
North Lanarkshire Council



**Leavers Process on myTeam
Manager User Guide**

Version Control

Document Name: Manager User Guide – Leavers Process

Version Control History

Version	Date Completed	Authors	Description
0.1		Mark Lennon Nichola Millen Gavin Scott	Manager User Guide for myTeam Leavers
0.2	September 2020	Amiee McGarrell	Additional information added on Personal Bonds Checks
0.3	November 2020	Rhiannon Chisholm	Opening & closing dates (iTrent).
0.4	28/04/2022	Amy Dale	Updating of screenshots and amended email address to new People Operations team

Reviewed & Approved By:

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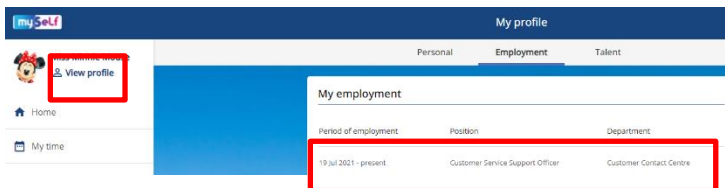
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Background

An employee can now log onto mySelf and request to resign from a position they occupy. **The following process described should not be used for employees who are transferring from one position to another. This is still actioned by the Employee Service Centre. Also, please do not use this process for retirements or redundancies.**

For an employee to notify they wish to resign, they do this in the **Employment** tab in mySelf under **'View Profile'**. From there they navigate to the **'Employment'** section and choose the **applicable job** within my employment as shown below:



The employee then scrolls down to **Resignation notification** and completes the following information:

Resignation notification

After submission, you will have a 48 hour period to change your mind by pressing **Withdraw**.

* Last working day (dd/mm/yyyy) (required)



Resign from all positions

* Resignation statement (required)

Save

Cancel

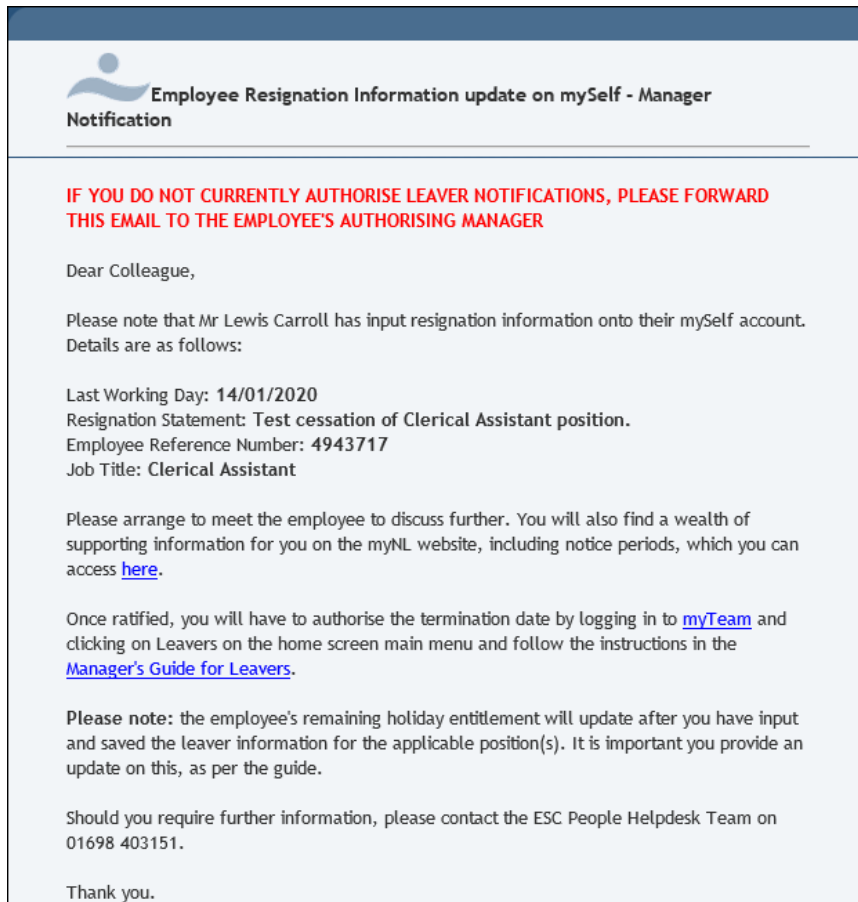
NB: An employee cannot submit a resignation statement with a retrospective date.

