Changes to PeopleCHRIS Course training manual

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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).

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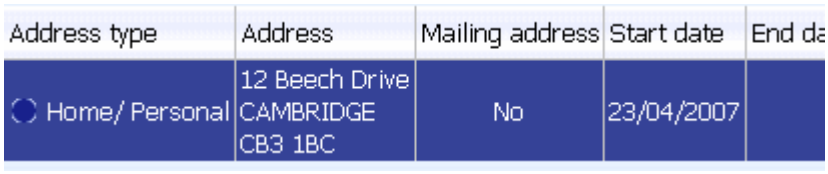
1.2 Address details

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.

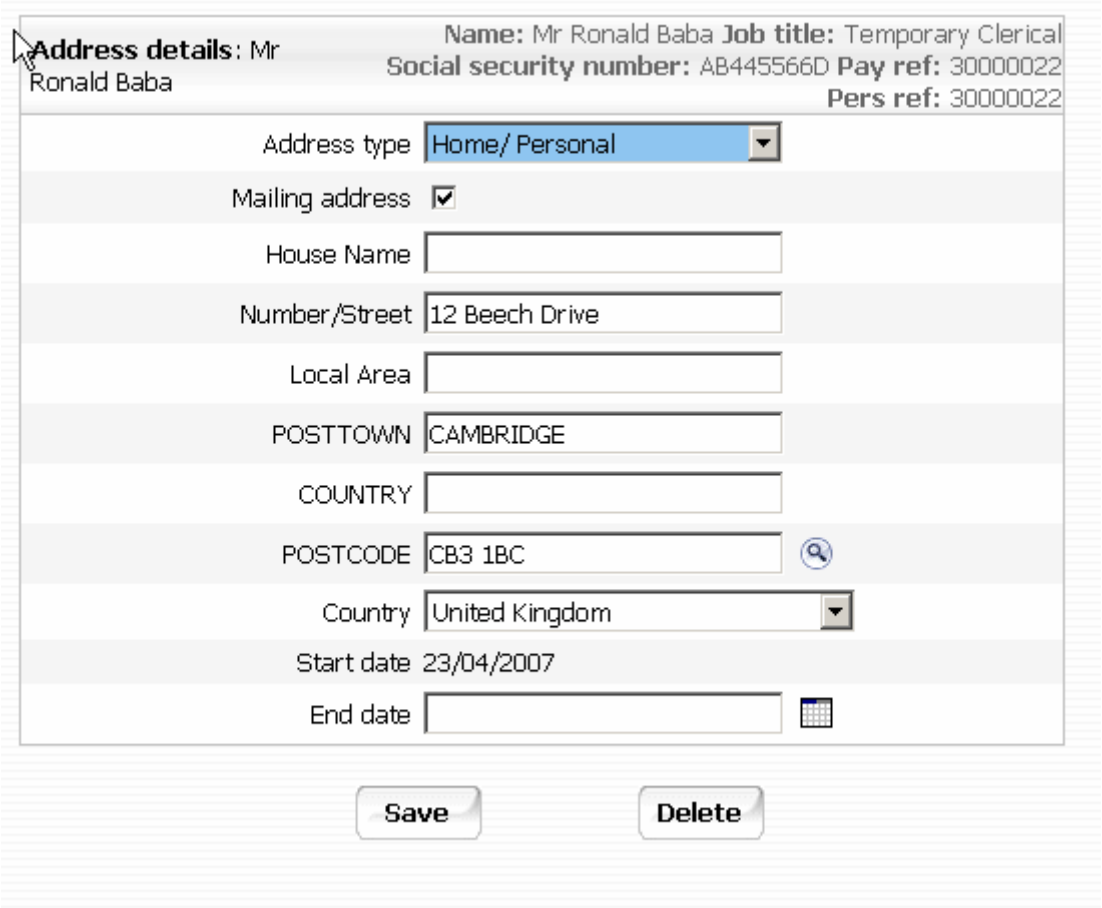


Address type	Address	Mailing address	Start date	End da
Home/ Personal	12 Beech Drive CAMBRIDGE CB3 1BC	No	23/04/2007	

1.2.1 Amending address details

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

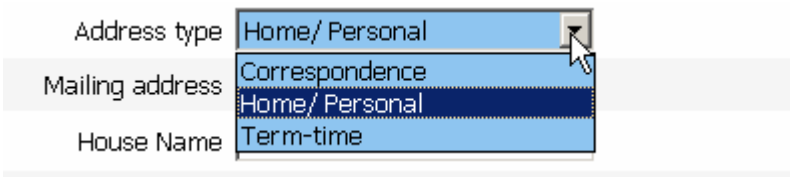
1. Use the search facility to locate the person whose contact details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu.
2. Choose the address type that you wish to change from the object pane
3. Click on Address details menu in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



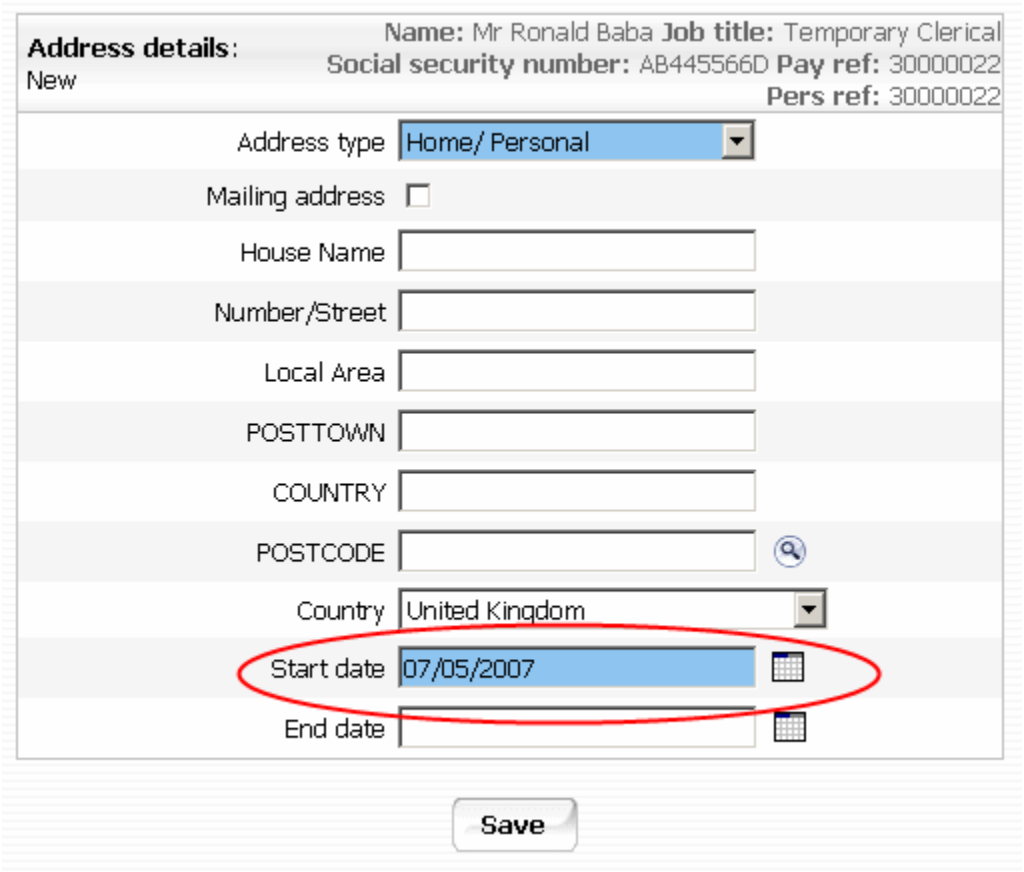
4. The selected address will be displayed.
5. Amend as necessary.
6. Click on the button.

