

Departments can only end appointments held in their department. To end the appointment(s) refer to the appropriate scenario.

Before you end an employee's appointment(s) additional instructions should be provided for Payroll (**section B**).

If relevant, a forwarding address may need to be added (**section C**). It is also important to check that there are no outstanding salary requests (**section D**).

Refer to [Recording start and end dates in CoreHR](#) for guidance on the correct end date to enter to ensure the employee is paid correctly.

### What's changed?

1. Note added regarding Manager Self-Service Access following the implementation of Self-service.
2. Navigation updated.

**September 18**



**Note:** If there are any final payments to be made, eg outstanding holiday pay, these should be notified to Payroll via the Additional Instructions (**section B**).



**Note:** If an employee is leaving one of multiple appointments and the employee is a Self-Service Manager, the department from which the employee is leaving should complete a Service Request (available from the [HRIS Service Catalogue](#)) to remove their manager access to the original Work Group.

Where an employee is 'leaving' one department for another department elsewhere in the University refer to **QRG: PA2e\_Appoint Transfer - new department**.

Before you begin you will need to refer to the Scenarios section to determine what actions you need to take.

**NOTE: Sections A, B, and D must be followed before ending any appointment.**

This guide covers the following process steps:

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## Scenarios

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### Scenario 1: Individual is leaving the University and has one appointment

1. Follow the steps in sections A, B, C and D.
2. End the Appointment following the steps in section E.



**Note:** Please ensure you state where the P45 should be sent

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### Scenario 2: Individual has multiple appointments in the same department and all of them will end on the same day

End the appointments in the following order:

Non-substantive appointment(s):

1. Follow the steps in sections A, B and D.
2. End the Appointment(s) following the steps in section E.

Substantive appointment:

*(For guidance on identifying the substantive appointment refer to section G of this guide)*

1. Follow the steps in sections A, B, C and D.
2. End the Appointment following the steps in section E.



**Note:** Please ensure you state where the P45 should be sent

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## Scenario 3: Individual has multiple appointments in different departments and all of them will end on the same day

Each department should follow the steps below. The appointments should be ended in the following order:

### Non-substantive department(s):

1. Follow the steps in sections A, B and D.
2. End the Appointment(s) following the steps in section E.

### Substantive department:

*(For guidance on identifying the substantive appointment refer to section G of this guide)*

1. Follow the steps in sections A, B, C and D.
2. End the Appointment following the steps in section E.

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## Scenario 4: Employee has multiple appointments in the same department and is leaving one appointment

1. Follow the steps in sections A, B and D.
2.
  - a. Substantive appointment is ending: End the Appointment following the steps in section E.  
*(For guidance on identifying the substantive appointment refer to section G of this guide)*
  - b. Non substantive appointment is ending: End the Appointment(s) following the steps in section E **BUT** record the Leaving Destination Code and Location after leaving as follows:

<b>Leaving Destination Code *</b>	Not Applicable/Not Required
<b>Location after leaving*</b>	N/A Continuing as University employee. (This information is required for HESA purposes.)

# EA1 - End appointment(s)

## Scenario 5: Employee has multiple appointments in different departments and is leaving one appointment

Substantive appointment is ending:

(For guidance on identifying the substantive appointment refer to section G of this guide)

1. Follow the steps in sections A, B, C and D.
2. End the Appointment following the steps in section E.



**Note:** Please ensure you state where the P45 is to go to

Non-substantive appointment is ending:

1. Follow the steps in sections A, B and D.
2. End the Appointment(s) following the steps in section E **BUT** record the Leaving Destination Code and Location after leaving as follows:

**Leaving Destination Code \*** Not Applicable/Not Required

**Location after leaving\*** N/A Continuing as University employee. (This information is required for HESA purposes.)

## A. Updating the employee record

**Navigate to: Personnel > Maintenance > Personal Profile**

1. Search and open the employee record and go to **Select Detail > Appointment Details**. The *Appointment Details* window opens.
2. Click the **Appointment Details** button. (If necessary click into the Appointment ID field to select the relevant appointment.) The *Post Appointment Maintenance* window opens.



**Note:** If a screen opens regarding selection of a sequence, this indicates that there is a future-dated change on the appointment. Cancel out of the screen and e-mail the HRIS Support Centre so that they can amend the change to allow you to proceed with ending the appointment. Please quote the date you need to end the appointment(s) in the e-mail.

