

## MY PEOPLE

### MY TEAM CHANGES – LEAVER PROCESS

In order to make an employee a leaver you need to select the option from the side bar. You do **NOT** select the employee first.

#### STEP 1

- Select the employee and correct post from the team list available.
- If the employee holds more than one post within your team you will need to select the post from which they are leaving. (If they are leaving both posts see notes in **Step 3**)
- Click the **Next** button

**Leavers Process**

These processes will allow you to make changes to your employees. This includes the recruitment of and changes to employees within your team, depending on the option selected.

Use the options below to either select the relevant employee (if making changes to an employees post) or the post that you are recruiting into.

[Save](#)

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Search

[Search for Employee](#)

Employee Name	Employee Number	Post	Employee Information
Basil Brush	CSTR015	Manager	
<input type="radio"/> Dee Dawson AM	CSTR046	Administrator 29	Has another post
<input type="radio"/> Dee Dawson AM	CSTR046	Administrator 30	Has another post
<a href="#">+</a> <input type="radio"/> Betty Boo	CSTR010	Manager	
<a href="#">+</a> <input type="radio"/> Cindy Crawford	CSTR011	Manager	

[Next](#)

[Previous](#) [Save](#) [Submit](#)

- If the employee is currently being paid then you will be warned of this and you will only be able to save the process at this time. You will then need to return later to submit the request

**Warning**

- Employee is being paid for the current pay period. Changes can be saved, but only changes effective after the pay period can be submitted.

#### STEP 2

- Enter the **Last Day of Paid Employment** – Please ensure that the date you enter is the **Last Paid Date**. This should include any holiday absence the employee is taking after the last working day.
- Select the reason for leaving from the **Leave Reason** selection. This information is used by the organisation for recruitment and retention purposes.
- Click the **Next** button

## MyView for Managers - LEAVERS

**Leavers Process (Freda Ford AM, CSTR048)**

This process is used to make an employee a leaver from the position that you manage. If the employee holds more than one post for the organisation then you will be prompted to select which position you are making them a leaver from.

Follow each screen using the next button until the final page and then use the **Submit** button to complete the process

The date used during this process will be the last date that an employee will receive pay for. **Do not enter the last working date unless this is also the last day an employee should be paid for**

Any outstanding leave after this date will be paid to the employee or if the employee has taken more leave than is due, they will have a deduction made

Flexi credit **will not** be paid but flexi deficit will be recovered if you advise HR before payment has been made

Please select the **HELP** button for further guidance

[Save](#)  
[Cancel](#)

[Leave Details](#) | [Absence & Attendance](#) | [Complete](#) | [Check List](#)

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Leave Details [Close Help](#)

This will enable you to end an individuals employment within your team. The employee will be paid up to and including the date entered here as the last paid date and should include any holiday absence the employee is taking after the last working day.

\* Last Day of Paid Employment

\* Leave Reason

[Previous](#) [Cancel](#) [Next](#)  
[Save](#) [Submit](#)

### STEP 3 – ONLY APPLICABLE IF THE EMPLOYEE HAS MORE THAN ONE POST

If the employee has another post within the organisation (either in your team or not) you will be see the following screen. It is recommended that you only make the employee a leaver from your team and their other manager should make them a leaver from the other post if applicable.

### Termination Type

**Leave from team** = only selected post in team

**Leave from Organisation** = other posts not under your management and/or other posts in your team (NB This option should only be used when the employee has more than one post and all posts are in your team)

## MyView for Managers - LEAVERS

Leave Details
Assets
Absence & Attendance
Complete
Check List

Leave Details [Close Help](#)

This will enable you to end an individuals employment within your team. The employee will be paid up to and including the date entered here as the last paid date and should include any holiday absence the employee is taking after the last working day.

The person you have selected as the leaver is in other post(s) as shown below.

Other Post Holding	Manager	Future Start Date	End Date
Senior Solicitor	Anne-Marie Bond	01/02/2016	
Administrator 30	Basil Brush	01/02/2016	

Termination Information

Termination Type  Leave from team  Leave from company

Previous
Cancel

Save
Next
Submit

### STEP 4 – ABSENCE & ATTENDANCE

The next stage of the process will ask you to consider previously authorised Absence & Attendance records which fall after the leave date.

