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1 Introduction

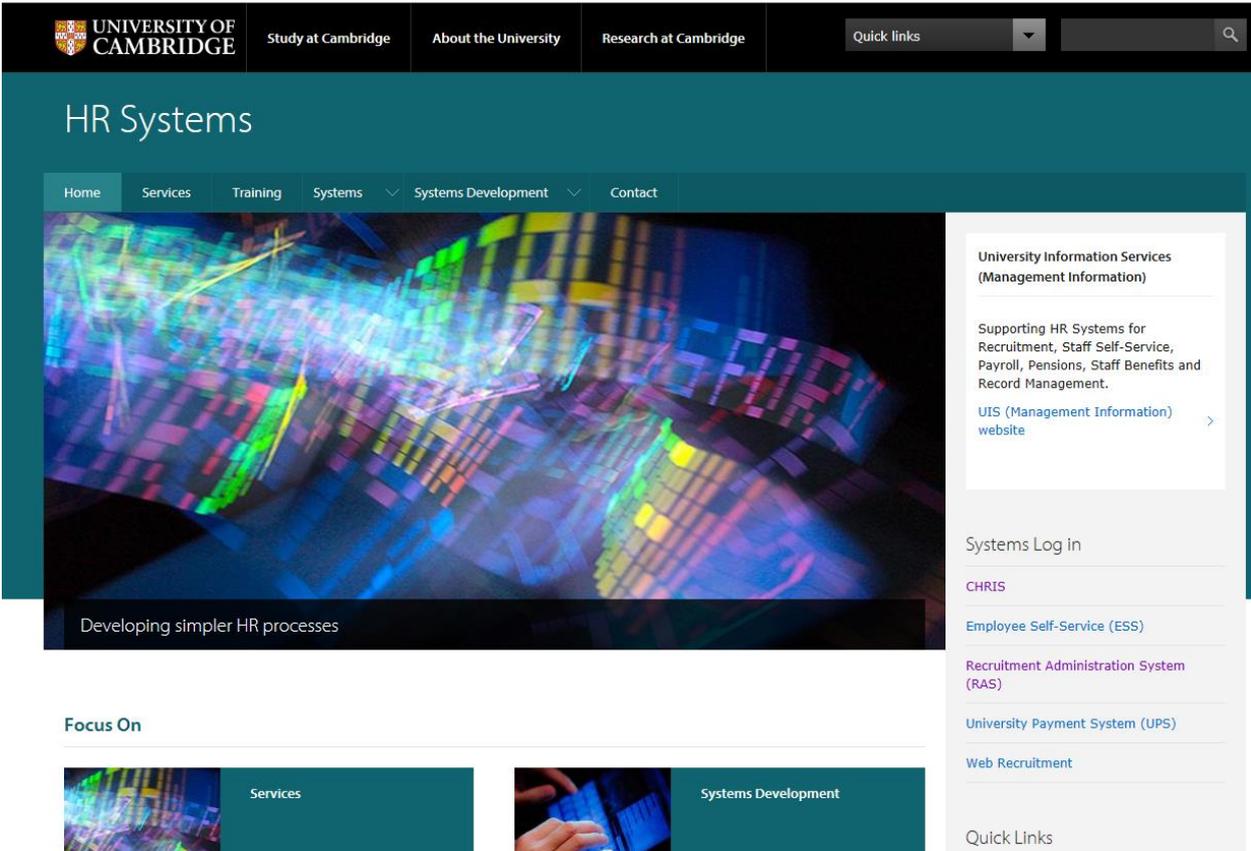
The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called **Cambridge Human Resources Information System (CHRIS)**.

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/>

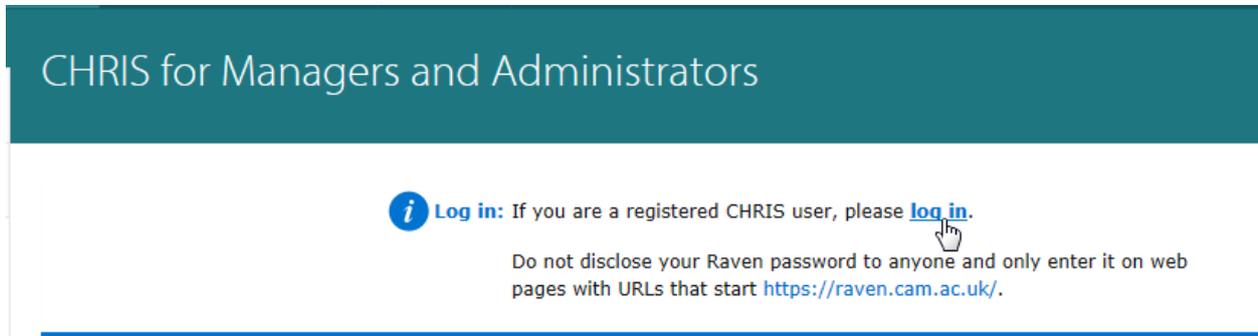
The page shown below will be displayed



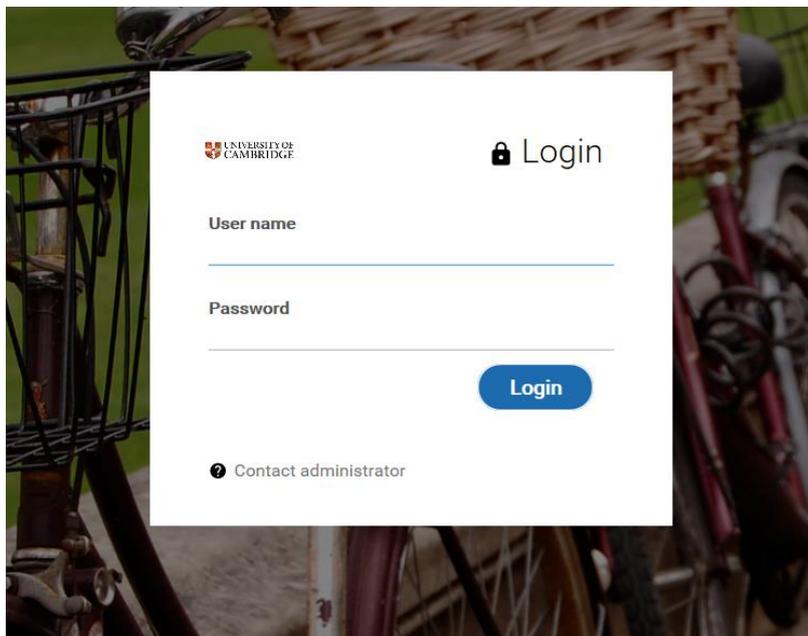
The screenshot shows the HR Systems website interface. At the top, there is a navigation bar with the University of Cambridge logo and links for 'Study at Cambridge', 'About the University', and 'Research at Cambridge'. A 'Quick links' dropdown menu is also visible. Below the navigation bar, the main heading is 'HR Systems'. A secondary navigation bar includes 'Home', 'Services', 'Training', 'Systems', 'Systems Development', and 'Contact'. The main content area features a large, colorful, abstract graphic of data points and lines. Below this graphic, there is a section titled 'Focus On' with two sub-sections: 'Services' and 'Systems Development'. On the right side, there is a sidebar with several sections: 'University Information Services (Management Information)', 'Supporting HR Systems for Recruitment, Staff Self-Service, Payroll, Pensions, Staff Benefits and Record Management.', 'UIS (Management Information) website', 'Systems Log In', 'CHRIS', 'Employee Self-Service (ESS)', 'Recruitment Administration System (RAS)', 'University Payment System (UPS)', 'Web Recruitment', and 'Quick Links'.

