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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)



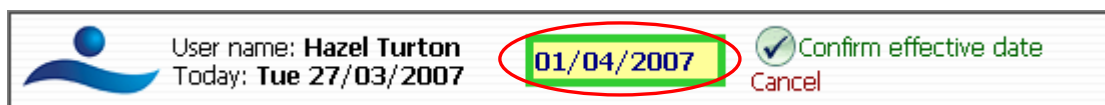
1.2 Effective Dates

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



User name: **Hazel Turton**
Today: **Tue 27/03/2007** Confirm effective date

Enter the required date and click on the 'Confirm effective date' option next to the field or press Enter.

2 Changing Salaries

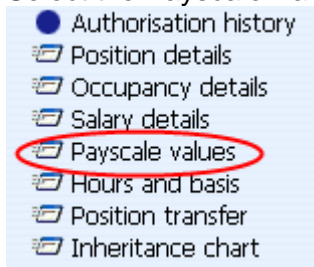
For changes to salary, you need to ascertain whether the employee is being paid via a Payscale (i.e. on a recognised grade) or a Spot Salary. You may then access the relevant form to make the changes.

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.

X Payscale values : Clerk (Permission to Fill granted)		Name: Miss Jenny M Bosten Job title: Clerk	
		Social security number: JW685626A Pay ref: 10100525	
		Pers ref: 10100525	
Grade	Administrative Assistant Grade II		
Payment table	All non clinical staff		
FT Salary	012 -- 26,470.00		
Protected			
Override minimum			
Override maximum			
Grade payment table	All non clinical staff		
Grade minimum	23,182.00		
Grade maximum	30,002.00		
Next increment date	<input type="text"/> 		
Additional increment points	<input type="text"/>		
Protected rate of pay	<input type="text"/> <input type="text"/>		
FTE value	1.00		
Change reason	<input type="text"/>		
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

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

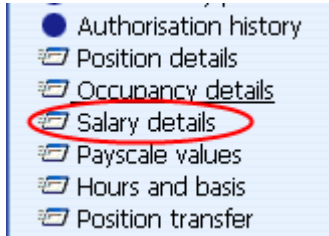
- Click the drop down arrow to the right of change reason and select the reason for the change

Additional increment points	Acting Up
Protected rate of pay	Administrative
FTE value	Annual increment
Pro-rated rate of pay	Discretionary increment
Change reason	New Starter
	Promotion
	Regrading
	Training progression

- Click the button

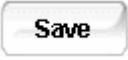
2.2 Spot Salaries

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



2. The salary details form will be displayed.

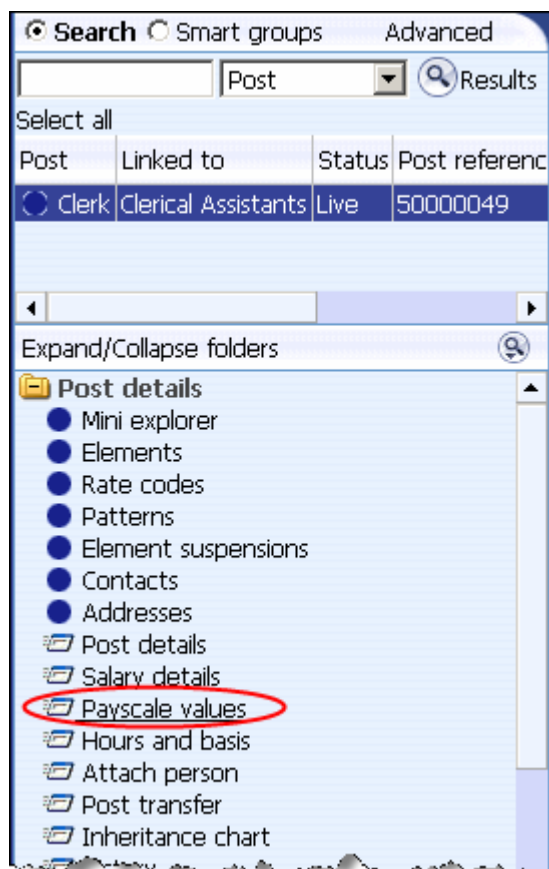
X Salary details : Clerk (Permission to Fill granted)		Name: Miss Jenny M Bosten Job title: Clerk	
		Social security number: JW685626A Pay ref: 10100525	
		Pers ref: 10100525	
Grade	<input type="text"/>		
FT Salary	<input type="text" value="24,900.0"/>	<input type="text" value="Annually"/>	
Override minimum	<input type="text"/>		
Override maximum	<input type="text"/>		
Grade minimum	<input type="text"/>		
Grade maximum	<input type="text"/>		
Protected rate of pay	<input type="text"/>	<input type="text"/>	
FTE value	1.00		
Pro-rated rate of pay	24,900.00		
Change reason	<input type="text"/>		
<input type="button" value="Save"/>		<input type="button" value="Delete"/>	