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



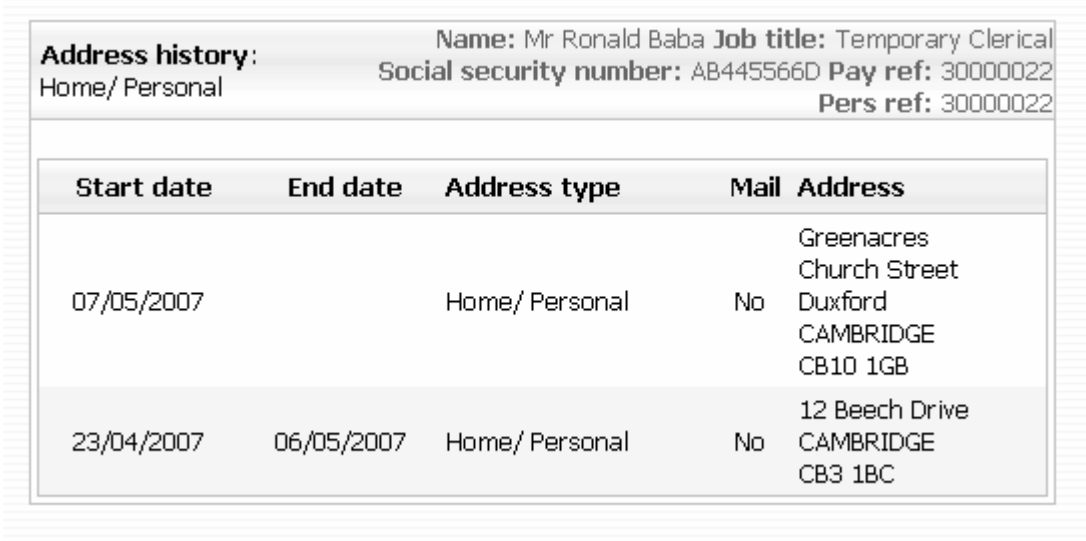
4. Select new



5. Set the date to be the start date for the new address, and type in the new address details.

6. Click on the button.

7. Address history will report this and automatically end dates the old address.



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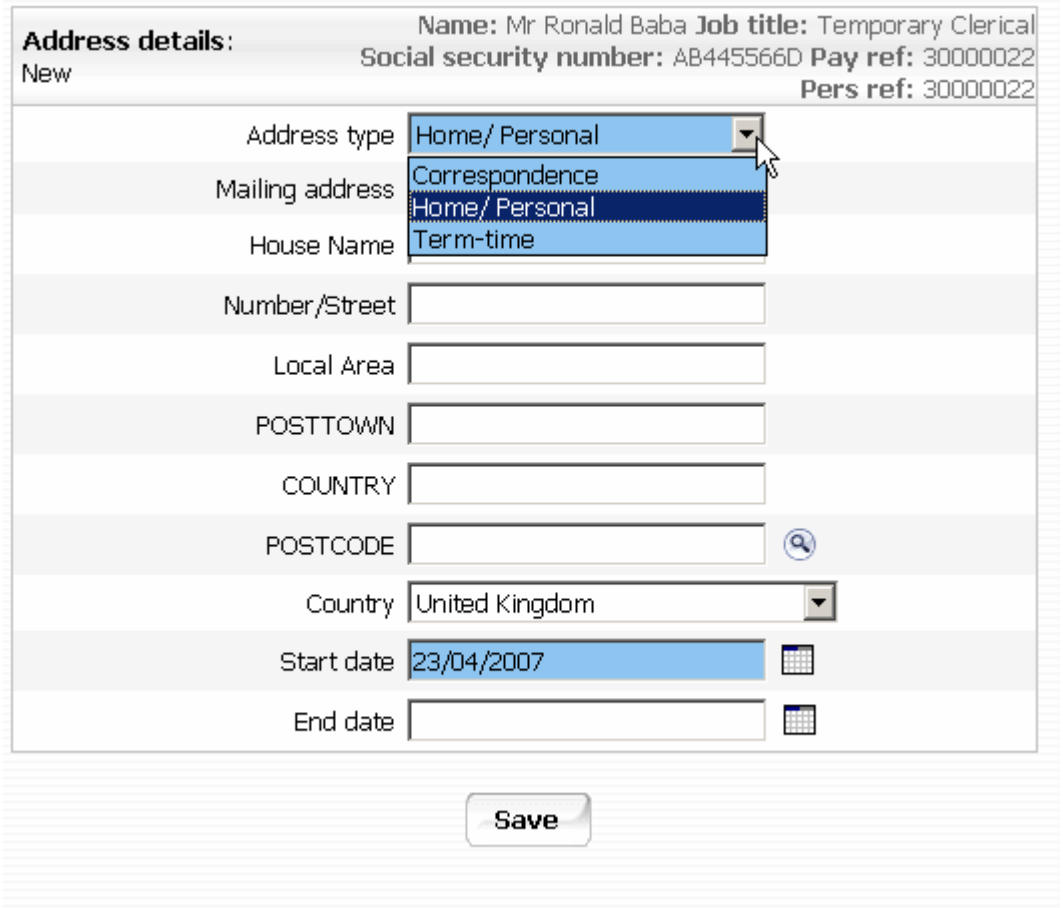
1.2.3 Adding a new address

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.



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 Save button.

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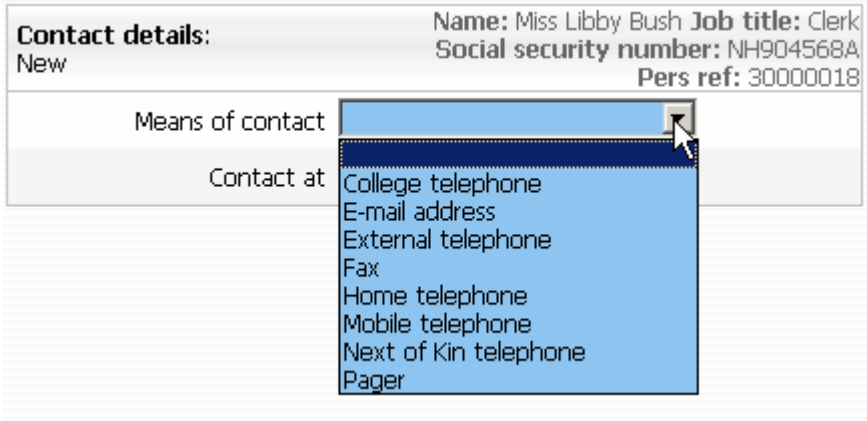
1.3 Contact Details

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

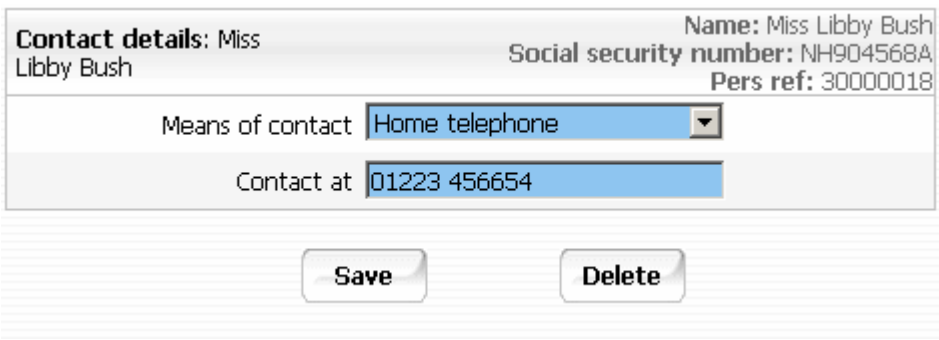


Contact details can be obtained from the New Appointment Request Form CHRIS/10 page 2, section C – Personal Details. Question 18 requests home phone number These details will be completed as part of the New Person chain but can subsequently be amended by selecting the contact details you wish to change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

