Contractual Changes

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1 Introduction

The purpose of the user guide is to provide information, procedures and instructions to help you maintain an employee's contractual information within the Trent HR system, including:

- Work Hours
- Salary
- Working Pattern
- Funding
- Contractual Elements
- Extensions to Tenure
1.1 Where to Find the Data

Most of the options listed can be located in the Positions area of the People module using the following navigation path:

**Navigate:** Organisation > People (select the employee) > Employment > Positions (select position)
1.2 Effective Dates

Whenever changes to position details are required, you must ensure that the effective date of the change is entered. This is achieved in two ways and is dependant on the item being changed.

- Using the Effective Date field in the Control Bar
- Completing the Start Date field in the relevant form

Once you choose the appropriate form for the change, Trent will wait for you to enter the date in the Effective Date field in the Control Bar.

1.2.1 Using the Control Bar

Enter the required date and click on the ‘Confirm effective date’ option next to the field or press Enter.
2 Changing Salaries

For changes to salary, you need to ascertain whether the employee is being paid via a Payscale (i.e. on a recognised grade) or a Spot Salary. You may then access the relevant form to make the changes.

2.1 Payscale Salaries

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the person whose salary is being changed
4. Choose Employment, positions
5. Select the Payscale Values form
6. The payscale values form will be displayed.
7. Select the Spinal Point (from the FT salary drop down box), and type in the next increment date

Where the salary is within the normal range for the grade (i.e. within the service band) the override maximum should be set to the grade maximum (i.e. the top service point) and the FT Salary point will be less than or equal to the grade maximum.

Where the salary is within the contribution band the override maximum should be set to the same point as the FT Salary point.

Where a personal bar is set the override maximum and the FT Salary point should be less than the grade maximum.
8. Click the drop down arrow to the right of change reason and select the reason for the change.

9. Click the **Save** button.
Contractual Changes

2.2 Spot Salaries

1. Follow steps above, but select the Salary Details form

![Salary Details Form](image)

2. The salary details form will be displayed.

3. Enter the salary in the FT Salary field and the select the frequency from the drop down list.

4. Click the *Save* button.
2.3 Post Re-Grade

Where a Post has been re-graded:

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select Posts and search for the required Post
4. Select Payscale details
5. The Payscale values form will be displayed

<table>
<thead>
<tr>
<th>Payscale values: Clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade: Grade 3</td>
</tr>
<tr>
<td>Payment table: National Spine</td>
</tr>
<tr>
<td>FT Salary:</td>
</tr>
<tr>
<td>Protected:</td>
</tr>
<tr>
<td>Override minimum:</td>
</tr>
<tr>
<td>Override maximum:</td>
</tr>
</tbody>
</table>

6. Select the required grade

7. Click the Save button.
3 Changing Post Title

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select Posts and search for the required Post
4. Select Post details

   ![Post Details Form]

5. Amend the Post title in the first field of the form
6. Click the button
3.1 Changing Position Title

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the person whose position title is being changed
4. Choose Employment, positions
5. Select Position details

Position details: Chief Clerk (Divisional Administrator)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title</td>
<td>Chief Clerk (Divisional Administrator)</td>
</tr>
<tr>
<td>Start date</td>
<td>11/11/1911</td>
</tr>
<tr>
<td>End date change?</td>
<td>☐</td>
</tr>
<tr>
<td>End date</td>
<td></td>
</tr>
<tr>
<td>Position reference</td>
<td>40824</td>
</tr>
<tr>
<td>Probationary period</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td></td>
</tr>
<tr>
<td>Occupant</td>
<td>Mrs Patricia A Bentley</td>
</tr>
<tr>
<td>Reporting unit</td>
<td>Department of Engineering</td>
</tr>
<tr>
<td>Reports to</td>
<td>Head of Department</td>
</tr>
<tr>
<td></td>
<td>Professor Keith Glover (01/01/1900 - )</td>
</tr>
<tr>
<td>Expected position and date</td>
<td></td>
</tr>
<tr>
<td>Expected position and reason</td>
<td></td>
</tr>
<tr>
<td>Structure group 1</td>
<td>School of Technology</td>
</tr>
<tr>
<td>Structure group 2</td>
<td></td>
</tr>
<tr>
<td>Position status</td>
<td>No permission status</td>
</tr>
</tbody>
</table>

6. Amend the job title in the first field of the form (note that you can type more characters than the display allows you to view)
7. Click the save button
4 Changing Hours

