Business World HR Form Guide
LEAVER FORM – SCHOOL ADMINISTRATOR

Shropshire Council

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1. Introduction

The following guide provides information to the Headteacher, Office Manager/Administrator or delegated person to ensure they are familiar with the process of completing a Leaver Form. When the form has been completed at school level it workflows to Payroll.

Where the Resource is not able to complete the form, or it is not appropriate for the Resource to complete (for example ill health/retirement), the school administrator can complete it on their behalf.

Payroll Deadlines – please check when these are for the month you are checking your tasks to ensure they are submitted in time for Payroll to action, normally the 3rd of each month for schools.

These steps show how to complete a leaver once the Resource has completed the leaver form.

2. Navigating Business World

Please refer to the 'Business World HR How To – Navigate' for additional tips for manoeuvring Business World.

2.1 The Tab key

Please ensure that you are familiar with the tab key.

Use the TAB button on your keypad, to move from one field to the next to work through the form.

Also become familiar with the scroll bars to move the screen up and down or left to right.

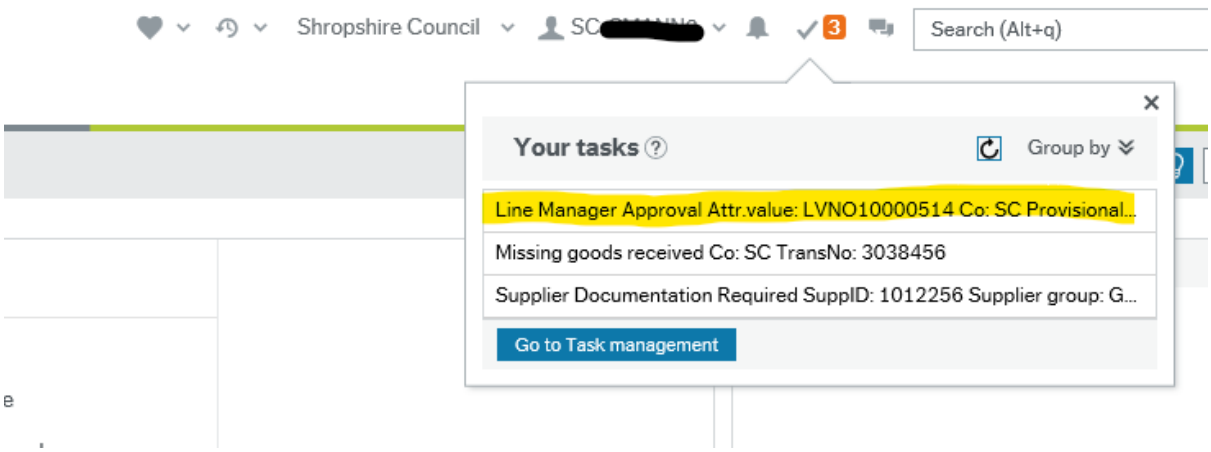
3. To complete a LEAVER FORM – SCHOOL ADMINISTRATOR/HEADTEACHER

STEP 1

Check your task bar and you will see in this example there are 3 tasks:

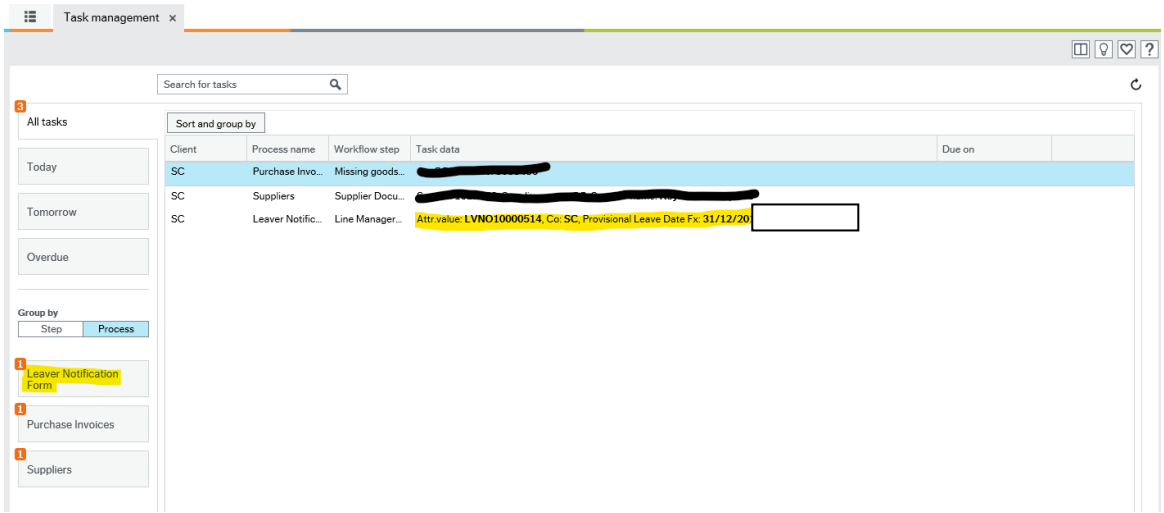
Click on the task bar:

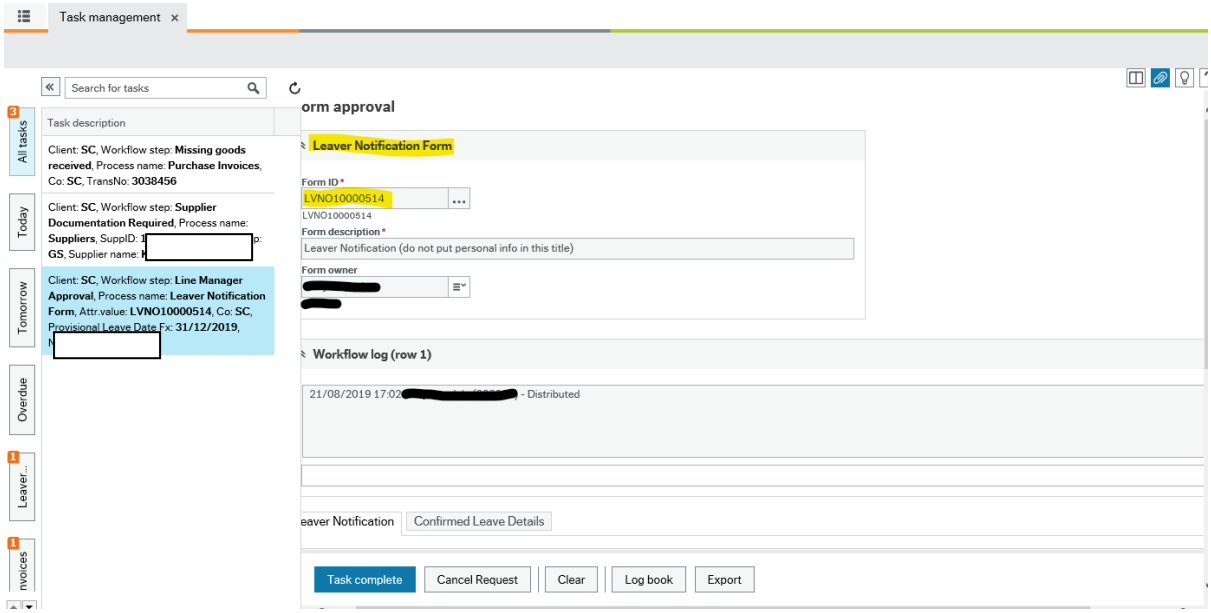
Select Line Manager Approval LVNO (Leaver form):



