



How to...Make Your Employee a Leaver

Purpose:

This guide will show you how to understand how to...make an employee a leaver for an employee within **People Manager** in Your HR.

Important Note:

You must ascertain if the employee is leaving Warwickshire County Council (WCC) employment or, whether they are leaving your team and transferring to another one (or transferring from one position within your own team to another position in the same team).

If the employee is leaving WCC employment, then please use this How to guide to make them a leaver.

If the employee is transferring internally to another role within WCC, then HR will transfer them to their new position as part of the recruitment process and the new manager will be notified of the actions required. The transfer will automatically end their current position and you will not be required to make them a leaver. You will, however, need to:

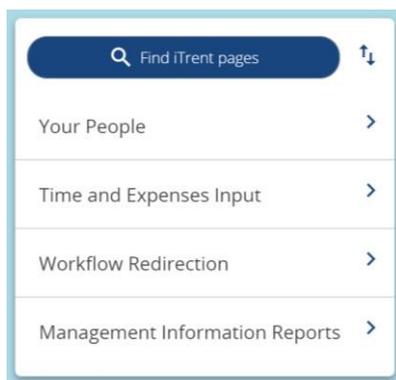
- ensure that the employee has submitted all claims relating to their position before they transfer and that these are approved before the transfer takes place.

Logging in to Your HR:

To log into Your HR, please refer to the **How to...Log in to Your HR Guide (ESS 1)**. After login you will be presented with the People Manager Homepage.

Make Your Employee a Leaver:

- Click on **Your People** in the top right menu



- Select the required employee from your list of direct reports which will be presented on the pane on the left hand side of the screen:

^ People ⋮

test Surname Q +

Results 3 People Save this group

 Mr Lewis Test

 Dr Virgil Tests

 Miss Viv Tests

- From the links section, click on **Make Your Employee a Leaver**:

LINKS

> Personal information
> Employment Details
> Pre Employment Checks
> Time and Expenses

> Leave and Absence
> Appraisal Records
> Learning, Qualifications & Memberships

> Disciplinary/Capability & Grievance
> Process Chains
v Make your Employee a Leaver

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Step 1 - Occupancy Maintenance
Step 2 - Position Details
Step 3 - Check Address Details

- Click on **Step 1 – Occupancy Maintenance**
- An effective date box will be displayed. Set the date to today's date to view the positions occupied by the employee then click on **OK**

Effective date





Please enter the date you wish to view or edit this information from.

OK CANCEL

- The **Occupancy details** screen is displayed:

Miss Viv Tests

▲ This person will leave any organisation, contract or position selected.

Occupancy maintenance (as of 08/02/2023) MENU ↻ 🖨️ 📎

Leaving details

Leaving date* 📅

Last working day 📅

Last payment date 📅

Reason for leaving* ▼

Exit interview complete

Occupancy details

👤	Warwickshire County Council	<input type="checkbox"/>
👤	Contract	<input type="checkbox"/>
👤	Test Team Lead (PA2035299)	<input type="checkbox"/>

Save

Note: if the employee has a position(s) which are not within your area of responsibility, the following message will be displayed:

▲ You do not have security access to view some of this person's occupancy details.
 ▲ This person will leave any organisation, contract or position selected.

- Red stars next to the field title indicate mandatory fields that must be completed.
- In the Leaving details section enter:
 - **Leaving date:** enter the employee's leaving date
 - **Last working day:** enter the employee's last working day
 - **Last payment date:** leave this blank unless the employee has a leaving date at the start of April which falls within the previous financial year e.g. 1st to the 5th April in which case the Last payment date needs to be the 31st March
 - **Reason for leaving:** select the appropriate reason from the drop down list
 - **Exit interview complete:** tick this box if the exit interview has been completed