Select "CHRIS" from the Systems Log In section on the right hand side

Then click on “log in”

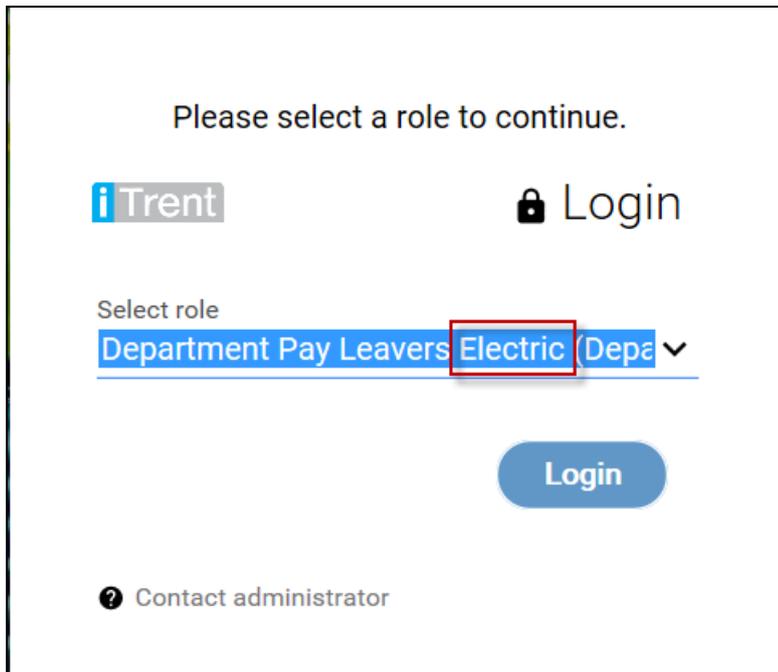


The Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the ‘Login’ Button.



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.



Please select a role to continue.

iTrent  Login

Select role
Department Pay Leavers **Electric** (Depa ▼

Login

 Contact administrator

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

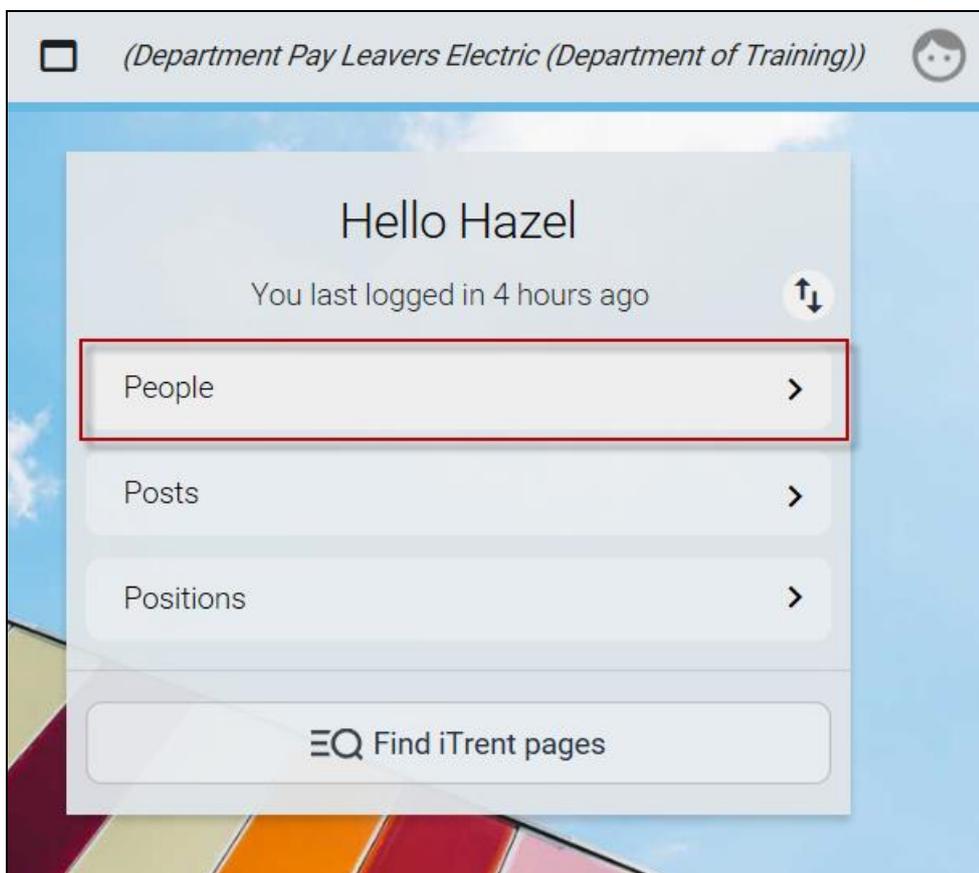


2 Search

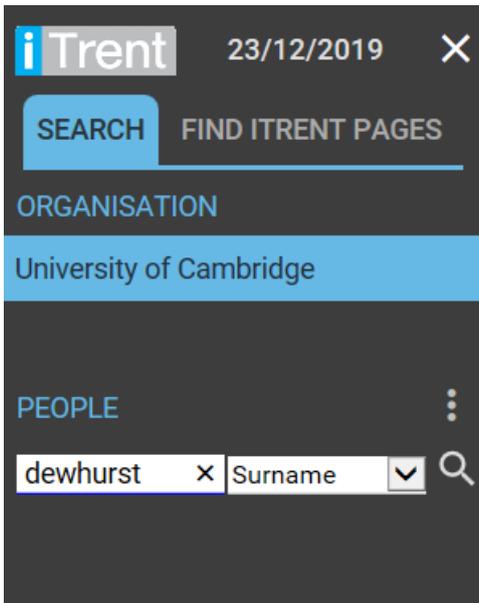
You can search by people, posts or positions

2.1 Searching for employees

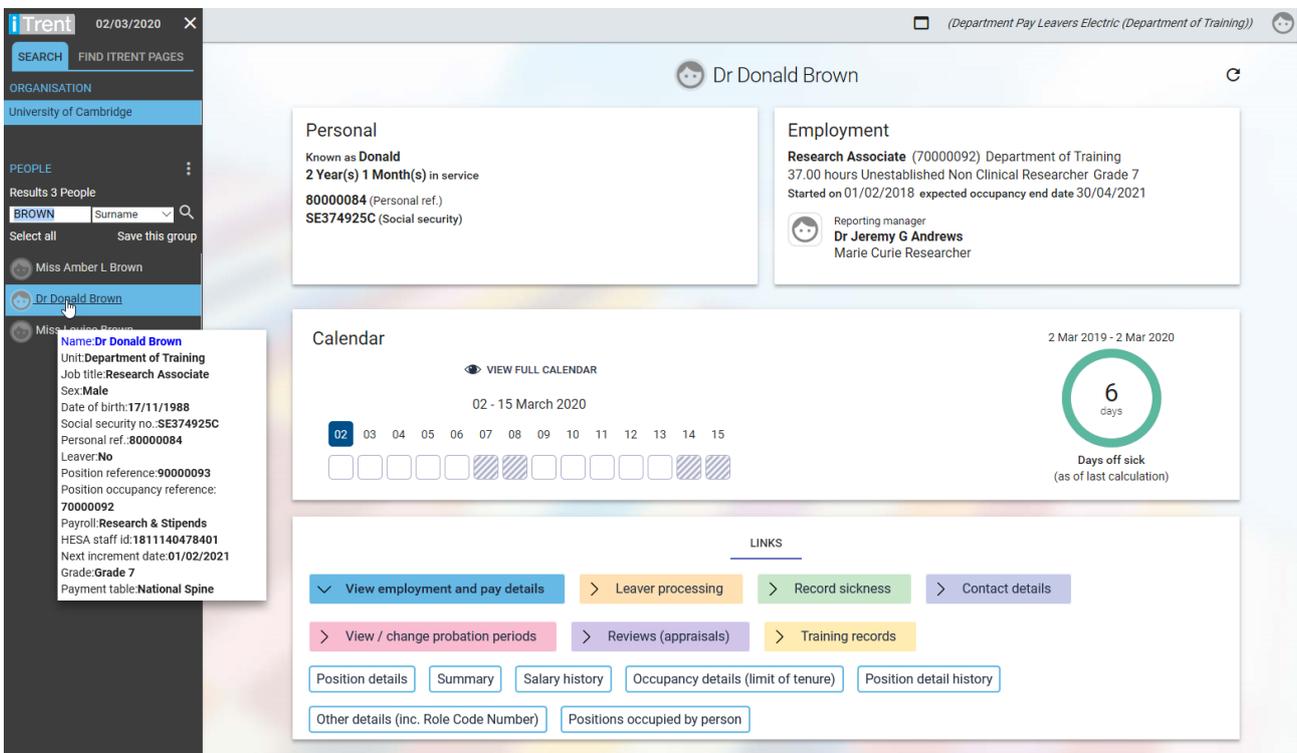
Select People.