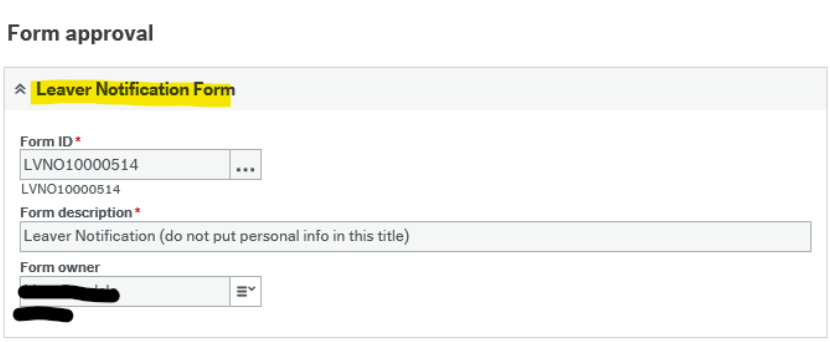
Alternatively, if you have lots of tasks, click on Go to Task Management to see all your tasks sorted into areas for you.

Click on the leaver form you wish to authorise, and it will appear in the screen shot below:

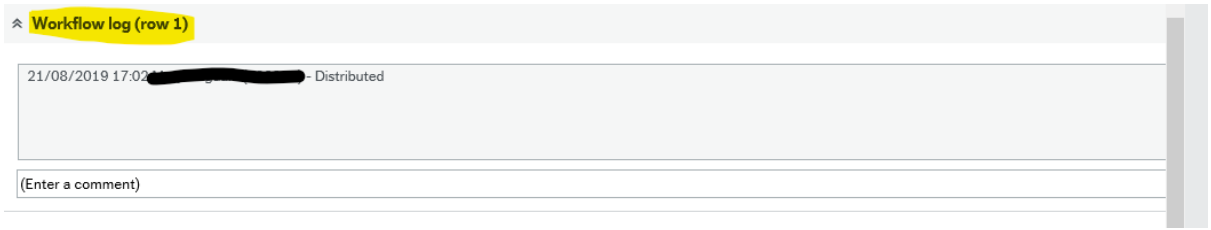




The first section will auto populate the following information:



The Workflow Log – this tool will update information regarding when the form was created and if you need to reject it for any reason - please enter your comment that will be workflowed back to the Resource.



STEP 2

The leaver notification box holds information about the Resource – please check the following fields to check that they are correct:

Name – correct name of Resource. Press SPACE BAR for drop down list of Resources in your establishment.

Line Manager – this will populate for you.

Position – check that the position the Resource has selected to resign from is correct. If the Resource holds more than one position, check the comments box to view which positions are relevant. You may need to check with them and can log your comment in the Workflow log as per screen shot above.

At present an administrator can only view the positions the Resources hold within the school establishment. If the Resource has other positions across the Council the administrator will be unable to view them to notify Payroll accordingly. Please confirm with the Resource at the time of notification of them leaving, what other positions they hold and if they are leaving them too.

Cost Centre – this box will populate with the school name.

Date Raised – is the date the leaver form was created (this field is auto populated by Business World).

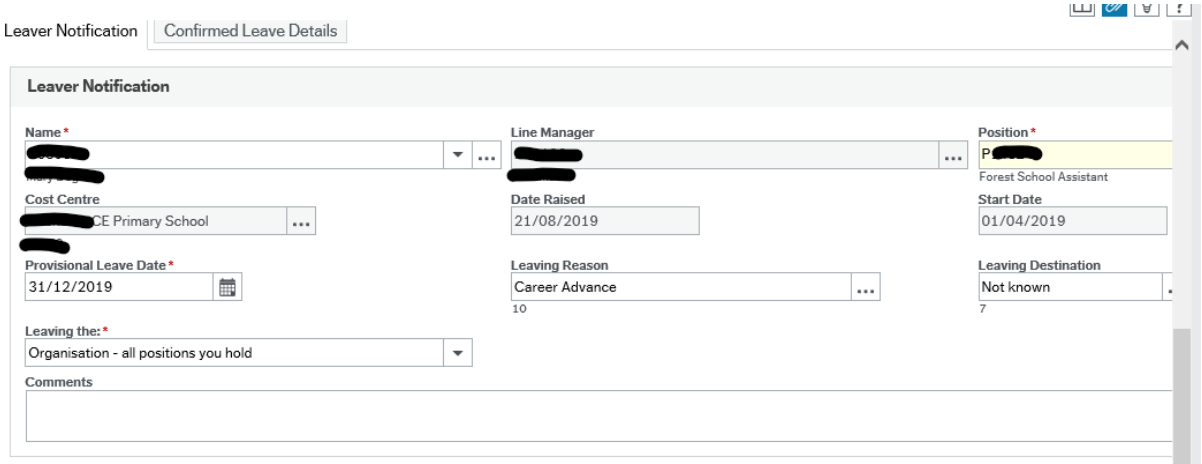
Start Date - (Auto populated to the date 1/4/2019 when Business World went live).

Provisional Leave Date – the date the Resource intends to leave your establishment.

