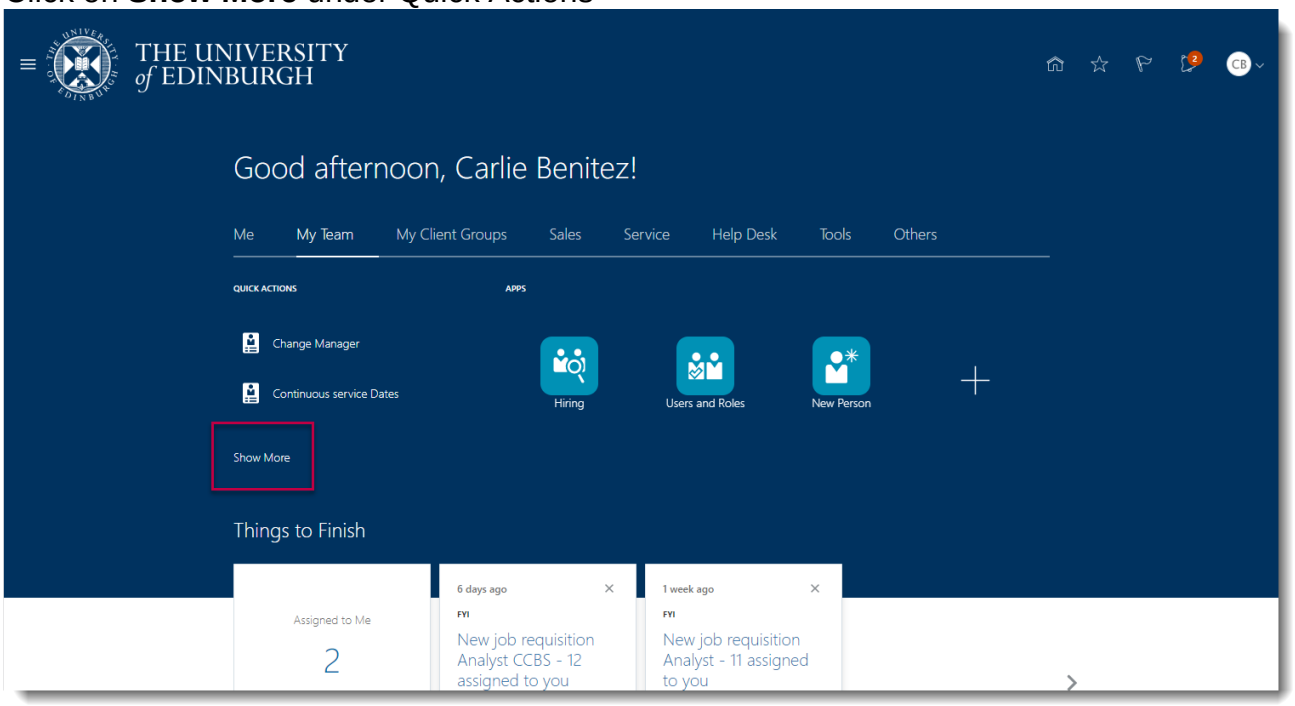
In Detail...

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

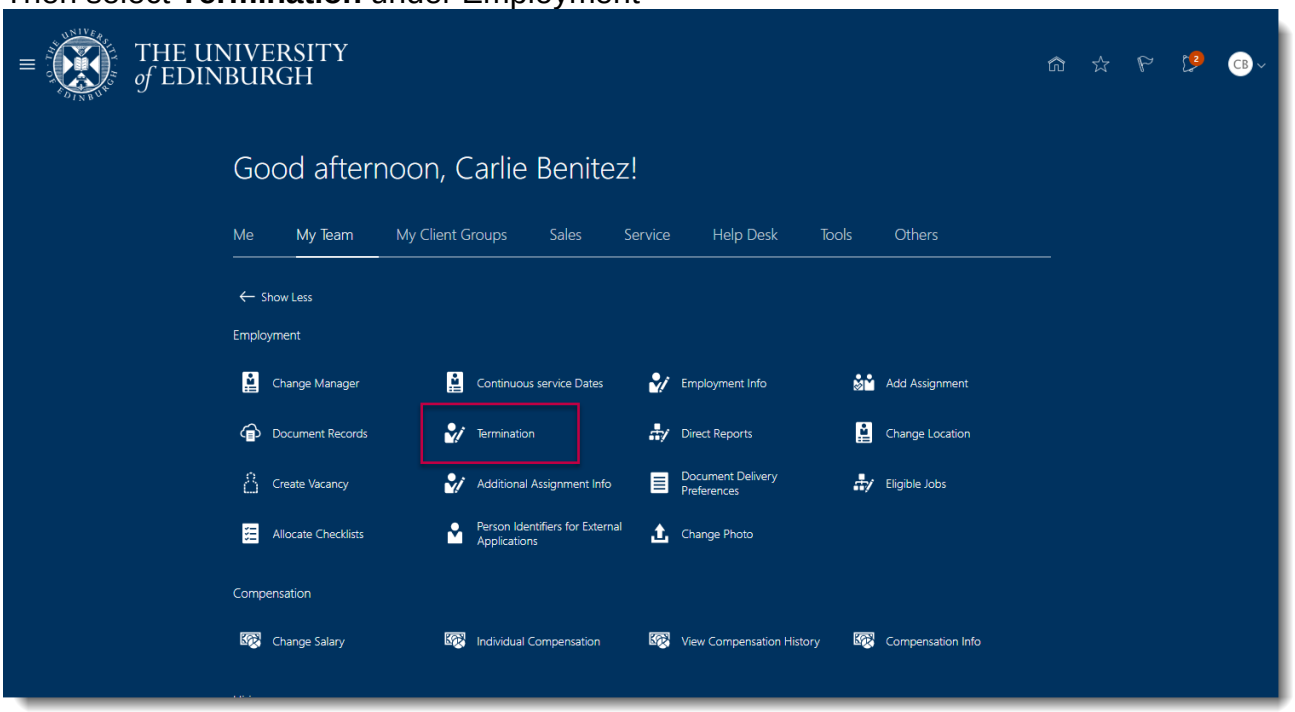


Note: If you're a school/department admin, please select **My Client Groups**.

