



Information Section

After the type of educational establishment has been selected, the information section does what it says on the tin. It contains some information about how the data provided will be used with a link to the Council's Privacy Notice.

There is also information to note before completing the form for the first time and links to some guides that will help you to understand how the fields in the forms work. There is also a link to a Q&A document that will hopefully answer questions you might have about the information requested in the form, preventing you from having to make contact with the Payroll Team.

Payroll Digital Forms - Leaver Form

Information Contact Details Personal Details Leavers

Type of educational establishment *

Academy

Local Authority School



Schools - Request relating to an employee leaving

Please note this leaver form should only be used for Officers and Teachers leaving the authority or are moving between Officer and Teacher payrolls.

For employees who are changing sections and schools but not moving between payroll types the **Starter and Transfer** form should be completed.

Data Protection Act 2018 and UK General Data Protection Regulations

We will use the information you provide to meet our contractual, legal, and management obligations.

As part of this, we will share your personal information with internal service areas and external organisations who provide services on our behalf. We also need to share with the Cabinet Office (which is a government department) to detect fraud and error in support of the **National Fraud Initiative**

More information on how we handle personal information and your rights under the data protection law can be found in our **Privacy Notice**

We will keep all information you provide confidential and treat it in accordance with the requirements of data protection law.

I confirm that I have read and accept the terms under which the information provided will be used



Helpful Supporting Information

1. A link to a **document** that provides some answers to questions that SBMs may have about the information being provided in employee leaver requests. This document also contains information that the Payroll Team want SBMs to be aware of.

2. A link to a **guide** that explains how the various different types of boxes and lists in the form work.

3. A link to a **guide** that gives an overview of the information that is required to be input in each section of the form.

4. **Change of User Form** - this form will need to be completed when the SBM is absent or has left the employment of the school

Contact Details Section

The contact details section is where the security validation happens. This ensures that before details of the officers employed by the school are presented for selection, the form validates that it is the authorised representative of the school that is logged in and using the form.

The validation checks:

- The employee number entered belongs to the authorised representative of the school – the School Business Manager (SBM) in most cases, and
- The employee number is linked to the current post holding entry for the post number entered, and
- The 'Business manager email' address (which is also the user's account email address) is held in the SBM's ResourceLink record.

Once you have entered your employee & post numbers click the 'Find School' button. The form will validate the above information and if correct will return the name of the school enabling the SBM to progress to the next section.

Payroll LM Schools - Leaver Form

Prototype Form for the Payroll External Customer caseload

Information Contact Details ⓘ Personal Details Leavers

Your Contact, Employee & Post Number Details

Name *

 ✓

Business manager email *

 ✓

Employee number allocated to you *

Employee numbers have 6 digits in them starting with '0' or '1'

 ✓

Your post number *

Post numbers are 6 digits long if starting with '0' and are 7 digits long if starting with '1'

 ✓

Find School

School *

Example Primary School

Personal Details Section

The only field that you can input details in here is the 'known as name' field. If a 'known as name' has already been added to the employee's ResourceLink record it will be pre-populated here.

The employee information that is populated once an employee (officer) is selected is taken from a copy of ResourceLink data at the end of each working day. This means that any changes made to ResourceLink records during a working day will not be reflected in the form employee selection list until the next working day.

Payroll LM Schools - Leaver Form

Prototype Form for the Payroll External Customer caseload

Information Contact Details **!** Personal Details Leavers

Employee personal details

Select employee *

DEBBIE RICE Higher Level Teaching Assistant Employee number: 168324 ✓

Surname *

Rice

Legal first name *

Debbie

Please provide a 'known as' name for Debbie if they like to be referred to it rather than by their legal first name

Employee number allocated to Debbie *

168324

School Name *

Example Primary School

Post title *

Higher Level Teaching Assistant

Current post number *

1026538

Current post grade *

GRD4

Current spinal point *

11

Leavers Section

This is the section where the specific details about the employee leaving will be captured.

Once confirmation of the leaver request type has been selected i.e. whether they are leaving the authority or moving between teacher and officer payrolls, further questions and input boxes will be revealed for you to enter the specific details relating to the employee who is leaving their current role.

Specific leaver details

Leaver request type *

Leaving the Authority Moving between Teacher and Officer Payrolls

Information about the different types of boxes that will appear on the form is contained in another guide that can be accessed from link 2 in the 'Helpful Supporting Information' box in the Information Section of the form (see page 1 on this guide for details).

Payroll LM Schools - Leaver Form

Prototype Form for the Payroll External Customer caseload

Information

Contact Details

Personal Details

Leavers 1

Specific leaver details

Leaver request type *

Leaving the Authority Moving between Teacher and Officer Payrolls



For GDPR purposes the address added below needs to be Chloe's most recent address. This ensures any future paperwork, eg: P45/leavers letter is sent to the correct address. Please note we are unable to issue replacement P45s

Home address - property number & street *

126 Dalton Road



Address line 2

City/Town *

Bedworth



County/Region

Please enter the country here if Chloe will be living outside of the UK

Warwickshire



Post code *

CV12 8SJ



Reason for leaving *

Redundancy



Please upload the appropriate approval documentation *

Drop files here to upload - Upload



Resignation Letter - STW.docx (64.71...

Uploaded: 1 of 1



Date of leaving *

31/08/2023



When certain Leaving Reasons are selected in this section of the form you will be asked to upload documentation either:

- In support of the management decision to allow the employee to leave, or
- That confirms the employee's intention to leave

These requirements differ between Officers and Teachers as below.

Officers & Teachers (Note: uploading approval documentation in these circumstances will be a mandatory requirement for Officers, and helpful for Teachers but not a mandatory requirement for them)

Leaving Reason Selected
Early Retirement - Efficiency
Early Retirement - Redundancy
Redundancy
Redundancy Voluntary

Officers Only (Note: uploading the employee's letter of resignation will be a mandatory requirement)

Leaving Reason Selected
Early Retirement
Retirement