Leaving Reason – check this is correct, if not correct, you can comment in the Workflow log.

Leaving Destination – this is completed by the Resource, if not correct please amend.

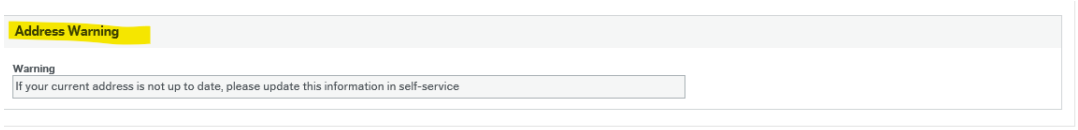
Leaving the Organisation/Position – check that the correct option has been selected as if leaving the organisation is selected they will be issued a P45.



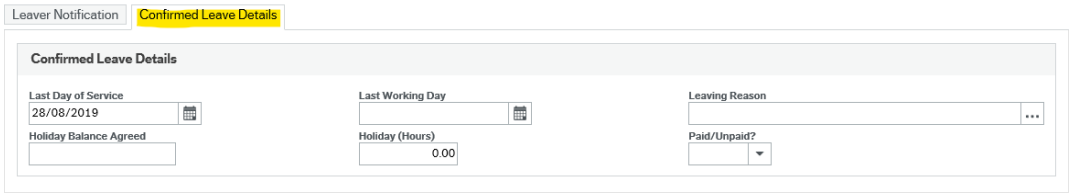
STEP 3

The Resource must be made aware that their details **must be current** as the P45 and last payslip will be sent via the post to the address saved on Business World.

Please remind the Resource that they need to print off their payslips and P60 as they won't have access to Business World once they leave their position within the Council.



Please select the Confirmed Leave Details Tab:



Use the calendar to select the last day of service and refer to the terms and conditions below.

STEP 4

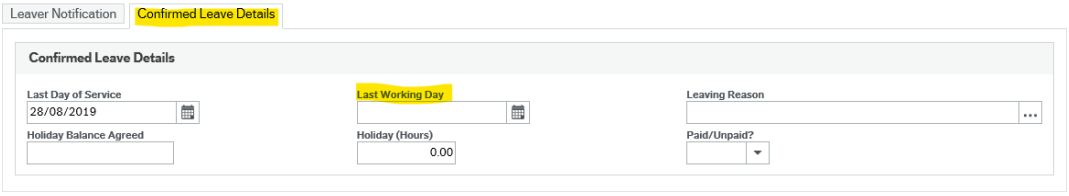
Payment on Leaving

The following arrangements which have been agreed with the Trade Union (Unison) will apply to a part-year employee on leaving a post:

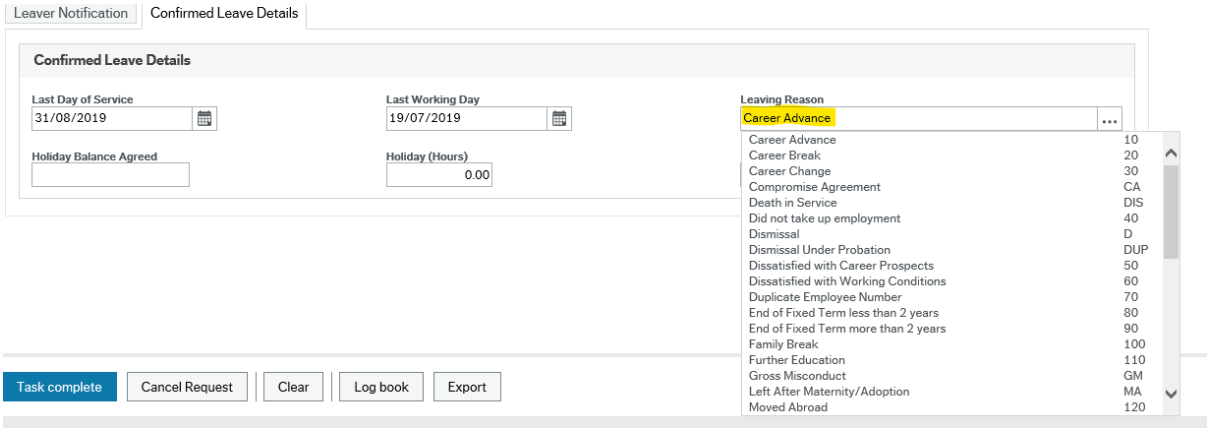
Leave		**Pay to**
End of Autumn Term	→	31 December
End of Spring Term	→	30 April (or up to and including the day prior to the beginning of the Summer Term if this is earlier)
End of Summer Term		
Those that start 1 January	→	31 July
Those that start 1 September	→	Those who have worked a full academic year or more who would receive payment up until 31 August

Last working Day – this is the day that they last worked (end of term date for summer e.g. 19th July).

For those that are part-time and have completed all their contracted hours for the week – pay to the Sunday or end of term.



Leaving Reason – confirm the leaving reason – this is important as the details are used for the School Work Force Census.



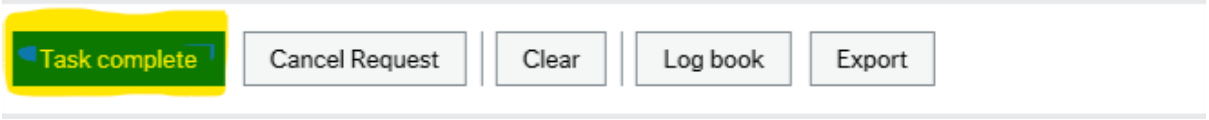
Holiday Balance Agreed - this may apply if your Resource has a 52.14 week contract.

Holiday (Hours) - this may apply if your Resource has a 52.14 week contract.

Paid/Unpaid – this may apply if your Resource has a 52.14 week contract.

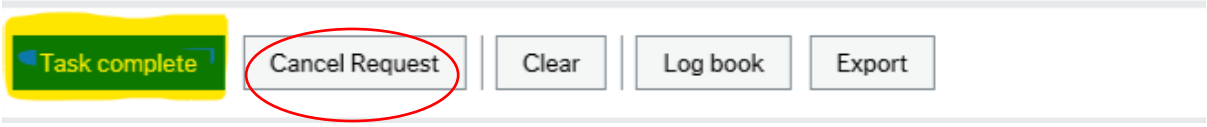
STEP 5

Once you are happy that everything is correct, click TASK COMPLETE and the form will be workflowed to the leaver team to action the form.