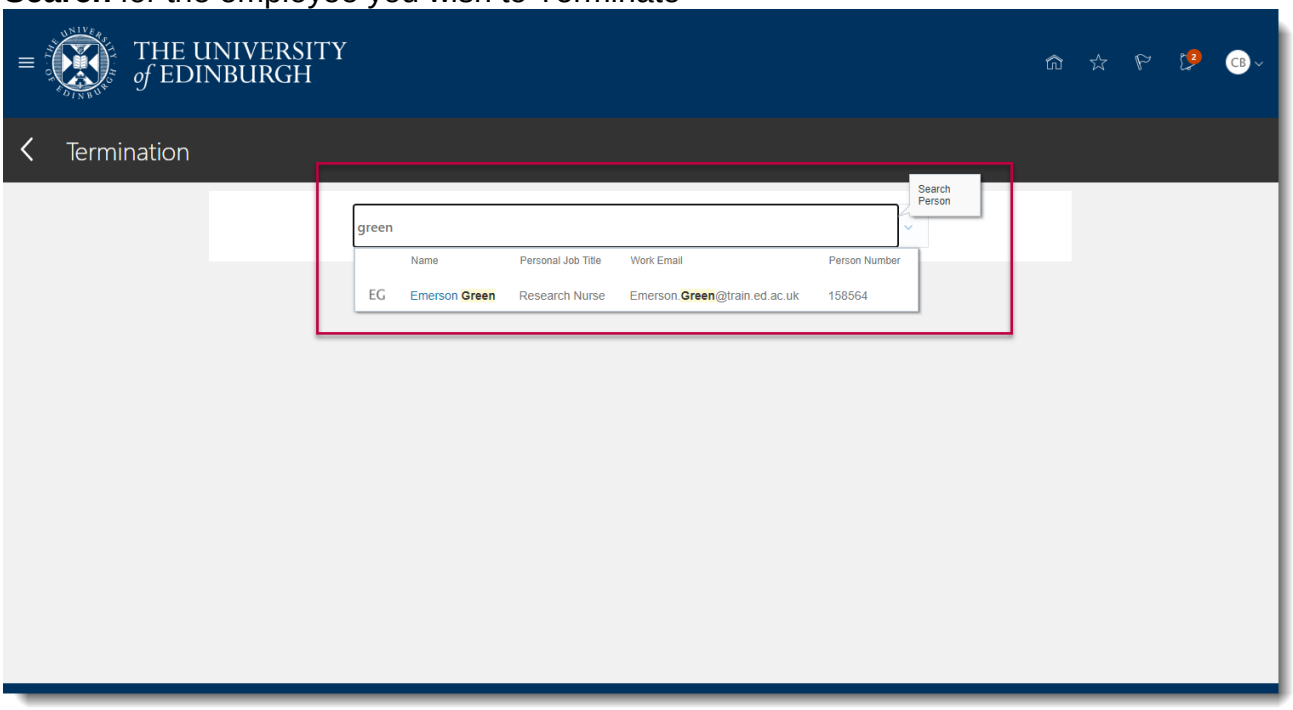
2. Click on **Show More** under Quick Actions



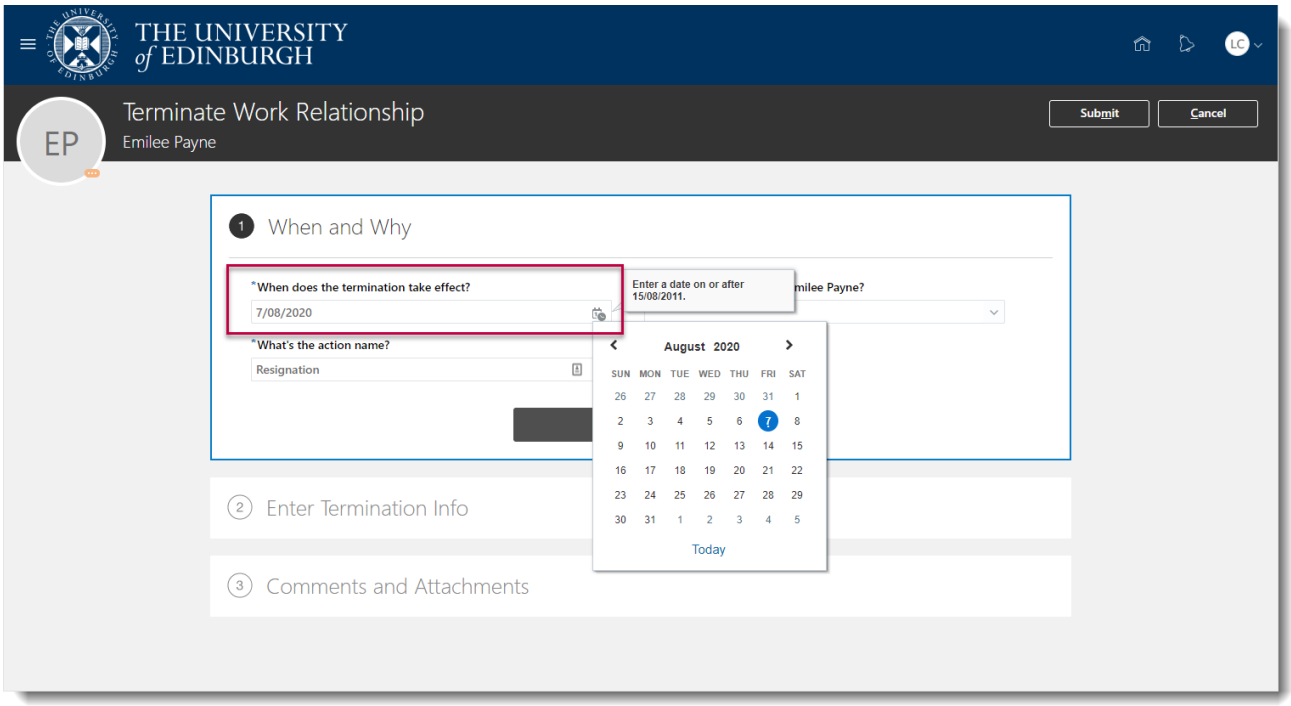
3. Then select **Termination** under Employment



