Making an Employee a Leaver

Purpose:

This guide will show you how to **Make an Employee a Leaver** in Your HR.

Please note:
- If the employee is only leaving one of many positions then skip 'Making an Employee a Leaver' and go straight to 'Ending Position Occupancy'.

Making an Employee a Leaver
- Your People > Search for the required employee and select their record
- **Click '**Make your Employee a Leaver'

- **Click 'Step 1 – Occupancy Maintenance**'
- Effective date – Set this to the employee's leaving date - *For Teachers, please find the Teaching Resignation Dates for the leaving date to use:*
  - *-* Spring – 30 April (this may change each year due to when Easter falls)
  - *-* Summer – 31 August
  - *-* Autumn – 31 December
- The Occupancy Maintenance screen will be shown:

- **Enter** the leaving date
- **Enter** last working day
- **Enter** Reason for leaving
- **Tick** the exit interview complete box if this has been done

- Occupancy details - If the employee is leaving ALL of their positions and the leaving reason is the same for all then **Tick** the Organisation box i.e. Warwickshire County Council which will automatically tick the Contract and Position boxes to the position and make the employee a leaver altogether from Your HR. If the employee is only leaving one of many positions, tick the box next to the relevant position(s) you want to end.
- **Click** Save

- The 'Occupancy maintenance' screen will be displayed:

- **Click 'Step 2 – Occupancy Details'**
- The Occupancy details screen will be displayed. No action is required unless the employee was on a fixed term contract. If so, check and ensure that the 'Expected Occupancy End Date and Reason are up to date. Save any changes.

- **Click 'Step 3 – Position Details'**
- Effective date – This will be the leaving date. **Click** OK
- The Position details screen will be displayed
- If the position needs to be ended when the employee leaves i.e. because it is being made redundant or you will not recruit to it again in the future, tick the **End date change** box which will be enabled and enter the end date. If the position will still be required in future, do not tick the End date change box.

    If you need to end date another position from which the employee is leaving, select this from the left hand navigation and repeat the above steps.

- **Click 'Step 4 – Check Address Details'**
- Effective date – If the employee is not changing home address, you are not required to amend this. If the employee is moving address, 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 will be shown
- 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 employee's address is not changing, then you do not need to do anything

Ending position occupancy

Please note:
- If an employee is leaving one position and will still have active positions with you then you only need to end the occupancy of that relevant position that is ending.

- Your People > Search for the required employee
- **Click** Employment details > **Click** Occupancy details
- **Click** the required job role from the Positions section of the navigation bar on left hand side of the screen
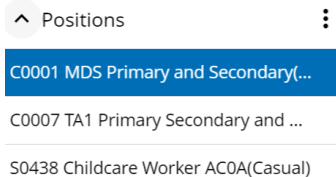
- Effective date – This can be set to "today's" date
- The Occupancy details screen is shown
- Tick the end occupancy box. The following fields will be shown:
    - **Leaving date**: Enter the employee's leaving date. ***For Teachers, please find the Teaching Resignation Dates for the leaving date to use:***
    - o Spring – 30 April (this may change each year due to when Easter falls)
    - o Summer – 31 August
    - o Autumn – 31 December
    - Last working day: not mandatory however can be entered if you wish
    - Last payment date: this must only be entered if the employee's leaving date is 1-5th of April otherwise leave this blank.
    - Exit interview complete: **tick** this box if you want to record that the interview has taken place
    - Reason for leaving: Select the appropriate reason from the list
- **Click** on save

If the employee is term time only (TTO), WES Payroll will manually calculate and attach any adjustments for TTO.

Final Actions

The following will also need to be manually entered:

- If the employee has given their consent for you or WCC to respond to reference requests i.e. mortgage, employer etc. you need to enter this in the 'New Starter Declaration / Reference Consent' screen which can be accessed from Personal Information > Person Details Administration link
- If the employee is term time only (TTO), WES Payroll will manually calculate and attach any adjustments for TTO
- For a 52 week employee, please pay or deduct any hours due using the Holiday Pay Adjustment template.
- All employees should have e-form preferences set up so they can receive an email payslip and P60. For those schools who use Employee Self-Service (ESS), employees can also view and download these from ESS each month. However, it is important to check that the e-form preferences have been setup before someone leaves to ensure they receive their final payslip (i.e. if leaving mid-month as their access to ESS will end from their leaving date) and if relevant, to ensure they will receive their P60. Check and if required, enter this from Personal Information > E-form Preferences.