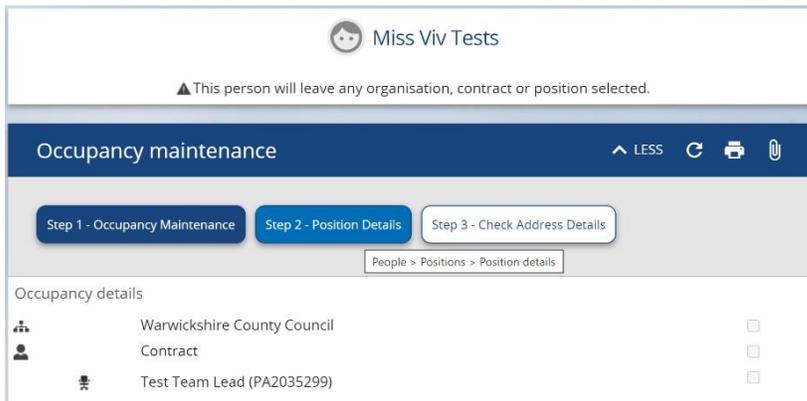
- In the Occupancy details section:
 - If the employee only has 1 position, this will be shown and you can **tick** the box to the right of Warwickshire County Council which will also tick the boxes next to Contract and the Position title

OR

- If the employee has more than 1 position and all are within your area of responsibility, all of them will be listed; tick the position(s) that the employee is leaving. If they are leaving all positions and these are all within your area of responsibility then you can tick the box to the right of Warwickshire County Council to select them all. Note:if positions report to different managers, you cannot tick the 'Warwickshire County Council' or 'Contract' options



- When the required information has been entered click on **Save**.
- Click on the paper clip  in far-right hand corner to **add documents if required**.
- Click on Save.
- Then click on **Step 2 – Position Details from the menu:**



Step 2 of the Leavers process is displayed. The

Effective date box is displayed. Click on **OK**



- The **Position details** screen is displayed: (if the employee has more than one position you may need to click on the one they are leaving from the left hand side of the screen)

The screenshot shows a web form titled "Position details (as of 08/02/2023) Test Team Lead". The form contains the following fields and values:

- Job title*: Test Team Lead
- Start date*: 01/11/2022
- End date change:
- End date: [Empty field]
- Position reference: PA2035299
- Location: Barrack Street, Warwick, CV34 4F
- Work location: [Empty field]
- Structure security group: [Empty dropdown]
- Occupant: Miss Viv Tests
- Reporting unit: Warwickshire Test Unit
- Reports to: Service Improvement Senior Officer
- Reporting post: Mr Lewis Ashwood (26/01/2023 -)
- Expected position end reason: [Empty dropdown]
- Expected position end date: [Empty date field]

- **Only** if the position also needs to be end dated e.g. because it is being made redundant then tick the 'End date change' box and enter the **End date change** i.e. the date from which this post is redundant otherwise, leave this blank. By doing this, you will not be able to recruit to this position after this date.

- If the employee is leaving more than one position, click on the next position from the left hand side and enter the position details as required.



- Click on **Save**. The following message will be displayed. You do not need to save if no details are entered on this screen.
- Click on the down arrow button next to Menu to expand the options and click on Step 3 – **Check Address Details**



Check that the employee's home address is up to date. You are prompted to enter the effective date. If the employee is moving address after their employment ends, you must set the effective date to the date of the new address so that the current address details are end dated from the correct date.

- The Address details screen is displayed:

The screenshot shows a web interface for 'Miss Viv Tests'. The main heading is 'Address details (as of 08/02/2023) New'. Below this, there are several form fields: 'Address type' is a dropdown menu set to 'Home'; 'Mailing address' is a checkbox that is checked; 'Country' is a dropdown menu set to 'United Kingdom'; 'Address Line 1' is a text input field containing '20 Test Road'; 'Address Line 2', 'Address Line 3', 'Address Line 4', and 'Address Line 5' are empty text input fields; 'POSTCODE' is a text input field containing 'CV34 4RL'; 'Start date' is a date picker set to '08/02/2023'; and 'End date' is an empty date picker. At the bottom of the form is a green 'Save' button.