You should always leave the action as **DELETE** from the options to ensure that the employee’s final pay is accurate. Failure to select **DELETE** could result in the employee being paid for attendance claims that they have not worked and absences (such as annual leave) that will reduce their entitlement

Leave Details
Assets
Absence & Attendance
Complete
Check List

Planned Absence and Attendance [Close Help](#)

These options refer to any absences or attendance claims that the employee has in their account after the leaving date you have entered. You should always select **DELETE** from the options to ensure that the employees final pay is accurate. Failure to select **DELETE** could result in the employee being paid for attendance claims that they have not worked and absences (such as annual leave) that will reduce their entitlement.

Absence Start Date	End Date	Type	Category	Total	Action
08/16/2016	08/16/2016	Bank Holiday		0 Hour(s)	<span style="border: 1px solid #ccc; padding: 2px;">DELETE ▾</span>
08/17/2016	08/17/2016	Holiday		0 Hour(s)	<span style="border: 1px solid #ccc; padding: 2px;">DELETE ▾</span>

Attendance Start Date	Type	Category	Total	Action
There are no records available for selection.				

Previous

Save
Next
Submit

Any absence or attendance booked by the employee which now falls after the leave date entered will be deleted from their record (and calendars) and their leave entitlement will be re-calculated to take this into account

- **IGNORE** = If you select **IGNORE** the claim/request **WILL** be paid (or taken into account in the case of holiday) in the employee’s final pay calculation.
- **Click Next**

## STEP 6 – COMPLETE

- Click **Next** to complete the leaver’s process and move on to the Leavers Check List

The screenshot shows a progress bar at the top with four steps: 'Leave Details', 'Absence & Attendance', 'Complete', and 'Check List'. The 'Complete' step is highlighted in purple. Below the progress bar, the heading 'Complete' is followed by a paragraph of instructions: 'Use the Next button to review the checklist before completing the leavers process. Once this process has been submitted any changes to the leavers date will need to be notified using the 'Change to employees Leave Date' form which can be found in My Team Forms. The employee will show in your My People tab until the day after the date entered in this process and then they will no longer be available for review.' At the bottom, there are four buttons: 'Previous' on the left, and 'Next', 'Save', and 'Submit' on the right.

## STEP 7 – CHECKLIST & SUBMIT

- Complete the leaver’s Check List by ticking the relevant options that apply to this employee.

**This check list is a reminder for managers only.** No adjustments / recoveries will be made on the employee’s final pay unless the manager also **EMAILs amounts to payroll** as indicated against each question. You will be reminded of this in the final completion screen message.

- Click **Submit**

The screenshot shows a progress bar at the top with four steps: 'Leave Details', 'Absence & Attendance', 'Complete', and 'Check List'. The 'Check List' step is highlighted in purple. Below the progress bar, there are 'Previous' and 'Next' buttons. The main content area is titled 'Check List' and contains seven items, each with a checkbox:

- Training agreement, recovery of monies required (email amount to payroll)
- Relocation agreement, recover of monies required (email amount to payroll)
- If employee has discounted annual Bus Ticket issued ensure it is returned
- Cycle scheme agreement? Balance will be recovered
- Ensure any security passes are returned
- Ensure any parking permits are returned
- Ensure any assets are returned
- Flexi DEFICIT (email hours for recovery to payroll)

At the bottom right, there are four buttons: 'Save', 'Submit', 'Previous', and 'Next'.

## MyView for Managers - LEAVERS



The leavers form has now been completed and the details have been added to the individuals record. If the leavers date changes at any time please complete the relevant form which can be found in **My Team Forms**.

If the leaver has had a training agreement or a relocation agreement and there are amounts that need recovering you will need to email payroll@torbay.gov.uk with the amount that needs to be recovered through the employees last months pay. You should email these details immediately to ensure that this can be actioned. If payroll are unable to recover the entire amount they will contact you so that you can make alternative arrangements.