1. Select the Hours and Basis form from the Position menu
   - Authorisation history
   - Position details
   - Occupancy details
   - Salary details
   - Payscale values
   - **Hours and basis**
   - Position transfer
   - Inheritance chart
   - History

2. The Hours and Basis form will be displayed

   ![Hours and Basis Form](image)

3. Enter the required changes to Contractual Hours.
4. Select a change reason where applicable

<table>
<thead>
<tr>
<th>Change reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Break Scheme</td>
</tr>
<tr>
<td>Flexible working</td>
</tr>
<tr>
<td>Graduated Return - Maternity</td>
</tr>
<tr>
<td>Graduated Return - Sickness</td>
</tr>
<tr>
<td>Organisation change</td>
</tr>
<tr>
<td>Unpaid Leave of Absence</td>
</tr>
</tbody>
</table>

5. Click the **Save** button
5 Changing Working Patterns

1. In order to change an employee’s working pattern, you need to click the Patterns option from the Position menu. Select Working Pattern and choose the New – Pattern Details form.

<table>
<thead>
<tr>
<th>Type</th>
<th>Pattern name</th>
<th>Start day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowance</td>
<td>Mon-Fri default</td>
<td>Week 1 / Day 1</td>
</tr>
<tr>
<td>Working Pattern</td>
<td>Mon-Fri default</td>
<td>Week 1 / Day 1</td>
</tr>
</tbody>
</table>

Expanding/Collapsing folders

- Patterns
  - Pattern details
    - New - Pattern details
    - Inheritance chart
    - History
    - Process chaining

2. The pattern details form will be displayed.

<table>
<thead>
<tr>
<th>Pattern details: New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level: Clerk</td>
</tr>
<tr>
<td>Type: Working Pattern</td>
</tr>
<tr>
<td>Pattern: Mon, Tues, Thurs, Fri</td>
</tr>
<tr>
<td>Start day: Week 1 / Day 1</td>
</tr>
<tr>
<td>Start date: 26/03/2007</td>
</tr>
<tr>
<td>End date: [blank]</td>
</tr>
<tr>
<td>Save</td>
</tr>
</tbody>
</table>

2. Select the appropriate position from the Level drop down box and select Working pattern from the Type field.

3. Choose the new pattern from the drop down box on the Pattern field and add the details for the Start Day and Start Date (if the start date is a Monday then the start day is week 1/ Day 1, if the start date is a Tuesday, then the start day is week 1/ Day 2)

4. Click the [Save] button.

Note that if you are setting this change up in the future, but your effective date at the top of the screen is today's date, you will not see this change in the object pane. Use the History screen to view your changes.
Trent will automatically place an end date against the original pattern, and the new one will be used from the start date entered. To view a history of the changes, select the History option.

**History:** Clerk [Working Patterns] (Permission to Fill granted)

<table>
<thead>
<tr>
<th>Effective date</th>
<th>Working Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td>26/03/2007</td>
<td>Mon, Tues, Thurs, Fri</td>
</tr>
<tr>
<td>07/02/2007</td>
<td>Mon-Fri default</td>
</tr>
</tbody>
</table>
6 Changing Permanent Elements

Elements are a part of someone’s pay and can include additional allowances or deductions. The term permanent means that it is received/deducted on a regular basis.

6.1 Frequency

Allowances can vary in frequency, i.e. an allowance may be paid every month, every quarter or even annually. However, the user will not need to worry about this as each individual element’s frequency will be specified when the system is configured and hence the correct payment will be made automatically.

Trent provides the option to enter “end dates” for allowances to ensure that payment is automatically stopped at a particular point in time. As all allowances are date effective there is also the added benefit that any back pay will automatically be calculated and paid during the payrun following the entry of the allowance.

6.2 Attributing an element to a position

The element Basic Pay will be attached to the post and details will then be inherited down to the post holder.

