# CHRIS for Institutions

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1 Introduction

The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called Cambridge Human Resources Information System (CHRIS).

This guide provides information to help you learn about navigating your way through the iTrent Human Resources Management and Payroll system.

1.1 The Login screen

Go to https://www.hrsystems.admin.cam.ac.uk/

The page shown below will be displayed

Select “CHRIS” from the Systems Log In section on the right hand side
Then click on “log in”

The Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the ‘Login’ Button.
Some users may have multiple roles to select from.

The screen prints in this manual are based on the Department Pay Leavers Electric Role and will vary slightly in other roles.

Once logged in you can change to a different Role by clicking here:
2 Search

You can search by people, posts or positions

2.1 Searching for employees

Select People.

Enter the surname of the person whose details you wish to find and press enter.
Select the record you wish to view and information will be displayed in the display pane. When you rest your mouse on the person record a pop up will be displayed.
The options available to your user access are displayed as Links

When you select a link, the options are displayed below

When you choose an option you will see the details contained within and can navigate to other options within that link using the menu button at the top of the screen.

Clicking on the arrow to the left of Menu displays the options.
You can hide the search pane here

And display again by clicking on the Menu button

To log off select the button at the top right hand side of the screen and select Log off.
2.2 Searching for leavers.

When you perform a simple search, records for people who are currently in employment will be returned, but if you select the Include leavers checkbox you can also search for previous employees.

Click on the symbol to the right hand side of People.

Select the checkbox for Include leavers.
The leaving date for the employee can be viewed in Key dates.
2.3 Entering effective date

Where screens require an effective date the following screen will be displayed:

Enter a date, use the current date, or select a date from the calendar and click ok.

To return to the Links click on the person’s name at the top of the screen.
2.4 Employees with more than one position

Many individuals have more than one position. When you search for an individual who has more than one position the titles of each position are displayed under the Employment heading and details of each can be displayed by selecting the position title.

Click on the other position title to view details
You will be required to select which position details you wish to view when you select the options within the employment and pay details. This employee has two positions to choose from:

- Museum Attendant
- Receptionist

Whereas this employee has four. The positions will be displayed in alphabetical order.

You will need to expand the pane to view which is the current position.

The current position will be the one without an End date.
3 Limit of Tenure

Where an appointment has a limit of tenure this information will be recorded as part of the new appointment in Web Recruitment. From this the expected occupancy end date, the expected occupancy reason, the expected position end date and the expected position end reason can be viewed as part of the position details.

Where a position has an occupancy limit of tenure, the date will be displayed in the Employment details.

To view the reason for the occupancy end date view the Occupancy details under employment and pay details.
Enter the effective date and the Occupancy details will be displayed. Here the date and the reason for the expected occupancy end are displayed.

Some positions will have both an occupancy end date and a position end date. Others will just have an occupancy end date – this will be the case where an employee is covering maternity leave.
Limit of tenure details can be also be viewed in the Position Details and the Position Summary.

3.1 Position Details

With the person selected, choose View employment and pay details and then Position details.

Enter the effective date and the Position details screen will be displayed.
3.2 Position Summary

The position Summary form also shows the Expected Position end date, but it does not show the reason.

Select Summary from Employment and Pay details:

The Summary displays the date, but does not tell you why the position is expected to end, for this information use the Position Details.
4 Salary Information

Please note that this information is not available to users who have non-pay access.

4.1 Position Salary change history

1. Search for the person for whom you wish to view salary information.

2. Select the View employment and pay details link and then select Salary history

3. The Position salary change history screen will be displayed.

4. Payment table rate change refers to the yearly cost of living increase, this change always has an effective date of 01/08 each year.
4.2 Payscale values

Salary information, along with details of next increment date (where applicable) can be viewed from current payscale values within the View employment and pay details link. This screen shows the grade boundaries – these are the automatic increments, excluding contribution (*) points.
In this example the Next increment date is in the past. This is because the employee has reached the Grade maximum. This employee also works part time and therefore displays the pro-rated rate of pay.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Grade 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment table</td>
<td>National Spine</td>
</tr>
<tr>
<td>FT Salary</td>
<td>048 – 40,322.00</td>
</tr>
<tr>
<td>Protected</td>
<td></td>
</tr>
<tr>
<td>Override minimum</td>
<td></td>
</tr>
<tr>
<td>Override contribution-related threshold</td>
<td></td>
</tr>
<tr>
<td>Override maximum</td>
<td></td>
</tr>
<tr>
<td>Grade payment table</td>
<td>National Spine</td>
</tr>
<tr>
<td>Grade minimum</td>
<td>039 – 30,942.00</td>
</tr>
<tr>
<td>Contribution-related threshold</td>
<td>048 – 40,322.00</td>
</tr>
<tr>
<td>Grade maximum</td>
<td>048 – 40,322.00</td>
</tr>
<tr>
<td>Next increment date</td>
<td>03/03/2018</td>
</tr>
<tr>
<td>Protected rate of pay</td>
<td></td>
</tr>
<tr>
<td>FTE value (rounded to 5 DP)</td>
<td>0.60000</td>
</tr>
<tr>
<td>Pro-rated rate of pay</td>
<td>24,193.20</td>
</tr>
</tbody>
</table>
5 Position Summary

Note: This menu is not available to users who have non-pay access

The position summary screen allows you to view much of the information available from separate links together with information on costing, elements and terms and conditions on one screen. The top part shows the standard information relating to this position – Occupant, position name, position reference, occupancy start, expected end date, location and the lower portion of the page summarises all the information related to the position.

