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1.1 Introduction

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

- Address details
- Contact details
- Social Security Details
- Emergency Contact Details
- Key Date details
- Passport, Residency and Work Permit details
- HESA details
- Employee checks
- Probation details

Personal details are obtained in the first instance from the New Appointment Request Form CHRIS/20 and the Certificate of Acceptance CHRIS/10. Changes to these details can then subsequently be made as necessary. In phase 2 of the CHRIS project some of these changes can be actioned by the Departmental Administrator or by the employee themselves through ESS (Employee Self Service).

1.2 Address details

Address details can be obtained from the New Appointment Request Form, section C – personal details. Address details can be viewed by selecting  Address details menu from the action pane. The address(es) for the person will be displayed in the object pane.

Address type	Address	Mailing address	Start date	End date
<input checked="" type="radio"/> Home/ Personal	12 Beech Drive CAMBRIDGE CB3 1BC	No	23/04/2007	

1.2.1 Amending address details

These steps should be followed where an error has been made with the address.

1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Choose the address type that you wish to change from the object pane
3. Click on  Address details menu in the action pane

Address details: Mr Ronald Baba Name: Mr Ronald Baba Job title: Temporary Clerical
Social security number: AB445566D Pay ref: 30000022
Pers ref: 30000022

Address type	Home/ Personal
Mailing address	<input checked="" type="checkbox"/>
House Name	<input type="text"/>
Number/Street	12 Beech Drive
Local Area	<input type="text"/>
POSTTOWN	CAMBRIDGE
COUNTRY	<input type="text"/>
POSTCODE	CB3 1BC <input type="button" value="🔍"/>
Country	United Kingdom
Start date	23/04/2007
End date	<input type="text"/> <input type="button" value="📅"/>

4. The selected address will be displayed.
5. Amend as necessary.
6. Click on the button.

1.2.2 Adding a future change of address

1. Use the search facility to locate the person whose address details you wish to maintain. Where do you set the date?
2. Click on the Addresses menu in the Action Pane.
3. Select the address that is to be changed

Address type	Home/ Personal
Mailing address	Correspondence
House Name	Term-time

4. Select new

Address details: Name: Mr Ronald Baba Job title: Temporary Clerical
 Social security number: AB445566D Pay ref: 30000022
 New Pers ref: 30000022

Address type: Home/ Personal

Mailing address:

House Name:

Number/Street:

Local Area:

POSTTOWN:

COUNTRY:

POSTCODE:

Country: United Kingdom

Start date: 07/05/2007

End date:

Save

5. Set the date to be the start date for the new address, and type in the new address details.
6. Click on the **Save** button.
7. Address history will report this and automatically end dates the old address.

Address history: Name: Mr Ronald Baba Job title: Temporary Clerical
 Social security number: AB445566D Pay ref: 30000022
 Home/ Personal Pers ref: 30000022

Start date	End date	Address type	Mail	Address
07/05/2007		Home/ Personal	No	Greenacres Church Street Duxford CAMBRIDGE CB10 1GB
23/04/2007	06/05/2007	Home/ Personal	No	12 Beech Drive CAMBRIDGE CB3 1BC

1.2.3 Adding a new address

1. Use the search facility to locate the person whose address details you wish to maintain.
2. Click on the Addresses menu in the Action Pane.
3. Select  New - Address details
The new address details screen will be displayed.
4. Click the drop down arrow and select which address you wish to add.

Address details:		Name: Mr Ronald Baba	Job title: Temporary Clerical
New		Social security number: AB445566D	Pay ref: 30000022
			Pers ref: 30000022
Address type	<input type="text" value="Home/ Personal"/>		
Mailing address	<input type="text" value="Correspondence"/>		
House Name	<input type="text" value="Term-time"/>		
Number/Street	<input type="text"/>		
Local Area	<input type="text"/>		
POSTTOWN	<input type="text"/>		
COUNTRY	<input type="text"/>		
POSTCODE	<input type="text"/>		
Country	<input type="text" value="United Kingdom"/>		
Start date	<input type="text" value="23/04/2007"/>		
End date	<input type="text"/>		

Save

5. Home/Personal address is displayed as default and this address is supplied on the New Appointment Request Form CHRIS/10, section C, personal details. Correspondence and term time address currently appear in the drop down list but these will disappear post Go Live. The UMS address held against position will be used for mailings.
6. Key in address details. The COUNTRY field only needs to be filled for an address that is not in the United Kingdom. (Note this field *is* meant to be Country and not County. The Post Office guidelines for writing addresses are that a post town with a postcode is all that is necessary as the County is reflected in the postcode). The Country field will automatically default to United Kingdom.
7. Click the  button.

1.3 Contact Details

A number of different forms of contact details can be stored for a person.