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

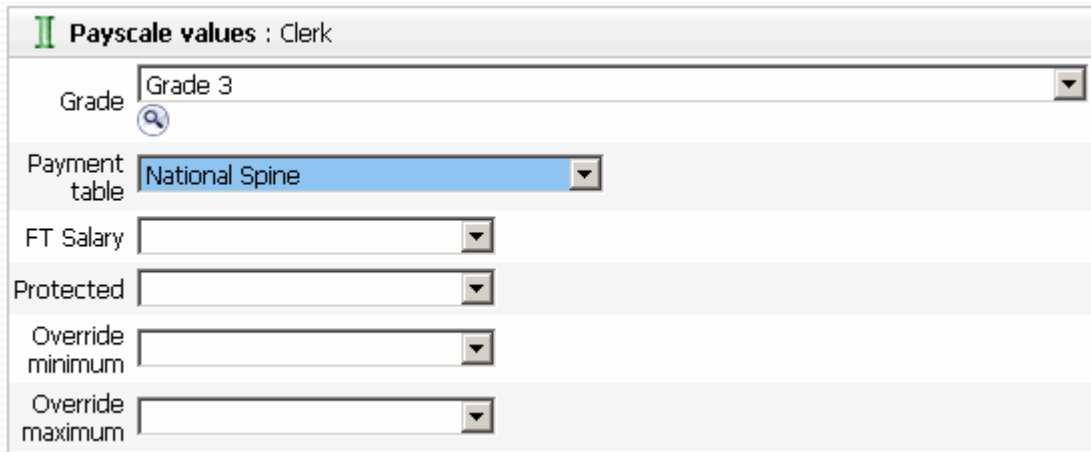
2.3 Post Re-Grade

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



II Payscale values : Clerk

Grade

Payment table

FT Salary

Protected






Override minimum


Override maximum

6. Select the required grade
7. Click the 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: Chief Clerk	
Post	<input type="text" value="Chief Clerk"/>
Start date	01/01/1900
End date change?	<input type="checkbox"/>
End date	
Post reference	44389
Current status	Live
Job share	<input type="checkbox"/>
Suspend from	<input type="text"/> 
Suspend to	<input type="text"/> 
Probationary period	<input type="text"/> <input type="text"/>  II
Location	<input type="text"/> II
Structure group 1	School of the Humanities and Social Sciences  II
Structure group 2	<input type="text"/> 
Third party return details	
Teacher	<input type="checkbox"/>

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)

Job title

Start date 11/11/1911

End date change?

End date

Position reference 40824

Probationary period II

Location II

Occupant Mrs Patricia A Bentley

Reporting unit Department of Engineering

Reports to
Professor Keith Glover (01/01/1900 -)

Expected position end date

Expected position end reason

Structure group 1 II

Structure group 2

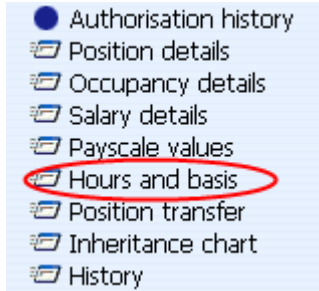
Position status

Position status

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 button

4 Changing Hours

1. Select the Hours and Basis form from the Position menu



2. The Hours and Basis form will be displayed

Hours and basis : Clerk (Permission to Fill granted)	
Contractual Hours	<input type="text" value="37.00"/> II
FTE hours	<input type="text" value="37.00"/> II
Post budgeted hours	<input type="text" value="37.00"/> II
Annual weeks worked	<input type="text" value="52.25"/> II
Category	<input type="text" value="Office Support/Secretarial"/> X
Basis	<input type="text" value="Established - Permanent"/> X
Type	<input type="text" value="Assistant CS"/> X
Change reason	<input type="text"/>
FTE details	
Override FTE calculation	<input type="text" value="No override"/>
FTE value	1.00
<input type="button" value="Save"/>	