There is **NO** authorisation for this process although the employee and manager will receive a confirmation email. The initial screen in this process will now show the leave date entered

My Team > My Team Leaver

### Leavers Process

Search

Search for Employee

Employee Name	Employee Number	Post	Employee Information
Basil Brush	CSTR015	Manager	
<input type="radio"/> Dee Dawson AM	CSTR046	Administrator 29	
<input type="radio"/> Dee Dawson PM	CSTR047	Administrator 30	Leaving on 31/07/2016

Previous Save Next Save Submit

## Copy email to Employee

Subject: MyView Leaving Date Notification

Dear Freda Ford AM

We have been notified that you are leaving employment on 17/08/2016 from the post of Administrator 31.

If you have any claims for expenses, mileage or extra hours these **MUST** be submitted, via MyView, prior to your leaving date. You will **NOT** be able to make these claims after the leaving date above.

If you are continuing to work for the organisation, in another role, then you will not receive any further communication. However, if you are leaving this employer you will receive your P45 and any additional correspondence will be forwarded to you in due course.

Please note a P60 will not be supplied for this Tax Year if you have no further employment with us.

If you have any queries regarding this please contact your manager.

Regards  
MyView

## STEP 8 – ADDITIONAL INFORMATION

Having submitted this process (or a **Change of Employee Leave Date** form) you will receive an email asking you to confirm any outstanding **FLEXI DEFICIT** that may need to be recovered. Please ensure this is completed and sent to payroll as soon as possible.

## Copy email to Manager

**Subject:** MyView Leaver: Freda Ford AM has been made a leaver.

The employee detailed below has been made a leaver from the post noted.

Name: Freda Ford AM  
Employee Number: CSTR048  
Post: Administrator 31  
Effective Date: 17/08/2016

The employee will continue to be shown in your MyView account until the day after the effective date above.

In order to correctly calculate their pay for this post you will need to forward **this** email to [payroll@torbay.gov.uk](mailto:payroll@torbay.gov.uk) detailing the hours which need to be

- 1) Recovered for **Flexi DEFICIT**
- 2) Paid for Annual Leave (this can be confirmed via MyView as long as all requests have been actioned)

A calculation will be made and the amount owing will be deducted/added through their final payment. Failure to do so will result in the adjustment not being made.

Please Note:  
Flexi credit will not be paid and this should be taken by the employee before the last date where possible.

If the leaving date changes you will need to complete a **Change of Employee Leave Date** form which can be found on the **My People** tab.

Regards  
MyView

## GENERAL

- Once this Leave Process has been submitted, any changes to the leaver's date will need to be notified using the **Change to Employee Leave Date** form which can be found in **My Team Forms**
- There is **NO** authorisation for this process although the employee will receive a confirmation email.
- The employee will show in the **My People** tab until the day after their leave date and then they will no longer be available for review
- It is the manager's responsibility to collect any assets that the employee may have and to arrange any recovery of Training Agreements / Relocation expenses etc with Payroll.
- Once payroll has generated the final payslip and P45, the employee will automatically be informed of how to access MyView (as a leaver) and also how to access and complete the Exit Questionnaire Form.
- MyView will send notifications to relevant departments to advise of the leaver details

## 7 day Reminder email to Manager

This is a reminder that the attached employees are due to leave their post within 7 days.

If you are aware of any changes to this please complete the MyTeam form 'Change of Employee Leave Date' immediately to ensure that pay is correct.

Please ensure you arrange for the return of any assets the employee may hold; and also make sure that you have notified Payroll of any remaining Flexi DEFICIT. A calculation will be made and the amount owing will be deducted from their final payment. Failure to do so will result in the recovery not being made.

## MyView for Managers - LEAVERS

**Please Note:**

- Flexi credit will not be paid and this should be taken by the employee before the final last date where possible.

- Final adjustments for Annual Leave will need to be confirmed to payroll, details of which can be found on the employees entitlements screen within MyView – please ensure that this is accurate and up to date

If you have any other queries concerning this notification please contact [MyViewSupport@Torbay.gov.uk](mailto:MyViewSupport@Torbay.gov.uk)

MyView for Managers - LEAVERS