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



5. Enter the termination details into the **When and Why** display box:
   a. **Date** the termination takes effect (employee's last day of employment)

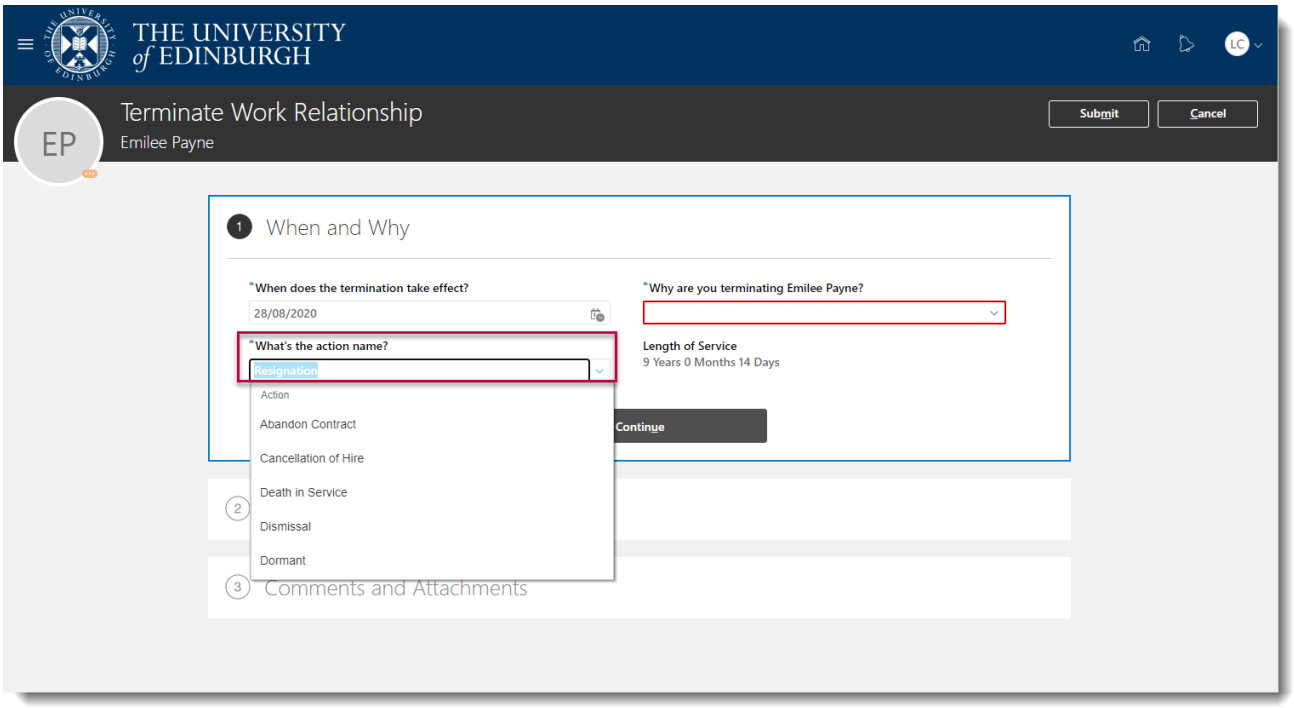


   b. Relevant **Action Name** from the dropdown menu.
   Note:
      i. Please be aware that each action has differing checklist items and correspondence attached to it. If you would like to check what the

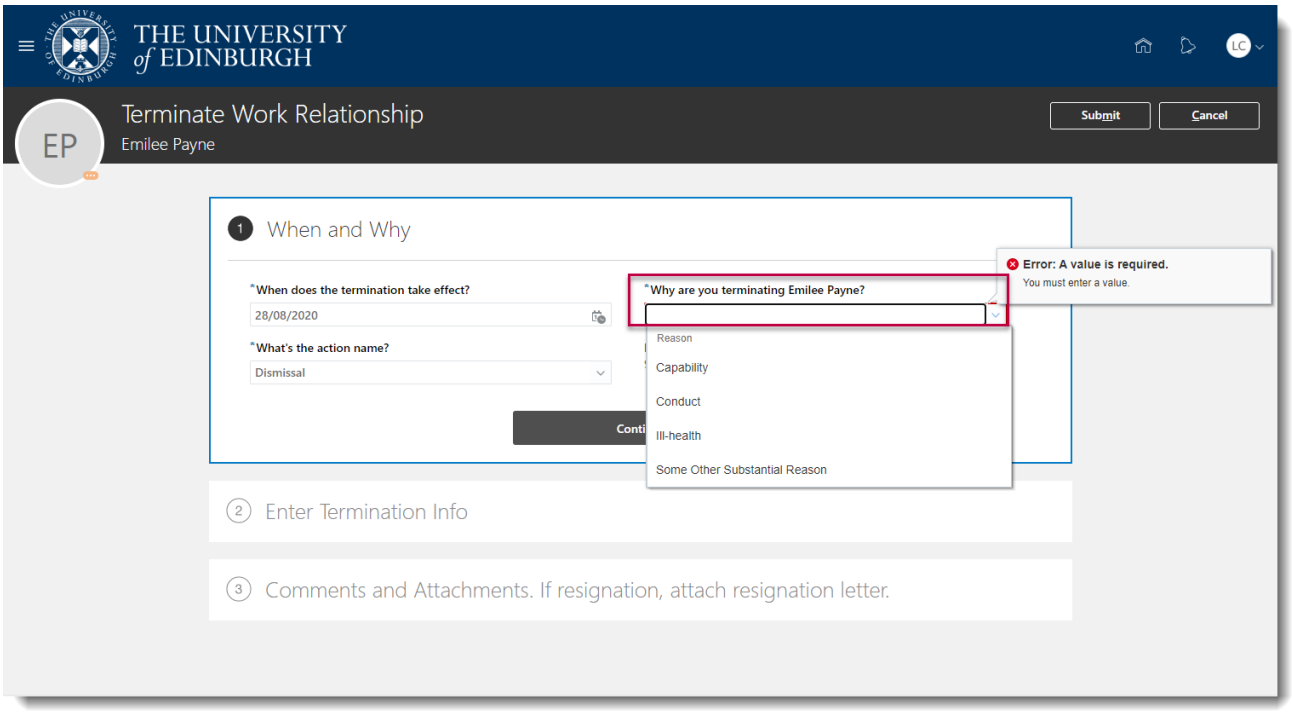
relevant employee, line manager and school/dept administrator will receive, see the appendix at the end of this document.