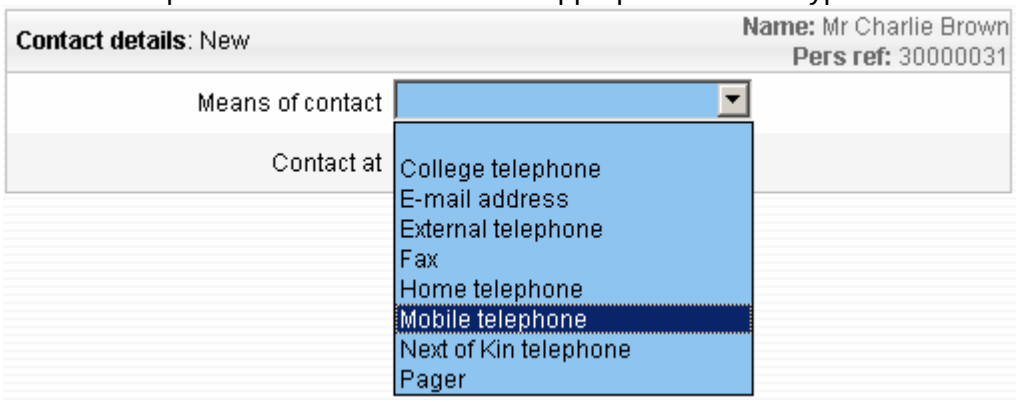
5. The details will be displayed.



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

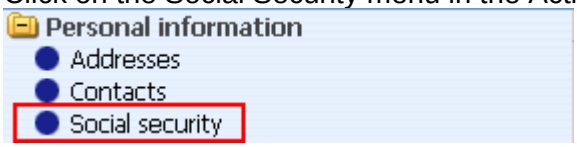
1.4 Social Security Details

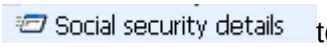
The social security details menu is used to record a persons National Insurance number. This will be recorded as part of the New person screen chain and can be obtained from the New Appointment Request Form CHRIS/10, section C – personal details, question 16 or question 5 of the Certificate of Acceptance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

to amend existing number

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

button

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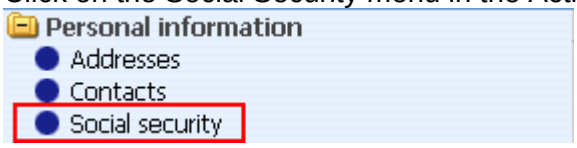
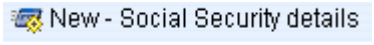
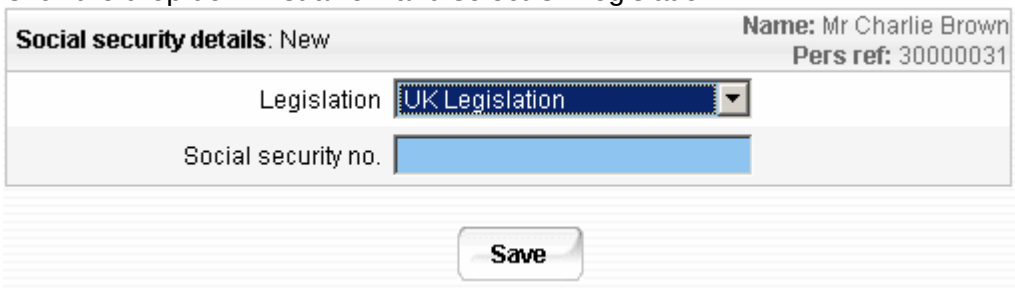
1.4.2 Adding Social Security details

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.



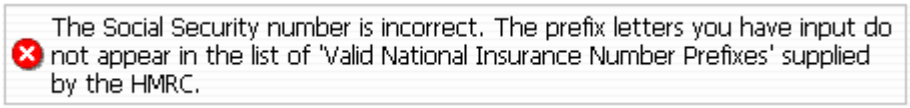
3. Click on 

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

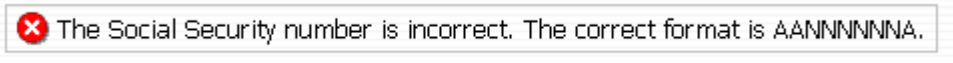


5. Input the national insurance number
6. Click the button

7. There is validation of the number, if entered incorrectly the following messages may appear



or



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

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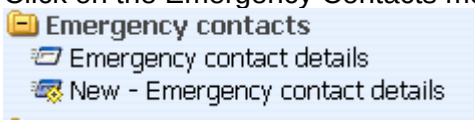
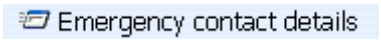
1.5 Emergency Contact Details

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.

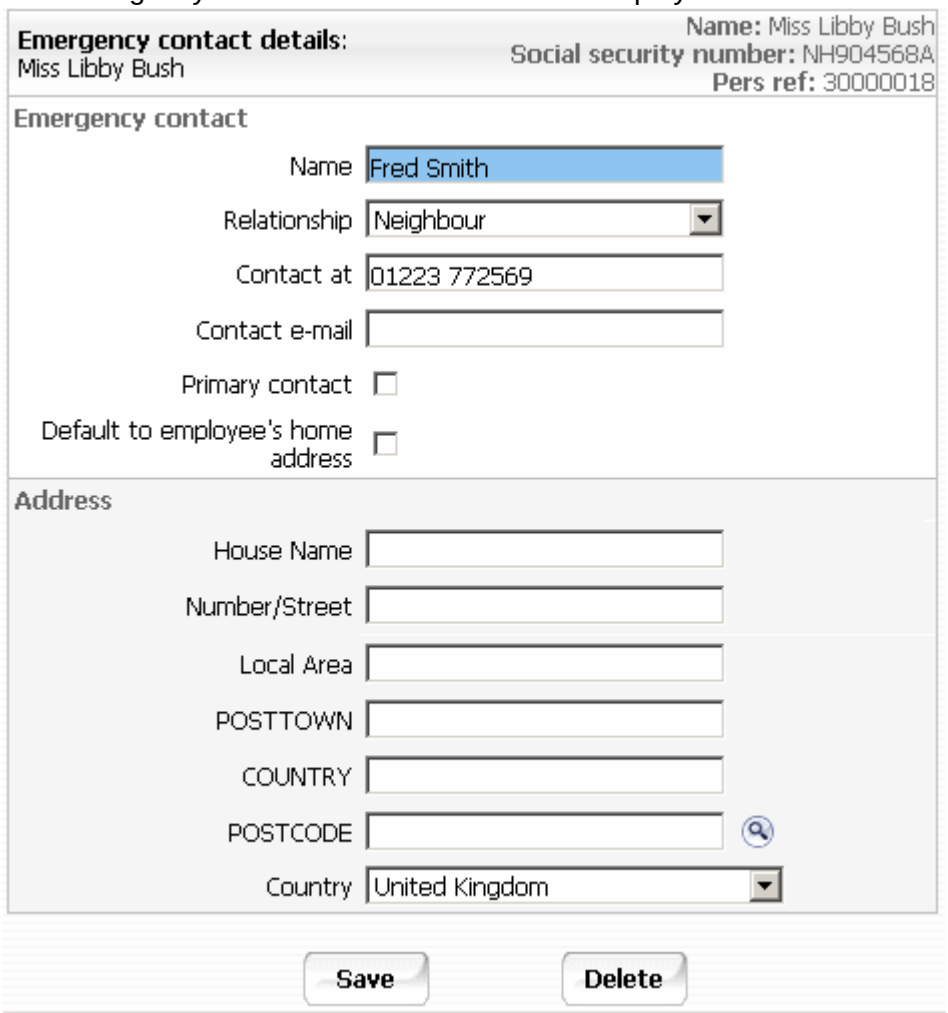
1.5.1 Amending Emergency Contact Details

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



3. Click on 

4. The emergency contact details screen will be displayed.



5. Make amendments as required.

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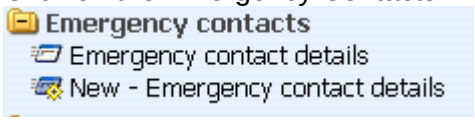
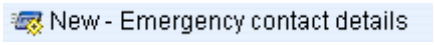
6. Click on the Save button.