Contact details: New	Name: Miss Libby Bush Job title: Clerk Social security number: NH904568A Pers ref: 30000018
Means of contact	<input type="text"/>
Contact at	<ul style="list-style-type: none"> College telephone E-mail address External telephone Fax Home telephone Mobile telephone Next of Kin telephone Pager

Contact details can be obtained from the New Appointment Request Form CHRIS/10 page 2, section C – Personal Details. Question 18 requests home phone number These details will be completed as part of the New Person chain but can subsequently be amended by selecting the contact details you wish to change and selecting  Contact details

1.3.1 Amending Contact details

1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Click on the Contacts menu in the Action Pane
3. Select  Contact details
4. Select the means of contact that requires amending

<input checked="" type="radio"/> E-mail address	libbybush@btopenworld.com
<input type="radio"/> Home telephone	01223 456654

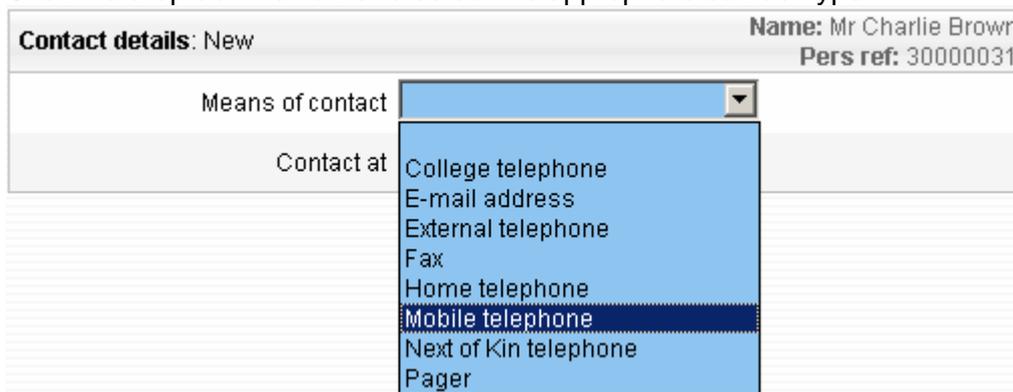
5. The details will be displayed.

Contact details: Miss Libby Bush	Name: Miss Libby Bush Social security number: NH904568A Pers ref: 30000018
Means of contact	Home telephone
Contact at	01223 456654
<input type="button" value="Save"/> <input type="button" value="Delete"/>	

6. Amend as necessary.
7. Click on the  button.

1.3.2 Adding new contact details

1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Click on the Contacts menu in the Action Pane.
3. Select  **New - Contact details**
The new contact details screen will be displayed.
4. Click the drop down arrow and select the appropriate contact type



5. Key in the appropriate number or e-mail address in the 'contact at' field.
6. Click the  button.

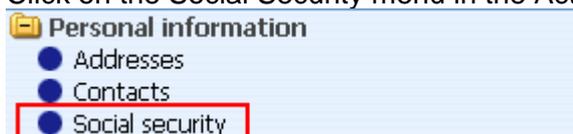
1.4 Social Security Details

The social security details menu is used to record a persons National Insurance number. This will be recorded as part of the New person screen chain and can be obtained from the New Appointment Request Form CHRIS/10, section C – personal details, question 16 or question 5 of the Certificate of Acceptance CHRIS/20.

Where an employee has applied for a National Insurance number the details will need to be completed when they are issued with their number.

1.4.1 Amending Social Security Details

1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Click on the Social Security menu in the Action Pane.



3. Select  Social security details to amend existing number



A screenshot of the 'Social security details' form for Miss Libby Bush. The form displays the following information:

Social security details: Miss Libby Bush	Name: Miss Libby Bush
	Social security number: NH904568A
	Pers ref: 30000018
Legislation	<input type="text" value="UK Legislation"/>
Social security no.	<input type="text" value="NH904568A"/>

At the bottom of the form, there are two buttons: 'Save' and 'Delete'.

4. Amend the national insurance number.
5. Click the  button

1.4.2 Adding Social Security details

1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Click on the Social Security menu in the Action Pane.



3. Click on 
4. Click the drop down list arrow and select UK legislation



A screenshot of the 'Social security details: New' form. The form includes a 'Name' field with the value 'Mr Charlie Brown' and a 'Pers ref' field with the value '30000031'. Below these is a 'Legislation' dropdown menu currently set to 'UK Legislation'. There is an empty 'Social security no.' field. A 'Save' button is located at the bottom of the form.

5. Input the national insurance number
6. Click the  button
7. There is validation of the number, if entered incorrectly the following messages may appear

 The Social Security number is incorrect. The prefix letters you have input do not appear in the list of 'Valid National Insurance Number Prefixes' supplied by the HMRC.

or

 The Social Security number is incorrect. The correct format is AANNNNNNA.

If one of these messages appear, check the format of the number, amend and save again

1.5 Emergency Contact Details

Emergency contact details are obtained from the Certificate of Acceptance PDC/4 form, Section C. They will be completed by payroll in the first instance along with bank details. Amendments can be made if the emergency contact details subsequently require changing.

1.5.1 Amending Emergency Contact 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. Click on the Emergency Contacts menu in the Action Pane

 - Emergency contacts
 - Emergency contact details
 - New - Emergency contact details
3. Click on  Emergency contact details
4. The emergency contact details screen will be displayed.

