**Leavers Process (eForms)**

**Guidance & Process for Managers**

**Principles**

* Line Managers will complete an online form to notify HR Services of leavers.
* This will replace e-mail notification and ensure that all required information is provided correctly first time - speeding up the process and avoiding back and forth by e-mail.
* This has been piloted in PS&CI and is gradually being rolled out across the University.

**Process**

* Line Managers (or their delegate) will complete an [online leaver notification form](https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUQlRBSThKQ041R1RMT1BCNE5MTk1RTU5LVy4u) to notify HR Services of all staff leaving the University.
* Line Managers will receive an automated e-mail response with a link to the [mandatory leaver’s checklist](https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUMTVDSjlBMVlRMEk5NllMUUVZODRZRlhUUi4u) that will also be completed online.
* HR Services will complete appropriate verification, requesting further information if required, and process the leaver.
* Where appropriate, staff that are leaving will receive a link to an online [exit questionnaire](https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUOExOU1UwUURWQ1FaN1NRSkNUS043VjlJRi4u) in their confirmation of leaving letter.

**FAQs for Managers**

**Should the forms be used if someone is changing jobs at the University?**

* The [leaver notification form](https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUQlRBSThKQ041R1RMT1BCNE5MTk1RTU5LVy4u) should not be used if someone is transferring internally from one job to another. It should be used if someone has more than one job and is leaving one but remaining in the other.
* The [mandatory leaver’s checklist](https://forms.office.com/Pages/ResponsePage.aspx?id=B8tSwU5hu0qBivA1z6kadzBLA3lzNsZDpBJ3THo3h-NUMTVDSjlBMVlRMEk5NllMUUVZODRZRlhUUi4u) should be used for both internal job moves and leaving the University altogether. This will ensure systems and access remains appropriate for the new job.

**Is the form used to notify HR of a death in service?**

No – your HR Partner should be notified who will support you and liaise with HR Services direct.

**Is the form used to tell HR about agency workers that are leaving?**

No – you should liaise direct with the employment agency to terminate the contract and e-mail [hrservices@manchester.ac.uk](mailto:hrservices@manchester.ac.uk) to end the IT access early if required.

**Is the form used to tell HR about casual workers that are leaving?**

Yes, but only if they are leaving before their planned projected end date.

**Is the form to be used when someone’s fixed-term contract (FTC) is ending?**

Yes. This will ensure that all follow on automated actions take place, such as the sending of the reminder regarding the completion of the mandatory leaver checklist.

**Is the form used to tell HR about an employee taking retirement?**

Yes the form should be completed for anyone leaving on retirement, but only after a retirement application has been submitted, and the application and pre-retirement plan agreed. Please see the [Retirement Guidance](https://www.staffnet.manchester.ac.uk/human-resources/current-staff/leaving-the-university/retirement/) and [Retirement Policy](https://documents.manchester.ac.uk/display.aspx?DocID=11679) for information.

**Can I submit an attachment to the form?**

No. If HR Services require any other documents to be sent they will liaise direct with you or the individual that the form is regarding.

**Can I make a change to the form after it has been submitted?**

No – simply e-mail [hrservices@manchester.ac.uk](mailto:hrservices@manchester.ac.uk) to make us aware of anything that has changed after you have submitted the form.

**Who can line managers delegate completion of the leaver notification form to?**

Anyone can complete the form on behalf of the line manager. However In order to complete the form, the delegate will need to know the leaver’s staff ID (visible to the line manager in MyView) and the reason for leaving, destination on leaving, and annual leave balance. They will need to liaise with the manager and leaver for this information, if they do not already have it.

Please note it has been agreed in the Faculty of Science and Engineering that all leaver notification forms will be completed by the Faculty Operations Team.

We recommend that the mandatory staff exit checklist is completed with both the manager and leaver present (over phone, or by video) as there will be many operational matters regarding the handover of information and assets to be discussed.

**FAQs for HR Services**

**What should I do if I receive notification of a leaver by e-mail instead of the online form?**

If the leaver is in an area of the University where we are now using the form, the form must be completed by the manager. Please contact to politely make them aware of the online form and ask them to complete. Diarise to check this is done in line with the date you have been given by e-mail.

**What should I do if I receive notification of a retirement via the online form, where a case does not already exist?**

Contact the relevant HR Partner and Pensions team to check they are aware of the case; follow the existing process for handling retirements.

**What do I need to do with Staff Exit Checklist information?**

This is being securely retained in the database for reporting purposes; you don’t need to take any action on these.

**Do we still need the resignation letter from the individual?**

Where the manager has received notification in writing please ask them to forward this to you and place it on the leaver’s personnel file.

**Key contacts**

Advice and Guidance on the revised Leaver Process: Your [HR Partner](https://www.staffnet.manchester.ac.uk/human-resources/abouthr/contact-us/hr-partners/) & [Employment Services Officer](https://www.staffnet.manchester.ac.uk/human-resources/abouthr/contact-us/hr-services/)

Feedback regarding forms: Sarah Kakanskas, Employment Services Manager