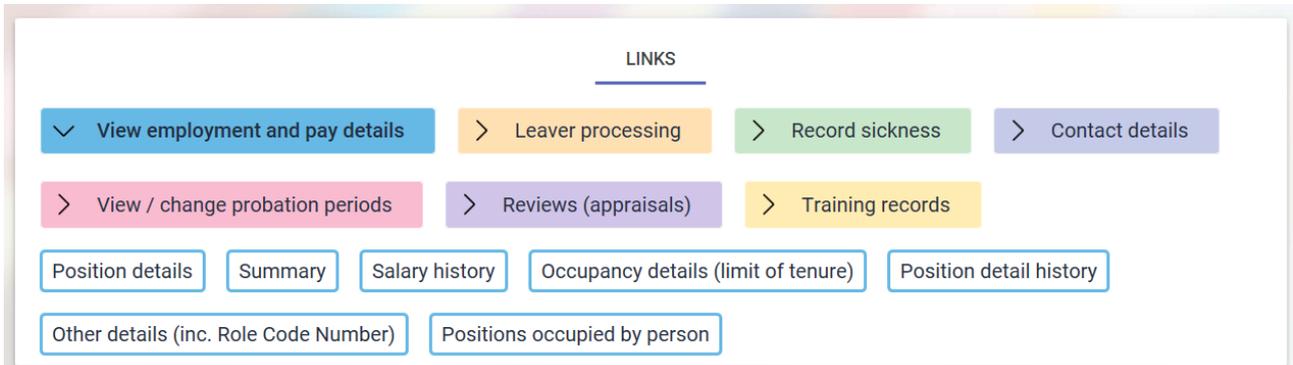
Enter the surname of the person whose details you wish to find and press enter.



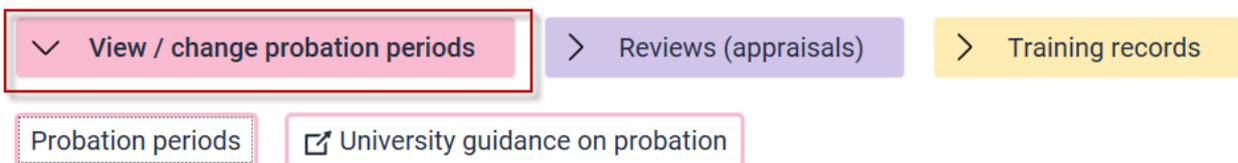
Select the record you wish to view and information will be displayed in the display pane. When you rest your mouse on the person record a pop up will be displayed.



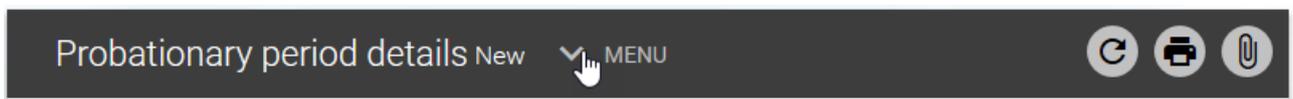
The options available to your user access are displayed as Links



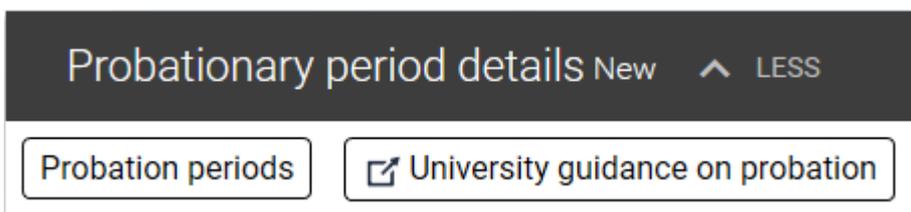
When you select a link, the options are displayed below



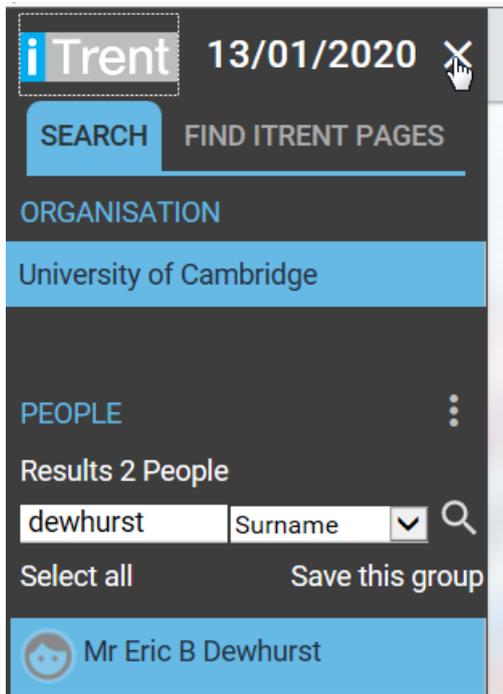
When you choose an option you will see the details contained within and can navigate to other options within that link using the menu button at the top of the screen.



Clicking on the arrow to the left of Menu displays the options.

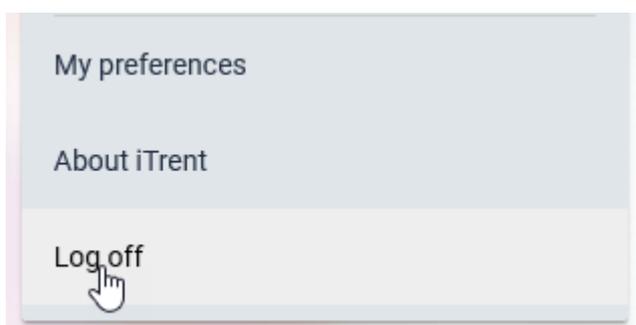
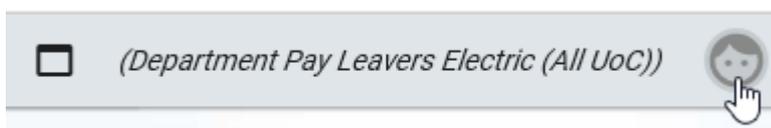


You can hide the search pane here



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.