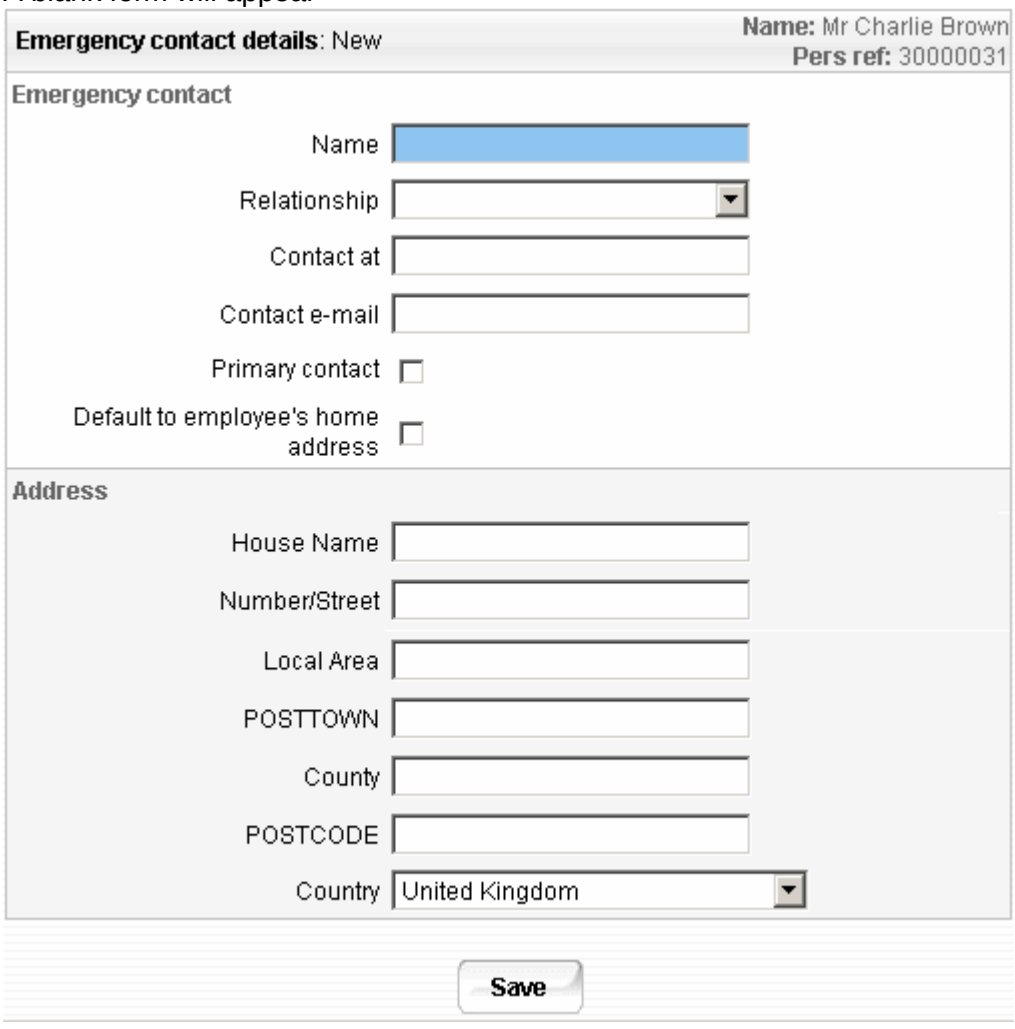
1.5.2 Adding Emergency Contact Details

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 

A blank form will appear



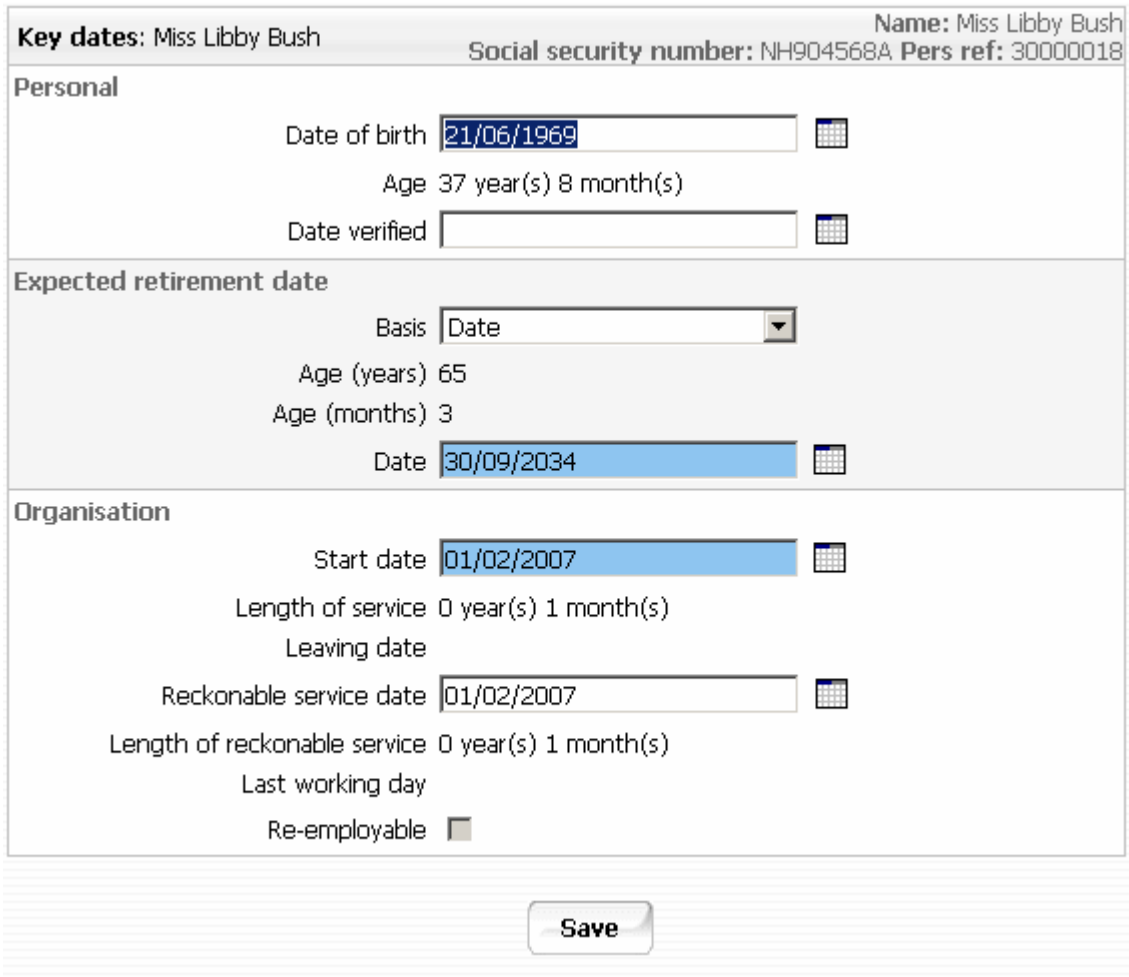
4. Key in the name of the emergency contact
5. Select the relationship from the drop down list
6. Key in details as appropriate.
7. Click the Save button.

