Process Leaver Guide

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for all tasks managed within the Employees Management Module in EPM Connect.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 21st April 2026 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	21st April 2026
Summary of Change	Addition of Archive a role section.
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Changes to be notified to	Keren Prior, Director of Operational Excellence

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Process Leaver

Important

When an employee resigns, several steps must be completed. The steps outlined below apply only when the employee has resigned from all roles held within the school/Trust.

If the employee is resigning from one role only but will continue in other roles within the school/trust, the only required action is to end the specific job role/appointment. However, we recommend reviewing the **User Groups** the employee belongs to, to ensure these still reflect their remaining roles and that the associated permissions remain appropriate.

1. End all job role/appointments held by the employee.
2. Process leaver
3. Update User Groups, removing access to all current User Groups and adding the employee to the Leaver User Group, in order to provide access to payslips and documents only.
4. Archive User at the point that access to payslips and documents should be removed.

Before ending an employee's employment at the school/Trust, it is important to first end each appointment/role held by the employee and to provide a reason for leaving. Once this has been done the employee's appointment can be ended.

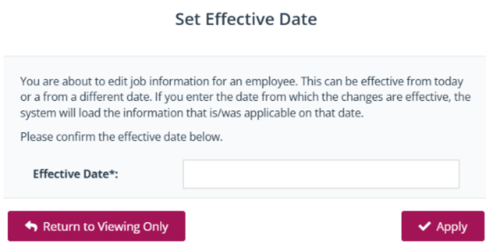
End a Job Role/Appointment

These steps apply to both processing leavers and ending only specific roles for the particular employee.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Scroll down the page and above the **Job Information** tab, select the relevant job role.
6. Click the **Job Information** tab. The relevant job information is displayed.
7. Click the **Edit Details** button.

8. In the **Set Effective Date** window, enter today's date.

This window will appear whenever you view **Job Details** or **Salary Details** in **Edit** mode.



9. Click **Apply**.

10. In the **End Date** field, enter the end date of the appointment.
11. In the **Reason for leaving** field, enter the reason the employee is leaving the role.

Important

This is needed to update the employee's pension record and the School Workforce Census.

The leaver cannot be processed without a reason.

12. In the **Final Holiday Balance** field, enter the final balance.

This field only applies to part-time or full-time non-teaching staff.

13. In the **Paid Leave** field, enter the number of days or hours and select **Hours** or **Days**.

Paid Leave should be entered for employees who are part-time or full-time non-teaching staff.

Enter the number of days or hours leave here.

14. Click **Save**. A pop up warning is displayed.

Adding an end date to a job role or changing it to an earlier date will apply the same date to all its associated additions/deductions.

16. Click **OK** to confirm or **Cancel** to return back to the main screen.

Process Leaver

1. Repeat the steps for End Job Role/Appointment for all other roles held by the employee.

Once all appointments have been ended, you need to end the employee's employment.

This can be managed within the **Employment Record**.

This should not be changed until all appointments have ended.

2. Select **Employment Record** from the tab on the left-hand side of the Employee Record.
3. In the **Employment End Date** field, select the date the employment at the school will end.

This date should be no earlier than the end date of any of the appointments you have ended.

4. Click **Save**. A pop up warning is displayed.

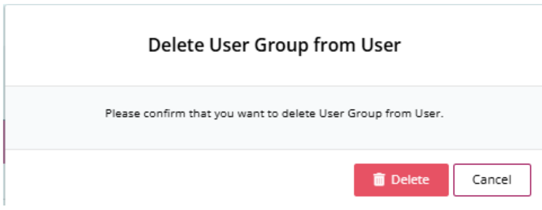
5. Tick the box to confirm that you understand that this action may trigger a P45.
6. Click **OK** to confirm or **Cancel** to return back to the main screen.

Update User Permissions

Once the leaver has been processed, User Groups should be updated to ensure that users only have access to appropriate permissions.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.
5. Click the **x** icon next to the permission you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed.
8. Click the **+ Add User Group** button.

9. Tick the box next to **Leaver**.

   This will add the user to the Leaver User Group and limits access to **My Payslips** and **My Documents** within **My Portal** only.

10. Click the **+ Add User Group** button.

Archive user

Archiving a user is the final step when processing a leaver. Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes their access to EPM Connect.

We recommend archiving users 3 months after their **Leave Date**. This will remove access to the system.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page is displayed and displays all current employees.

3. Use the **Search Users** function to find the employee you wish to archive.

4. Click the **x** icon in the far right-hand column of the user's name to delete the user. A confirmation pop up window is displayed.
5. Select **Archive** or **Cancel**.

6. Click the Show Archived Users button to check the employee has been archived.

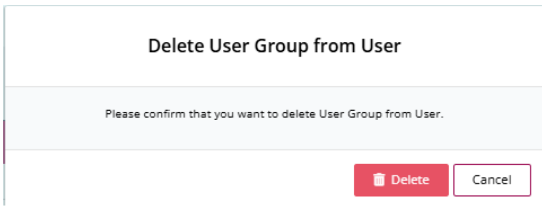
Users can be reactivated by clicking on the double arrow icon. The permissions granted to the user before archive will be applied to the user.