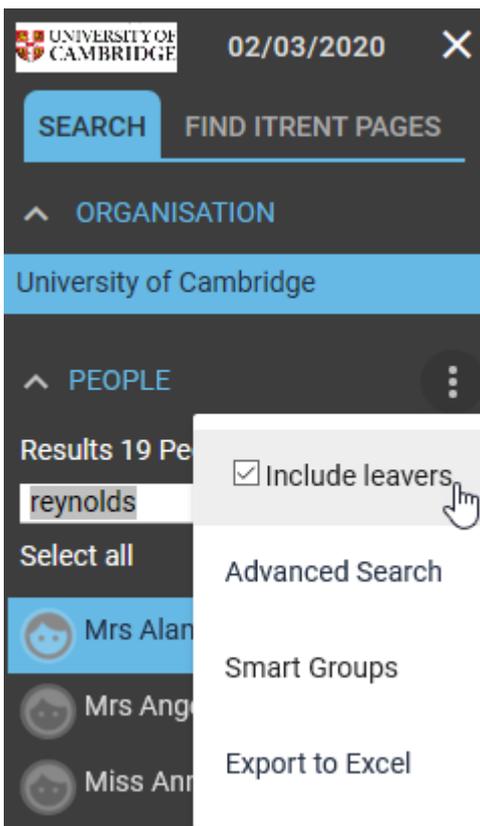
2.2 Searching for leavers.

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.

Key dates ▼ MENU





Personal

Date of birth • 

Age

Date verified 

Expected retirement date

Rule ▼

Age (years)

Age (months)

Date • 

Organisation

Start date •  

Length of service

Leaving date

Reckonable service date 

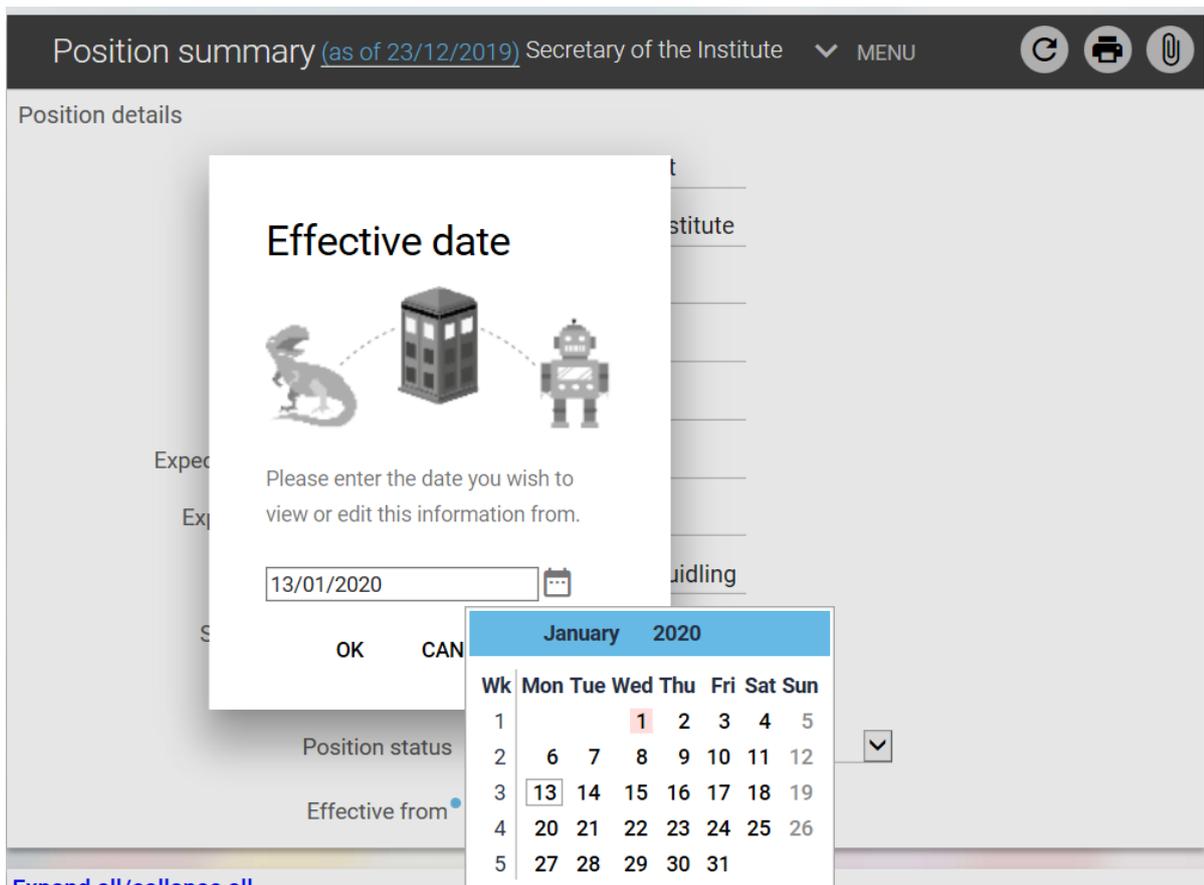
Length of reckonable service

Last working day

Re-employable

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.

Employment

< HEAD OF DEPARTMENT PROFESSOR OF MEDICINE (1987) >

Head of Department Department of Medicine
 Other (non employee) Chairmanship/Headship
 Started on 01/04/2010 expected occupancy end date 31/03/2020

 Reporting manager
Vacant

Employment

RECEPTIONIST MUSEUM ATTENDANT

Receptionist Department of History and Philosophy of Science
 8.00 hours Assistant Assistant CS Grade 2
 Started on 01/05/2015

Click on the other position title to view details

Employment

RECEPTIONIST MUSEUM ATTENDANT

Museum Attendant Department of History and Philosophy of Science
 25.00 hours Assistant Assistant M Grade 1
 Started on 15/09/2010

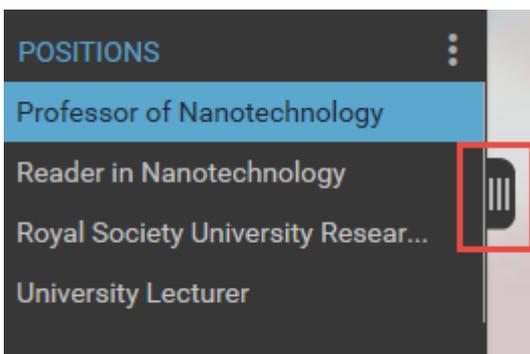
You will be required to select which position details you wish to view when you select the options within the employment and pay details. This employee has two positions to choose from



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.

Job title	Start date	End date	Contract
Professor of Nanotechnology	01/10/2011		RS Monthly
Reader in Nanotechnology	01/10/2009	30/09/2011	RS Monthly
Royal Society University Research Fellow	01/10/2002	30/09/2010	RS Monthly
University Lecturer	01/10/2006	30/09/2009	RS Monthly

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.

Employment

Research Associate (70000092) Department of Training
37.00 hours Unestablished Non Clinical Researcher Grade 7
Started on 01/02/2018 **expected occupancy end date 30/04/2021**

 Reporting manager
Dr Jeremy G Andrews
Marie Curie Researcher

To view the reason for the occupancy end date view the Occupancy details under employment and pay details.

LINKS

[View employment and pay details](#) [Leaver processing](#) [Record sickness](#) [Contact details](#)

[View / change probation periods](#) [Reviews \(appraisals\)](#) [Training records](#)

[Position details](#) [Summary](#) [Salary history](#) **[Occupancy details \(limit of tenure\)](#)** [Position detail history](#)

[Other details \(inc. Role Code Number\)](#) [Positions occupied by person](#)

Enter the effective date and the Occupancy details will be displayed. Here the date and the reason for the expected occupancy end are displayed.