Emergency contact details: Miss Libby Bush		Name: Miss Libby Bush Social security number: NH904568A Pers ref: 30000018	
Emergency contact			
Name	<input type="text" value="Fred Smith"/>		
Relationship	<input type="text" value="Neighbour"/>		
Contact at	<input type="text" value="01223 772569"/>		
Contact e-mail	<input type="text"/>		
Primary contact	<input type="checkbox"/>		
Default to employee's home address	<input type="checkbox"/>		
Address			
House Name	<input type="text"/>		
Number/Street	<input type="text"/>		
Local Area	<input type="text"/>		
POSTTOWN	<input type="text"/>		
COUNTRY	<input type="text"/>		
POSTCODE	<input type="text"/>		
Country	<input type="text" value="United Kingdom"/>		
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

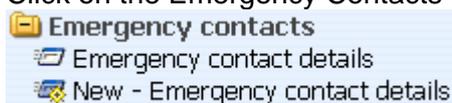
5. Make amendments as required.

6. Click on the  button.

1.5.2 Adding Emergency Contact Details

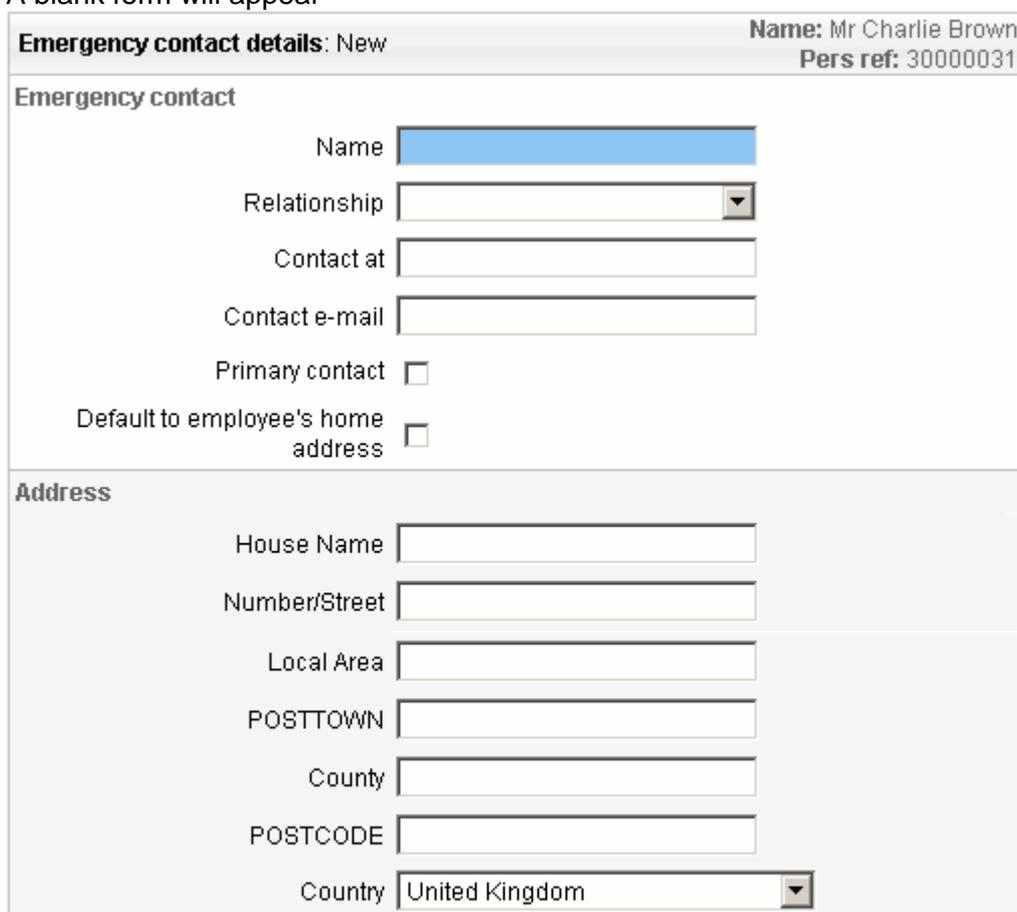
1. Use the search facility to locate the person whose details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.

2. Click on the Emergency Contacts menu in the Action Pane



3. Click on the  New - Emergency contact details

A blank form will appear



4. Key in the name of the emergency contact
5. Select the relationship from the drop down list
6. Key in details as appropriate.
7. Click the  button.

1.6 Key Date Details

The key date details screen is used to record date of birth, retirement date and reckonable service date. The date of birth can be obtained from the New Appointment Request Form CHRIS/10, Section C – Personal Details or Certificate of Acceptance CHRIS/20, Section A – Personal Details. These details should be recorded as part of the new starter process chain, but can be amended as necessary subsequently.

1.6.1 Amending 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

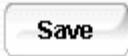
Key dates: Miss Libby Bush		Name: Miss Libby Bush	
		Social security number: NH904568A	
		Pers ref: 30000018	
Personal			
Date of birth	<input type="text" value="21/06/1969"/>		
Age	37 year(s) 8 month(s)		
Date verified	<input type="text"/>		
Expected retirement date			
Basis	<input type="text" value="Date"/>		
Age (years)	65		
Age (months)	3		
Date	<input type="text" value="30/09/2034"/>		
Organisation			
Start date	<input type="text" value="01/02/2007"/>		
Length of service	0 year(s) 1 month(s)		
Leaving date	<input type="text"/>		
Reckonable service date	<input type="text" value="01/02/2007"/>		
Length of reckonable service	0 year(s) 1 month(s)		
Last working day	<input type="text"/>		
Re-employable	<input type="checkbox"/>		