The employee clicks **Save**, after then a cooling-off period is initiated where they have up to 48 hours to delete the request if they change their mind.

After this period, if the employee chooses not to delete the request, the manager will receive a notification advising to meet the employee to discuss further and to update leaver information on **myTeam**.

If, after the 48 hour period the employee still wishes to cancel the request, a meeting should be arranged to discuss this.

You will receive the following email:



You can action this by **logging into myTeam**, as per the myTeam link in the above screenshot in your emails.

Please note, the following process is only available when iTrent is opened. Open and closed dates can be found [here](#). If you are concerned an employee will be overpaid due to their resignation date, please contact the ESC People Help Desk on 01698 403151 or email esc-helpdesk@northlan.gov.uk

1 Logging In

Log into **myTeam** using your username (employee number) and password:

https://ce0076li.webitrent.com/ce0076li_web/

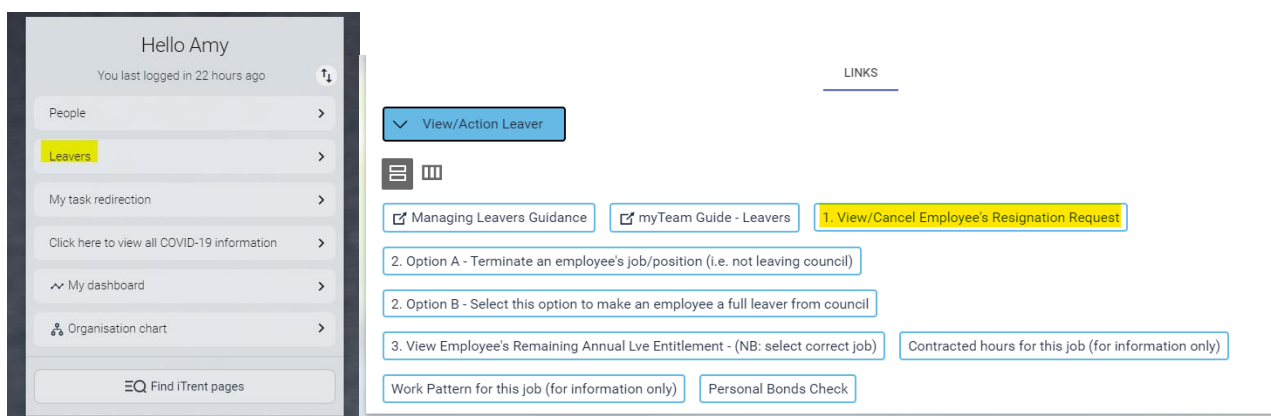


All relevant areas for these processes can be found within the Leavers section as indicated above.

2 Processing a Leaver

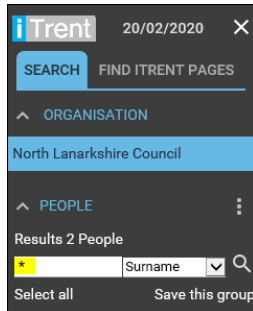
2.1 Check the resignation details

On the menu of the home screen select **Leavers** then choose **1. View/Cancel Employee's Resignation Request**.

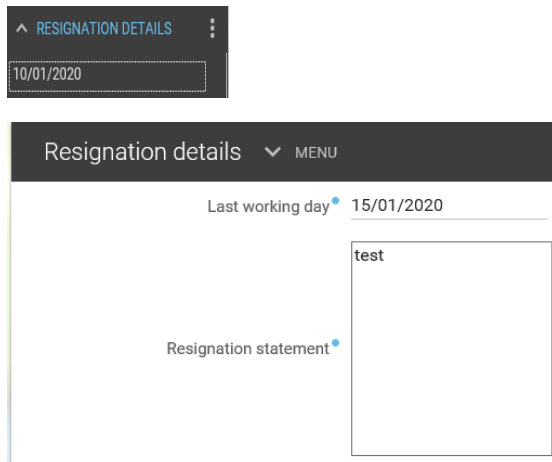


You should then select the employee who has submitted the resignation, from the left-hand side of the screen.