Post No / Sequence	Post Title	Appointment Type	Appointment Status	Start Date	End Date	FTE
12718	ACADMIC-RELATED ACA	Primary	Confirmed	28-NOV-2012		8
12719	ACADMIC-RELATED ACA	Primary	Commenced	27-AUG-2012	25-NOV-2012	6

## B. Additional instructions for Payroll

Payroll will need to know where to send the P45 if the employee is leaving the University, and may also require additional instructions such as:

- Details of outstanding holiday pay including the cost centre that this is to be paid from.
- Details of redundancy payments
- Notification that more detailed instructions are being forwarded by email

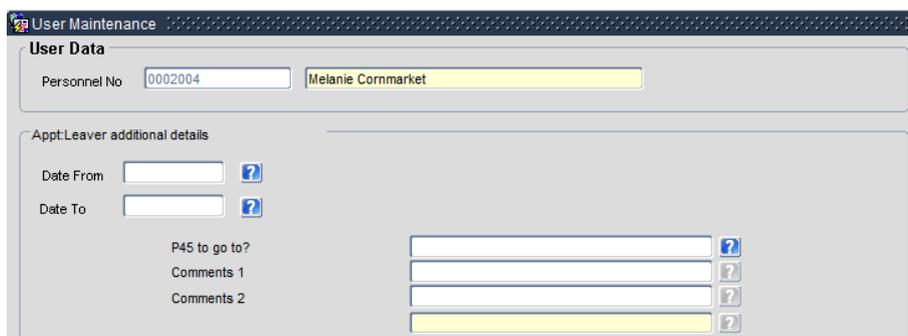
1. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.



2. Click to display **User Defined Field** List of Values.

3. Select **Appt: Leaver Additional Details**.

4. Click .



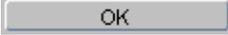
5. Complete details as below:

Field Name (* mandatory)	Description
<b>Date From*</b>	Enter the date the employee is leaving
<b>Date To</b>	Leave blank
<b>P45 to go to? *</b>	Select the relevant option from the LoV eg P45 to go to Home Address – see note below.
<b>Comments</b>	Add Comments for Payroll as required (see list above). <b>Note:</b> Two comments fields are provided to allow for multiple comments.

# EA1 - End appointment(s)



**Note:** The 'P45 to go to' must be entered on the substantive appointment where it is the only appointment and it is ending or where all appointments are ending i.e. the employee is leaving the University. (For guidance on identifying the substantive appointment refer to section G of this guide)

6. Click . A 'transaction complete' message will appear. Click . Exit all windows back as required.

## C. Change of address for forwarding purposes

**Navigate to: Personnel > Maintenance > Personal Profile**

1. If the employee's home address has changed, update this in the Address Maintenance screen. For guidance on how to add a new address refer to [QRG: CH8 – Personal Details](#)



**Note:** Only complete the following steps if payslips are to go to an address other than the Location or Home Address **and** Payroll have been informed by email.

2. If an address other than home or location is to be used for their final payslip/P45 then go to **Select Detail** box > **Address Maintenance**.
3. **Address Type:** Select **Label Address (Payslip)** and update the address as required.

The screenshot shows a window titled 'Address Maintenance' with a sub-section 'Address Details'. It contains three input fields: 'Date Effective' with the value '15-SEP-2015', 'Address Type' with the value 'LABEL ADDRESS (PAYSLIP)', and 'Country' which is currently empty. Each field has a small question mark icon to its right.



**Note:** Do not select Address Type: **Forwarding Address** as there is an issue with pulling through to the payslip.

4. Click . Exit windows back to the *Personal Profile* screen.

# EA1 - End appointment(s)

## D. Checking outstanding salary requests

It is important to check that any salary requests related to appointments which are to be ended have a status of "Approved" **before** the appointments are ended.



**Note:** You may need to liaise with other departments and Payroll to ensure all salary requests are approved, particularly where the individual has appointments in multiple departments. The status of salary requests in other departments will not be visible to you.

To check the status on appointments in your department:

1. From the *Personal Profile Maintenance* window go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. From the *Appointment Details* window click the **Appointment Details** button. (If necessary click into the Appointment ID field to select the relevant appointment. The *Post Appointment Maintenance* window opens.
3. Go to **Selection** > **View Position History**. The *View Position History* screen opens:

Start Date	End Date	Appointment Id	Status	Job Title	Post Type	FTE	Rate Of Pay	Allowances
01-JUL-2015	28-JUL-2015	228804-1	COMMENCED	ASSOCIATE PROFESSOR	FIXED TERM	0.8000	37423.00000	<input type="checkbox"/>
14-JUL-2015		228869-1	COMMENCED	RESEARCHER	FIXED TERM	0.2000	43325.00000	<input checked="" type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>

Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason
01-JUL-2015	28-JUL-2015	01-AUG-2014	30S		Annual	37423.00000	.800000	29938.40000	Approved	NEW STAR

4. If the status is not 'Approved' you should check PERDEP20\_Monthly Personnel Changes Report (Approved Salary Changes tab) to see where the approval is outstanding (Department or Payroll) and follow up appropriately.