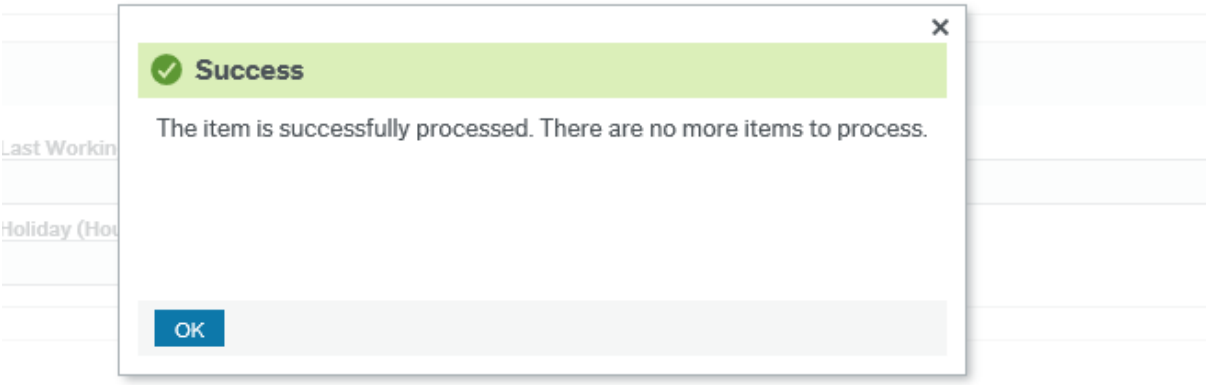


If you have a query and need further clarification from your Resource, click the CANCEL REQUEST and it will be workflowed back to the Resource to check and amend the form. You will have left any comments in the Workflow log for the Resource to check and action.

If you CANCEL REQUEST, then it will reject, and the Resource will need to resubmit the form.



This message will appear once the form has been either approved or rejected and moved from your task bar:



Your task has now been sent to Payroll for authorisation and your task has been deleted from your task bar.

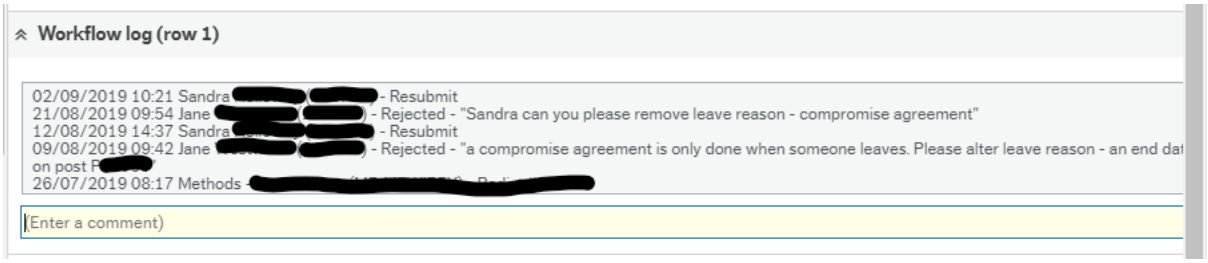
STEP 6

Form Rejected from Payroll as Incorrect

Please check your Workflow information as shown below - this section details the reasons why the form has been rejected by Payroll.

The form will need to be updated with the relevant amendments and resubmitted to Payroll.

Please Do Not Resubmit Form Without Reading the Information/Comments Box first.

