1. **Create a position for the individual in the Pension Organisation**

The Pension Team will continue to notify the Payroll Team as they do now, by paper form of any new pensioners that require setting up in CHRIS in order to be paid. When this happens a new position will need to be created within the appropriate unit of the Pension Organisation. To assist with location of individuals within each unit posts have been set up for each letter of the alphabet and you will use the pensioner’s name as the position title.

**Step 1: Create a new position**

**Navigate:** Pension Organisation > organisational explorer (highlight P unit and drill down to the appropriate post) > Create position

a) Enter the name for the new position in the following format: ‘SURNAME, Initials.’ E.g. PABLO, P.

b) Click on SAVE
Step 2: Navigate to the new position

A) Once you have created and saved your position as detailed in step 1. Click on the 'mini explorer' menu on the left. This will pictorially display the relevant category of post that you were working within (e.g. in our example ‘P’).

b) Making sure your curser is in the top left pane, right click on the mouse and select refresh. After a few seconds the view will be refreshed and automatically expanded to show the position that you have just set up (i.e. the green chair).

c) Highlight the position (i.e the green chair).

Step 3: Enter the annual pension

Important – make sure you are in the position details folder (not post details).

a) Select the ‘salary details’ form

b) Enter the annual pension entitlement as the FT salary

c) Save
## Salary details: PAELO, P

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td></td>
</tr>
<tr>
<td>FT Salary</td>
<td>£12,000</td>
</tr>
<tr>
<td>Override minimum</td>
<td></td>
</tr>
<tr>
<td>Override maximum</td>
<td></td>
</tr>
<tr>
<td>Grade minimum</td>
<td></td>
</tr>
<tr>
<td>Grade maximum</td>
<td></td>
</tr>
<tr>
<td>Protected rate of pay</td>
<td></td>
</tr>
<tr>
<td>FTE value</td>
<td></td>
</tr>
<tr>
<td>Pro-rated rate of pay</td>
<td></td>
</tr>
<tr>
<td>Change reason</td>
<td></td>
</tr>
</tbody>
</table>

[Save] [Delete]
2. Setting up an individual as a pensioner

In order for an employee to be recorded as a pensioner they need to be made a leaver from the main University of Cambridge organisation and then set up as a new person within the Pensioners Organisation.

A screen chain is available to take you through setting up:

- The new person
- Attaching them to the position you have just set up
- Attaching them to the pensioners' payroll
- Adding the required payroll details

To get to the start of this chain navigate as follows:

Navigate: Pensioners Organisation> People> Process Chaining> Process Chaining> New person (Pensioner)
**Step 1: New Personal Details**

Alternatively this form can be navigated directly by going to **Pension Organisation > People > New Personal Details**.

1. Key in the surname, first name, first name 2, first name 3 if applicable.
2. Click the drop down list arrow and select a title.
3. Enter preferred name if applicable, sex, previous name, honours and the (pension) organisation start date. Leave workflow group set to Default.
4. Click the **Save** button. The record will be saved and the new person’s details will be displayed in the object pane.
Step 2: Enter home address

Alternatively this form can be navigated directly by going to Pension Organisation > People(find person) > Addresses > Address details-New

Complete the necessary fields and save, before you move onto the next step.
Step 3: Enter their National Insurance number

Alternatively this form can be navigated directly by going to Pension Organisation > People (find person) > Personal Information> Social Security Details> New_Social Security details.

a) Select UK legislation from the drop down list

b) Enter the individual’s NI number.

c) Save
**Step 4: Enter date of birth**

Alternatively this form can be navigated directly by going to **Pension Organisation > People (find person) > Personal Information> Key Dates.**

![Form screenshot showing key dates: Captain Cedric Pablo](Image)

- **a)** Enter their date of birth

- **b)** Save. Once you have saved this form Trent will work out and display the individual’s current age.
**Step 5: Attach the person to the vacant position in the organisation**

Alternatively this form can be navigated directly by going to Pension Organisation > People (find person) > Employment > Attach person to structure.

- Find the vacant position that you created earlier
- Save
Step 6: Enter bank account details

Alternatively this screen can be navigated to directly by going to Pensioners Organisation > People (find person) > Payroll > Bank accounts > New Bank Account Details.

![Bank Account Details Screen](image)

- a) Either use the magnifying glass to search for the sort code number (or alternatively just type straight into the field. If you do the latter please note that the system performs no verification on the sort code entered and the bank’s name will not be displayed underneath.

- b) Enter the account number (and roll number if it is a building society account) and the full account name.

- c) Save.
Step 7: Enter payment method

Alternatively this screen can be navigated to directly by going to Pensioners Organisation > People (find person) > Payroll > Payment methods > New Payment methods.

a) Always leave the run type as 'default'.

b) Select from the drop down list BACS as the payment method

c) Select the bank account name that you set up in the previous step from the drop down list.

d) Save
Step 8: Attach to payroll

Alternatively this screen can be navigated to directly by going to Pensioners Organisation > People (find person) > Payroll > Attach to Payroll > Attach contract to Payroll.

a) Select the ‘P Pensioners’ payroll from the drop down list

b) Save
**Step 9: Enter tax code details**

Alternatively this screen can be navigated to directly by going to Pensioners Organisation >People (find person) > UK Legislation> Tax codes> Tax code details_new.

**Tax code details: New**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax code source</td>
<td>P9</td>
</tr>
<tr>
<td>Start date</td>
<td>07/06/2007</td>
</tr>
<tr>
<td>Tax code</td>
<td>503L</td>
</tr>
<tr>
<td>Basis</td>
<td>Cumulative</td>
</tr>
</tbody>
</table>

**Filing status**

a) Complete the fields as appropriate

b) Save
Step 10: Enter the NI category

Alternatively this screen can be navigated to directly by going to Pensioners Organisation >People (find person) > UK Legislation> National Insurance> National Insurance details-new.

a) Select the relevant NI category X from the drop down list

b) Save
**Step 11: Calculate Pay**

Alternatively this screen can be navigated to directly by going to Pensioners Organisation > People (find person) > Payroll > Pay History > Calculate Pay.

<table>
<thead>
<tr>
<th>Pay period control: Now</th>
<th>Name: Captain Cedric Pabo Job title: PABLO, P</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll</td>
<td>Social security number: A8546789C Pay ref: 40000012 Pers ref: 40000012</td>
</tr>
<tr>
<td></td>
<td>Not paid</td>
</tr>
<tr>
<td></td>
<td>Lock contracts on calculation □</td>
</tr>
</tbody>
</table>

Select people

Smart group name

[Search]

[Calculate] [Rollback] [Cleardown]

a) Click on ‘calculate’
b) Say Ok to continuing

c) Wait until the pop up message telling you the payroll has been calculated appears.
**Step 12: View on-line payslip**

Alternatively this screen can be navigated to directly by going to Pensioners Organisation >People (find person) > Payroll > Pay History > Pay Details

NB. Ensure that pay has been calculated for the individual before you view this screen.

![Payslip Example](image-url)