Occupancy details [\(as of 27/02/2020\)](#) Research Associate (No permission status)

v MENU

Current status	Live
Occupant	Dr Donald Brown
Occupancy start	01/02/2018
Occupancy end	
Position occ. reference	70000092
Expected occupancy end date	30/04/2021
Expected occupancy end reason	Limited Funding v
End occupancy	<input type="checkbox"/>

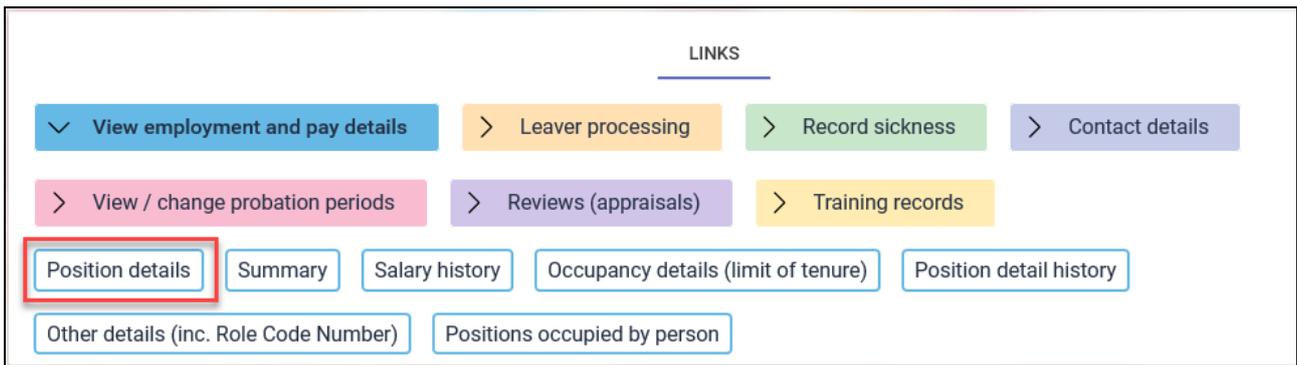
Some positions will have both an occupancy end date and a position end date. Others will just have an occupancy end date – this will be the case where an employee his covering maternity leave

Expected occupancy end date	28/03/2020
Expected occupancy end reason	Maternity Cover v
End occupancy	<input type="checkbox"/>

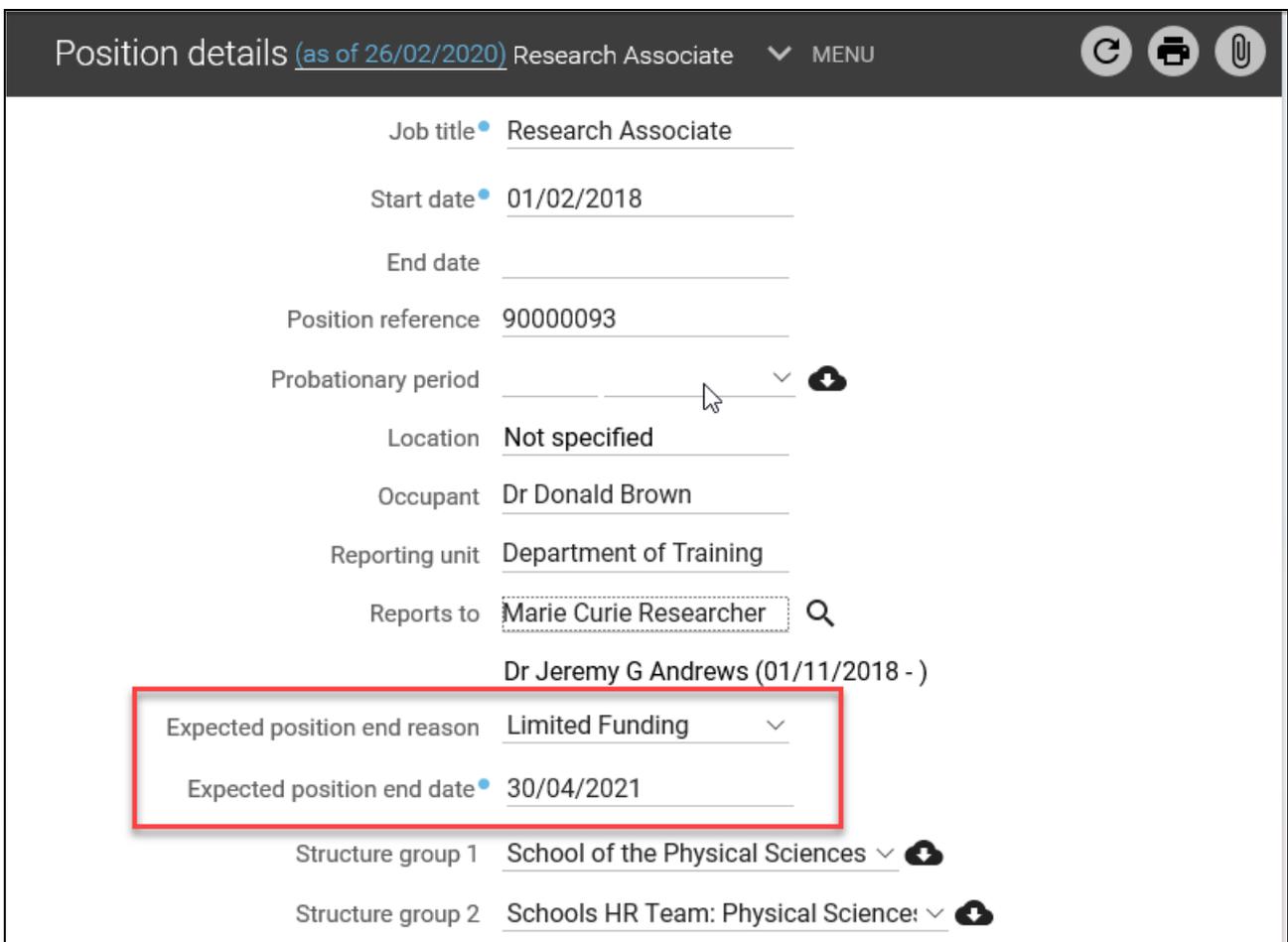
Limit of tenure details can be also be viewed in the Position Details and the Position Summary.

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:

LINKS

▼ View employment and pay details

> Leaver processing

> Record sickness

> Contact details

> View / change probation periods

> Reviews (appraisals)

> Training records

Position details

Summary

Salary history

Occupancy details (limit of tenure)

Position detail history

Other details (inc. Role Code Number)

Positions occupied by person

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


Dr Donald Brown

Position summary (as of 26/02/2020) Research Associate

▼ MENU
↻
🖨
📎

Position details

Occupant	Dr Donald Brown
Job title	Research Associate
Position reference	90000093
Occupancy start	01/02/2018
Occupancy end	
Expected occupancy end date	
Expected position end date	30/04/2021
Location	Not specified
Structure workflow group	
Organisation unit	Department of Training

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

The screenshot shows a navigation menu under the heading 'LINKS'. The menu items are: View employment and pay details (highlighted with a blue border), Leaver processing, Record sickness, Other absences, Contact details, View / change probation periods, Reviews (appraisals), and Training records. Below this is a secondary menu with icons for a list and a grid. The items in this menu are: Key dates, Position details, Summary, Salary history (highlighted with a red border and a mouse cursor), Current payscale values, and Occupancy details (limit of tenure). At the bottom, there are three more items: Position detail history, Other details (inc. Role Code Number), and Positions occupied by person.