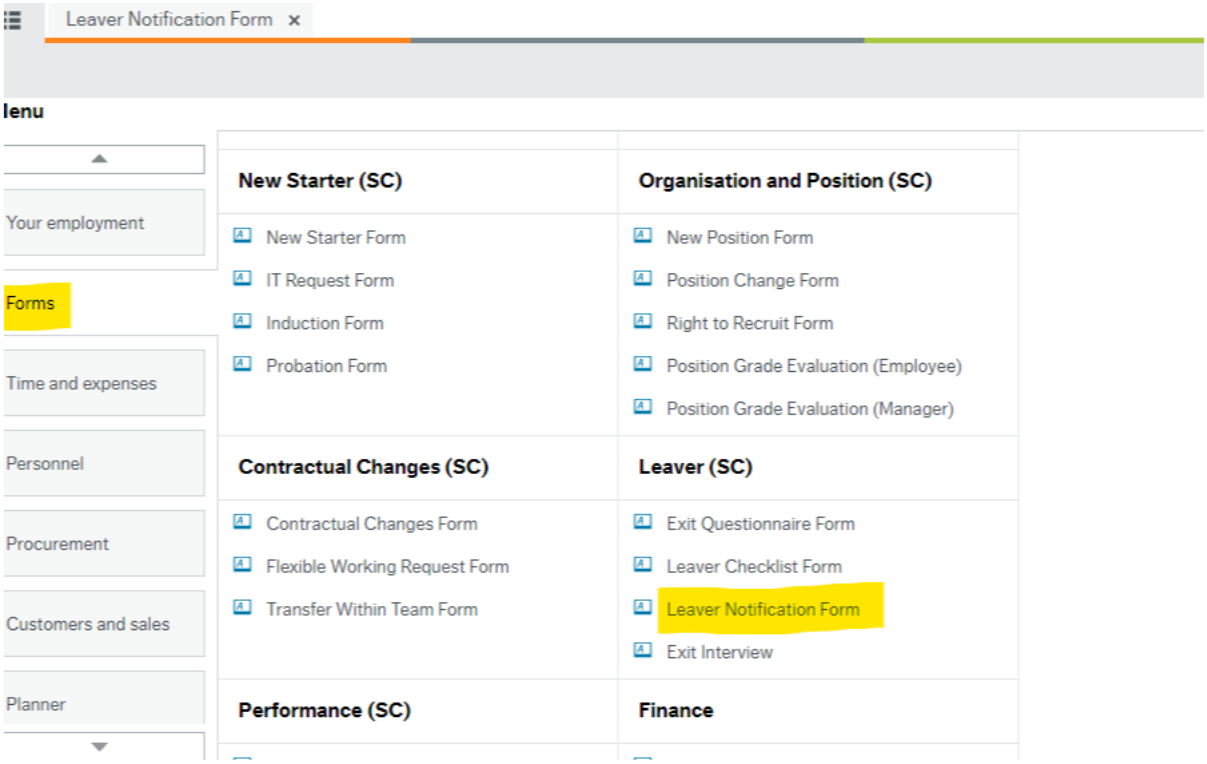


Administrator completing a leaver form on behalf of Resource

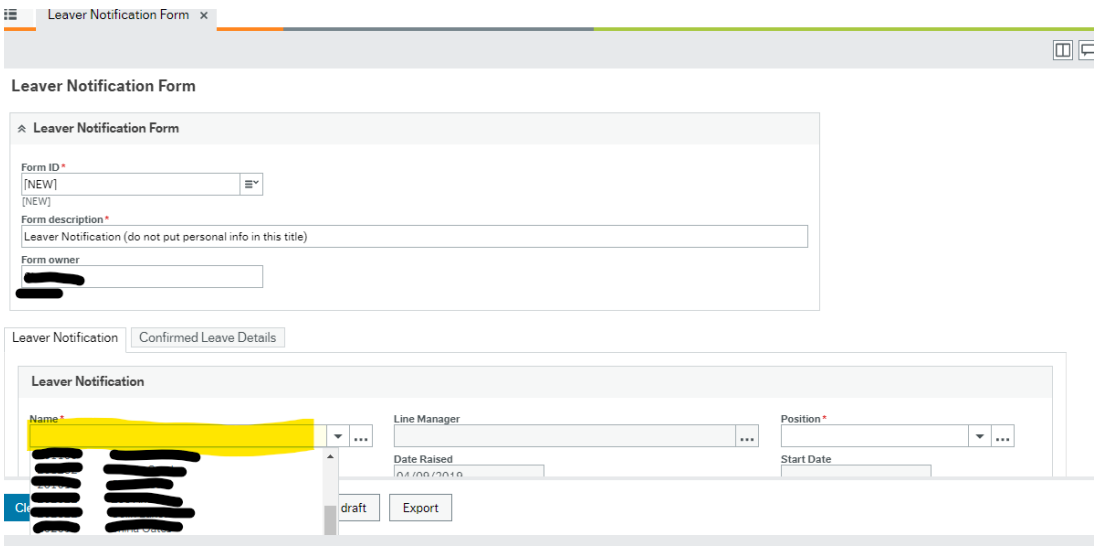
STEP 1

Select Forms.

Choose Leaver Notification Form and click to open the option.



This will open the Form.



These fields below will auto populate:

Name - press SPACEBAR to select name of Resource.

Line manager – this will populate.

Position – press SPACEBAR to select the position Resource is leaving if they hold more than one position.

If the Resource is leaving one position select that position, if they are leaving more than one position select one of the positions they are leaving.

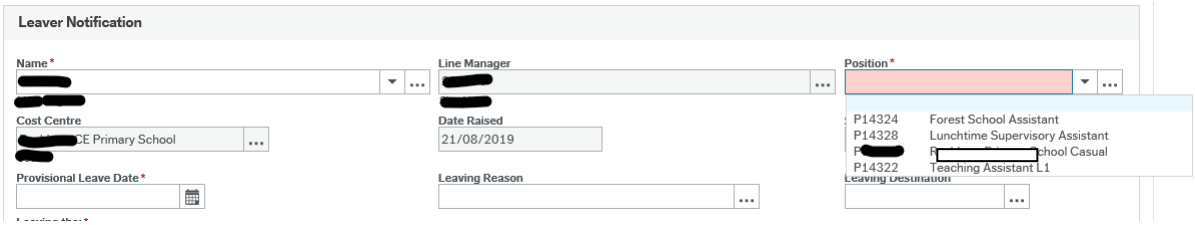
The Resource may hold other positions in the Council that are not school based, if the Resource is remaining in these, please indicate this in the additional information section.

If the Resource is leaving all positions within the Council, please confirm the Position IDs in the Comments box. At present you will not be able to view these, so please check with your Resource.

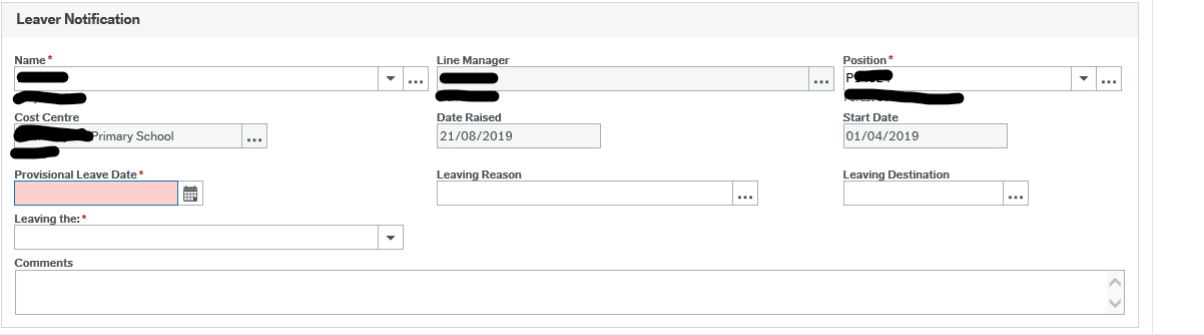
Cost Centre – this will populate.

Date Raised – this will populate to the date the form is being completed.

Start Date – this will be populated to 1/4/2019 – don't worry if this isn't your start date this is the day Business World was created.



Provisional Leave Date – use the calendar to choose the intended date the Resource will leave the position.



