8 Personal Details

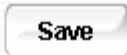Personal details are obtained in the first instance from the New Appointment Request Form CHRIS/10 and the Certificate of Acceptance CHRIS/20. Changes to these details can then subsequently be made as necessary. These details cover changes to personal details that have contractual issues.

8.1 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 <img_ref> Key date details from the Action pane
The key date details form will be displayed

Key dates: Mr Charlie Brown	Name: Mr Charlie Brown
	Pers ref: 30000031

Personal

Date of birth		🗓
Age		
Date verified		

Expected retirement date

Basis	UK Legislation ▾
Age (years)	
Age (months)	
Date	

Organisation

Start date	04/09/2006	🗓
Length of service	0 year(s) 0 month(s)	
Leaving date		
Reckonable service date		🗓
Length of reckonable service		
Last working day		
Re-employable	☐	

[Save]

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 **Save** 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.

Enter this date and click on the Save button.

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 **Save** button
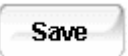
8.2 Miscellaneous Details

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.

8.2.1 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

3. Enter the appropriate changes for the employee

4. Click the [Save] button.

8.3 Occupancy details

Where a persons 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.

5. Use the navigation trail to return to the people menu
6. Select Employment, Positions

   📁 **Employment**
   ● Positions

7. Select Occupancy details and enter the effective date
   The occupancy details form will be displayed

Occupancy details: Clerk (Permission to Fill granted)	Name: Miss Libby Bush **Job title**: Clerk **Social security number**: NH904568A **Pers ref**: 30000018

Current status	Live
Occupant	Miss Libby Bush
Occupancy start	01/02/2007
Occupancy end	
Occupancy type	Standard
Position occ. reference	
Expected occupancy end date	06/10/2008
Expected occupancy end reason	Visa/Passport
End occupancy?	☐

[Save]   [Delete]

8. 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

9. Click the [Save] button.