Follow this guide when ending an appointment (including where a person leaves the University or ends one of multiple appointments). Where an employee is transferring to another University department, use the Transfer between departments How-to guide, instead.

| Useful information | Complete the leaver actions before the payroll deadline (or supplementary, for late-notification leavers) of the month in which the employee is leaving. This is necessary for the employee to be sent their final (paper) payslip to their home address. An automated email containing information about their payslips and P60s in ESS, as well as pension information, will be sent to the employee once they are processed as a leaver. If an employee is leaving one of multiple appointments and the employee is a Self-Service Manager, the department they are leaving should complete a Service Request (see HRIS Service Catalogue) to remove this access. You can only end appointments within the department(s) to which you have access. |

This guide covers the following process steps:

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1. Updating the employee record

Core Portal > Employee Dashboard > People Management > Employees > View > Employee Search > (Locate individual) > View

1. Select **Contracts (1)** from the staff record menu.

2. Click into the **Appointment selection menu (2)** to ensure the correct appointment is highlighted.

3. Substantive appointment will have a blue star (3) shown in the list of contracts. If there is no blue star, the substantive appointment is in another department.

Note *If the appointment has a future-dated change, contact HRIS Support (state end date in your email). They will need to amend this, so you can proceed with ending the appointment.

2. Additional instructions for Payroll

Record additional instructions to Payroll in a UDF, as required, eg where to send the P45, or details of outstanding holiday pay etc. Follow the Add and Manage UDFs How-To guide add the Leaver UDF. Complete UDF: **Appt: Leaver Additional Details** as below.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Date*</td>
<td>Enter the date the employee is leaving</td>
</tr>
<tr>
<td>To Date</td>
<td>Leave blank</td>
</tr>
<tr>
<td>P45 to go to? *</td>
<td>Select the relevant option eg P45 to go to Home Address. <strong>Note:</strong> The ‘P45 to go to’ must be entered on the substantive appointment, in all cases where the employee is leaving the University. <em>(To identify the substantive appointment, refer to section 1 of this guide)</em></td>
</tr>
<tr>
<td>Comments</td>
<td>Add Comments for Payroll (use both comments fields, if needed), eg:</td>
</tr>
<tr>
<td></td>
<td>• Give details of outstanding holiday pay, including the cost centre this should be paid from.</td>
</tr>
<tr>
<td></td>
<td>• Provide details of redundancy payments</td>
</tr>
<tr>
<td></td>
<td>• Note if more detailed instructions will be emailed</td>
</tr>
</tbody>
</table>

3. Change of address for forwarding purposes

If required, update the employee’s home address: see Add and manage personal details How-To guide. If the final payslip should be sent to a different address, select **Label Address (Payslip)**, when adding the address. Confirm this to Payroll in an email too.
4. Checking outstanding salary requests

Salary requests related to the appointments being ended must have a status of “Approved” before the appointments are ended.

Note: Where an employee is leaving multiple appointments across different departments, liaise with the relevant department(s) and Payroll to ensure that all relevant salary requests have been approved.

Check the status on appointments in your department:
4. Select Current Salary (1) from the staff record menu.
5. Click into the Appointment selection menu (2) to ensure the correct appointment is highlighted.
6. If the status is not ‘Approved’ (3), follow up on this, as appropriate.

5. Ending the appointment(s)

Core Portal > Employee Dashboard > People Management > Employees > View > Employee Search > (Locate individual) > View > Contracts

1. Click into the Appointment selection menu to ensure the correct appointment is highlighted.
2. Using the ellipsis menu select End Contract

The End Appointment window opens:

3. In the Leaving Detail section enter/select details, as outlined below:
### Field Name | Description
--- | ---
**Leaving Date** | The last paid date. (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.)
**End All Contracts** | Select only if there is more than one appointment in your department and they are all ending on the same day. Slide the toggle to end all contracts.
**Leaving Code** | Select the relevant reason, e.g., Resignation - Promotion/career prospects
**Leaving Destination** | This is a **HESA-required field**. Select the relevant option. If the leaving destination is another UK HEI, select the relevant HEI from the list. Non-UK HEIs and related organisations won’t appear in this list.
**Location After Leaving** | This is a **HESA-required field**. Select the relevant option (geographic location of the activity being coded for in 'Leaving Destination Code').
**Comments** | Provide details not available in the fields above, to validate the Leaving Destination Code and Location After Leaving. **Do not** enter details for payroll or sensitive information, e.g., nature of ill health etc.

**Note** *Only correct details must be entered in these fields. If you are not sure what to enter, refer to the [HR Analytics team webpages](#) for guidance on updating the above information.*

4. Click **SAVE**
5. The Appointment is now ended. If the end date is in the future the contract Status will show as **Ending** and will update to **Ended** on the last day.

![Appointment Summary](#)

6. To view the leaving details entered, click on the **ellipsis** and select **Leaving Summary**.

![Leaving Summary](#)

**Note** *The employee status will remain ‘Active’, until the monthly payroll has run.*

6. **Remove or amend end date**

If you have incorrectly ended an appointment/entered the wrong end date you can, this may be amended if payroll hasn’t yet been run. Take extreme care, and if in doubt contact HRIS Support.
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.

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1. Using the *ellipsis* menu select **Amend end date**

   ![Amend end date screenshot](image1)

   2. Select **Remove or Amend End date** as required.
   3. If amending the end date, also complete the **New Date Left** field.
   4. Click **OK**.

   ![Amend end date screenshot](image2)

   ![Amend end date screenshot](image3)

   ![Amend end date screenshot](image4)

   ![Amend end date screenshot](image5)

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

   **Note** *If the contract status still shows as Ending, exit the record, and return for it to update.*

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**Useful Reports**
To help track changes, including leavers, don’t forget to regularly run: **PERDEP20_Monthly Personnel Changes**