ii. In the case of non-workers who are on a Tier 5 visa, the reason 'Employment Terminated Due to Immigration Restrictions' should always be used.

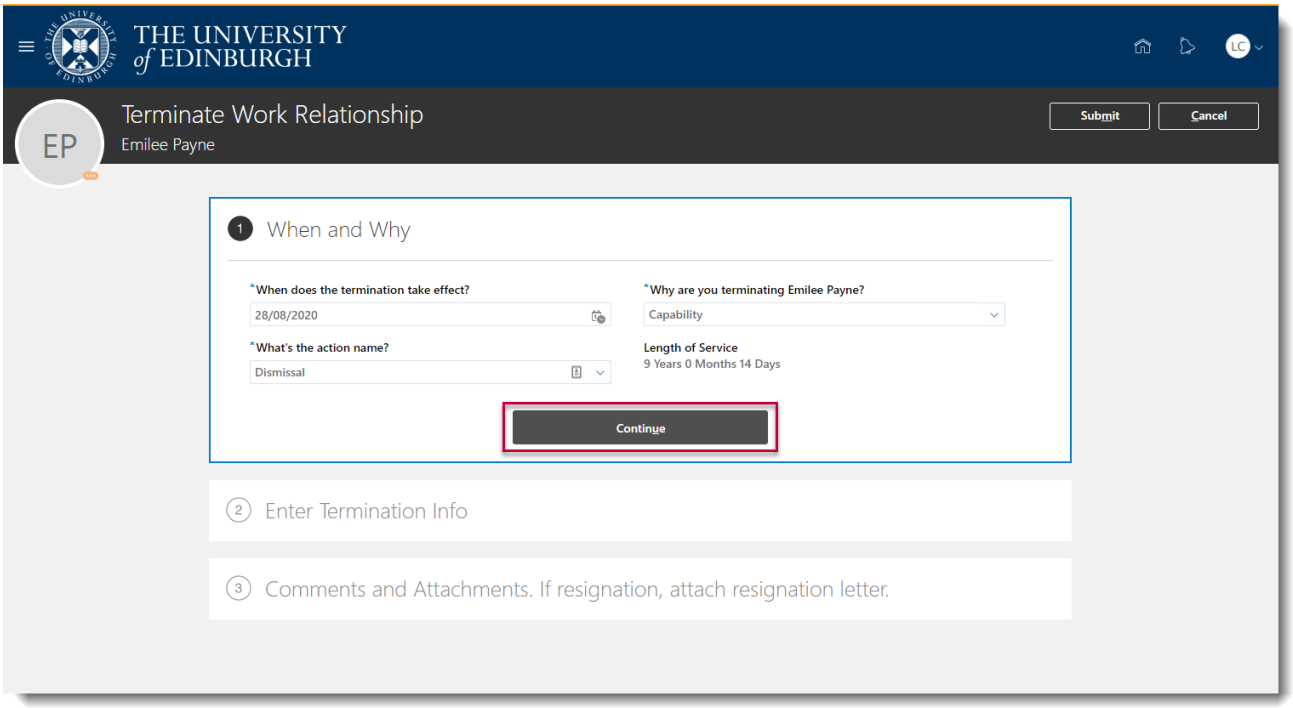
iii. Contingent Workers ending their period of engagement - please use the action 'End Contingent Worker' in all cases.