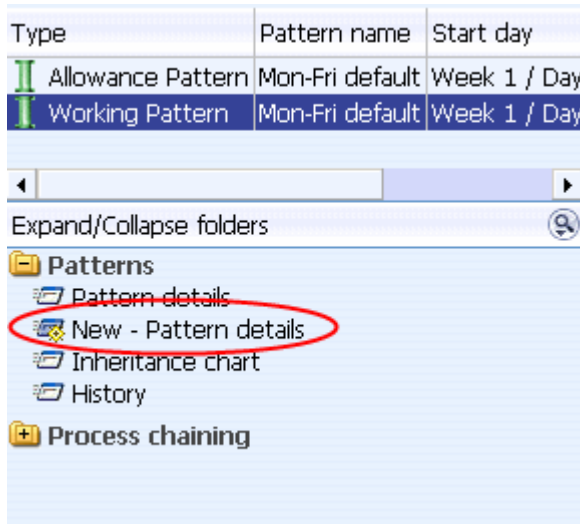
3. Enter the required changes to Contractual Hours.
4. Select a change reason where applicable

Change reason	<input type="text"/>
FTE details	
Override FTE calculation	
FTE value	
<ul style="list-style-type: none"> Career Break Scheme Flexible working Graduated Return - Maternity Graduated Return - Sickness Organisation change Unpaid Leave of Absence 	

5. Click the 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.



2. The pattern details form will be displayed.


Pattern details: New Name: Miss Jenny M Bosten Job title: Clerk

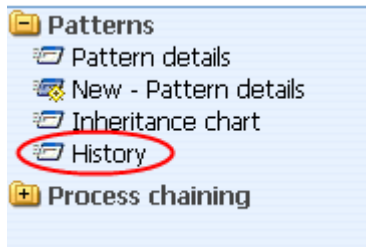
Social security number: JW685626A Pay ref: 10100525 Pers ref: 10100525



Level	Clerk
Type	Working Pattern
Pattern	Mon, Tues, Thurs, Fri
Start day	Week 1 / Day 1
Start date	26/03/2007
End date	

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 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)	
Effective date	Working Pattern
26/03/2007	 Mon, Tues, Thurs, Fri
07/02/2007	 Mon-Fri default

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, (contractual elements). E.g. Early Morning Supplement, Head of Department; and will be attached by the East Room

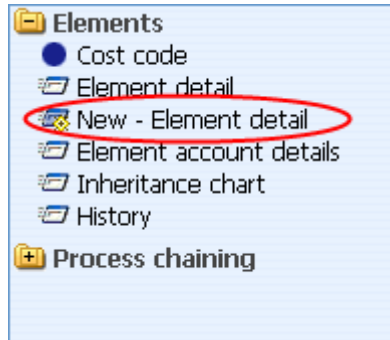
Elements specific to the individual will be attached on an individual basis by the Payroll Team after the employee has been attached to the payroll. E.g. Childcare vouchers

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

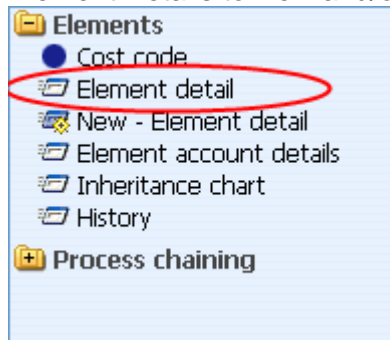
6.3 Attaching elements

5. In order to change an employee's permanent payment elements, you need to click the Elements option and choose either:

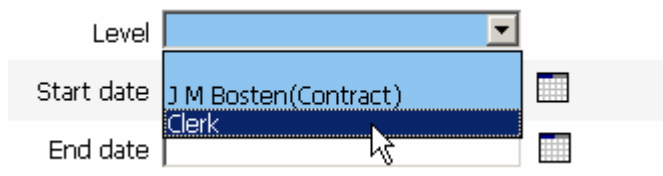
- New – Element Details to add new elements



- Element Details to view and/or amend existing elements




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.