3. Amend the details as required
4. Click the  button.

1.6.2 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

Key dates: Mr Charlie Brown		Name: Mr Charlie Brown	
		Pers ref: 30000031	
Personal			
Date of birth	<input type="text"/>		
Age			
Date verified			
Expected retirement date			
Basis	<input type="text" value="UK Legislation"/>		
Age (years)			
Age (months)			
Date			
Organisation			
Start date	<input type="text" value="04/09/2006"/>		
Length of service	0 year(s) 0 month(s)		
Leaving date			
Reckonable service date	<input type="text"/>		
Length of reckonable service			
Last working day			
Re-employable	<input type="checkbox"/>		
			

3. Enter Date of Birth. This can be obtained from the CHRIS/10 or CHRIS/20
4. The expected retirement date and organisation date details will be maintained by the contracts team. Do not make any entries in these fields.
5. Click the  button.
6. Check that the age calculated is “sensible” as a way of verifying you entry. There is no validation of the age within Trent. It is possible to enter any date of birth.

1.7 Miscellaneous Details

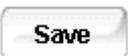
Miscellaneous details provides summary details of expiry dates of passport, visa, work permit and residency permit. If you change the latest date(s) on this page, then the date(s) displayed on the relevant details page will also be changed and vice versa.

1.7.1 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 trail to return to the people menu.
2. Select  Miscellaneous details
The miscellaneous details screen will be displayed

Miscellaneous details: Miss Libby Bush		Name: Miss Libby Bush	
Social security number: NH904568A		Pers ref: 30000018	
Correspondence			
Language of correspondence		<input type="text" value="English"/>	
Right to work			
Status		<input type="text" value="Yes"/>	
Passport			
Expiry date		<input type="text" value="25/07/2011"/>	
Visa			
Expiry date		<input type="text"/>	
Work Permit			
Expiry date		<input type="text"/>	
Residency permit			
Expiry date		<input type="text"/>	
Driving licence			
Valid until		<input type="text"/>	
Vehicle insurance			
Valid until		<input type="text"/>	
Date verified		<input type="text"/>	



3. Enter the appropriate changes for the employee.
Note that the Right to work status will be maintained in Checks rather than within this screen.
4. Click the  button.

1.8 Passport Details

1.8.1 Amending passport details:

1. Use the search facility to locate the person whose passport 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 Passports menu from the action pane.



3. Select  **Passport details**
The passport details screen will be displayed

A screenshot of a web form titled "Passport details: Miss Libby Bush". The form contains the following fields: "Passport number" with value "P1255456", "Passport issue date" with value "25/07/2001" and a calendar icon, "Passport expiry date" with value "25/07/2011" and a calendar icon, and "Issuing country" with a dropdown menu showing "United Kingdom". At the top right, it says "Name: Miss Libby Bush", "Social security number: NH904568A", and "Pers ref: 30000018". Below the form are two buttons: "Save" and "Delete".

4. Amend passport number, issue date, expiry date and issuing country as necessary
5. Click the  button.

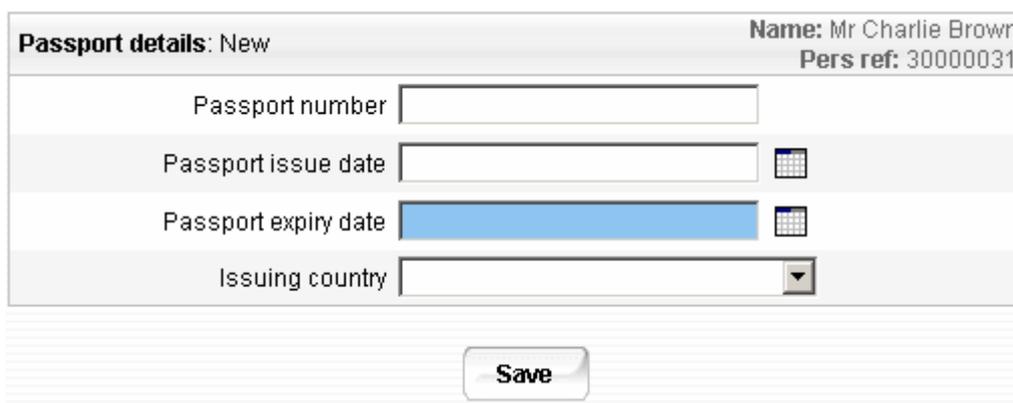
1.8.2 Adding Passport details

1. Use the search facility to locate the person whose passport 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 Passports menu from the action pane.



3. Select **New - Passport details**
The blank Passport details form will be displayed



A screenshot of a web form titled "Passport details: New". The form is for a person named "Mr Charlie Brown" with a "Pers ref: 30000031". The form contains the following fields:

Passport number	<input type="text"/>
Passport issue date	<input type="text"/> 
Passport expiry date	<input type="text"/> 
Issuing country	<input type="text"/> 

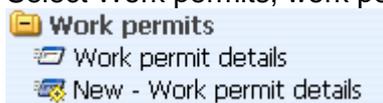
Below the form is a "Save" button.