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

Position salary change history MENU   

Exclude payment table rate change

+ Effective date	- FT Salary	- FTE value (rounded to 5 DP)	- Pro-rated salary	- FTE hours	- Grade	- Payment table	- Scalepoint	- Position	- Position reference	- Change reason
18/09/2019	40,322.00	1.00000		37.00	Grade 7 (Research)	National Spine	048	Research Associate	70048116	Annual increment
01/08/2019	38,017.00	1.00000		37.00	Grade 7 (Research)	National Spine	046	Research Associate	70048116	Payment table rate change
01/10/2018	37,345.00	1.00000		37.00	Grade 7 (Research)	National Spine	046	Research Associate	70048116	Contribution increment
18/09/2018	36,261.00	1.00000		37.00	Grade 7 (Research)	National Spine	045	Research Associate	70048116	Annual increment
01/08/2018	35,211.00	1.00000		37.00	Grade 7 (Research)	National Spine	044	Research Associate	70048116	Payment table rate change
18/09/2017	34,520.00	1.00000		37.00	Grade 7 (Research)	National Spine	044	Research Associate	70048116	New Starter

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.

LINKS

View employment and pay details

Leaver processing

Record sickness

Other absences

Contact details

View / change probation periods

Reviews (appraisals)

Training records

☰ ☰

Key dates

Position details

Summary

Salary history

Current payscale values

Occupancy details (limit of tenure)

Position detail history

Other details (inc. Role Code Number)

Positions occupied by person

	Grade	Grade 5	▼	🔍
	Payment table	National Spine	▼	
	FT Salary	035 – 27,511.00	▼	
	Protected		▼	
	Override minimum		▼	
	Override contribution-related threshold		▼	
	Override maximum		▼	
	Grade payment table	National Spine		
	Grade minimum	034 – 26,715.00		
	Contribution-related threshold	039 – 30,942.00		
	Grade maximum	039 – 30,942.00		
	Next increment date	04/06/2020		📅
	Protected rate of pay		▼	
	FTE value (rounded to 5 DP)	1.00000		
	Pro-rated rate of pay	27,511.00		

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.

Grade	Grade 7	▼	🔍
Payment table	National Spine	▼	
FT Salary	048 -- 40,322.00	▼	
Protected		▼	
Override minimum		▼	
Override contribution-related threshold		▼	
Override maximum		▼	
Grade payment table	National Spine		
Grade minimum	039 -- 30,942.00		
Contribution-related threshold	048 -- 40,322.00		
Grade maximum	048 -- 40,322.00		
Next increment date	03/03/2018		📅
Protected rate of pay		▼	
FTE value (rounded to 5 DP)	0.60000		
Pro-rated rate of pay	24,193.20		

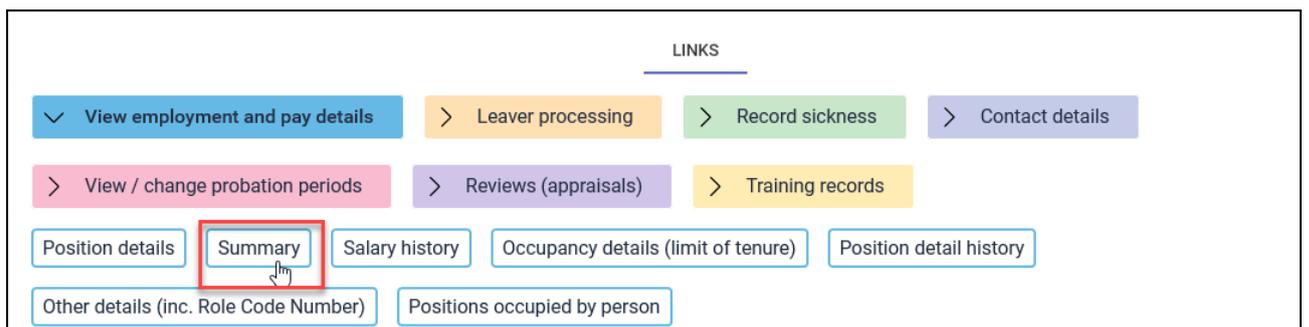
5 Position Summary

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.

 **Dr Donald Brown**

Position summary (as of 02/03/2020) Research Associate
MENU




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

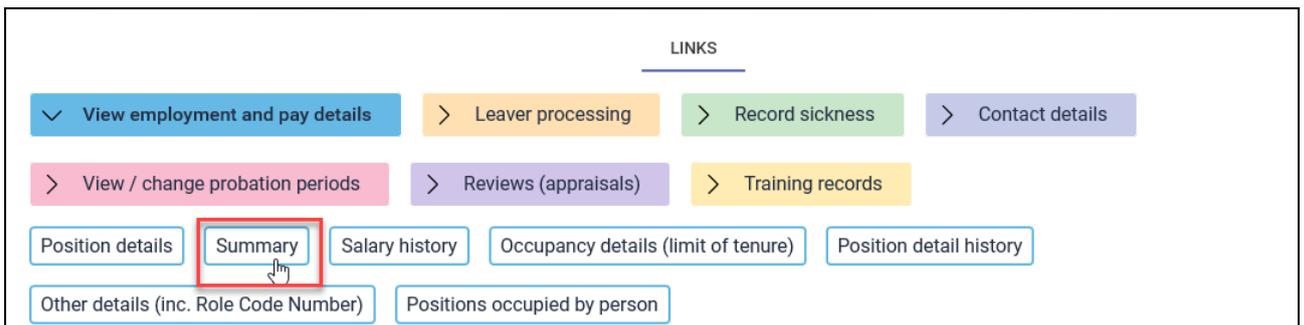
- + Reporting manager
- + History
- + Category, Basis and Type
- + Hours
- + Costing Levels
- + Elements
- + Terms and Conditions
- + Payment Details

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 ▼ MENU ↻ 🖨 📎

Position details

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

- [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.

– Costing Levels				
Status	Start date	End date	Type	Value
	01/09/2014		Structure	1: (100 % / PDAG/259.01.RG71993.ADHA)
	01/09/2014		Costing Rule	UC1

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

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

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

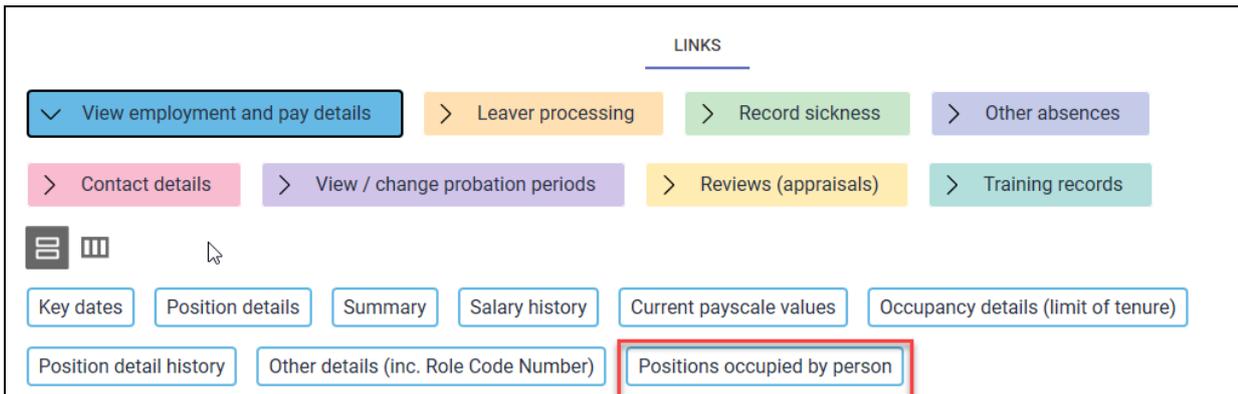
– Costing Levels				
Status	Start date	End date	Type	Value
	01/10/2019	31/03/2020	Structure	1: (65 % / RHAG/ 321.05.RG85698.ADJA)
	01/10/2019	31/03/2020	Structure	2: (35 % / RHZF/001.01.RG88620.ADJA)
	01/07/2018		Costing Rule	UC1