Sometimes a specific position will attract certain additional payments, (contractural elements). E.g. Early Morning Supplement, Head of Department; and will be attached by the East Room

Elements specific to the individual will be attached on an individual basis by the Payroll Team after the employee has been attached to the payroll. E.g Childcare vouchers

Permanent elements set up for a new starter by the East Room will be reviewed as part of the Payroll process chain.
6.3 Attaching elements

5. In order to change an employee’s permanent payment elements, you need to click the Elements option and choose either:
   - New – Element Details to add new elements
     - Cost code
     - Element detail
     - New - Element detail
     - Element account details
     - Inheritance chart
     - History
     - Process chaining
   - Element Details to view and/or amend existing elements
     - Cost code
     - Element detail
     - New - Element detail
     - Element account details
     - Inheritance chart
     - History
     - Process chaining

6. Select the position from the Level drop down box (not the contract). As a general rule, if the element is an allowance it will be attached at position level, whereas if it is a deduction it will be attached at contract level.
7. For new elements, enter a start date. If the element is to be paid for a set period of time enter an end date.

8. Select the element from the drop down box on the Element field. (NP stands for non-pensionable). For existing elements enter the end date or change required.

9. For a cash based element enter the annual cash amount of the allowance in pounds and pence.

10. Click the button.
6.4 Element Costing

The element will be costed to the employees ‘home’ cost centre(s) as default.

If the element is to be to a different cost code than basic pay this needs to be actioned through **People > Payroll > Elements**

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the required person
4. Select the Payroll menu
5. Select Elements

   ![Payroll Menu](image)

6. The existing elements for the person will be displayed.  Select the element that requires the costing to be changed.

   ![Elements Menu](image)
11. Select Cost Code, and New – Cost code details (ele for contract)

12. Select the Rule (there’s only one, UC1) from the drop down box

13. Fill in the Cost code for the element
14. Percent should be set to 100
15. Value is left blank in most cases. This can be used if you wish to cost a set amount of a payment elsewhere (i.e. employee gets £500 allowance and £200 of it is funded by another dept regardless of whether the £500 changes)
16. Apportion costs is not used, leave this field blank
17. Override should be ticked as this then ensures that any additional values entered against this element are costed to the same place (i.e. backpay)
18. Click the button.
7 Changing Cost Details

In order to change costing details, you need to click the Structure Costing option in the Costing folder.

1. Search for the relevant Post.
2. Select Costing
and choose either:

- **New – Structure Costing** to add new details
- **Structure Costing** to view and/or amend existing elements

### Structure Costing:

<table>
<thead>
<tr>
<th>Organisation default: cost code</th>
<th>ERROR</th>
</tr>
</thead>
</table>

#### Rule

- **Rule name**: UC1

#### Level details

- **No.**: 1
- **Costing level**: Structure
- **Length**: 24
- **Cost code**: UAH.AM.D.AAAA.CAAJ.0000
- **Percent**: 100.00%
- **Start date**: 02/04/2007
- **End date**: 

### 3. When entering new costing details, the Rule name will always default to UC1.

“Structure” is the only choice for Costing level.

Enter the Cost Code, this must be 24 characters.

For example:

<table>
<thead>
<tr>
<th>Dept Code</th>
<th>Cost Centre</th>
<th>Source of Funds</th>
<th>Transaction Code</th>
<th>Spare</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.</td>
<td>MA.</td>
<td>MABA.</td>
<td>ABAA.</td>
<td>ABAP.</td>
</tr>
</tbody>
</table>

Or for Research Grants

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Task</th>
<th>Award</th>
<th>Transaction Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAG/001.</td>
<td>01.</td>
<td>RG12345.</td>
<td>ABAE</td>
</tr>
</tbody>
</table>
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Enter 100 Percent and Start Date fields. Only enter an End Date when there is a definitive end.

4. Click the Save button
7.1 Split costing

If the position is to be charged to more than one account

1. Enter the first cost code as instructions above

2. Open the Split form from the Structure Costing options

3. Enter the details for the second code and percentage and adjust the percent for the first code in the box called “Split records”. The total % must be 100 at all times.
4. Click the Save button.

If a three or more way split is required, split two ways first, then split the second costing and so on. (You cannot split the first costing again)
## 7.2 To Amend Costing After Start Date

1. Set the effective date to be the end date of the current code (the day before the start date of the new entry).

2. Select the cost line in the object pane which has the highest sequence number. (This will be the last line in the object pane)

3. Enter the end date for this costing.

   ![Start date: 01/04/2006](image)

   ![End date](image)

4. Click on the **Save** button.

5. Select the remaining code(s) from highest to lowest sequential number in turn and end date each and save.

6. Navigate back to the post using the navigation trail to exit the screen.

7. Set the effective date to be the start date of the new costing.

8. Select the Costing menu and choose Structure Costing, New – Structure Costing. Enter the first cost code with the same start date as the set effective date with 100% allocation.