# EA1 - End appointment(s)

## E. Ending appointment(s) - all scenarios

1. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.

2. Click on **End Appointment**. (If necessary click into the Appointment ID field to select the appointment to be ended. Where multiple appointments exist, check in the Appointment Detail section that you have selected the correct one to be ended.)

The *End Appointment* window opens:

# EA1 - End appointment(s)

3. In the Leaving Detail section enter/select details as below:

Field Name (* mandatory)	Description
<b>Effective Date *</b> 	The last paid date. <i>(Refer to <a href="#">Recording start and end dates in CoreHR</a> for guidance on the correct end date to enter to ensure the employee is paid correctly.)</i>
<b>Leaving Code *</b>	Select relevant reason, eg Resignation - Promotion/career prospects
<b>Leaving Destination Code *</b>	This field is collected for HESA. Select the relevant option. If the leaving destination is another UK HEI then select the name of the HEI from the list. If the institution is not in the list of values then it is not a UK HEI and may be an organisation related to an HEI.
<b>Location After Leaving *</b>	This field is collected for HESA. Select an option to indicate the geographic location of the activity being coded for in 'Leaving Destination Code'.
<b>Ending Reason *</b>	This field is used to validate Leaving Destination Code and Location After Leaving. Record additional information that cannot be coded for within those fields. Do <b>not</b> enter instructions for payroll or sensitive details of the reasons for leaving (eg family bereavement, nature of ill health, etc.).



**Note:** It is important to enter the correct details in these fields. If you are not sure what to enter please refer to the [HR Information team website](#) for additional guidance on updating the Leaving Destination Code and Location After Leaving.

4. Click . A message appears asking if you are sure want to end this appointment. Click . Exit all windows back to the main Personnel screen.

**NEXT STEPS:**

A letter should be sent to the individual to confirm their leaving date etc.

## F. Remove or amend end date

If you have incorrectly ended an appointment or entered the wrong end date you can, in certain circumstances, remove or amend it as required. Extreme care must be taken and if you are in any doubt please contact the HRIS support centre on [hr.systems@admin.ox.ac.uk](mailto:hr.systems@admin.ox.ac.uk) before making any changes.

### Notes:



1. You can only amend or remove an end date if the payroll has not been run for the month in which the end date entered occurs. You **must** notify payroll if you make a change.
2. If the payroll has been run for the month in which the end date occurs you will not be able to make any changes to the end date. Please contact HRIS Support on [hr.systems@admin.ox.ac.uk](mailto:hr.systems@admin.ox.ac.uk).

1. From the *Personal Profile Maintenance* window go to > **Appointment Details** > **Appointment details** > **Selection** box > **Amend Appointment End Date**



The *Modify Post Appointment end Date* window opens:

2. Remove or amend the end date as required and click .

3. Notify your payroll administrator that you have amended or removed the end date.

## G. Identifying the substantive appointment

Where multiple appointments exist you may need to identify the substantive appointment.

**Navigate to: Personnel > Maintenance > Personal Profile**

1. Go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.

The screenshot shows the 'Appointment Details' window. It contains fields for Personnel No. (0002004), Forename (Melanie), and Surname (Cornmarket). There is a 'Multiple Appointments Exist' checkbox which is checked, and a 'Show' dropdown menu set to 'My Current'. Below these fields is a table titled 'Appointments' with the following columns: Appointment Status, Appointment Id, Start Date, End Date, Department, Job Title, Employee Status, and Substantive Date. The table contains two rows of data. The second row has a date '01-JUL-2015' in the Substantive Date column, which is highlighted with a red box.

Appointment Status	Appointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Commenced	228869-1	14-JUL-2015		RESEARCH CENTRE	RESEARCHER	FIXED TERM	
Commenced	228804-1	01-JUL-2015		INSTITUTE OF FUTURE TECHN	ASSOCIATE PROFESSOR	FIXED TERM	01-JUL-2015

2. Check the current (active) appointment(s). The substantive appointment will have a date in the Substantive Date column.

+	2.000
0	+5.000
1	+1.500
0	+1.125
0	+1.062

### Useful Reports

To help track changes, including leavers don't forget to regularly run: [PERDEP20 Monthly Personnel Changes](#)