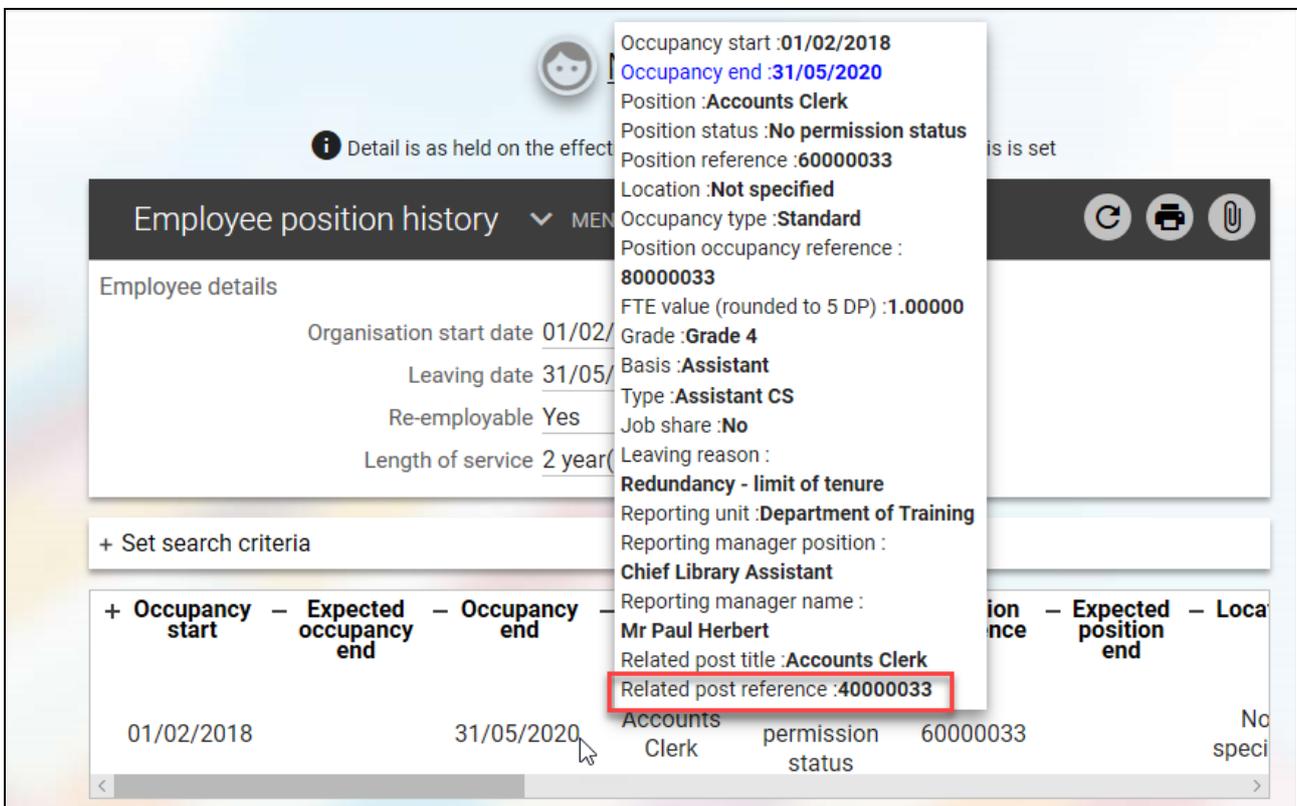
7 Finding Post reference number

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

Other details (inc. Role Code Number)

- ^ UDF CATEGORIES (POSITI... ⋮
- Invigilator Rate
- NHS Trust Information
- Permission to create
- Role Code Number
- Role Code number (new)**
- Term-time only details
- University Office
- Variable Time Employment
- ^ UDF DETAILS (POSITION) ⋮
- 08203**

UDF Details Role Code number (new) - Development Operations - Computer Associate  

▼ MENU

Role code no. (NEW) • 08203

Date start • 01/06/2017 

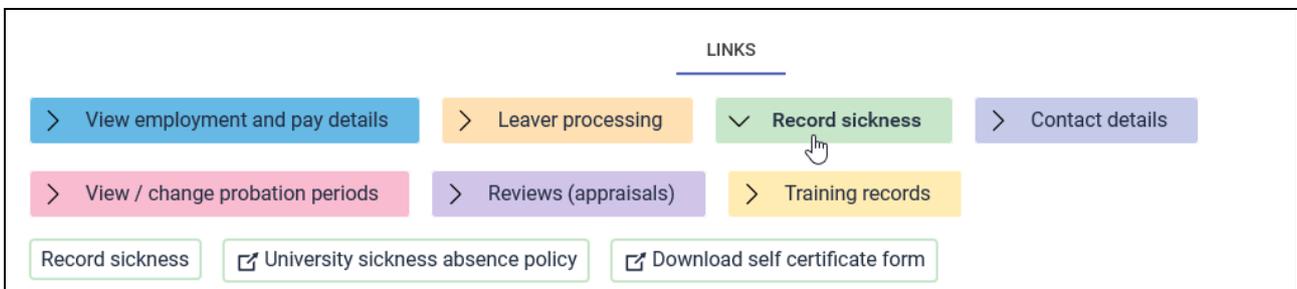
Date end _____ 

9 Absence

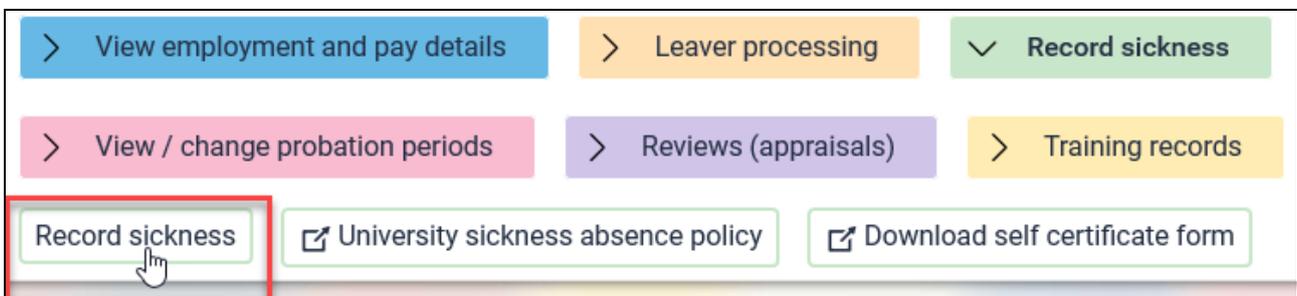
Absences within Trent are created in groups. Each group defines a generic type of absence – Holiday, Sickness, Maternity, Paternity and Other. Each group is also linked to one or more Absence Types where you can further define the type of absence (e.g. absence types of sabbatical and unpaid leave within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

