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 **National Shared Services Office**

# Local HR Exit Management Guide

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## Local HR Responsibility in the Exit Management Process

The objective of this ‘How To’ Guide is to outline Local HR’s role in relation to Exit Management.

The following Exit Management activities require final sanction from Local HR:

Resign/Retire

Employees should raise a case on the CMS with the NSSO once they have signalled their intention to resign/retire with LHR & their Head of Division as per the Exit Circular 10/2012. Exit notifications should be submitted at least one month in advance for grades up to Assistance Principal, and three months for Principal Officers and grades above.

Local HR will raise an Exit case on behalf of the Employee with the NSSO in limited instances - Death in Service, Retirement of staff with no PC access, on behalf of Employee on sick leave etc.

Death in Service

Local HR will issue initial correspondence such as condolences letter to the next of kin, or estate. Local HR Unit will notify the NSSO and complete an Exit Form to begin the Exit Management process for the deceased. The NSSO will deal with the case with all due sensitivity.

Please note: An Exit Form must be completed in all circumstances either by the Employee or Local HR. In the case of Ill Health Retirement, Local HR should submit an Exit Form and an IHR1 on behalf of the Employee.

Please Note: If an Employee submits an Exit Form to the NSSO, the NSSO will in turn advise Local HR.

Please Note: The NSSO may contact Local HR if any clarification is needed on any of the Exit Management activities. This will occur on a case by case basis.

## Exit Management Process

## Please Note: The trigger for this process is usually an Employee informing the NSSO of their intention to exit. The NSSO will inform Local HR and request any clarification required to complete the Exit activities. In all cases an Exit Form must be completed by the Employee or Local HR.

## Step 1: Employee accesses the CMS and drafts an Exit Management case

## Step 2: Employee completes an exit form, attaches the form and the retirement notice to the case and submits the case to the NSSO.

## Step 3: The NSSO receives the case and begins the exit process.

## Step 4: The NSSO conduct internal checks (for example, check leave balance).

## Step 5: The NSSO send Local HR an exit checklist.

## Step 6: The NSSO email Local HR requesting the employee file.

**Step 7:** Local HR send the NSSO the employee file by scanning or posting the file.

**Step 8:** The NSSO Pensions team will calculate the pension.

**Step 9:** The NSSO update the employee’s personnel file on HRMS with the retirement.

**Step 10:** The NSSO draft and issue an exit letter to the employee outlining their exit details.

## Please Note: Local HR will complete Step 1 on the Employee’s behalf in limited instances like Death in Service, Retirement of staff with no PC access, on behalf of an Employee on sick leave.

## Please Note: Local HR and/or Employee Assistance Officer (EAO) will be responsible for obtaining the completed Pensions forms from the spouse/child/legal representative and for sending these to the NSSO when the initial Exit case is raised.

## Please Note: The Employee’s Exit file may be requested in advance of their Exit.

## In the Exit Process, Local HR is responsible for completing the following steps in the process:

**Employee accesses the Case Management System and raises an Exit Management case (Step 1):**

**Step 1:** The Employee accesses the Case Management System via the NSSO website and raises an Exit Management Case**,** attaching any necessary documentation.

**Step 2:** Submit case to the NSSO.

**Local HR sends the NSSO the Employee’s File by courier (Step 7):**

**Step 1:** Local HR receives request for Employees file

Please Note: Local HR /Employee should not raise an additional Pensions case. The NSSO Exit team will administer a Pension case and request the Employee’s file as part of the Exit process. In some cases, the Employee’s Exit file may be requested in advance of their Exit.

**Step 2:** Local HR send the Employee’s file to the NSSO.

Please note: Original hardcopy files will be requested in some instances (for example, Spouse and Children’s Scheme form)

**Step 3:** The NSSO will confirm receipt of the Employee’s file if requested by Local HR.