- If the employee is changing address, click on the **NEW** button to display a blank address screen and enter the new details. **SAVE** the changes. If the address is not changing, no action is needed.
- To make a payment for holiday pay, or to change reporting lines for any direct reports please follow the steps below to complete the leavers process.

Holiday pay adjustment claim

1. This is to be used if you need to deduct or pay annual leave for a leaver

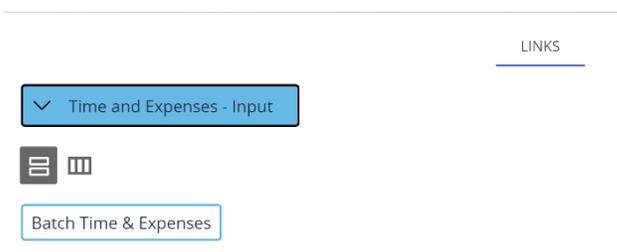
- Select **Time and Expenses Input**

The screenshot shows a navigation menu with a search bar at the top containing the text 'Find iTrent pages'. Below the search bar are several menu items, each with a right-pointing chevron: 'Your People', 'Time and Expenses Input', 'Workflow Redirection', 'Management Information Reports', and 'My dashboard'.

- This will take you to the next page where a list of claim templates will be shown to the left of the screen. Click on **Leavers Holiday Pay Adjustment**.



- From the main screen, click on **Batch Time & Expenses**:



- This will bring up the effective date box as shown below and you can enter the relevant date or select it from the calendar by clicking on the drop down arrow. You can set this to their leaving date then click on **OK**



- The following screen displayed:

Leavers Holiday Pay Adjustment

Batch Time & Expenses (as of 08/02/2023) New ▼ MENU  

Person search

Surname

Unit

Job title

Personal ref.

Smartgroup 



Time & Expenses claim

Claim template

Person name*

Job title*

Start date* 



- Use the smartgroup search engine by clicking the magnifying glass to find the required employee or you can enter the employee's personal reference number.

Leavers Holiday Pay Adjustment

Batch Time & Expenses (as of 08/02/2023) New ▼ MENU  

Person search

Surname

Unit

Job title

Personal ref.

Smartgroup 



Time & Expenses claim

Claim template

Person name*

Job title*

Start date* 



- Once you have found the right employee, click on **New** at the bottom of the screen.

- Enter in the effective date and a description and then the number of hours to be paid or deducted in the "Hours" field. **Use a "-" to make a deduction.**
- Click **Save**.

If the Leaver is a Reporting Manager then ...

If the leaver had employees reporting to them, you must move these to another manager e.g. to yourself or another one of your reportees until the vacancy is filled. If this is not done and the employees submit requests via Employee Self-Service, they cannot be actioned. Guidance on how to do this can be found in the **How to Change Reporting Manager** guide

Notifications

- Your employee will receive a system notification email when you make them a leaver. They will receive a separate notification for each position they are leaving.
- Other teams within WCC will also receive a notification so they can undertake the necessary action e.g. to end the employee's access to the network or to deactivate their ID badge.
- The manager will receive an email with details of follow up action they are required to take.
- The manager will receive a reminder 7 days before the employee's leaving date. You are required to check the employee's annual leave entitlement and pay or deduct this using the Leavers Holiday Pay Adjustment time and expenses template. Please note: if the employee works as a Retained Firefighter, the holiday pay adjustment must be notified to [HR Service Desk](#) who will process this on your behalf.

Returning to People Manager Homepage

- Click Your HR logo in the top left hand corner of the screen.

- If you would like to stay in this employee's record to view other information, click on the employee's name.
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For further information or support please refer to Your HR on the [Intranet](#) or please raise a request through the [HR Service Desk](#) or phone on 01926 738444

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