Element details : Training Co-Ordinator (NP)

Name: Miss Jenny M Bosten Job title: Clerk
Social security number: JW685626A Pay ref: 10100525 Pers ref: 10100525

Level


Start date 

End date 


Element 

Element type Payment

Cash

Payment table / rate code 

Membership reference

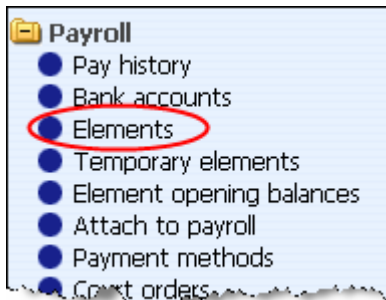
7. For new elements, enter a start date. If the element is to be paid for a set period of time enter an end date.
8. Select the element from the drop down box on the Element field. (NP stands for non-pensionable). For existing elements enter the end date or change required.
9. For a cash based element enter the annual cash amount of the allowance in pounds and pence.
10. Click the  button.

6.4 Element Costing

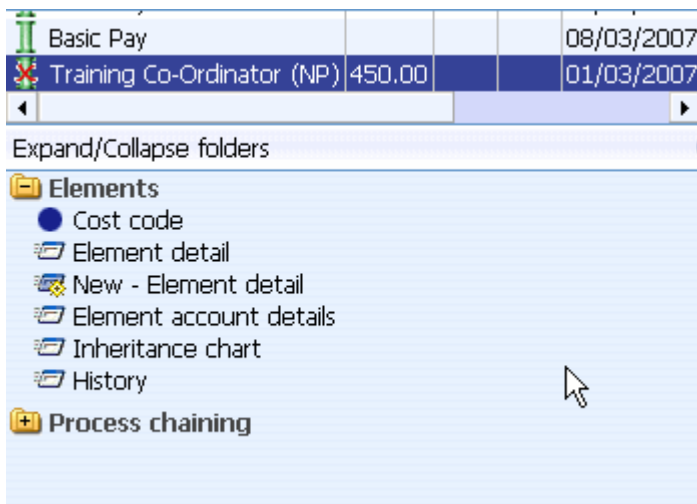
The element will be costed to the employees 'home' cost centre(s) as default.

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

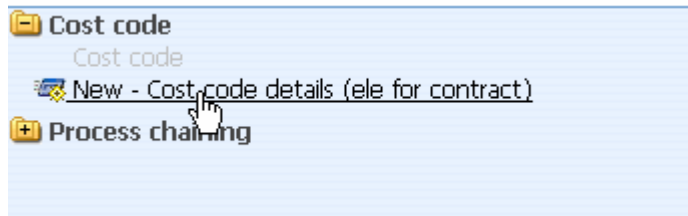
1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the required person
4. Select the Payroll menu
5. Select Elements



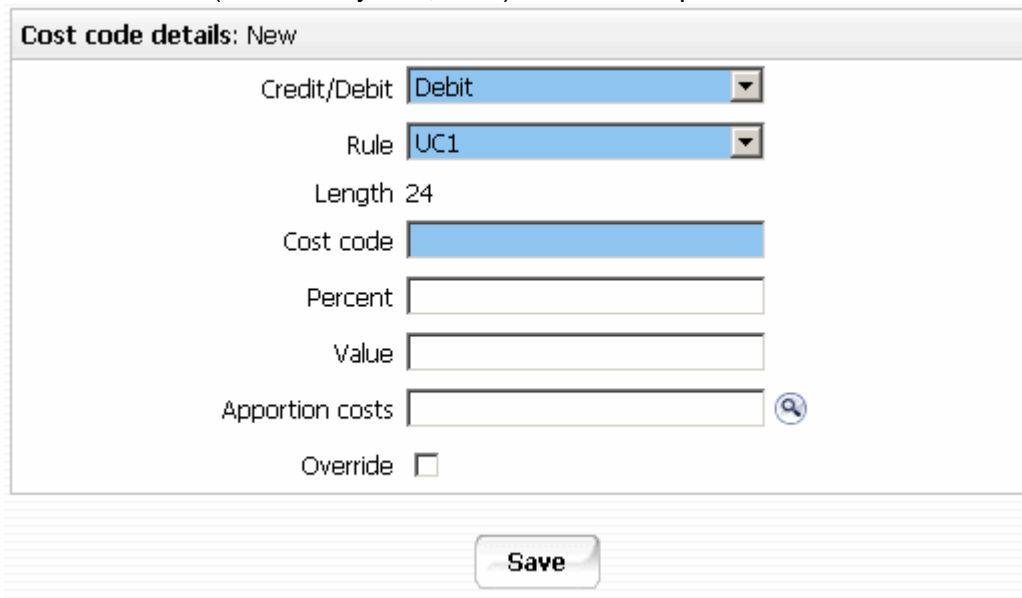
6. The existing elements for the person will be displayed. Select the element that requires the costing to be changed.