NB: If you have received the resignation request email from another reporting manager who is not authorised to process leavers, you can search for the employee by typing an asterisk in the field where you would search for an employee by their name or employee number.



You can click on this for further information which will show the last working date (leaving date) and reason for leaving.



The manager **should check if enough notice has been given** and that the correct last working day has been entered. For more details click [here](#) which will take you to Leaver FAQ's within myNL.

NB: The system does not accept resignations in the past. Also, if the employee has future dated absences beyond the leaving date, you will be prompted to reconfirm the leaving date entered. Once the above steps are complete, an email notification will then be sent to the relevant HR Operations Team and Business Partners, informing them of the changes made.

2.2 Terminate an employee's job/position (i.e. not leaving council)

When satisfied that you wish to proceed you should go back to the Leavers tab and choose **2. Option A – Terminate an employee's job/position (i.e. not leaving council)**

The screenshot shows a navigation menu titled 'LINKS'. It contains several buttons: 'View/Action Leaver', 'Managing Leavers Guidance', 'myTeam Guide - Leavers', '1. View/Cancel Employee's Resignation Request', '2. Option A - Terminate an employee's job/position (i.e. not leaving council)' (highlighted in yellow), '2. Option B - Select this option to make an employee a full leaver from council', '3. View Employee's Remaining Annual Lve Entitlement - (NB: select correct job)', 'Contracted hours for this job (for information only)', 'Work Pattern for this job (for information only)', and 'Personal Bonds Check'.

Select the employee from the list at the left-hand side (you can also search for them).

You will then be prompted to choose the Effective Date (this is normally today's date):

The Occupancy Details screen will now be visible

The screenshot shows the 'Occupancy details' form for 'Workforce Systems Development Senior Adv'. The form includes the following fields and instructions:

- Current status:** Live
- Occupant:** Miss Amiee McGarrell
- Occupancy start:** 24/08/2020
- Occupancy end:** (empty)
- Occupancy type:** Standard (dropdown menu)
- Position occ. reference:** (empty)
- Expected occupancy end date:** (calendar icon)
- Expected occupancy end reason:** (dropdown menu)
- End occupancy:** (checked)
- Additional fields:**
 - Reason for Change of Occupancy End Date:** (text area)
 - Please tick to confirm you have discussed the employee's remaining annual leave:**
 - I confirm that the employee will use their remaining annual leave before leaving:** (dropdown menu)
 - I authorise the employee to be paid any remaining holidays, prior to leaving:**
 - I confirm I've completed/sent the ICT Leaver's checklist for this employee:** (checked)
- SAVE:** (green button)

Red arrows point from the following text to the corresponding fields in the form:

- 'Add the **'expected occupancy end date'**' points to the 'Expected occupancy end date' field.
- 'Select the **'expected occupancy end reason'** from the drop-down list.' points to the 'Expected occupancy end reason' dropdown.
- 'Tick the box- **'End Occupancy'**' points to the 'End occupancy' checkbox.
- 'You should also confirm the information on the left regarding annual leave.' points to the 'Please tick to confirm you have discussed the employee's remaining annual leave' checkbox.
- 'Tick the box to confirm that you have completed/sent the ICT Leavers checklist.' points to the 'I confirm I've completed/sent the ICT Leaver's checklist for this employee' checkbox.
- 'Select **SAVE.**' points to the 'SAVE' button.

i Statutory/Company holiday background processing has started.
i Changes have been saved.

If you receive the message proceed to Section 3 of this guide regarding annual leave.

However, if this is the employee's only position within NLC you will receive an error message:

▲ You cannot end the occupancy because it is the only position within this contract. You must either transfer the person to another position, make the person a leaver, or end the contract.