4. Key in Passport number, issue date, expiry date and issuing country
5. Click the  button.

1.9 Work Permit Details

Where an employee has a work permit, details can be entered or amended using this menu

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 Work permits, work permit details



3. The work permit details page will be displayed

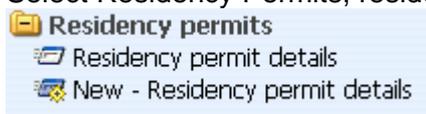
Work permit details: Miss Libby Bush	Name: Miss Libby Bush Job title: Clerk Social security number: NH904568A Pers ref: 30000018
Work permit number	<input type="text" value="1234567"/>
Work permit issue date	<input type="text"/> 
Work permit expiry date	<input type="text" value="06/03/2008"/> 
<input type="button" value="Save"/> <input type="button" value="Delete"/>	

4. Edit the work permit number, issue date and expiry date as necessary
5. Click the  button.

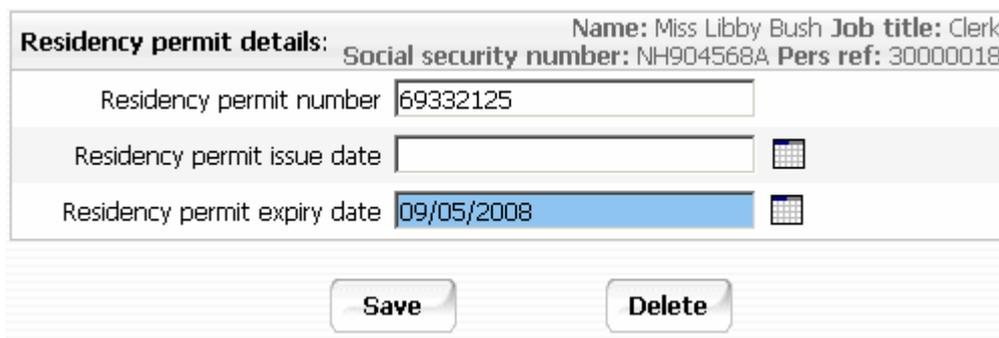
1.10 Residency Permit Details

Where an employee requires a residency permit, details can be entered using this form.

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 Residency Permits, residency permit details



3. The residency permit form will be displayed

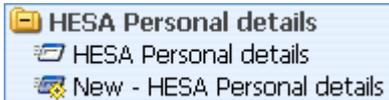


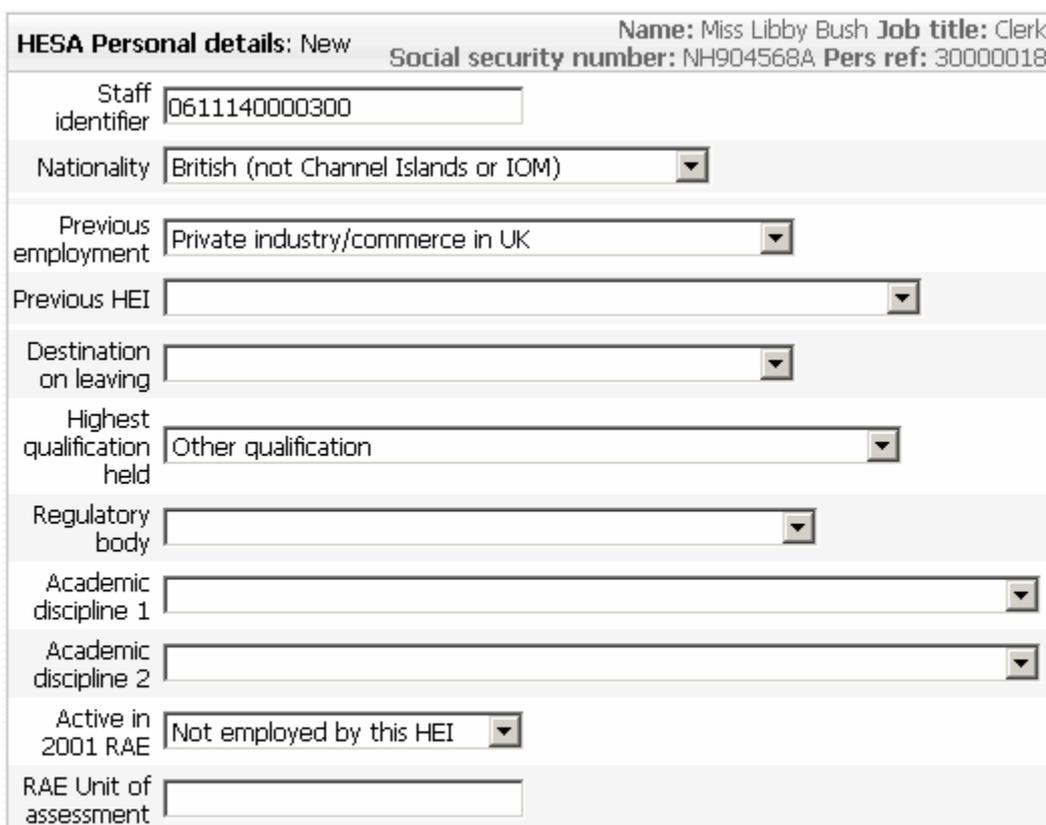
A screenshot of the "Residency permit details" form. The form is titled "Residency permit details:" and includes the following information: "Name: Miss Libby Bush", "Job title: Clerk", "Social security number: NH904568A", and "Pers ref: 30000018". The form contains three input fields: "Residency permit number" with the value "69332125", "Residency permit issue date" (empty), and "Residency permit expiry date" with the value "09/05/2008". Below the form are two buttons: "Save" and "Delete".