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



Then, click **Continue.**

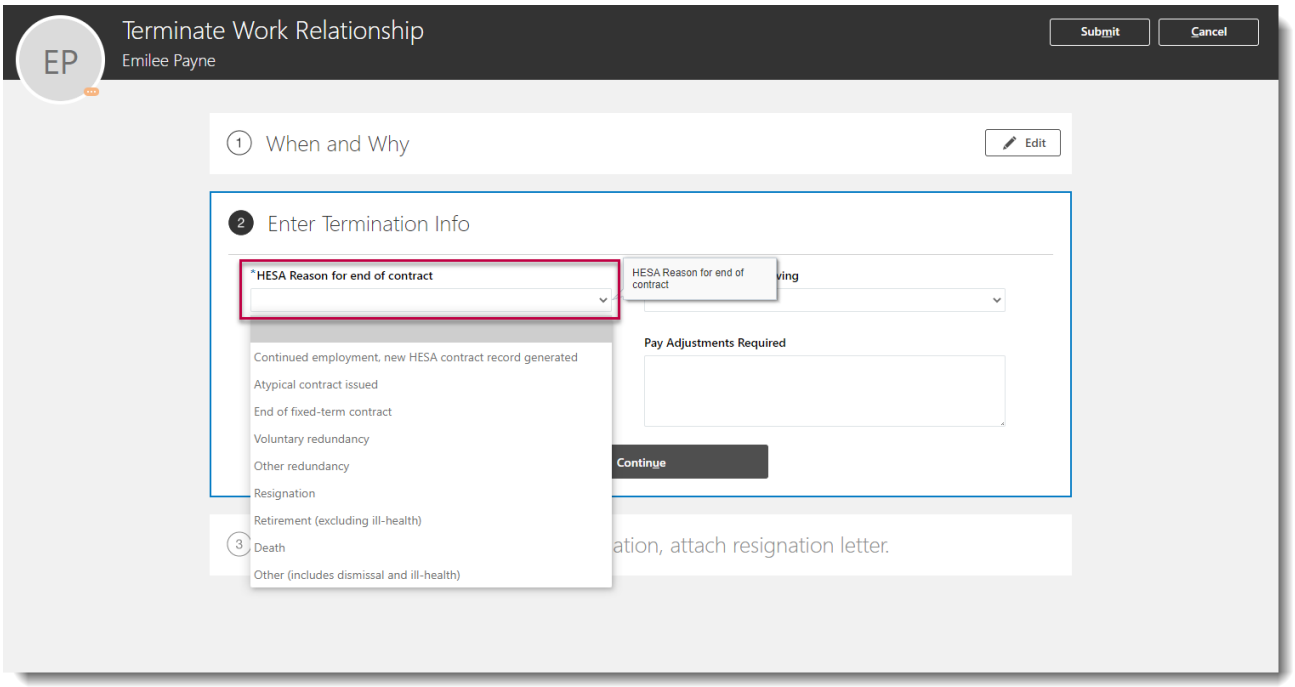


To see the different Action Name and Action Reason dropdown options and

when to use them, go to Appendix 5

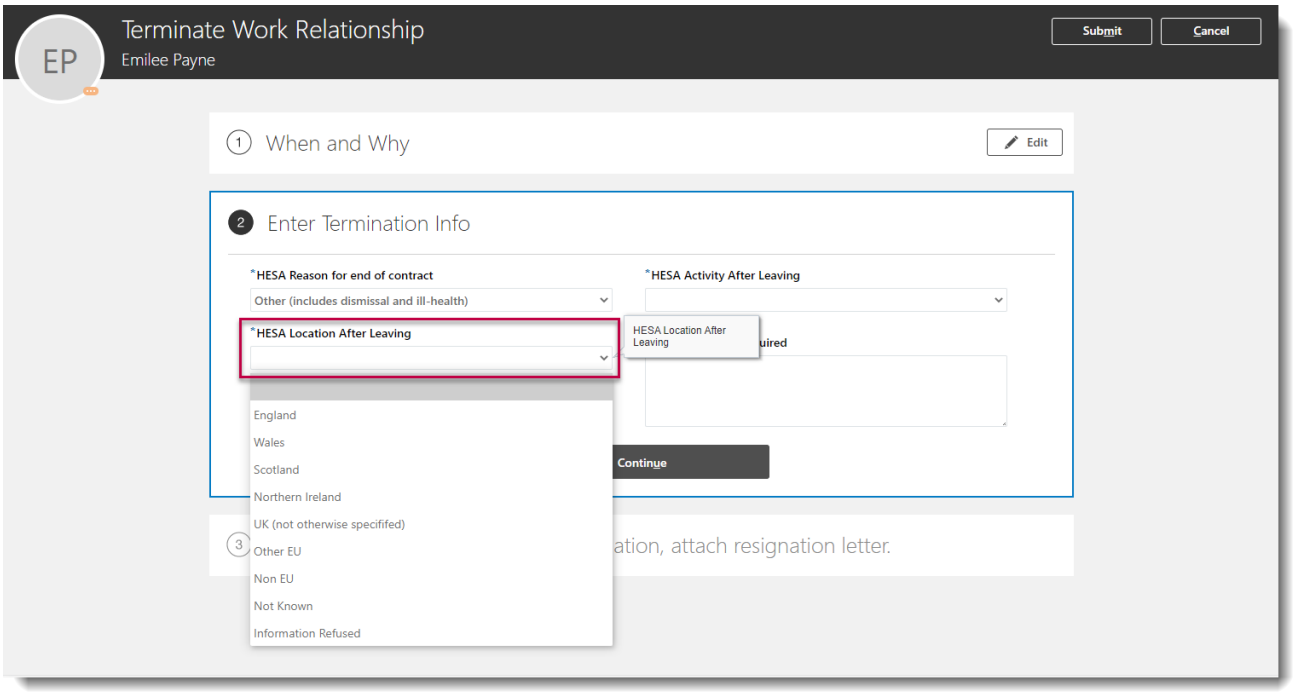
6. Enter the termination information into the **Termination Info** display box:

   a. Relevant **HESA Reason for End of Contract** from the dropdown menu.