9. Click the **Save** button.

10. Open the split form from the costing menu.

11. Enter the next code with its % and amend the first code % at the bottom of the screen so that they total 100%.

12. Repeat this process for each subsequent cost code required.

### Note: Take great care when entering end dates for costing.

It is not possible to amend the end date once entered. To remove a costing end date you would need to re-input it from the day after the original end date (the original end date then disappears). To bring forward a costing end date, you would need to re-input the costing after the end date and then put in the new end date.
7.3 Retrospective Costing Changes

To View History

1. Select the Post and choose History from the Post menu (do not use history from the costing menu)
2. In the Group drop down box select Costing Levels.

<table>
<thead>
<tr>
<th>Group</th>
<th>Costing Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>&lt;All&gt;</td>
</tr>
</tbody>
</table>
8 Changes to Tenure

When a position is created that has a fixed term tenure, an expected end date will have been entered into the Expected End Date fields on both the Position Details and Occupancy Details forms.

When this tenure requires extending you need to open these forms in turn and enter the new expected end date and then click on the Save button.

![Position Details Form]

- **Expected position end date:** 01/04/2007
### Occupancy details

**Name:** Miss Jenny M Bosten  
**Job title:** Clerk  
**Social security number:** JW685626A  
**Pay ref:** 1E00528  
**Pers ref:** 1E00528

<table>
<thead>
<tr>
<th>Current status</th>
<th>Live</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant</td>
<td>Miss Jenny M Bosten</td>
</tr>
<tr>
<td>Occupancy start</td>
<td>09/02/2007</td>
</tr>
<tr>
<td>Occupancy type</td>
<td>Standard</td>
</tr>
<tr>
<td>Position occ. reference</td>
<td>41000011</td>
</tr>
<tr>
<td>Expected occupancy end date</td>
<td>01/04/2007</td>
</tr>
<tr>
<td>Expected occupancy end reason</td>
<td>End of funding</td>
</tr>
<tr>
<td>End occupancy?</td>
<td></td>
</tr>
</tbody>
</table>

**Save**
8.1 Changing Permission to fill status

A position reference number is automatically generated by Trent when a position is created. Also the permission to fill status will automatically be set to Permission to Fill granted for a new position. Subsequently where the position status requires changing:

1. Select the position.
2. Select position details
3. Click the drop down arrow to the right of Position Status.

4. For a new position the position status will automatically be set to permission to fill granted. When the position status is changed to permission to fill on the strength of a letter from the Resource Management Committee section, the letter reference number ("ACD reference") is to be put in the Change Reason box.

Note: No permission status and Pending authority position status are used for migration purposes. Held vacant to create savings is equivalent to VH in SECQUS. Held in abeyance is used for Senior academic promotions.
8.2 Position Summary Screen

The Position summary screen provides a means of viewing position information all together in one place.

1. Select the position and choose position summary

2. The position summary screen will be displayed.
### Position summary: Clerk

<table>
<thead>
<tr>
<th>Position details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant</td>
</tr>
<tr>
<td>Job title</td>
</tr>
<tr>
<td>Position reference</td>
</tr>
<tr>
<td>Occupancy start</td>
</tr>
<tr>
<td>Occupancy end</td>
</tr>
<tr>
<td>Expected occupancy end date</td>
</tr>
<tr>
<td>Expected position end date</td>
</tr>
<tr>
<td>Location</td>
</tr>
<tr>
<td>Organisation unit</td>
</tr>
<tr>
<td>Position status</td>
</tr>
<tr>
<td>Effective from</td>
</tr>
</tbody>
</table>

3. To view specific details click on the expand icon.

### Reporting manager

<table>
<thead>
<tr>
<th>Reporting manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting manager</td>
</tr>
<tr>
<td>Reporting position</td>
</tr>
<tr>
<td>Reporting manager unit</td>
</tr>
</tbody>
</table>

### History

### Category, Basis and Type
9 Personal Details

Personal details are obtained in the first instance from the New Appointment Request Form CHRIS/10 and the Certificate of Acceptance CHRIS/20. Changes to these details can then subsequently be made as necessary. These details cover changes to personal details that have contractual issues.