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

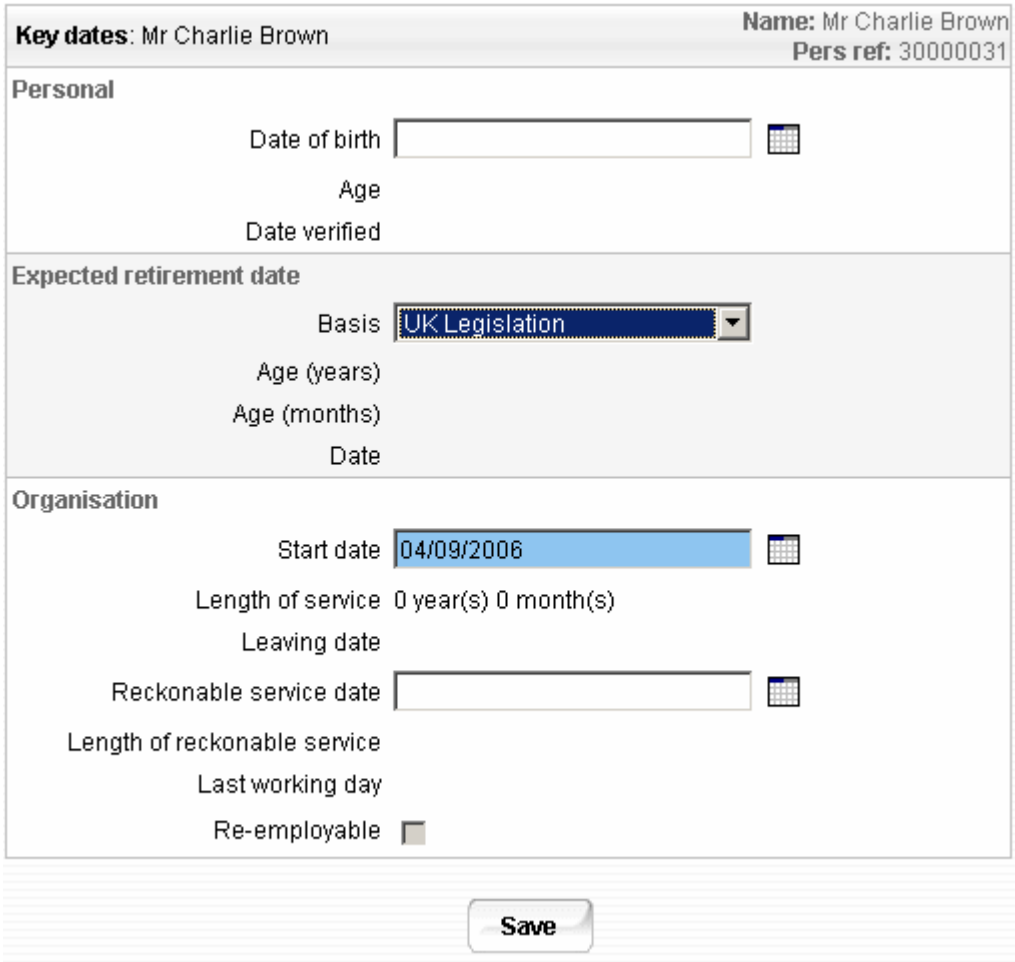
1. Use the search facility to locate the person whose details you wish to maintain or, if already working with the correct record, use the navigation trail to return to the people menu
2. Select Key date details from the Action pane
   The key date details form will be displayed



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



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 Save 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.

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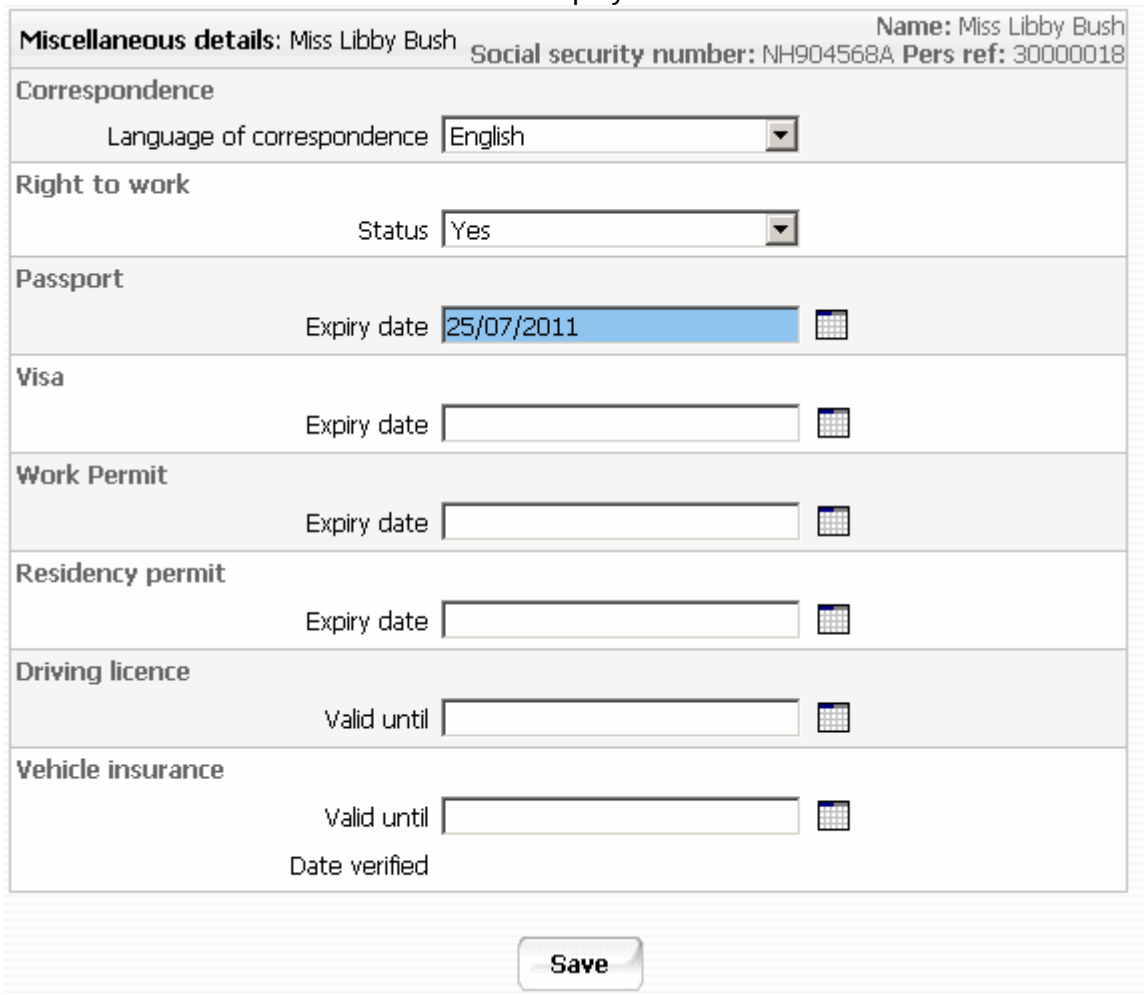
1.7 Miscellaneous Details

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

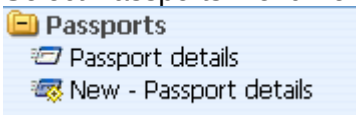


3. Enter the appropriate changes for the employee.
   Note that the Right to work status will be maintained in Checks rather than within this screen.
4. Click the Save button.

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

The passport details screen will be displayed

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

button.