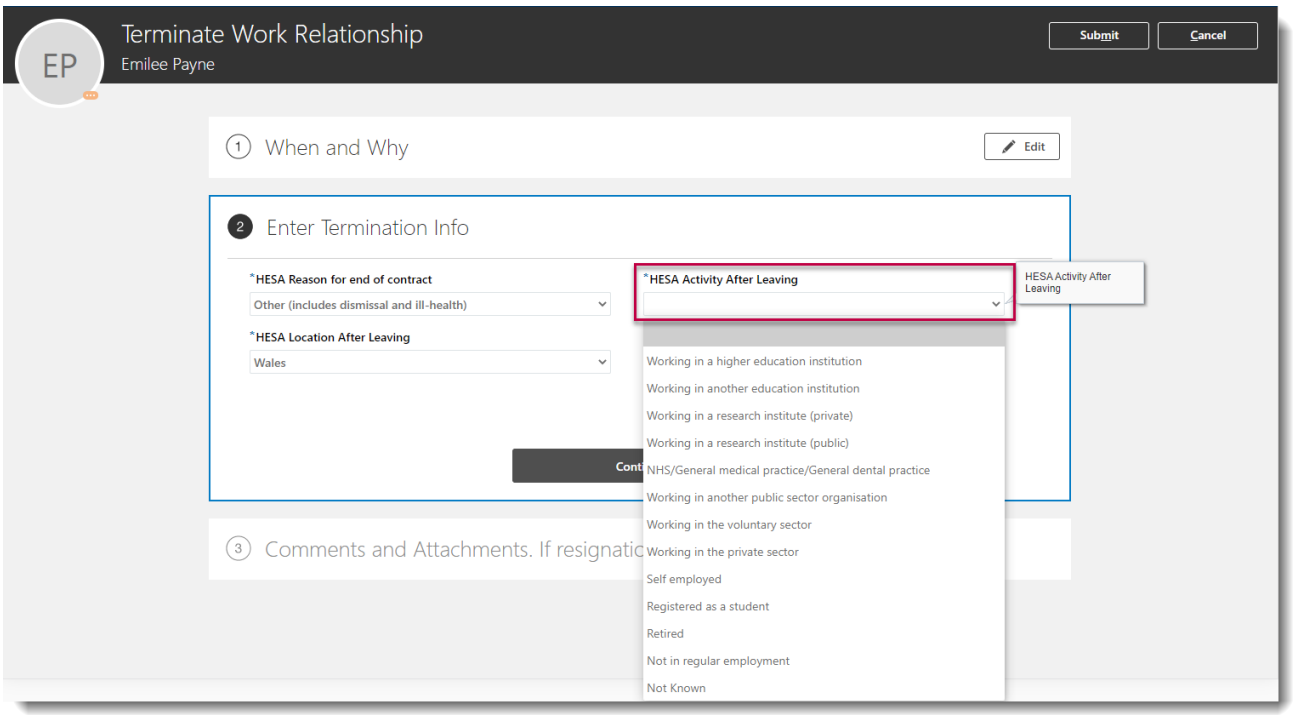
To see the different HESA Reason for End of Contract dropdown options, go to Appendix 6.a (not applicable for end contingent worker)

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



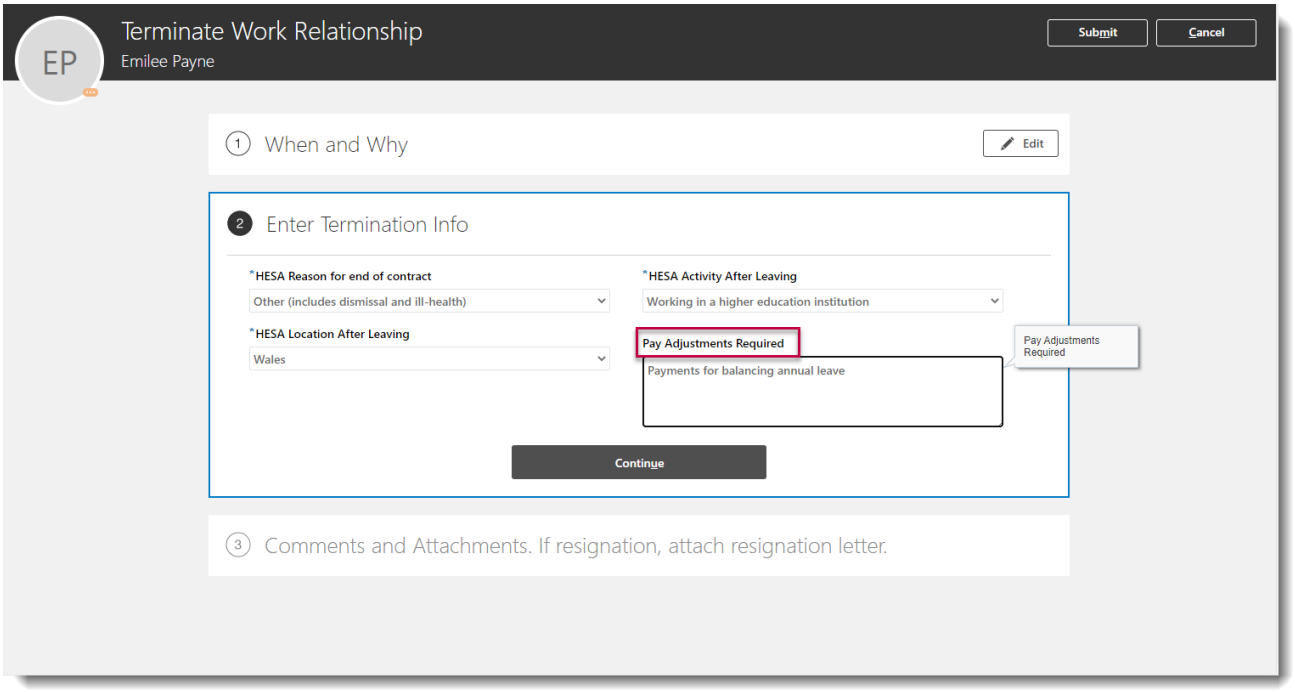
To see the different HESA Location after Leaving dropdown options and when to use them, go to Appendix 6.b (not applicable for end contingent worker)