4. Edit the residency permit number, issue date and expiry date as required.
5. Click the  button.

1.11 HESA Personal Details

HESA details will only need to be completed for employees of the University who are deemed to be HESA returnable. The source of this information is part 3 of the Certificate of Acceptance CHRIS/20 form.

1. Use the search facility to locate the person whose address 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 HESA Personal details, HESA Personal Details
The screenshot shows a menu with three items: 'HESA Personal details' (with a folder icon), 'HESA Personal details' (with a document icon), and 'New - HESA Personal details' (with a document icon and a plus sign).
3. The HESA Personal Details screen will be displayed

The screenshot shows a web form titled 'HESA Personal details: New'. At the top right, it displays 'Name: Miss Libby Bush Job title: Clerk' and 'Social security number: NH904568A Pers ref: 30000018'. The form contains several fields: 'Staff identifier' (text input with value 0611140000300), 'Nationality' (dropdown menu with value British (not Channel Islands or IOM)), 'Previous employment' (dropdown menu with value Private industry/commerce in UK), 'Previous HEI' (dropdown menu), 'Destination on leaving' (dropdown menu), 'Highest qualification held' (dropdown menu with value Other qualification), 'Regulatory body' (dropdown menu), 'Academic discipline 1' (dropdown menu), 'Academic discipline 2' (dropdown menu), 'Active in 2001 RAE' (dropdown menu with value Not employed by this HEI), and 'RAE Unit of assessment' (text input).

Staff identifier	0611140000300
Nationality	British (not Channel Islands or IOM)
Previous employment	Private industry/commerce in UK
Previous HEI	
Destination on leaving	
Highest qualification held	Other qualification
Regulatory body	
Academic discipline 1	
Academic discipline 2	
Active in 2001 RAE	Not employed by this HEI
RAE Unit of assessment	



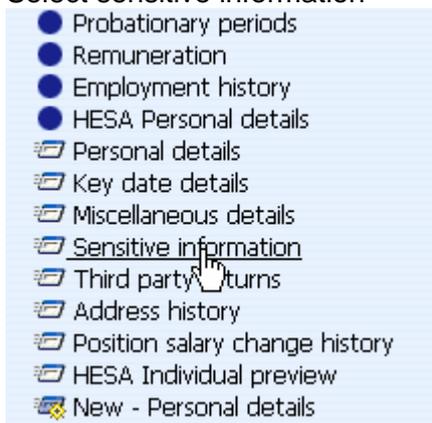
4. Edit the details as required. For detailed instructions on completing HESA Personal Details see the HESA Fields Reference Guide.
5. Click the  button.

1.12 Sensitive Information

The information required to complete this form can be obtained from the Certificate of Acceptance CHRIS/20 part 3 – personal details.

1. Use the search facility to locate the person whose address 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 sensitive information



3. The sensitive information screen will be displayed

Sensitive information: Miss Libby Bush	Name: Miss Libby Bush Job title: Clerk Social security number: NH904568A Pers ref: 30000018
Marital status Marital status <input type="text"/>	
Religion Religion <input type="text"/>	
Ethnic origin Ethnic origin <input type="text" value="White - British"/> Other classification <input type="checkbox"/>	
Nationality Nationality <input type="text" value="British (not Channel Islands or IOM)"/>	
Sexual orientation Sexual orientation <input type="text"/>	
Disability Self-certified disabled <input type="text"/> Description <input type="text"/>	
Date of check <input type="text"/> 	
Disciplinary <input type="checkbox"/> Expiry date <input type="text"/>	

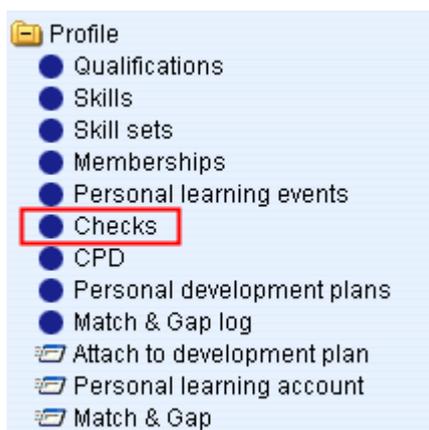
4. Edit the details as required. We are not making use of the following fields:
Marital Status
Religion
Sexual Orientation
5. Click the button.