This means you then have to proceed to **2. Option B – Select this option to make an employee a full leaver from the council.**

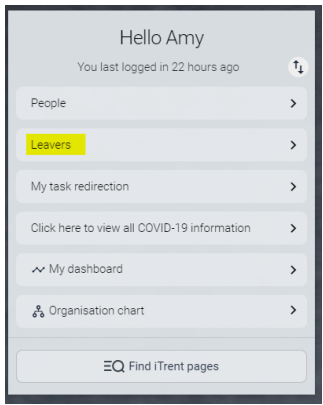
NB: If the employee is being processed as a leaver and is currently off work due to sickness absence, you must ensure you input the end date of the sickness absence. Please refer to Section 4 in this booklet for further guidance. video

[2.3 Terminating an employee from NLC:](#)

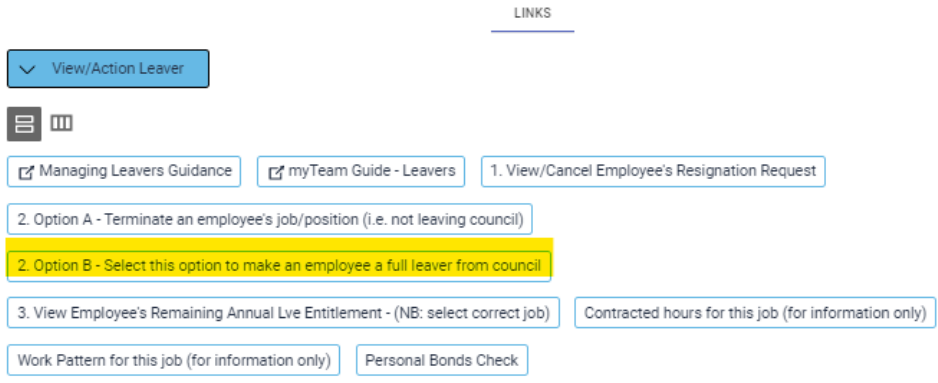
The following step MUST only be used when an employee is leaving NLC. If the employee has any additional positions within another department in the same service this process will terminate that position also, and a P45 will be become live on the employee's mySelf account for a period of 3 months from their leaving date.

Therefore, if you are the manager of all positions that the employee is resigning from you can use this process to terminate the employee's employment.

On the Home Screen menu, choose **Leavers**.



Select 2. Option B – Select this option to make an employee a full leaver from the council



Select the employee who has resigned from the left-hand side.

You will then see the **Leaver information** screen as shown below.

Leaver information Miss Amiee McGarrell MENU

Leaving details

Leaving date → Enter the **'leaving date'** the employee will be leaving NLC.

Last working day

Reason for leaving → Enter the **'reason for leaving'** from the drop down list.

STSS leaver reason → Select the **'STSS leaver reason'** (Teachers only).

Exit interview complete

New employer details

Employer name → Input the name of the new employer, if known.

Additional fields

Please tick to confirm you have discussed the employee's remaining annual leave

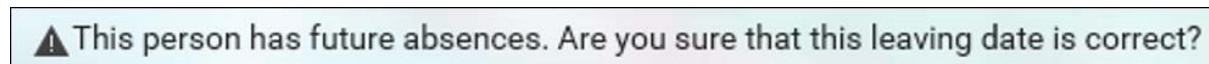
I confirm that the employee will use their remaining annual leave before leaving → Complete the additional information regarding annual leave as shown here.

I authorise the employee to be paid any remaining holidays, prior to leaving.

I confirm I've completed/sent the ICT Leaver's checklist for this employee → Tick the box to confirm that you have completed/sent the ICT Leavers checklist.

SAVE → Select SAVE.

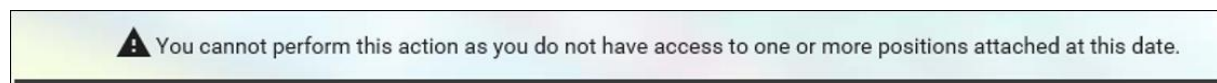
When you enter the leaving date you will see an alert flash up about future absences. This will include any non-working periods, public/bank holidays or personal holidays already pre entered.



This warning message does not prevent you from processing the leaver.

[2.4 For employees who have multiple positions within different services:](#)

If you are terminating an employee and receive the following message, you will be unable to proceed.



This means that the employee has an additional position/positions elsewhere in NLC in another service that you will not have access to.

You should then revert to Option A – End an employee's position.

2.5 Reporting Manager

If you are prompted to update the reporting manager of the position which is becoming vacant, then please choose from one of the following options from the **Reporting line action** drop-down menu:

Reporting line maintenance	
Position name	Workforce Systems Development Senior Advisor
Reporting line action	No change - Retain current reporting ▼

No change - Retain current reporting links to vacant position
Change reporting line to the manager's manager
Manually select a reporting position

Please note: these two fields only appear when you input the Leaving date.