Please refer to the following information:

Support Staff

In the event of your post being terminated you would be entitled to receive the greater of your statutory or contractual entitlement indicated above.
Unless otherwise agreed, the period of notice you must give to the Authority to terminate your employment is determined by the grading of your post and will normally be:

Those posts up to and including Grade 8	1 Month
Those graded Grade 9 & Grade 10 to PO8 inclusive	2 Months
Those graded PO9 and above	3 Months

Payment on Leaving

The following arrangements which have been agreed with the Trade Union (Unison) will apply to a part-year employee on leaving a post:

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End of Autumn Term	→	31 December
End of Spring Term	→	30 April (or up to and including the day prior to the beginning of the Summer Term if this is earlier)

End of Summer Term

Those that start 1 January → 31 July

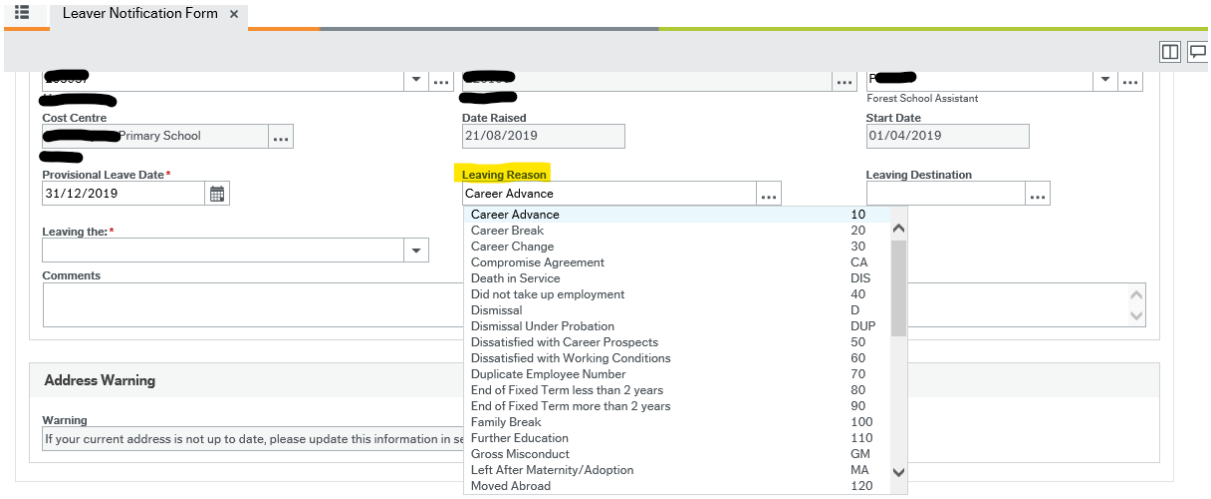
Those that start 1 September → Those who have worked a full academic year or more who would receive payment up until 31 August

Last working Day – this is the day that they last worked (end of term date for summer e.g. 19th July).

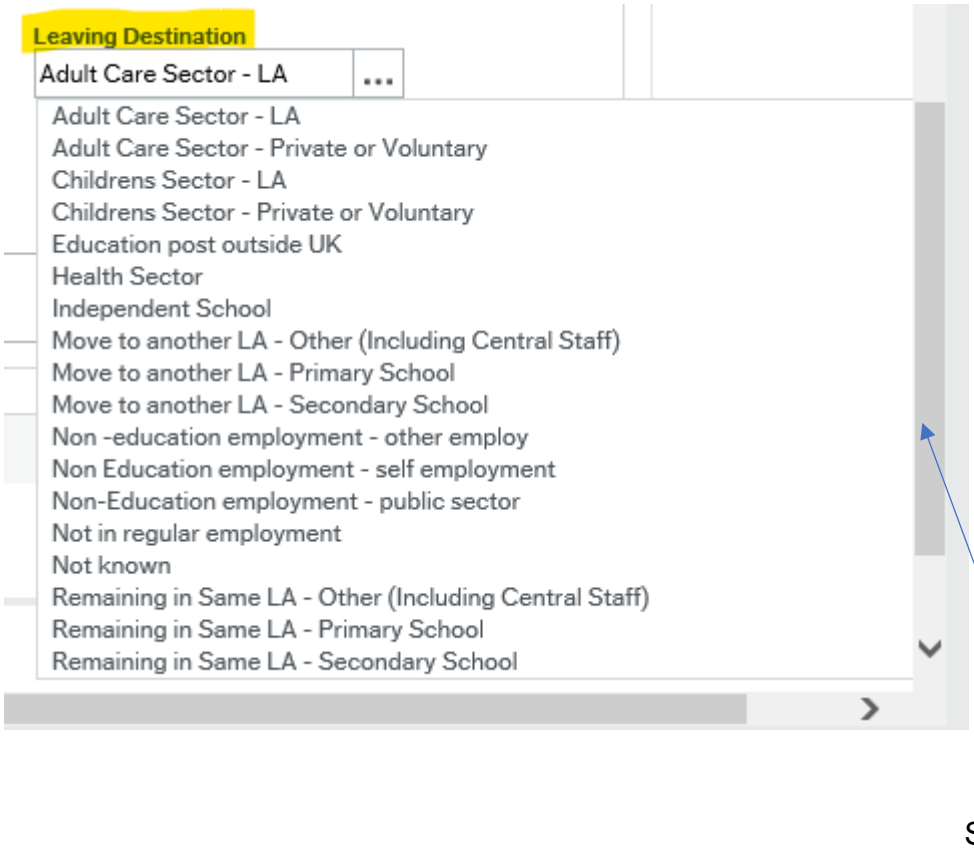
For those that are part-time and completed all their contracted hours for the week – pay to the Sunday or end of term.

Teachers – Written Statement of Particulars.

Leaving Reason – press SPACEBAR and select the reason as to why the Resource is leaving:

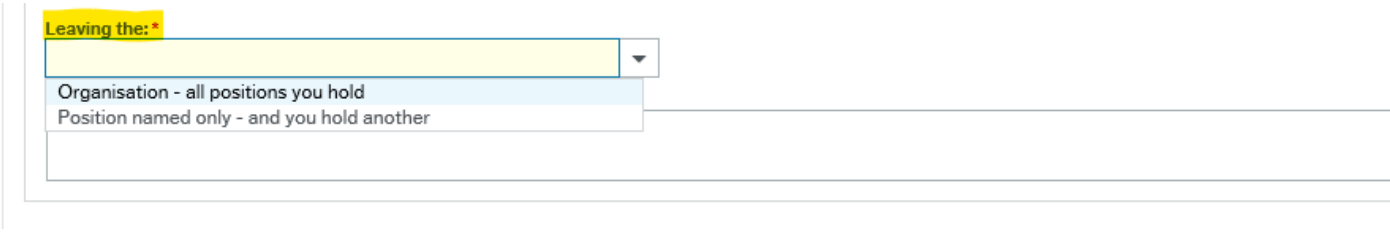


Leaving Destination – press SPACEBAR and select the option that you require. You can scroll down the list. This will inform the Work Force Census for schools.