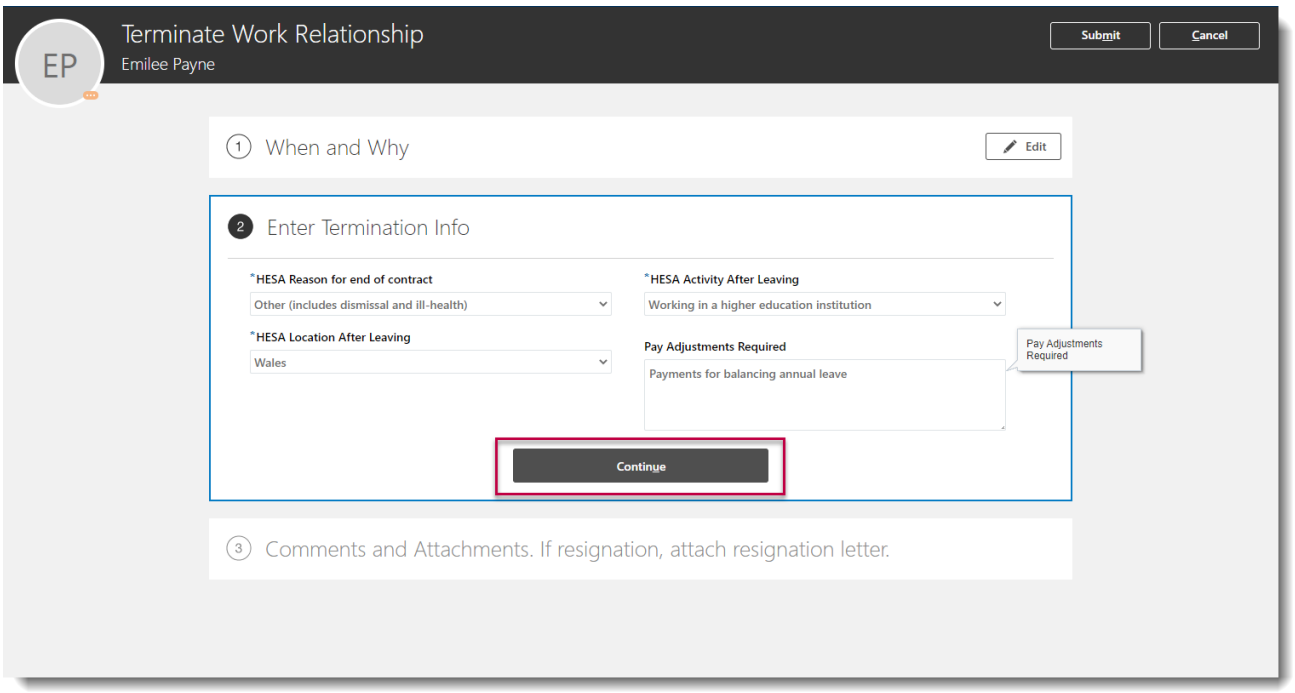
c. Relevant **HESA Activity After Leaving** from the dropdown menu



To see the different HESA Activity After Leaving dropdown options and when to use them, go to Appendix 6.c (not applicable for end contingent worker)

a. **Pay Adjustments Required** – Add any other pay adjustments required, for example, relocation payments to be recovered, payments for balancing of annualised or fractional contracts etc. 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