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



Cost code details: New

Credit/Debit

Rule

Length 24

Cost code

Percent

Value

Apportion costs

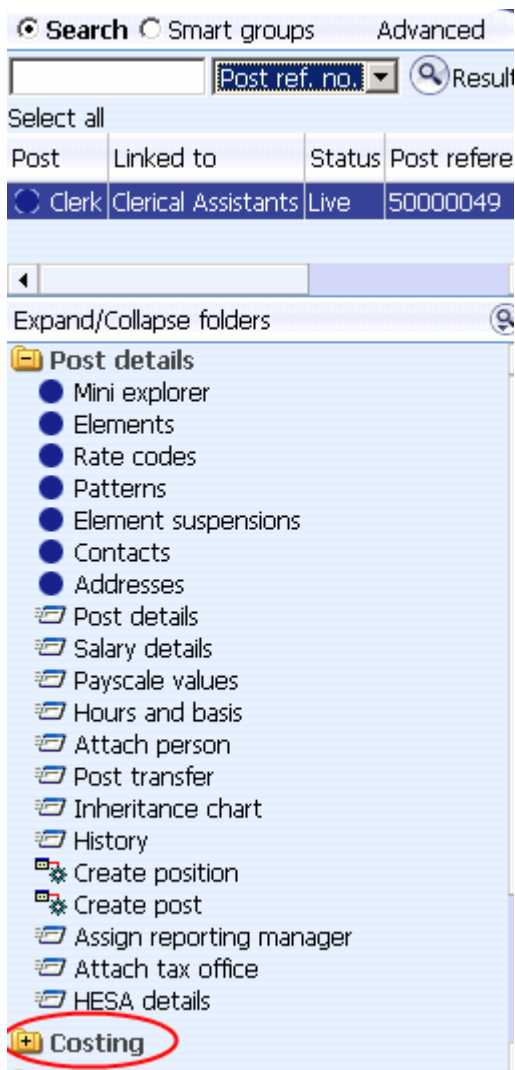
Override

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

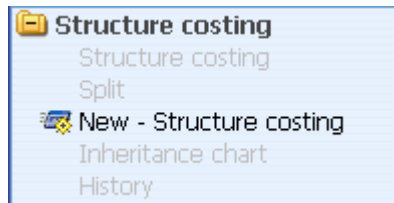
In order to change costing details, you need to click the Structure Costing option in the Costing folder.

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: New		Name: Miss Jenny M Bosten Job title: Clerk	
		Social security number: JW685626A Pay ref: 10100525	
		Pers ref: 10100525	
Organisation			
Organisation default cost code ERROR			
Rule			
Rule name		UC1	
Level details			
No. 1			
Costing level		Structure	
Length 24			
Cost code		U.AH.AHMD.ACAA.CAAJ.0000	
Percent		100.000	
Start date		02/04/2007	
End date			
<input type="button" value="Save"/>			

- 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:

Dept Code	Cost Centre	Source of Funds	Transaction Code	Spare
U. MA.	MABA.	ABAA.	ABAP.	0000

Or for Research Grants

Project Code	Task	Award	Transaction Code
AAAG/001.	01.	RG12345.	ABAE

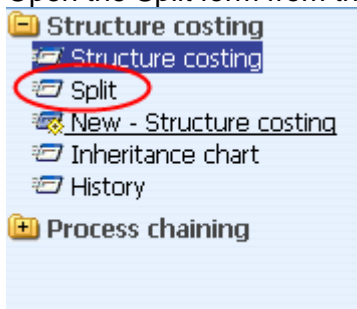
Enter 100 Percent and Start Date fields.
Only enter an End Date when there is a definitive end.