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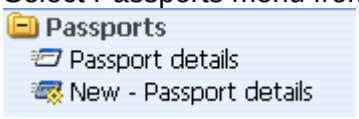
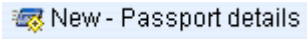
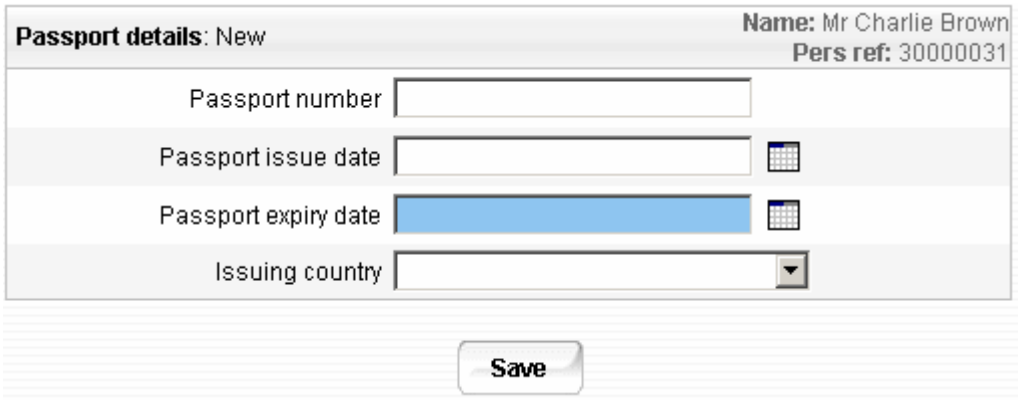
1.8.2 Adding Passport details

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 

The blank Passport details form will be displayed



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

button.

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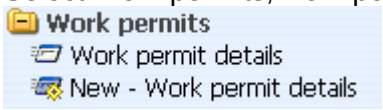
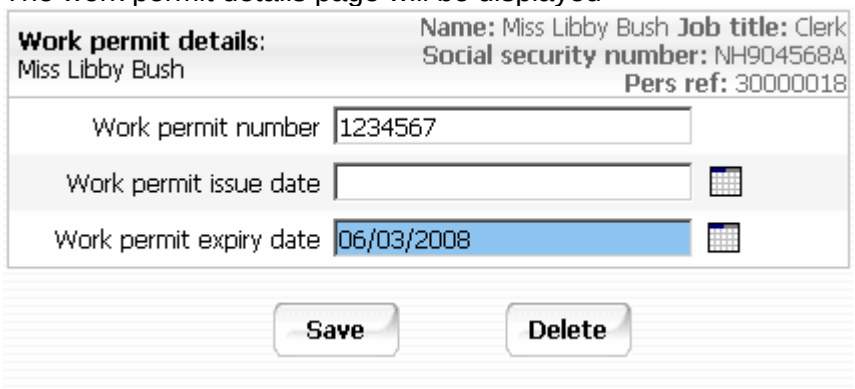
1.9 Work Permit Details

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



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

button.

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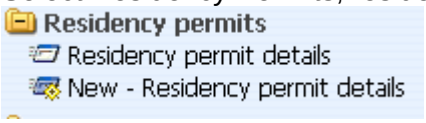
1.10 Residency Permit Details

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

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

button.

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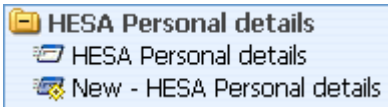
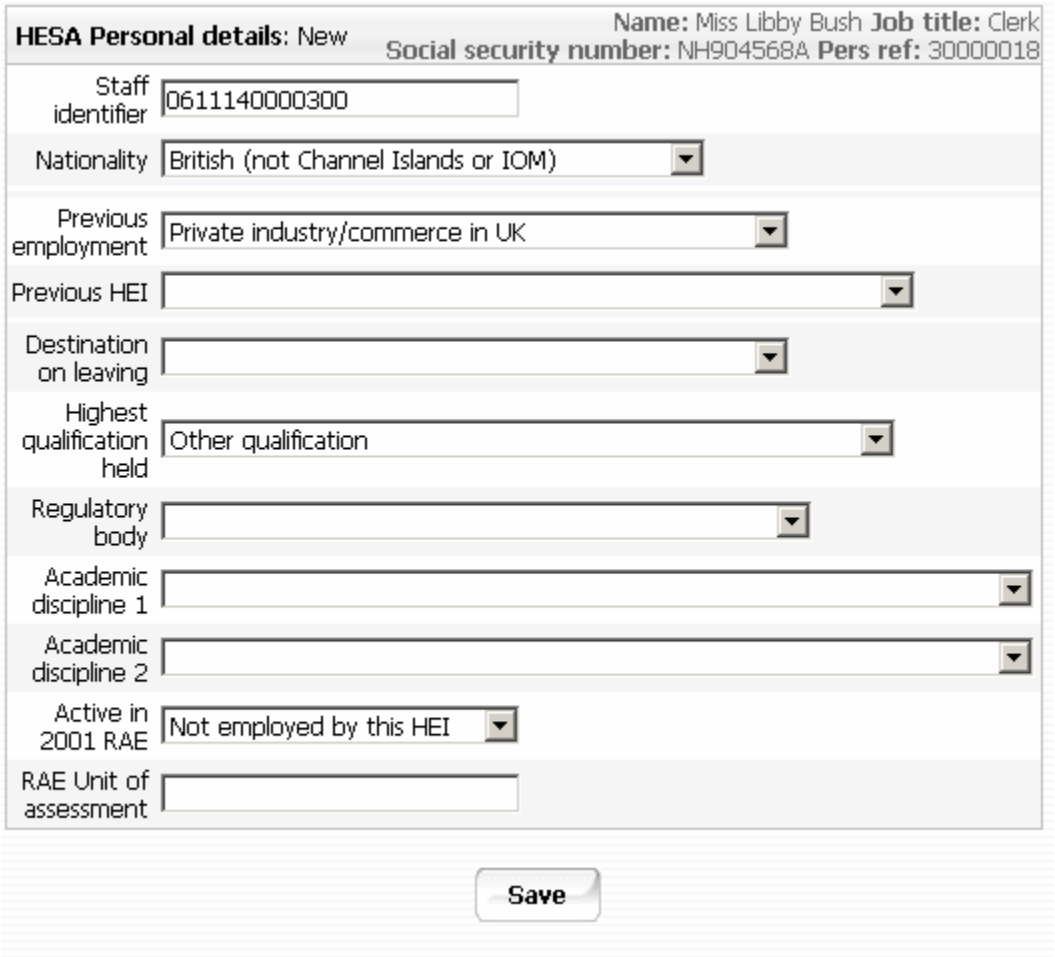
1.11 HESA Personal Details

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



3. The HESA Personal Details screen will be displayed



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

button.

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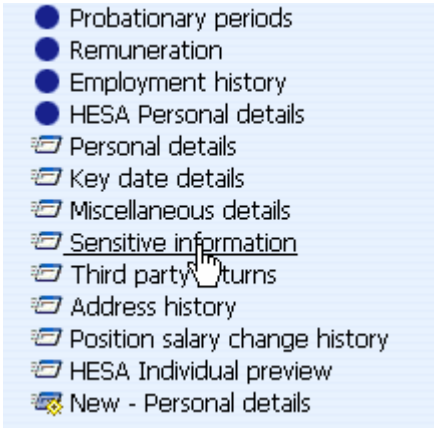
1.12 Sensitive Information