Manage suspended employees

Alternatively, if you wish to temporarily remove access, for example due to temporarily suspension, you can choose to remove permissions from the suspended user rather than deleting the user.

1. On the left-hand side of the EPM Connect window, click **Admin**. A list of further menu options is displayed.
2. Click **User Administration**. The **User Administration** page displays all current employees.
3. Use the **Search Users** function to find the employee you wish to search for the employee you wish to archive.

4. Click the **pencil** icon in the far right-hand column of the user's name to edit the user permissions. **Edit User** page is displayed.
5. Click the **x** icon next to the permission(s) you want to remove. A pop up window is displayed.



6. Click **Delete**.
7. Repeat the process until all relevant permissions are removed

View and Manage Archived and Previous Employees

Previous employees are those who have been processed as a leaver within the system, whilst archived employees are those who have been manually archived by a user. Archiving can be useful when an employee has been appointed but did not start within the role or when an employee has been added in error or duplicated.

Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes the user's access to EPM Connect.

View previous employee and employee role records

When an employee leaves their details are maintained within the **Previous Employee Role Records**. This section also includes current employees with previous roles.

If a previous employee returns by following the guidance detailed in the **Add a Returning Employee** guidance later within this guide.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Scroll down the page to the **Previous Employee Role Records** section.
5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
6. Scroll down the page and above the **Job Information** tab, select the relevant job role.
7. Click the **Job Information** tab. The relevant job information is displayed.

View archived records

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Scroll down to the bottom of the page and click the **View Archived Employees** button. A list of **Archived Employees Records** is displayed.
5. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
6. Alternatively, you can use the **Employees Search** function to search for archived employees. However, to do this please ensure you have clicked on the **View Archived Employees** button.

Archive an employee

Employees can be archived via the **Archive** button. These employees will not be included within reports, metrics and grids within the system. Archiving a user is different from archiving an employee. Archiving a user within **User Administration** removes their access to EPM Connect. This can be seen within the **Archive User** section later in this guide.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Select the **All Employees** tab. All employees within the property are displayed

   Employees cannot be archived within the **Employees by Department** tab.

   Selecting the **Employees by Job Role/Type** will only allow you to archive the individual role listed, not the entire employee. See **Archive a role**, later in this guide.
5. Enter the name of the employee within the **Employee Search** box.
6. Click the **x** icon on the right-hand side of the relevant employee to archive an employee.
7. A new window will appear. Click the **Archive** button.

Re-activate archived employees

Re-activating archived employees will make the employee live. If the roles weren't ended before archiving, they will appear within **All Employees** and the employee will be active. If the role was ended prior to archiving, they will appear within **Previous Employee Role Records** and a new role should be created, even if they are returning to the school in the same role that they held prior to leaving. A guide on how to **Add a returning employee** can be found below.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Scroll down to the bottom of the page and click the **View Archived Employees** button. A list of **Archived Employees Records** is displayed.

5. Click the double arrow icon on the right-hand side of the relevant employee to re-activate an employee's details. A new window is displayed.
6. Click the **Restore** button.

Archive a role

Individual roles can be archived via the **Archive** button. This will archive a particular role held by the employee, rather than the employee as a complete entity. These roles will not be included within reports, metrics and grids within the system.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **All Employees** page is displayed and displays all current employees.
4. Select the **Employees by Job Role/Type** tab. A list of all roles held by employees within the property are displayed.

   Employees cannot be archived within the **Employees by Department** tab.

5. Click the magnifying glass icon and enter the name of the relevant employee.
6. Click **Apply**.

   Apply

8. Click the **x** icon on the right-hand side to archive the role.
9. A new window will appear. Click the **Archive** button.

   Archive

   The role is archived and can be viewed by clicking the **View Archived Roles** button.

   View Archived Roles

Re-activate archived roles

Re-activating archived roles will make the employee live. If the roles weren't ended before archiving, they will appear within the **All Employees** page, within the **Employees by Job Role/Type** tab and the employee will be active.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Select **All Employees**. The **View Employee Details** page is displayed.
4. Select the **Employees by Job Role/Type** tab. A list of all roles held by employees within the property are displayed.
5. Scroll down to the bottom of the page and click the **View Archived Roles** button. A list of **Archived Employees Records** is displayed.

   View Archived Roles

6. Click the double arrow icon on the right-hand side of the relevant employee to re-activate an employee's details. A new window is displayed.
7. Click the **Restore** button.

   Restore

Add a returning employee

When an employee leaves their details are maintained within the Previous Employee Role Records. If a previous employee returns, a previous employee can be converted into a current employee by adding a new job role. Any previous roles held by the employee will be linked to their new **Employee Record**.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options is displayed.
2. Click **Details**. A list of further menu options will appear.
3. Scroll down to the bottom of the page until you get to **Previous Employee Role Records**.

   This is where all previous employees and current employees with previous roles are displayed.

4. Click the eye icon on the right-hand side to open an employee's details, or click on the person's **Forename**. The relevant **Employee Details** page is displayed.
5. Follow the **Add a job** section of the **Add a New Employee** guide (Teaching, Non-Teaching or Casuals), which can be found within the **Employees Module** page of the EPM Connect Guides.

   Adding a new role will convert the employee to current employee status, whilst linking all previous role held within the system to the **Employee Record**.