4. Click the  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.

Structure costing: New		Name: Miss Jenny M Bosten Job title: Clerk Social security number: JW685626A Pay ref: 10100525 Pers ref: 10100525	
Organisation Organisation default cost code ERROR			
Rule Rule name <input type="text" value="UC1"/>			
Level details No. 2 Costing level <input type="text" value="Structure"/> Length 24 Cost code <input type="text" value="U.KA.KAQA.ABAA.AAA.0000"/> Percent <input type="text" value="50"/> Start date <input type="text" value="02/04/2007"/> <input type="button" value="Calendar"/> End date <input type="text"/> <input type="button" value="Calendar"/>			
Split records			
	Cost code	Percent	Delete?
No.1	<input type="text" value="U.AH.AHMD.ACAA.CA"/>	<input type="text" value="50"/>	<input type="checkbox"/>

4. Click the  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

End date 

4. Click on the 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 button
10. Open the split form from the costing menu
11. Enter the next code with it's % 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.






The screenshot shows a web interface for viewing history. At the top, it says "History: Research Associate [Costing Levels]". Below this, there are two dropdown menus. The first is labeled "Group" and has "Costing Levels" selected. The second is labeled "Item" and has "<All>" selected.

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: Clerk	Name: Miss Jenny M Bosten Job title: Clerk
Social security number: JW685626A Pay ref: 10100525 Pers ref: 10100525	
Job title	Clerk
Start date	07/02/2007
End date change?	<input type="checkbox"/>
End date	
Position reference	70000016
Probationary period	<input type="text"/> <input type="text"/> II
Location	<input type="text"/> II
Occupant	Miss Jenny M Bosten
Reporting unit	Training
Reports to	Clerk 
	Ms Louisa May (07/02/2007 -)
Expected position end date	01/04/2007 
Expected position end reason	End of funding
Structure group 1	Unified Administrative Service II
Structure group 2	<input type="text"/>
Position status	
Position status	Permission to Fill granted
Effective from	07/02/2007 
Third party return details	
Teacher	<input type="checkbox"/>

Contractual Changes

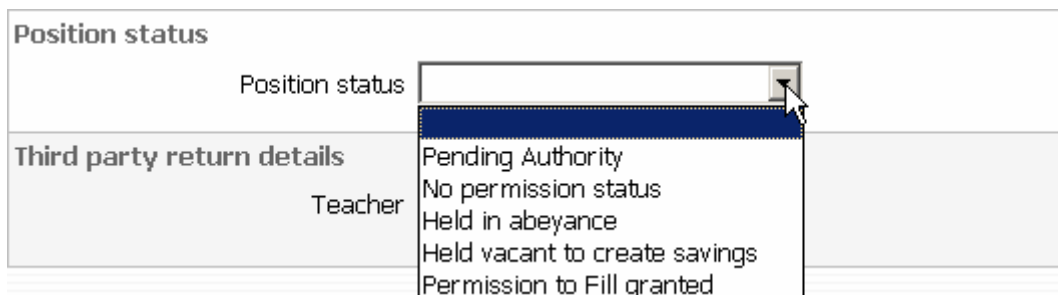


Occupancy details: Clerk (Permission to Fill granted)		Name: Miss Jenny M Bosten Job title: Clerk	
		Social security number: JW685626A Pay ref: 10100525	
		Pers ref: 10100525	
Current status	Live		
Occupant	Miss Jenny M Bosten		
Occupancy start	09/02/2007		
Occupancy end			
Occupancy type	Standard		
Position occ. reference	41000011		
Expected occupancy end date	01/04/2007		
Expected occupancy end reason	End of funding		
End occupancy?	<input type="checkbox"/>		
<input type="button" value="Save"/>			

8.1 Changing Permission to fill status

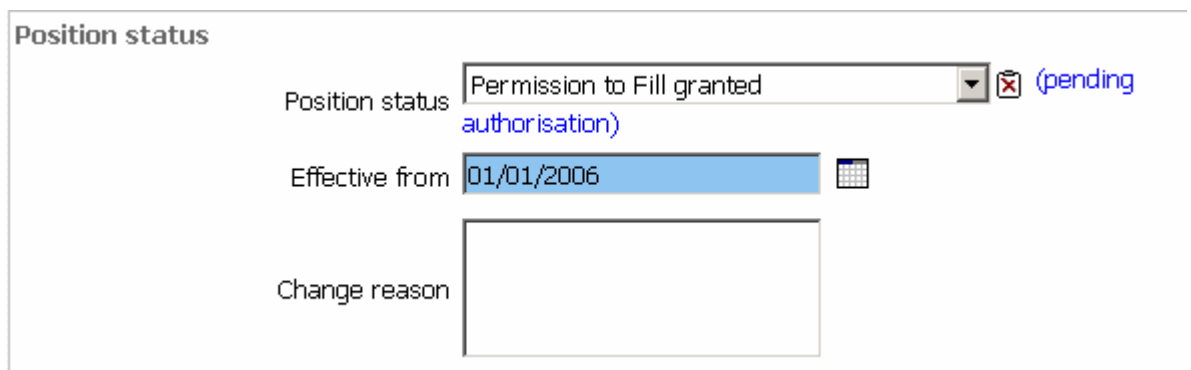
A position reference number is automatically generated by Trent when a position is created. Also the permission to fill status will automatically be set to Permission to Fill granted for a new position. Subsequently where the position status requires changing:

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



The screenshot shows a web form with a section titled "Position status". Below the title, there is a label "Position status" next to a dropdown menu. The dropdown menu is open, showing a list of options: "Pending Authority", "No permission status", "Held in abeyance", "Held vacant to create savings", and "Permission to Fill granted". A mouse cursor is pointing at the dropdown arrow. Below the dropdown menu, there is a label "Teacher" and a text input field.

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.



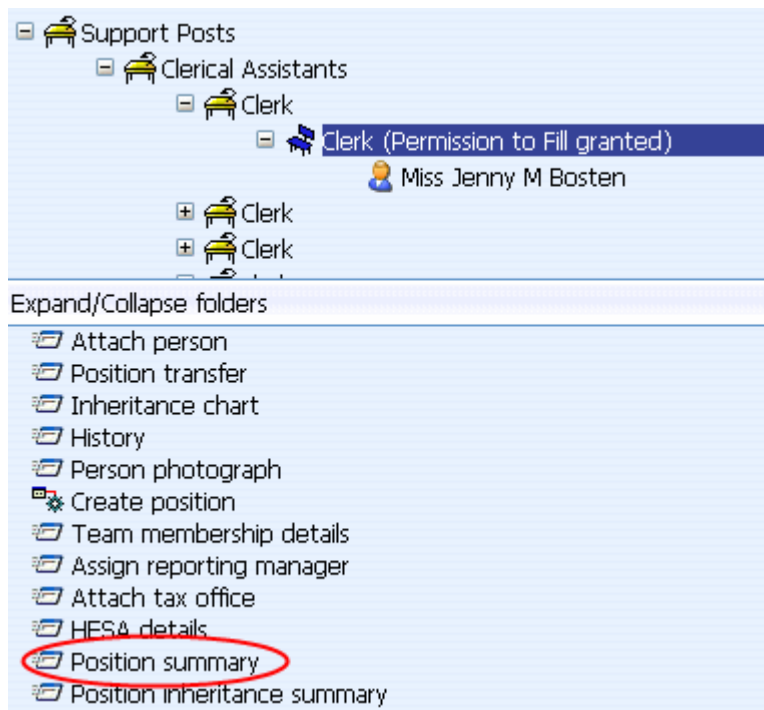
The screenshot shows a web form with a section titled "Position status". Below the title, there are three fields: "Position status" with a dropdown menu set to "Permission to Fill granted" and a red 'X' icon next to it with the text "(pending authorisation)", "Effective from" with a date input field set to "01/01/2006" and a calendar icon, and "Change reason" with a text input field.

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

Position details

Occupant Miss Jenny M Bosten
Job title Clerk
Position reference 70000016
Occupancy start 09/02/2007
Occupancy end
Expected occupancy end date
Expected position end date
Location
Organisation unit Training
Position status
Effective from 

+ Reporting manager

+ History

+ Category, Basis and Type

3. To view specific details click on the expand icon 

+ Reporting manager


- Reporting manager






Reporting manager Ms Louisa May
Reporting position Clerk
Reporting manager unit Training

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

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. 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.

Personal

Date of birth

Age 37 year(s) 8 month(s)

Date verified

Expected retirement date

Basis

Age (years)

Age (months)

Date

6. Click on the  button

Expected retirement date

Basis

Age (years) 65

Age (months) 0

Date

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.

Expected retirement date

Basis

Age (years) 65

Age (months) 3

Date

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  button

9.2 Miscellaneous Details

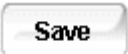
Miscellaneous details provides summary details of expiry dates of passport, visa, work permit and residency permit. If you change the latest date(s) on this page, then the date(s) displayed on the relevant details page will also be changed and vice versa.

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


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
4. Click the  button.

9.3 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.

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

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?	<input type="checkbox"/>

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  button.