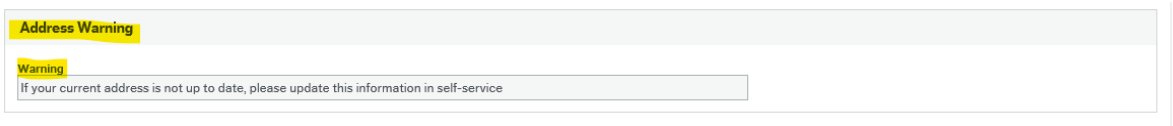


Leaving the Organisation – select this option if the Resource is totally leaving the Authority in all positions. The employment record will be closed down.

Leaving the Positions named only – choose this option if the Resource is only leaving one position and remaining in others (i.e. Forest School leaver – remaining as Lunchtime Supervisory Assistant, Casual and Teaching Assistant Level 1).

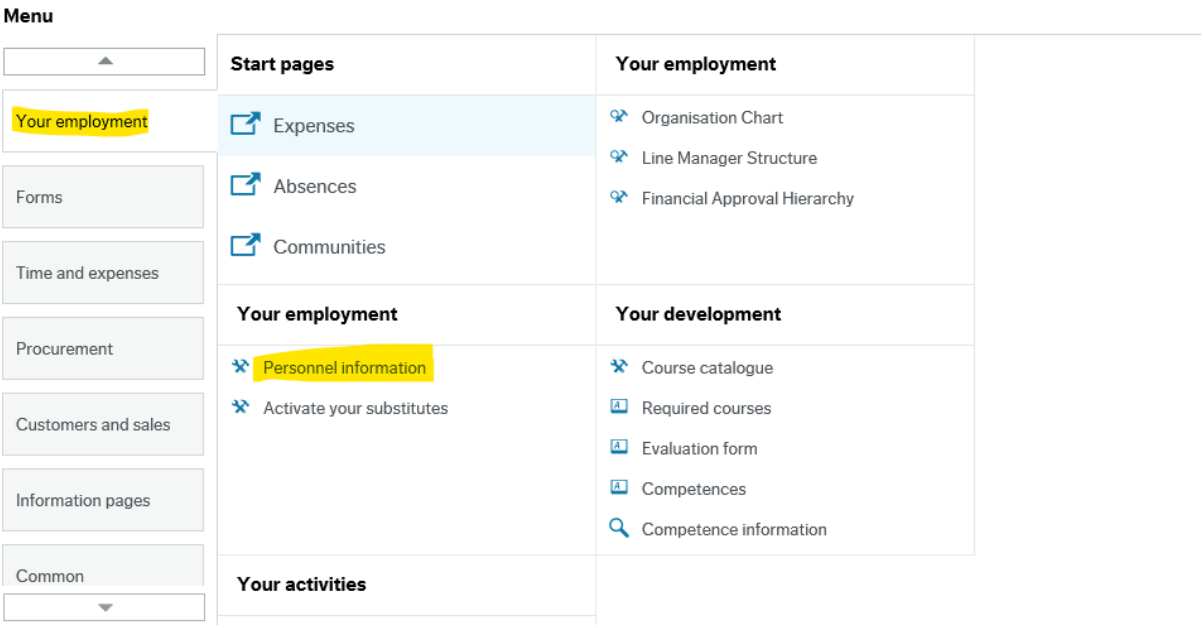


Please add any additional information here (type in the job title and position ID Number for each position the Resource is leaving) (i.e. which school is the Resource moving to and the position with start date, if known).

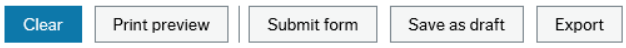


Ask your Resource to check that their address is correct – guide them to these screens on Business World.

To update your address please refer to the next two screen shots:



Check your address is correct. If not, please refer to section 4.2 which shows you how to update it in the Guidance for Schools – found on the Schools Learning Gateway.



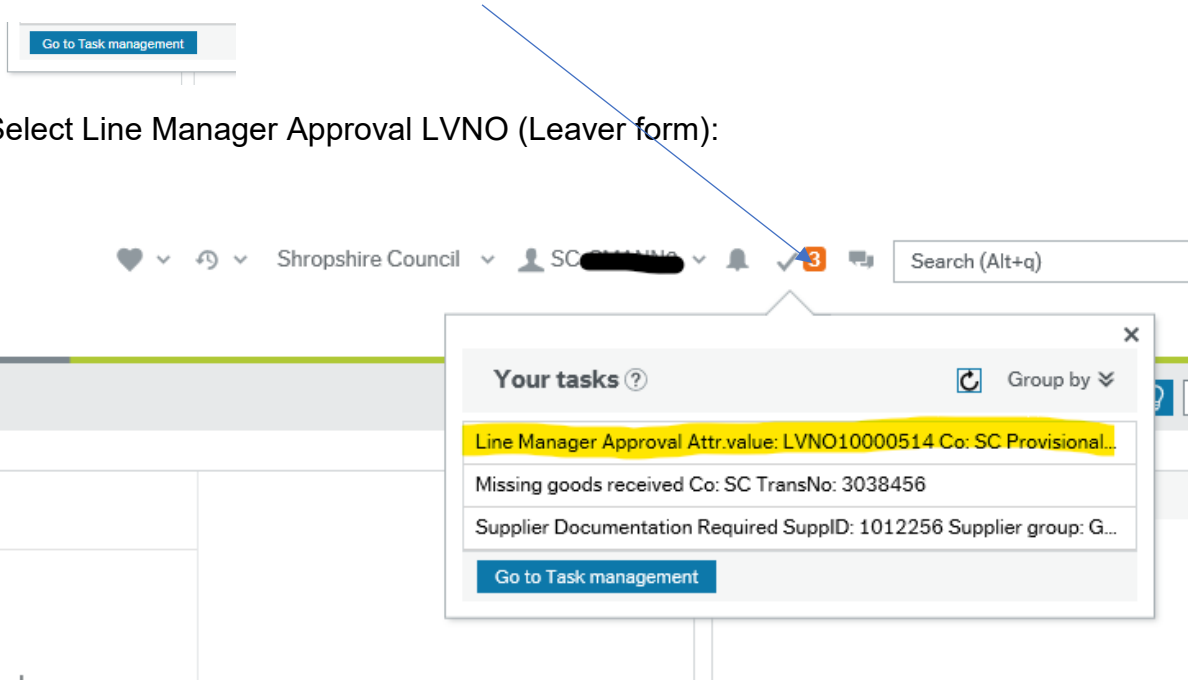
SUBMIT FORM, this will workflow to your manager to review and approve. If you are not ready, **SAVE AS DRAFT** to retrieve later.