To view the position summary information:

1. Search for the person for whom you wish to view position information.
2. Select Summary from View employment and pay details.
3. Enter the effective date
4. The Position Summary screen will be displayed.
To view details in the bottom portion of the screen expand the section or use the Expand all option.
6 Costing Information

To view the cost code(s) of where a position is funded select the Summary screen

1. Search for the person for whom you wish to view costing information.
2. Select Summary from View employment and pay details.

3. Enter the effective date
4. The Position Summary screen will be displayed.
## Position summary (as of 02/03/2020) Research Associate

### Position details

- **Occupant**: Dr Donald Brown
- **Job title**: Research Associate
- **Position reference**: 90000093
- **Occupancy start**: 01/02/2018
- **Occupancy end**: 
- **Expected occupancy end date**: 30/04/2021
- **Expected position end date**: 30/04/2021
- **Location**: 
- **Structure workflow group**: 
- **Organisation unit**: Department of Training
- **Position status**: No permission status
- **Effective from**: 01/02/2018

### Expand all/collapse all

- Reporting manager
- History
- Category, Basis and Type
- Hours
- Costing Levels
- Elements
- Terms and Conditions
- Payment Details
5. Expand the Costing details to view.

<table>
<thead>
<tr>
<th>Costing Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>01/09/2014</td>
</tr>
</tbody>
</table>

Cost codes will always be displayed as 24 characters (including full stops and forward slashes)

For example:

<table>
<thead>
<tr>
<th>Dept Code</th>
<th>Cost Centre</th>
<th>Source of Funds</th>
<th>Transaction Code</th>
<th>Spare</th>
</tr>
</thead>
<tbody>
<tr>
<td>U. MA.</td>
<td>MABA.</td>
<td>ABAA.</td>
<td>ABAP.</td>
<td>0000</td>
</tr>
</tbody>
</table>

Or for Research Grants:

<table>
<thead>
<tr>
<th>Project Code</th>
<th>Task</th>
<th>Award</th>
<th>Transaction Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>AAAG/001.</td>
<td>01.</td>
<td>RG12345.</td>
<td>ABAE</td>
</tr>
</tbody>
</table>

Split costing will be displayed as two or more rows of information

<table>
<thead>
<tr>
<th>Costing Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>01/10/2019</td>
</tr>
<tr>
<td>01/10/2019</td>
</tr>
<tr>
<td>01/07/2018</td>
</tr>
</tbody>
</table>
7 Finding Post reference number

The post reference number can be viewed from the Employee position history.

Select positions occupied by person from the View employment and pay details link

This reference number is required on certain CHRIS forms.
8 User Defined Forms

There is certain specific information required by the University which is not held within the standard forms. To enable this specific information to be recorded within iTrent, use has been made of the feature ‘User defined forms’

Select the Other details (inc.Role Code Number) to see these details

Select Other details (inc. Role Code Number)
9 Absence

Absences within Trent are created in groups. Each group defines a generic type of absence – Holiday, Sickness, Maternity, Paternity and Other. Each group is also linked to one or more Absence Types where you can further define the type of absence (e.g. absence types of sabbatical and unpaid leave within the group ‘other’)

Where absence details have been entered you can view them by accessing an employee’s personal absence list.

1. Search for the person for whom you wish to view absence information.
2. Select the Record sickness Link

3. Select Record Sickness

4. If the employee has any previous absences recorded these will be displayed.
5. To view details for an absence, select the absence from the list.

Information can be viewed from expanding the pane as well as from the popup.
To enter new sickness details complete the form. Different options are available depending on whether the absence is for a part day, full day or more than one day.
### Sickness absence details

**Sickness period**

- Sickness period: More than one day

**Absence start**

- Absence start date: 02/03/2020
- Absence start type: Full day

**Absence end**

- Absence end date: 06/03/2020
- Absence end type: Full day

**Absence**

- Absence type: Sickness Scheme
  - Set as default: unchecked
- Absence reason: Cold or Flu
- Hide absence reason: unchecked

[Button] SAVE  [Button] CALCULATE
10 Contact details

It is possible to both view and update contact details. Employees can also update this information themselves using Employee Self Service.

Select Contact Details.

Address, Phone and email and Emergency contact details can be viewed and changed.

![Contact Details Interface](Image)
Where you are adding new address details it is essential to use the New button (do NOT overtype the details) as this is a requirement of the HMRC. Add the new address details and click on Save.

You can then use the menu in the subject header to change other contact details as required.
11 Entering Probation and review details

Probation and review details can be viewed from the employment and pay details.