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



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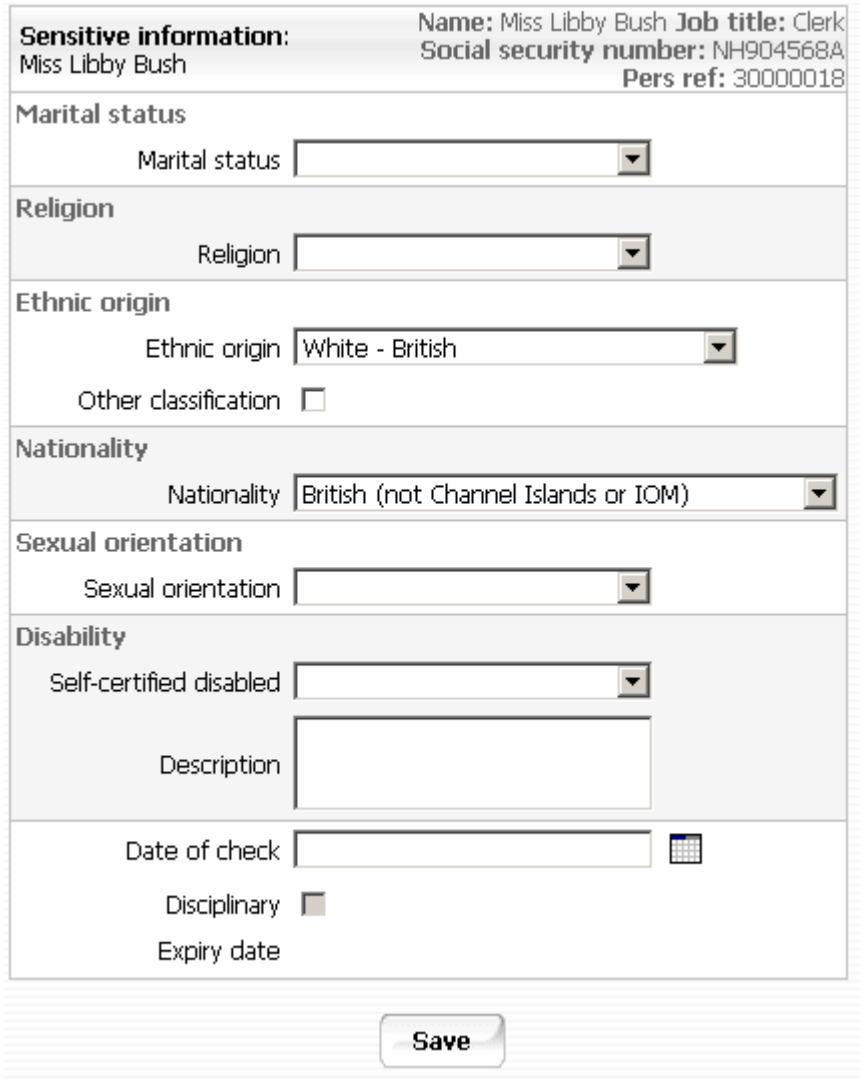
3. The sensitive information screen will be displayed



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

5. Click the

button.

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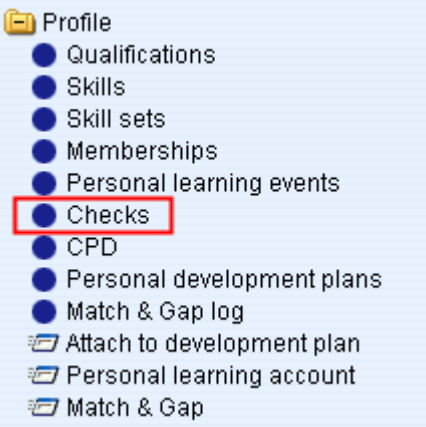
1.13 Employee Checks

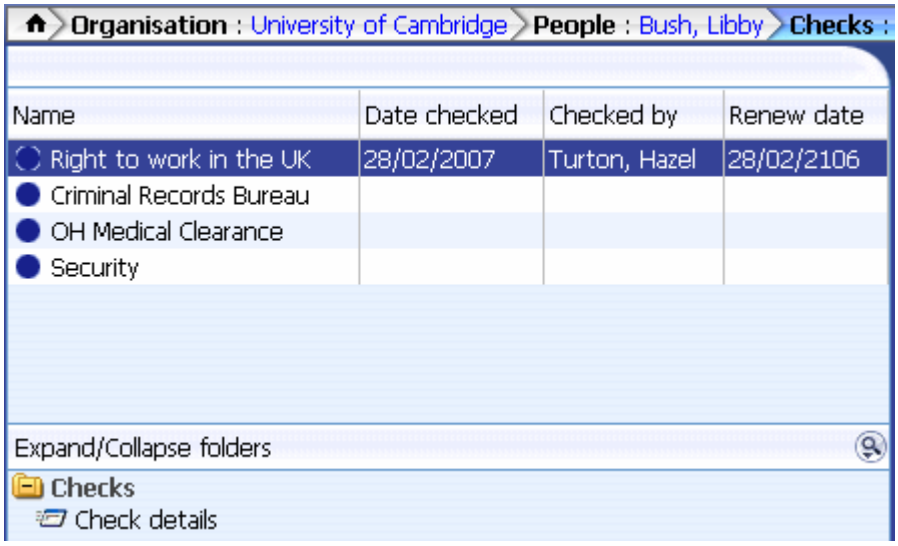
The University has a legal obligation to ensure that all employees have a valid entitlement to work and reside in the UK, regardless of nationality. All appointments require a right to work check and the details of this check should be recorded in employee checks. Where an appointment also requires the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



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

5. The selected form will be displayed

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.

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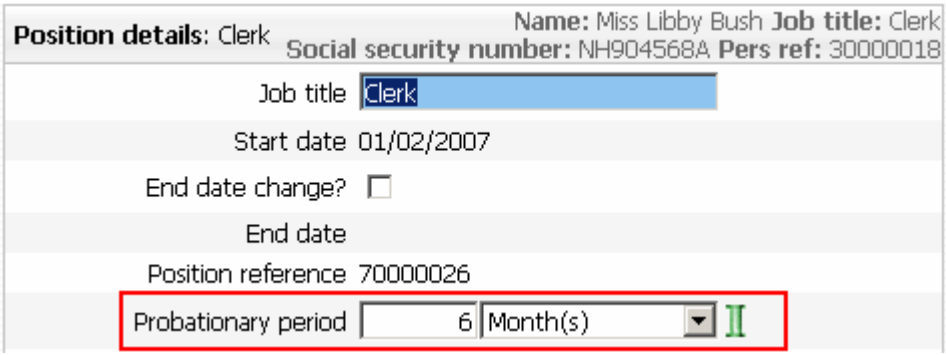
1.14 Probation

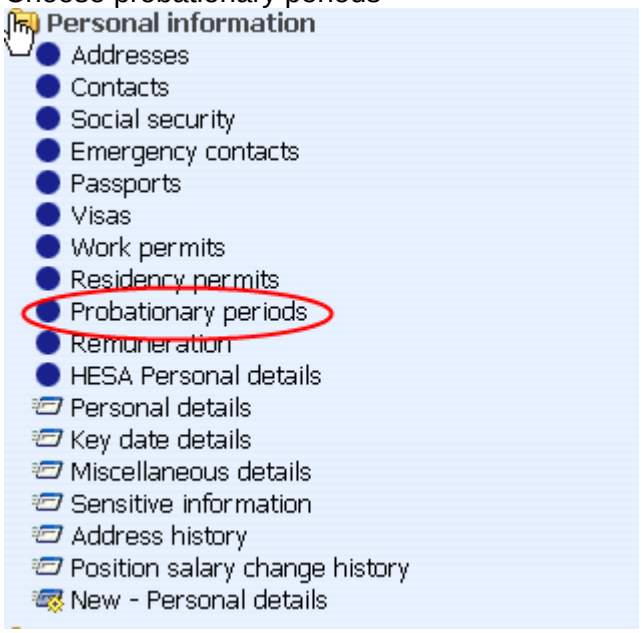
The probationary period for an employee is recorded as part of the position details. You can view a persons probationary period by selecting the person and then choosing position, position details.



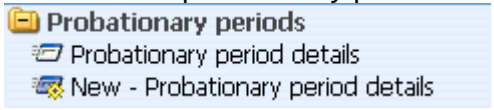
When the probationary period is complete this should be recorded in Probationary period details.