After all applicable fields are completed, click

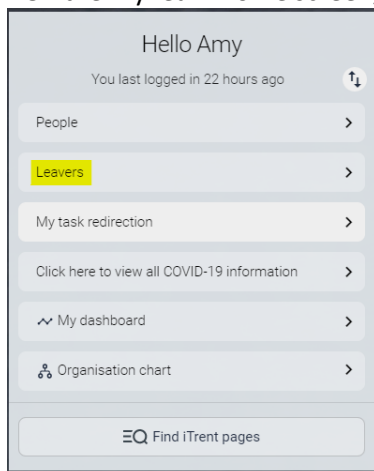


3 Annual Leave

3.1 Checking Employee's Annual Leave for outstanding holidays

After an employee submits their resignation statement, as a manager **you must ensure checks are taken to ascertain any outstanding holidays**. It should be **encouraged** that remaining annual leave is taken prior to leaving. If this is **not** taken, annual leave will be paid in the employee's final pay. To view an employee's Holiday entitlement summary, complete the following steps:

On the myTeam home screen, in the menu at the right hand-side, choose **Leavers**:



Then click on **3. View Employee's Remaining Annual Lve Entitlement – (NB: select correct job)**.

LINKS

View/Action Leaver

Managing Leavers Guidance myTeam Guide - Leavers 1. View/Cancel Employee's Resignation Request

2. Option A - Terminate an employee's job/position (i.e. not leaving council)

2. Option B - Select this option to make an employee a full leaver from council

3. View Employee's Remaining Annual Lve Entitlement - (NB: select correct job) Contracted hours for this job (for information only)

Work Pattern for this job (for information only) Personal Bonds Check

Please note: An adjusted Holiday entitlement will update on iTrent after you have processed the leaver and clicked **Save**.

To view the any remaining annual leave, look at the **Entitlement for period**, ensuring you select the correct job if the employee has more than one that you have access to view:

Mr Lewis Carroll

Holiday entitlement summary

Employment details
Position: Clerical Assistant / HR Operations Advisor

Period details
Holiday period dates: 01/01/2020 - 31/12/2020
Length of service at relevant date: 5 year(s) 6 month(s) 1 day(s)
Scheme name: A/L NLC - Schedule A (Hours)
Membership dates: 30/06/2014 -
Entitlement for period: 363.837 hours (266 hours Pro Rata) (97.837 brought forward)

From	To	Duration	Remaining entitlement
01/01/2020	01/01/2020	7.083	356.754
02/01/2020	02/01/2020	7.083	349.671
10/04/2020	10/04/2020	6.667	343.004
13/04/2020	13/04/2020	7.083	335.921
25/12/2020	25/12/2020	6.667	329.254
28/12/2020	28/12/2020	7.083	322.171

Always ensure you select the correct job to view the annual leave

3.2 Updating Annual Leave Outcome on Occupancy Details Screen

Once a manager has confirmed what the outcome will be with any remaining annual leave prior to the leaving date, the last three fields as shown below on the Occupancy Details screen must be completed. This information is **crucial** for updating the HR Operations Team.

Additional fields

Reason for Change of Occupancy End Date

Please tick to confirm you have discussed the employee's remaining annual leave

I confirm that the employee will use their remaining annual leave before leaving

I authorise the employee to be paid any remaining holidays, prior to leaving.

I confirm I've completed/sent the ICT Leaver's checklist for this employee

SAVE

Please tick to confirm you have discussed the employee's remaining annual leave

Please confirm that the employee will use their remaining annual leave before leaving by selecting **Yes or No** from the drop down list.

Please tick to confirm you authorise the employee to be paid any remaining holidays, prior to leaving.