11.1.1 Probation

Where a new appointment has successfully been completed the probationary period details should be updated.
Select the complete tick box and click on save.

**11.1.2 Reviews**

Select Reviews

- View employment and pay details
- Leaver processing
- Record sickness
- Contact details
- View / change probation periods
- Reviews (appraisals)

Where no previous review has taken place the screen will appear as below.

If previous reviews have taken place they will be displayed.
Enter a new review using the New button

Next review date: 27/03/2020

Click on Save

Changes have been saved.

Probationary reviews can also be entered.
12 Training records

Training information for online courses that have been completed can be viewed using the training records option

Where training has been completed they will be listed under personal learning events.

- Unconscious Bias (online)
- Equality and Diversity Training
13 Making a person a Leaver

This process should be completed as soon as you know when an individual is leaving.

Leaver information must be entered before the payroll deadline. This is usually the 16th/17th of the month – 7 working days before payday (usually the 26th of each month). If you attempt to make an employee a leaver after this date you will be unable to. The message of the day will notify you that the contracts are locked and it will not be possible to access the leaver process chain.

If you are notified after the payroll deadline that someone is leaving in the current month, then you should contact payroll immediately on extension 39779 to avoid making an overpayment.

Please note, this procedure should be followed for ALL leavers, but not where an employee is transferring to another position within the University (not the colleges). Transfers will be undertaken by the Recruitment Administration team. Please remember to make employees a leaver when they are leaving due to their fixed-term contract ending, redundancy, retirement and death in service.

1. Search for and select the person you wish to make a leaver.

2. Select Leaver processing, Process leaver

3. Enter the effective date
4. The Occupancy maintenance screen will be displayed.

5. Enter the Leaving Date
6. Enter the Reason for Leaving

![Occupancy maintenance screenshot]

- Capability
- Death
- Declined re-employment
- Dismissal
- End of Affiliated Lectureship
- End of Apprenticeship
- End of Associate Lectureship
- End of Studentship
- End of Voluntary Research Agreement
- End of appointment limited by Statute or Ordinance
- End of leave to undertake a research fellowship
- End of secondment
- End of training appointment
- End of visit
- Expiry of right to work
- Redundancy - limit of tenure
- Redundancy - restructure and other
- Resignation
- Retirement
- Retirement - Early
- Retirement - Ill Health
- SOSR - CRI Only
- SOSR - MRC/Sanger Only
- TUPE Transfer
7. Select the position that they are leaving. If they hold one position this will automatically also select their Payroll and University of Cambridge

8. Click on Save
9. Changes have been saved message will be displayed. Select Record Activity after leaving.

10. Enter the Activity after leaving and Location after leaving details
The purpose of this step is to comply with the University’s data collection obligations for the HESA staff return. Further information on HESA and the purpose of the HESA staff return can be found at www.hesa.ac.uk

Please note that Activity on leaving and Location on leaving only need to be completed for individuals leaving the employment of the University. You may leave these fields blank if you are dealing with someone who is ceasing employment in one of several occupancies or if the employee has died.

11. When you make a person a leaver, an email will automatically be generated confirming your action. You will need to action any instructions from the email that apply to your leaver.

Separate leaver detail emails are also sent to Payroll and Recruitment Administration.

If you do not receive a workflow confirmation email for a leaver, please contact the CHRIS Helpdesk
13.1 Entering Holiday Pay

A fast input screen has been created for entering Holiday Pay. This must only be used for a person who is a leaver. It must not be used where an employee is transferring to another University department as their leave records must transfer with them. Leave and sickness records should be transferred to the new department.

If you attempt to enter holiday pay information after the payroll deadline for a particular month, you will be unable to, a message notifying you that the contracts are locked will be displayed.

⚠ Changes cannot be saved for a locked contract.

Holiday Pay should be entered in the last month in which the person is working, before the payroll deadline, so that holiday pay is included in their final payslip.

To record holiday pay you need to enter the personal reference number. This is the same as the Payroll reference number. It can be viewed and copied from here:

Or from the person summary screen here:
Select the Holiday pay input option from leaver processing.

Or from the shortcut menu

The fast input details screen will be displayed.
Do not enter anything into the Payroll field unless the person has more than one payroll

Enter the Employee payroll number and click on validate
The employee name and job will appear, enter the number of days leave

<table>
<thead>
<tr>
<th>Employee payroll number</th>
<th>Employee name</th>
<th>Job</th>
<th>Days of leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>10102851</td>
<td>Mrs Hazel E Turton</td>
<td>CHRIS Trainer (Human Resources Di)</td>
<td>3</td>
</tr>
</tbody>
</table>

If you have several employees holiday to enter, use the + button to add a row

<table>
<thead>
<tr>
<th>Employee payroll number</th>
<th>Employee name</th>
<th>Job</th>
<th>Days of leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>10102851</td>
<td>Mrs Hazel E Turton</td>
<td>CHRIS Trainer (Human Resources Di)</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

Click on Save