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



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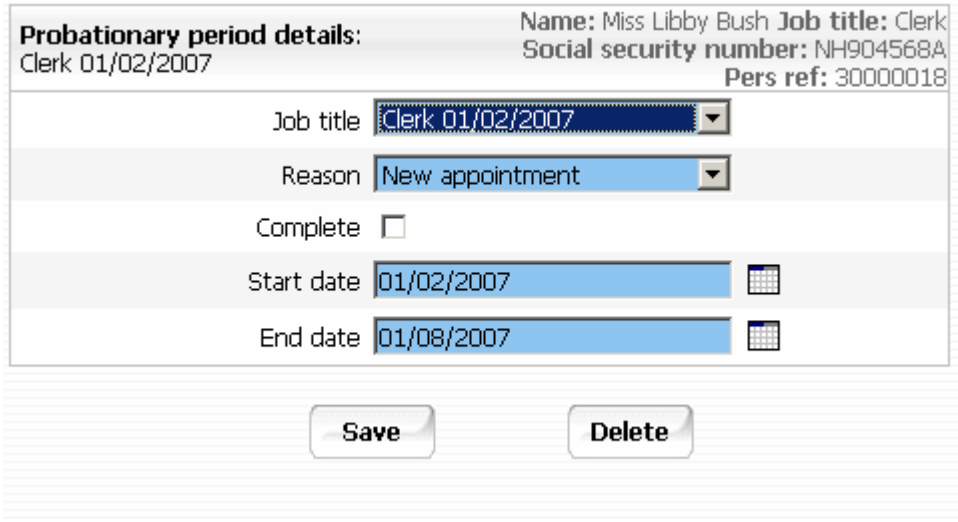
4. The probationary period details will be displayed. Click the complete box



5. Click on the button.

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

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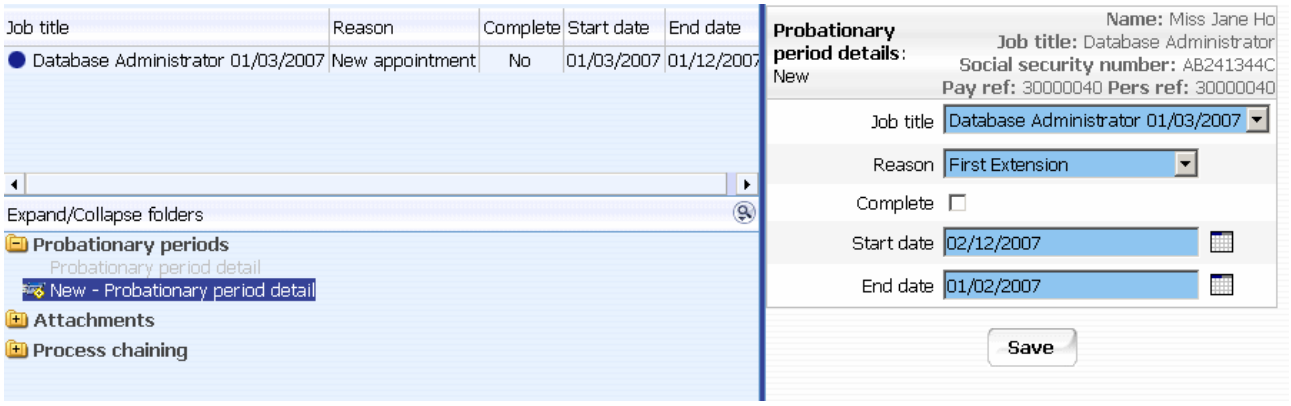
1.14.2 Probation extended.

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 Save button.



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.

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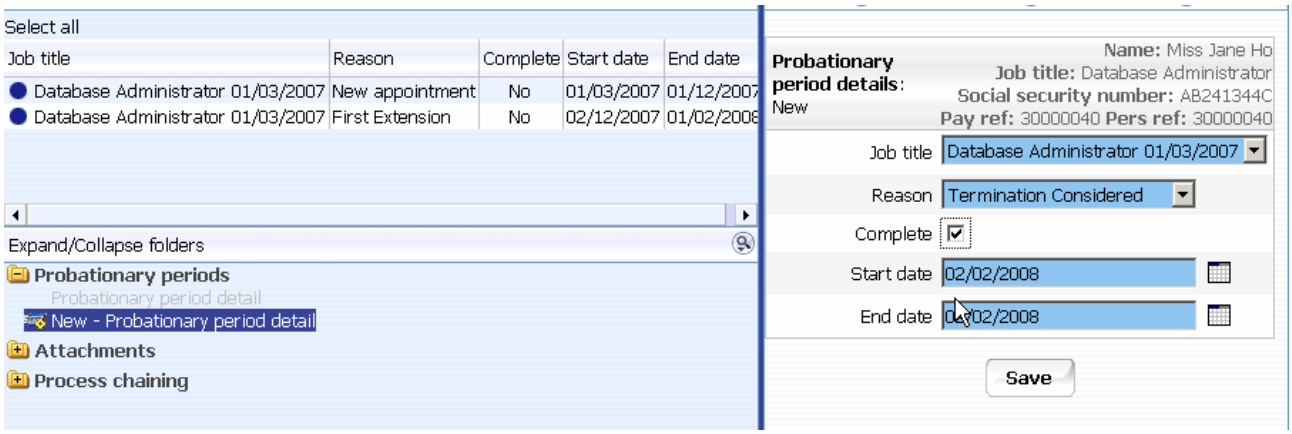
1.14.3 Termination Considered

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.



9. Click on the

button.

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

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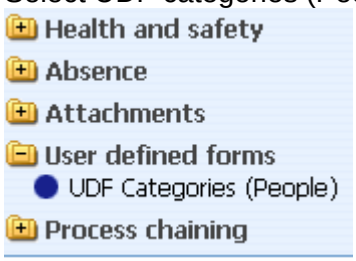
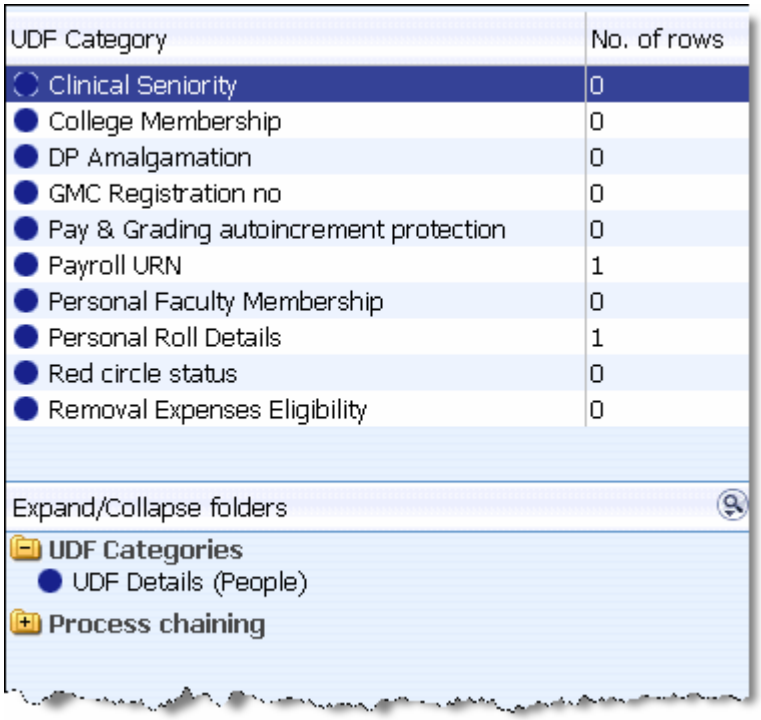
1.15 User Defined Fields

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



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.

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