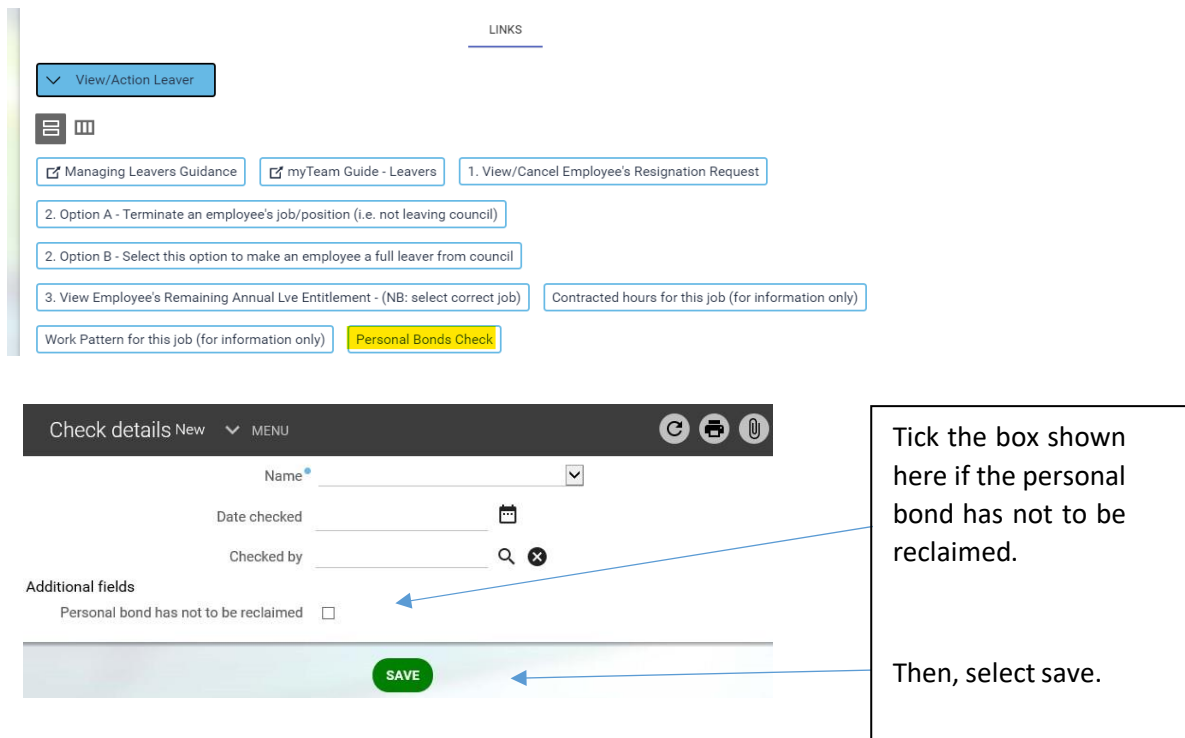
Q. What happens if an employee has taken more annual leave than they are entitled to, at the date of leaving?

A. The relevant HR Operations Team will make a deduction in the final salary. If the full amount is not able to be recouped, a letter will be sent to the employee from the relevant HR Operations Team, followed by an invoice with instruction and contact details for the Debtors department. This will allow the employee to discuss a repayment plan.

3.3 Personal Bonds Check

If an employee has a personal bond and is leaving NLC, it is important that the details are accurate and that the system is updated to show whether this personal bond has to be reclaimed or not. To do this, complete the following steps:

Click on **'Personal Bonds Check'** when in the employees' record.



LINKS

View/Action Leaver

Managing Leavers Guidance myTeam Guide - Leavers 1. View/Cancel Employee's Resignation Request

2. Option A - Terminate an employee's job/position (i.e. not leaving council)

2. Option B - Select this option to make an employee a full leaver from council

3. View Employee's Remaining Annual Lve Entitlement - (NB: select correct job) Contracted hours for this job (for information only)

Work Pattern for this job (for information only) **Personal Bonds Check**

Check details New MENU

Name

Date checked

Checked by

Additional fields

Personal bond has not to be reclaimed

SAVE

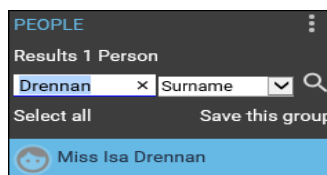
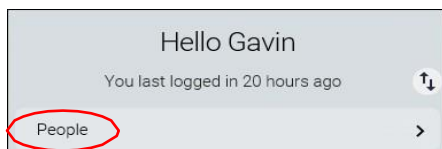
Tick the box shown here if the personal bond has not to be reclaimed.