1.13 Employee Checks

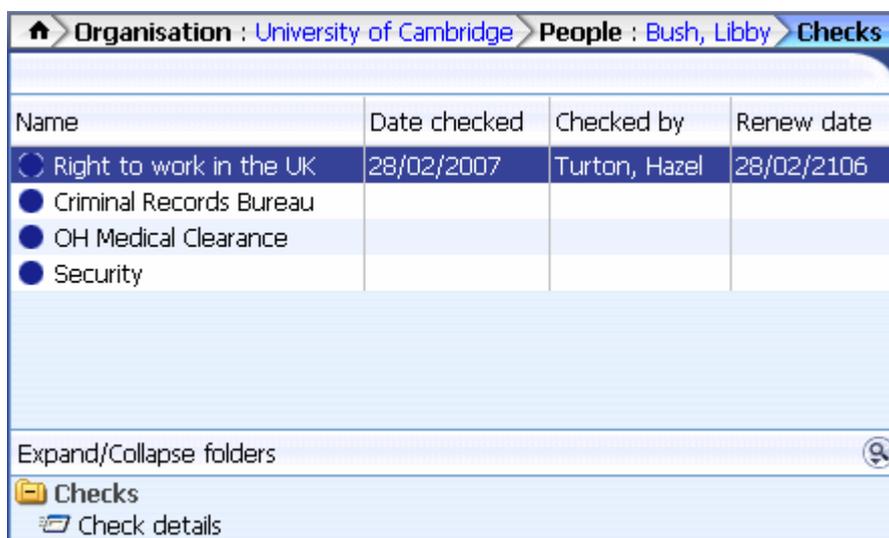
The University has a legal obligation to ensure that all employees have a valid entitlement to work and reside in the UK, regardless of nationality. All appointments require a right to work check and the details of this check should be recorded in employee checks. Where an appointment also requires the occupant to have health, criminal records or security checks these details can also be recorded.

1.13.1 Viewing or amending checks

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 the Profile menu, and then choose Checks.



3. The available checks will be displayed in the Object Pane. This currently consists of Right to Work, Criminal Records Bureau, OH Medical Clearance and Security.



Organisation : University of Cambridge > People : Bush, Libby > Checks :			
Name	Date checked	Checked by	Renew date
<input type="radio"/> Right to work in the UK	28/02/2007	Turton, Hazel	28/02/2106
<input checked="" type="radio"/> Criminal Records Bureau			
<input checked="" type="radio"/> OH Medical Clearance			
<input checked="" type="radio"/> Security			

Expand/Collapse folders

- Checks
 - Check details

4. Select the check you wish to enter details for and select Check details.

5. The selected form will be displayed

Check details: Right to work in the UK		Name: Miss Libby Bush Job title: Clerk	
Social security number: NH904568A		Pers ref: 30000018	
Name Right to work in the UK			
Date checked	<input type="text" value="28/02/2007"/>		
Checked by	<input type="text" value="Turton, Hazel"/>		
Renew date 28/02/2106			
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

6. Amend or enter details as required. The checked by name should be the name of the person who signs the paperwork as a true copy.
7. Click on the button.

1.14 Probation

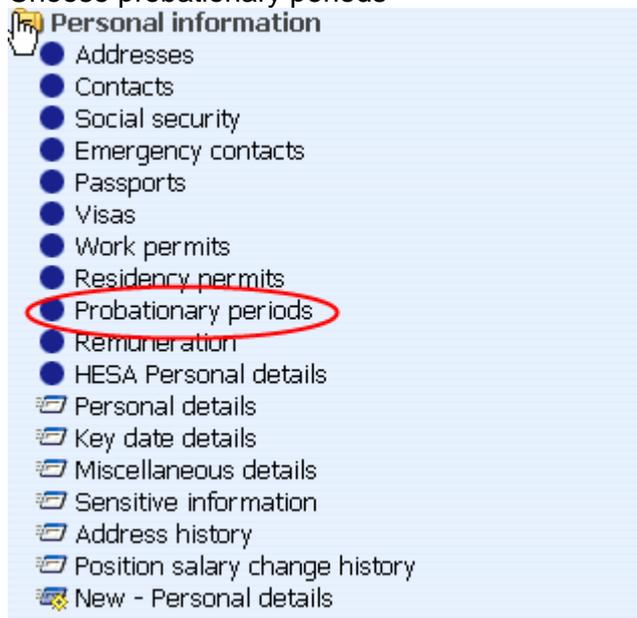
The probationary period for an employee is recorded as part of the position details. You can view a persons probationary period by selecting the person and then choosing position, position details.

Position details: Clerk	Name: Miss Libby Bush	Job title: Clerk
Social security number: NH904568A Pers ref: 30000018		
Job title	Clerk	
Start date	01/02/2007	
End date change?	<input type="checkbox"/>	
End date		
Position reference	70000026	
Probationary period	6	Month(s)  

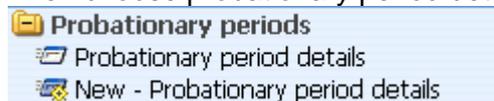
When the probationary period is complete this should be recorded in Probationary period details.

1.14.1 Appointment Confirmed

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. Choose probationary periods



3. Then choose probationary period details



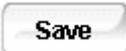
4. The probationary period details will be displayed. Click the complete box

Probationary period details: Clerk 01/02/2007		Name: Miss Libby Bush Job title: Clerk Social security number: NH904568A Pers ref: 30000018	
Job title	Clerk 01/02/2007		
Reason	New appointment		
Complete	<input type="checkbox"/>		
Start date	01/02/2007		
End date	01/08/2007		
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

5. Click on the button.

This will remove the person from any further reporting cycles. The person's appointment is now confirmed.

1.14.2 Probation extended.

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. Choose probationary periods
3. Click the New Probationary Period Detail menu item.
4. Select the job title
5. Create a new probationary period detail with a start date that is one day later than the end date of the first period.
6. Select a reason of First Extension
7. Do **not** tick the complete box.
8. Enter the new probationary period end date.
9. Click on the  button.