9.1 Adding Key Date details

1. Use the search facility to locate the person whose details you wish to maintain or if already working with the correct record use the navigation trail to return to the people menu
2. Select Key date details from the Action pane
   The key date details form will be displayed

<table>
<thead>
<tr>
<th>Key dates: Mr Charlie Brown</th>
<th>Name: Mr Charlie Brown</th>
<th>Pers ref: 30000031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date of birth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date verified</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expected retirement date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basis</td>
<td>UK Legislation</td>
<td></td>
</tr>
<tr>
<td>Age (years)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age (months)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organisation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start date</td>
<td>04/03/2006</td>
<td></td>
</tr>
<tr>
<td>Length of service</td>
<td>0 year(s) 0 months(s)</td>
<td></td>
</tr>
<tr>
<td>Leaving date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reckonable service date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length of reckonable service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last working day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Re-employable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Enter Date of Birth. This can be obtained from the CHRIS/10 or CHRIS/20
4. Enter expected retirement date. Select “Date” from the Basis drop down list and input 30 September of the academic year in which the individual turns 65 (Unestablished/Assistants) or 67 (Established)

5. To save calculating this date first enter expected retirement date basis of Age and type in 65 if an unestablished or assistant position or 67 if established.

6. Click on the button

7. This will automatically calculate the correct year, for those people with a birthday on or before 30th September which can then be manually changed to the 30th of September for that academic year. For those birthdays after 30th September, the year will need to be changed to the following year.

8. Enter Reckonable service date. This will be the same as the organisation start date except where an employee is joining under TUPE conditions or some other arrangement where previous service is to be recognised. This field must be completed for reporting purposes and Trent will not pick up the organisation start date if it is left blank. For a student reckonable service should not be entered.

9. Click the button
9.2 Miscellaneous Details

Miscellaneous details provides summary details of expiry dates of passport, visa, work permit and residency permit. If you change the latest date(s) on this page, then the date(s) displayed on the relevant details page will also be changed and vice versa.

9.2.1 Amending miscellaneous Details

1. Use the search facility to locate the person whose details you wish to maintain or if already working with the correct record use the navigation trial to return to the people menu.
2. Select Miscellaneous details
   The miscellaneous details screen will be displayed

<table>
<thead>
<tr>
<th>Miscellaneous details: Miss Libby Bush</th>
<th>Social security number: NH904568A Pers ref: 30000018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correspondence</td>
<td></td>
</tr>
<tr>
<td>Language of correspondence</td>
<td>English</td>
</tr>
<tr>
<td>Right to work</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Yes</td>
</tr>
<tr>
<td>Passport</td>
<td>Expire date 25/07/2011</td>
</tr>
<tr>
<td>Visa</td>
<td>Expire date</td>
</tr>
<tr>
<td>Work Permit</td>
<td>Expire date</td>
</tr>
<tr>
<td>Residency permit</td>
<td>Expire date</td>
</tr>
<tr>
<td>Driving licence</td>
<td>Valid until</td>
</tr>
<tr>
<td>Vehicle insurance</td>
<td>Valid until</td>
</tr>
<tr>
<td></td>
<td>Date verified</td>
</tr>
</tbody>
</table>

3. Enter the appropriate changes for the employee
4. Click the Save button.
9.3 Occupancy details

Where a person's employment for the University is dependent upon having a visa, work permit or residency permit, the expiry date of these documents should be recorded on the appropriate form and also the date of expiry should be recorded as the expected occupancy end date.

1. Use the navigation trail to return to the people menu
2. Select Employment, Positions
3. Select Occupancy details and enter the effective date
   The occupancy details form will be displayed

<table>
<thead>
<tr>
<th>Occupancy details: Clerk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Miss Libby Bush Job title: Clerk</td>
</tr>
<tr>
<td>Social security number: NH904568A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current status: Live</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupant: Miss Libby Bush</td>
</tr>
<tr>
<td>Occupancy start: 01/02/2007</td>
</tr>
<tr>
<td>Occupancy end</td>
</tr>
<tr>
<td>Occupancy type: Standard</td>
</tr>
<tr>
<td>Position occ. reference</td>
</tr>
<tr>
<td>Expected occupancy end date: 06/10/2008</td>
</tr>
<tr>
<td>Expected occupancy end reason: Visa/Passport</td>
</tr>
<tr>
<td>End occupancy?</td>
</tr>
</tbody>
</table>

4. Enter the expected occupancy end date as the same date as the visa/work permit or residency permit expiry date and expected occupancy end reason as Visa/Passport
5. Click the Save button.