Then, select save.

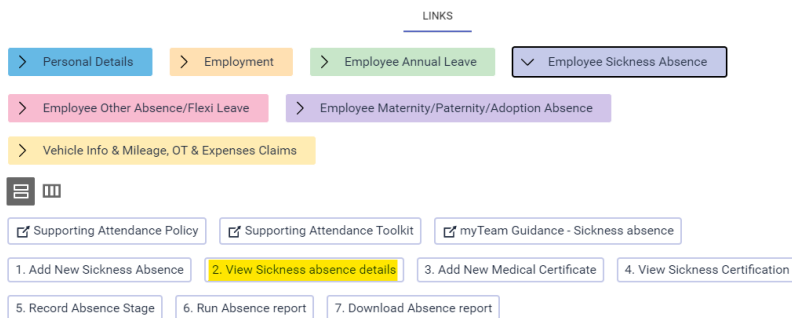
4 Employees who are Leaving but are currently off due to Sickness Absence


It is important that the sickness absence is ended at the same time that the Leaver is being processed. This is to ensure that all management absence reports are accurate. To do this, complete the following steps:

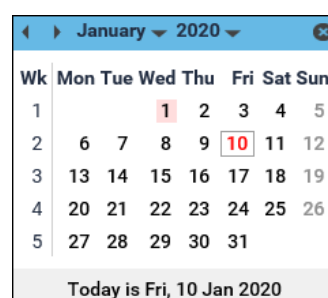
Go to **People** and search for the employee:



Click on the **Employee Sickness Absence** tab and then on **View Sickness absence details**:



Select the appropriate current sickness absence from the left-hand side of the page. Choose the **Absence end date** either by **typing in the date (DDMMYY)** or by **selecting the  icon** (this date would be the last working day).




Click 

Please note: if the employee has been off for a period of 65 working days or more cumulatively, an abatement calculation will be carried out by the relevant HR Operations Team.

[5 Employee Wishes to Cancel Resignation after Cooling Off Period Has Expired](#)

A Cooling off Period (COP) is a specific period of time allowing employees to edit their details or cancel their resignation within mySelf before it gets submitted onto their line manager.

During this period, the employee has the option to withdraw their resignation by going back into the Resignation notification section and selecting 

Managers are not notified until after 48 hours have expired from the point in time where an employee has submitted the resignation request on mySelf.

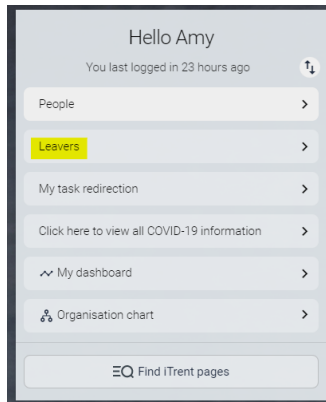
After the COP has ended, the employee's request cannot be amended on mySelf. The area will be shaded out:

However, the employee still has the option to cancel the resignation **only** by liaising with their
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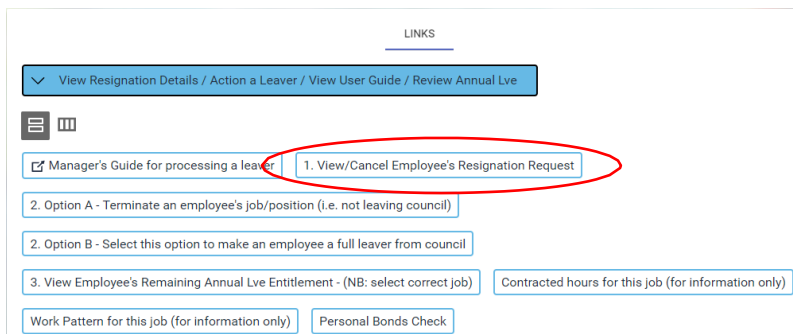
linemanager who can cancel the resignation on their behalf by using myTeam.

This can be done by following the subsequent steps.