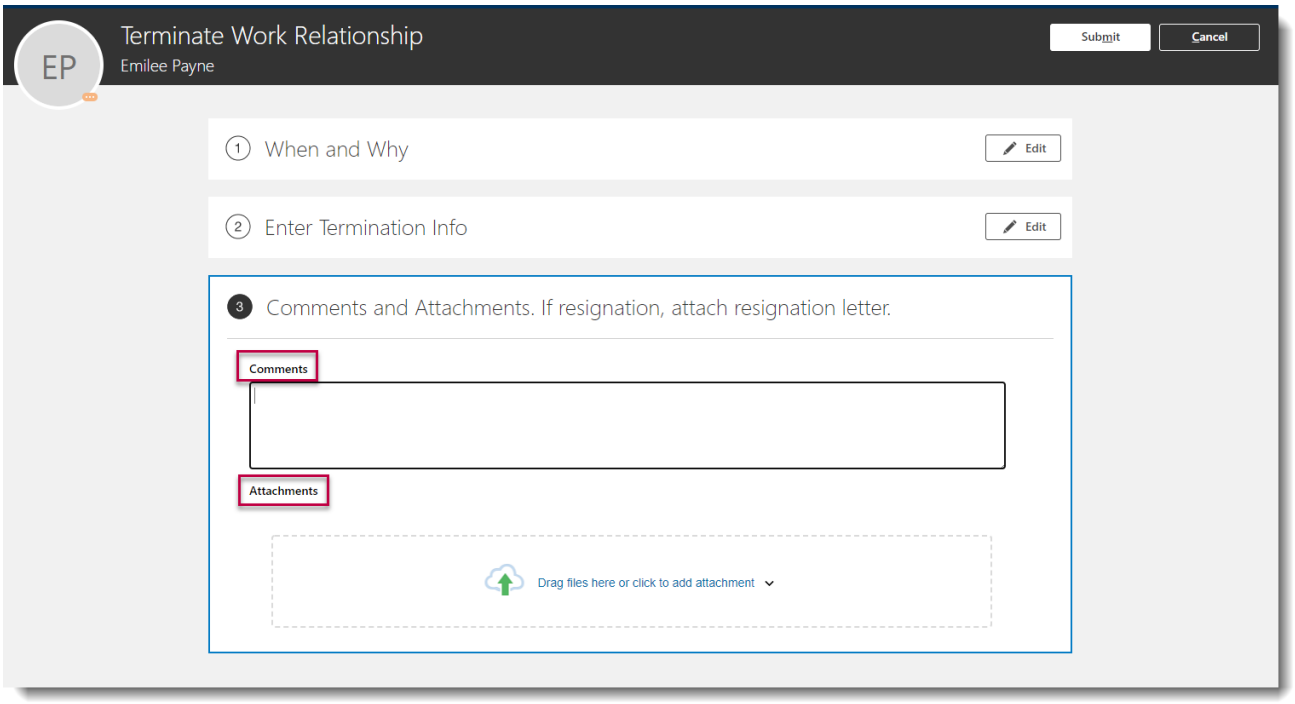




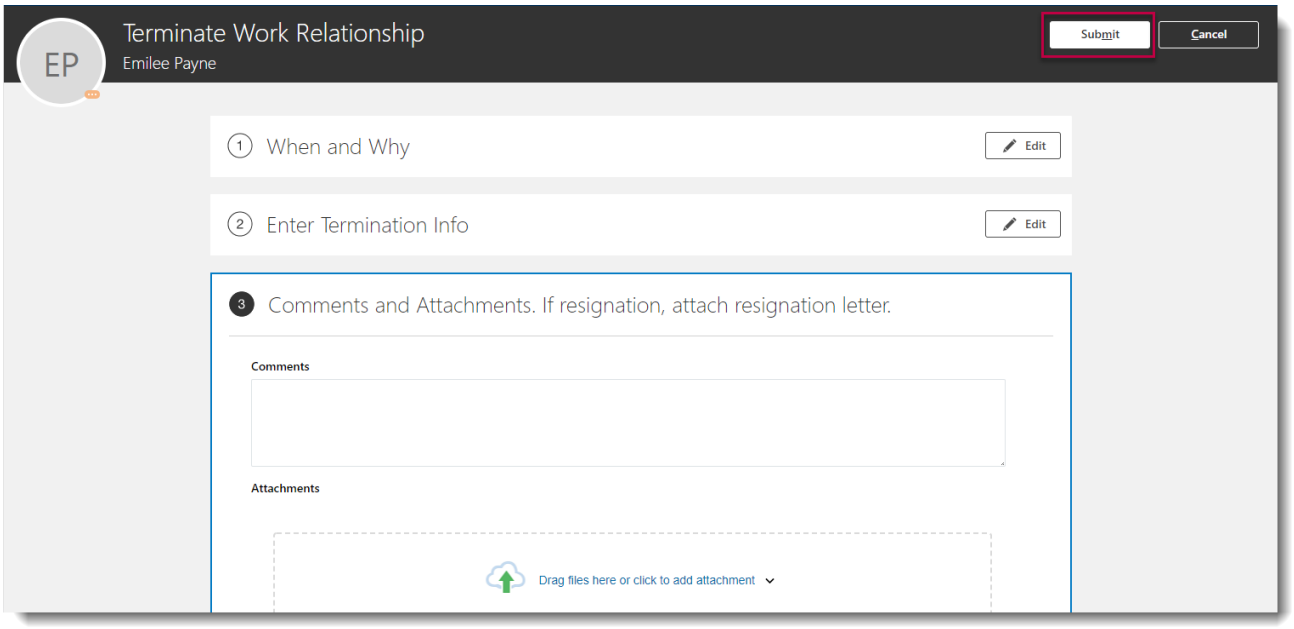
financial impact, (not applicable for end contingent worker).

Then, click **Continue.**

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



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



9. If resignation, upload resignation letter to Document Records.

Glossary

Please refer to Glossary

Appendix

5. **Action Name and Action Reason** dropdown options and linked correspondence and checklists:

Action Name	**Action Reason**	**When to use this Action Reason**	**Checklists 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 receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
	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 receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
	Ill Health Retirement	Employee retires due to ill health. This action reason should only be used by HR Partners	Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
End of Fixed Term Contract	End of Fixed Term Contract	Employee's fixed term contract has reached its end date and they have been in post for less than 2 years. **If they have more than 2 years' service check with your HR Partner before terminating their employment. 'Redundancy' action may apply i.e. 'Redundancy from Expiry of FTC'**	Employee receives confirmation that their fixed term contract is ending as expected. Employee receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
End of Casual Contract	End of Casual Contract	HR Operations use only	No checklist triggered
End Contingent Worker		When a Contingent Worker's period of engagement is ending	No checklist is triggered
Death In Service	Death In Service	Employee dies in service. This action reason should only be used by HR Partners.	Line manager receives a checklist with a link to the death in service guidance.

			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 receives a leavers checklist School/Dept Admin receives a leavers checklist
	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. You should only use this action reason following advice from HR.	
Redundancy	Redundancy from Expiry of FTC (Fixed Term Contract)	Employee is made redundant due to the expiry of their Fixed Term Contract.	Employee receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
	Redundancy from OE (Open Ended) contract	Employee is made redundant from their Open-Ended Contract. You should only use this action reason following advice from your HR Partner.	
Voluntary Severance	Voluntary Severance	Employee opts for voluntary severance. You should only use this action reason following advice from your HR Partner.	Employee receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
Mutually Agreed Termination	Mutually Agreed Termination	Employee is terminated based on a mutual agreement with the University. You should only use this action reason following advice from your HR Partner.	Employee receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
TUPE Out	TUPE Out	Employee transfers from the University to another	Employee receives a leavers checklist

		organisation under transfer of undertakings regulations.	Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
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 receives a leavers checklist Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
Cancellation of Hire	Cancellation of Hire	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 checklists triggered
Abandon Contract	Abandon Contract Without Following Resignation Procedure	Employee leaves without providing notice or a GH employee fails to work the hours they have been guaranteed.	Line manager receives a leavers checklist School/Dept Admin receives a leavers checklist
Dormant	Dormant	This is for HR Operations use only.	No checklists triggered
Non-Worker	Tier 5 Sponsored Worker	To end the payment of a scholarship for a non-worker	No checklists or correspondence triggered
	Scholarship	To terminate the record of a Tier 5 Sponsored Worker	No checklists or correspondence triggered

6.a **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

6.b **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

6.c **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