4. Headteacher Approval

If the Leaver Form has been completed by an Office Manager/Administrator, once the form is submitted it will workflow to the Headteacher for approval.

The Headteacher will be alerted that a task is waiting. This example shows that 5 tasks are awaiting action by the Headteacher:

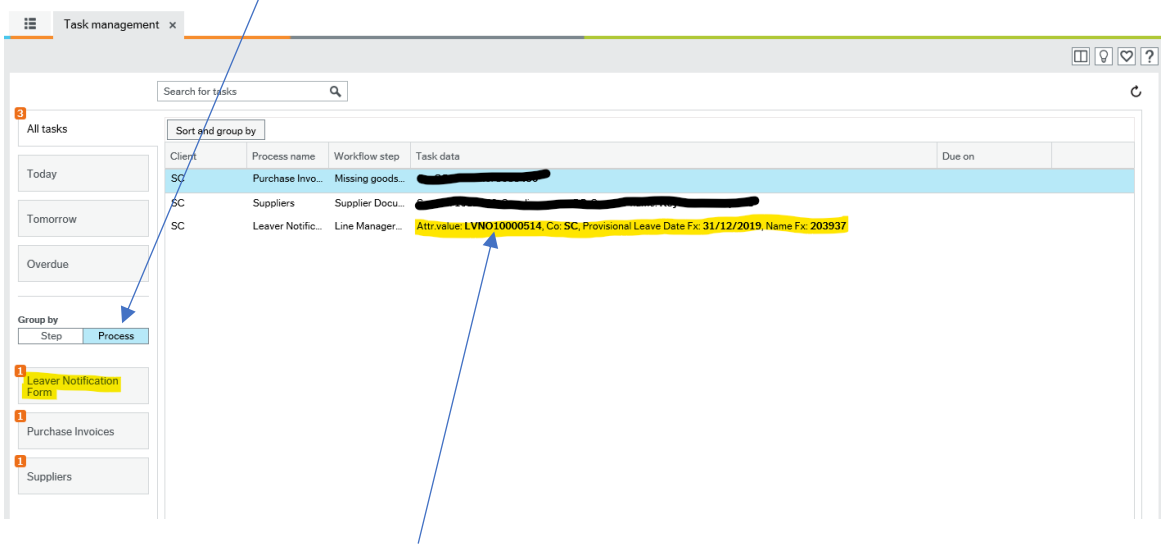
Click on the number highlighted in red. Then click 'Go to Task Management':



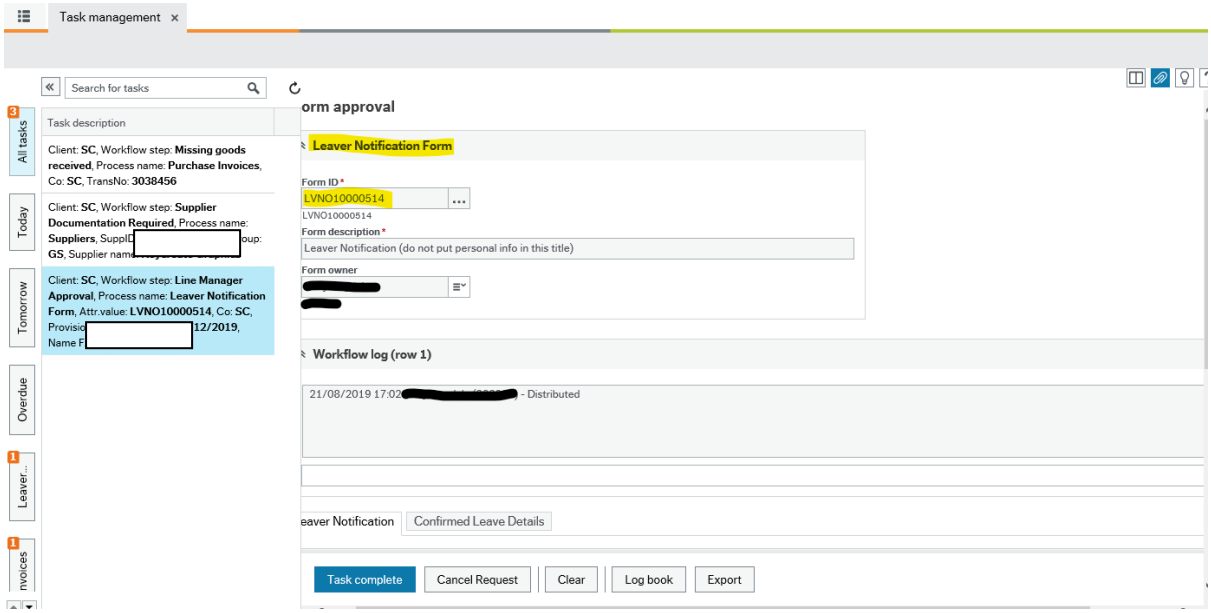
Select Line Manager Approval LVNO (Leaver form):

Alternatively, if you have lots of tasks, click on Go to Task Management to see all your tasks sorted into areas for you.

A new window will open. On the left-hand side, the tasks can be grouped by Step or Process. Click Process:



Click on the leaver form you wish to authorise, and it will appear in the screen shot below:



Then Click in the first form and review the details.

Use the scroll bars to move across and down the page.

- **If all the details are correct, the form can be approved (TASK COMPLETE)**.

  If all the details are correct, click '**Approve**'.

- **If the form is incorrect or has missing details it should be rejected (CANCEL REQUEST).**

  In this example the form should be rejected as there are several omissions, as shown below:

  - Incorrect date of leaving
  - Leaving the wrong position

5.0 Additional Information

Once the Leaver has been actioned by HR the Administrator will receive an alert asking to complete The Leavers Checklist. This form is not mandatory, however it would be helpful as a guide for schools to go through them when a Resource resigns.

The forms are found in Business World.

Once the Leaver has been actioned by HR the Resource will receive an alert asking them to complete The Leavers Questionnaire. The Resource will only need to complete this if they have resigned from your Establishment.