On the Home Screen menu, choose **Leavers**:



Choose **1. View/Cancel Employee's Resignation Request**:

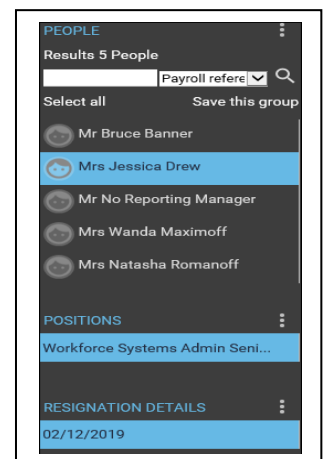


Complete the following steps:

1) Choose the relevant employee

2) Choose the relevant position

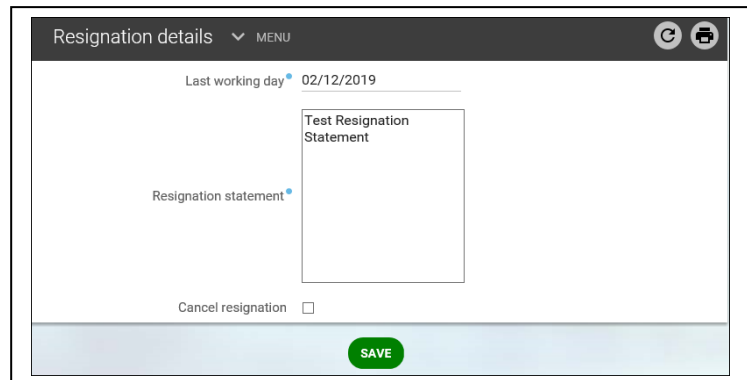
NB: If the employee has more than one job with the same job title, hover over the resignation details to ensure the last working day matches the date you have in the email you received. For further support, there is also the 'contracted hours' and 'work pattern' for the job to check. Please refer to the screenshot above.



3) Click on the date the resignation statement was submitted.

Tick **Cancel resignation** and input the reason:

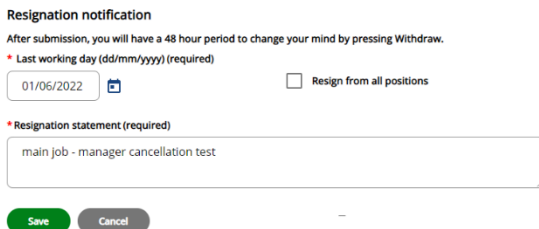
Finally, click **Save**. The employee will then receive an email notification **confirming the resignation statement has been cancelled**.



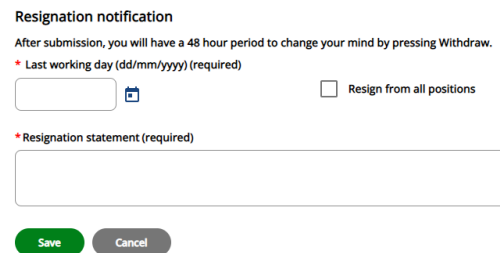
NB: Important – the employee or manager needs to cancel each position on an individual basis, if required. Therefore, repeat the above process for each position if applicable.

The employee's resignation information will have disappeared and will now amend:

Before



After



If you are unable to cancel the resignation, please email details to ESC-workforcesystemsadminteam@northlan.gov.uk.

NB: If, as a manager, you have processed the leaver and the employee has advised that they now wish to cancel; at this stage, please urgently contact one of the following email addresses providing details of the employee's reference number and the position name/number in question:

People Operations Team: (All Services) ESCPeopleOperations@northlan.gov.uk

6 Exit Questionnaire

Within 14 days of the employee's last working day, an exit questionnaire will be attached to the employee's mySelf account. An Exit Questionnaire is a survey issued to individuals leaving the organisation to gather thoughts on their experience gained.

7 Returning Employee ID Badges/Fobs/Equipment

Please refer to the [ICT checklist](#) on **myNL** and complete all relevant sections, as applicable.

8 Further Advice

For further assistance, please contact the below teams/email addresses:

People Helpdesk Team: ESC-helpdeskteam@northlan.gov.uk or call 01698 403151.

People Operations Team: *(All Services)* ESCPeopleOperations@northlan.gov.uk

Workforce Systems Admin Team: ESC-workforcesystemsadminteam@northlan.gov.uk

Click on [myNL](#) to view the Manager Leaver information.

[END OF GUIDANCE DOCUMENT]