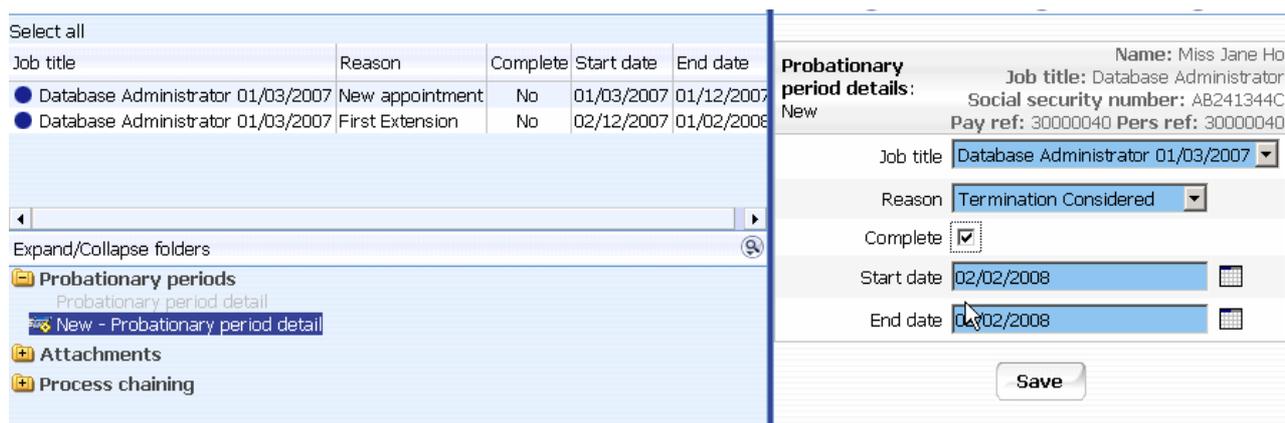
Job title	Reason	Complete	Start date	End date
Database Administrator 01/03/2007	New appointment	No	01/03/2007	01/12/2007

Name: Miss Jane Ho	
Job title: Database Administrator	
Social security number: AB241344C	
Pay ref: 30000040 Pers ref: 30000040	
Job title	Database Administrator 01/03/2007
Reason	First Extension
Complete	<input type="checkbox"/>
Start date	02/12/2007
End date	01/02/2007
	

The start and end dates for the second probationary periods should have been specified by the department. If in doubt, consult the relevant Personnel Consultant.

1.14.3 Termination Considered

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. Choose probationary periods
3. Click the New Probationary Period Detail menu item.
4. Select the job title
5. Create a new probationary period detail with a start date that is one day later than the end date of the previous probationary period.
6. Use a reason of Termination Considered
7. Tick the complete box.
8. Enter the new probationary period end date as the same date as the probationary start date.



The screenshot shows the CHRIS system interface. On the left, there is a table with columns: Job title, Reason, Complete, Start date, and End date. The table contains two rows of data. Below the table is a navigation pane with a tree view showing 'Probationary periods' expanded, with 'New - Probationary period detail' selected. On the right, the 'Probationary period details' form is displayed for a 'New' entry. The form includes fields for Job title (Database Administrator 01/03/2007), Reason (Termination Considered), Complete (checked), Start date (02/02/2008), and End date (02/02/2008). A 'Save' button is visible at the bottom of the form.

Job title	Reason	Complete	Start date	End date
Database Administrator 01/03/2007	New appointment	No	01/03/2007	01/12/2007
Database Administrator 01/03/2007	First Extension	No	02/12/2007	01/02/2008

Probationary period details:
Name: Miss Jane Ho
Job title: Database Administrator
Social security number: AB241344C
Pay ref: 30000040 Pers ref: 30000040

Job title: Database Administrator 01/03/2007
Reason: Termination Considered
Complete:
Start date: 02/02/2008
End date: 02/02/2008

Save

9. Click on the  button.

Any cases of this type should be reported to the Personnel Consultant immediately

1.15 User Defined Fields

Although Trent is very comprehensive there are some items of data specific to the University that the standard software cannot hold. User defined fields are used to save information which is not already included within Trent. User defined fields must be attached to User defined categories

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 the "User defined forms" folder from the main menu.
3. Select UDF categories (People)



4. The list of UDF categories will be displayed

UDF Category	No. of rows
<input type="radio"/> Clinical Seniority	0
<input checked="" type="radio"/> College Membership	0
<input checked="" type="radio"/> DP Amalgamation	0
<input checked="" type="radio"/> GMC Registration no	0
<input checked="" type="radio"/> Pay & Grading autoincrement protection	0
<input checked="" type="radio"/> Payroll URN	1
<input checked="" type="radio"/> Personal Faculty Membership	0
<input checked="" type="radio"/> Personal Roll Details	1
<input checked="" type="radio"/> Red circle status	0
<input checked="" type="radio"/> Removal Expenses Eligibility	0

Expand/Collapse folders 

- UDF Categories
 - UDF Details (People)
- + Process chaining

5. Select the UDF category required

6. Select UDF Details (People) menu and then New – UDF Details (People)



7. The relevant form will be displayed in the display pane
8. Complete the form
9. Click on the  button.