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

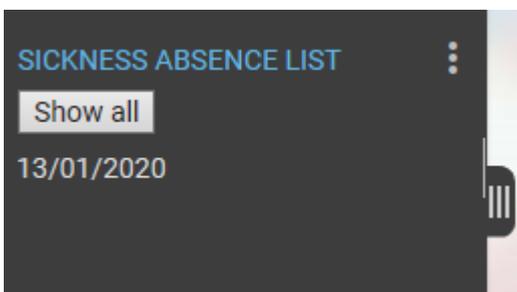
1. Search for the person for whom you wish to view absence information.
2. Select the Record sickness Link



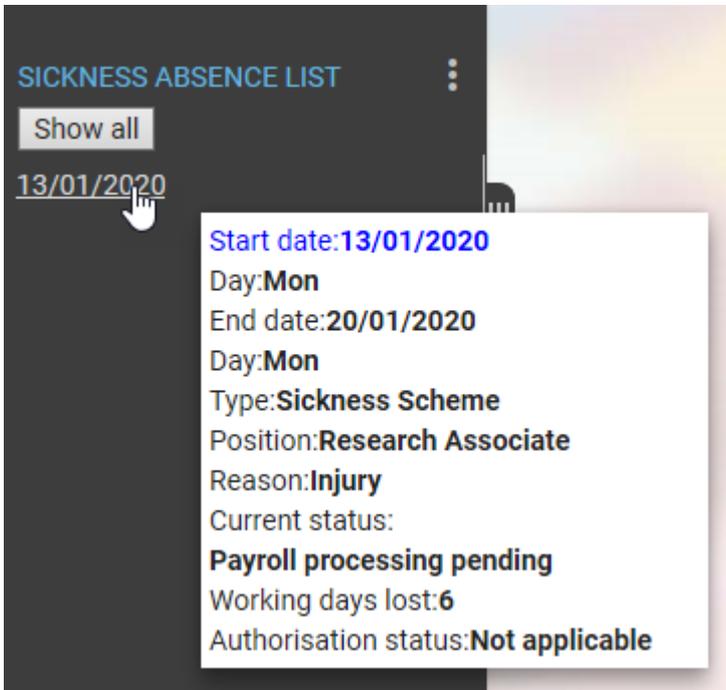
3. Select Record Sickness



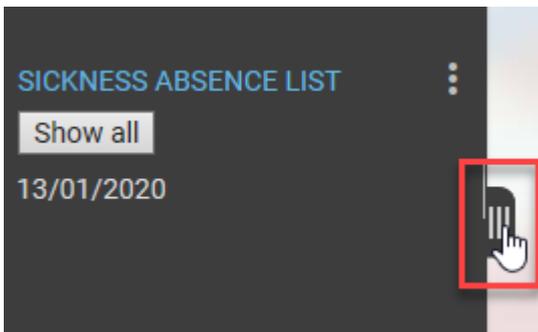
4. If the employee has any previous absences recorded these will be displayed.



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.



SICKNESS ABSENCE LIST

Show all

Start date	Day	End date	Day	Type	Position	Reason	Ci
13/01/2020	Mon	20/01/2020	Mon	Sickness Scheme	Research Associate	Injury	Payro

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.

Dr Donald Brown

Sickness absence details New ▼ MENU ↻ 🖨 📎

Sickness period

Sickness period • Part day
Full day
More than one day

Absence start

Absence start date • 📅

Absence start type Full day ▼

Absence end

Absence end date 📅

Absence end type Full day ▼

Expected end date 📅

Absence

Absence type • Sickness Scheme ▼ Set as default

Absence reason <None> ▼

Hide absence reason

Sickness absence details New ▼ MENU ↻ 🖨 📎

Sickness period

Sickness period • Full day ▼

Absence start

Absence start date •

Absence end

Expected end date

Absence

Absence type • Sickness Scheme

Absence reason <None>

Hide absence reason

March 2020

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
9							1
10	2	3	4	5	6	7	8
11	9	10	11	12	13	14	15
12	16	17	18	19	20	21	22
13	23	24	25	26	27	28	29
14	30	31					

Today is Mon, 2 Mar 2020

Dr Donald Brown

Sickness absence details New ▼ MENU



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 ▼

Expected end date

Absence

Absence type • Sickness Scheme ▼ Set as default

Absence reason Cold or Flu ▼

Hide absence reason

SAVE

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.

LINKS

[View employment and pay details](#)

[Leaver processing](#)

[Record sickness](#)

[Contact details](#)

[View / change probation periods](#)

[Reviews \(appraisals\)](#)

[Training records](#)

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

[View employment and pay details](#)

[Leaver processing](#)

[Record sickness](#)

[Contact details](#)

[View / change probation periods](#)

[Reviews \(appraisals\)](#)

[Training records](#)

Addresses

Phone and email

Emergency contacts

Address details (as of 02/03/2020) Mr Carl Jones MENU

Address type •

Mailing address

Country

Address line 1

Address line 2

Address line 3

Post town

County

Postcode 🔍

Start date •

End date

SAVE

DELETE

NEW

Where you are adding new address details it is essential to use the New button (do NOT overwrite the details) as this is a requirement of the HMRC.

Add the new address details and click on Save.

Address details (as of 02/03/2020) New ▾ MENU

Address type • Home ▾

Mailing address

Country United Kingdom ▾

Address line 1 The Beeches

Address line 2 South Street

Address line 3

Post town

County

Postcode 🔍

Start date • 02/03/2020 📅

End date 📅

SAVE

Address details (as of 02/03/2020) New ▾ MENU

You can then use the menu in the subject header to change other contact details as required.

Address details (as of 02/03/2020) New ↑ LESS

Addresses Phone and email Emergency contacts

 Mr Carl Jones

Contact details Mr Carl Jones ▼ MENU ↺ 🖨️ 📎

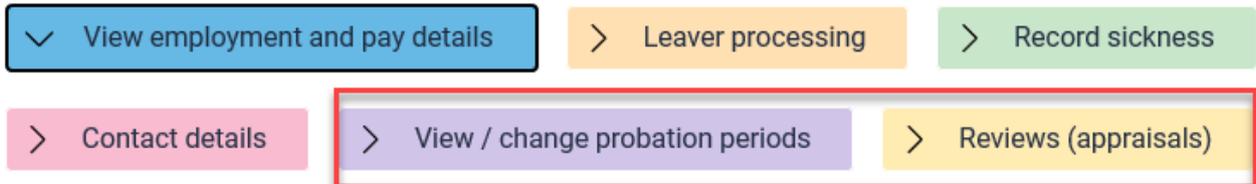
Means of contact • Home telephone ▼

Contact at • 01223 123456

[SAVE](#) [DELETE](#) [NEW](#)

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.

A screenshot of a web form titled 'Probationary period details New' with a 'MENU' dropdown and icons for refresh, print, and upload. The form contains the following fields:

- Job title: Accounts Clerk (dropdown menu)
- Reason: New appointment (dropdown menu)
- Complete:
- Start date: 08/01/2018 (calendar icon)
- End date: 08/07/2020 (calendar icon)

Select the complete tick box and click on save.

Probationary period details New MENU

Job title Accounts Clerk

Reason New appointment

Complete

Start date 08/01/2018

End date 08/07/2020

SAVE

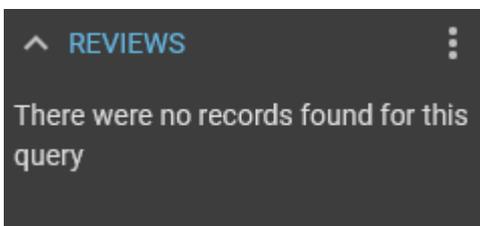
11.1.2 Reviews

Select Reviews

[View employment and pay details](#) [Leaver processing](#) [Record sickness](#)

[Contact details](#) [View / change probation periods](#) [Reviews \(appraisals\)](#)

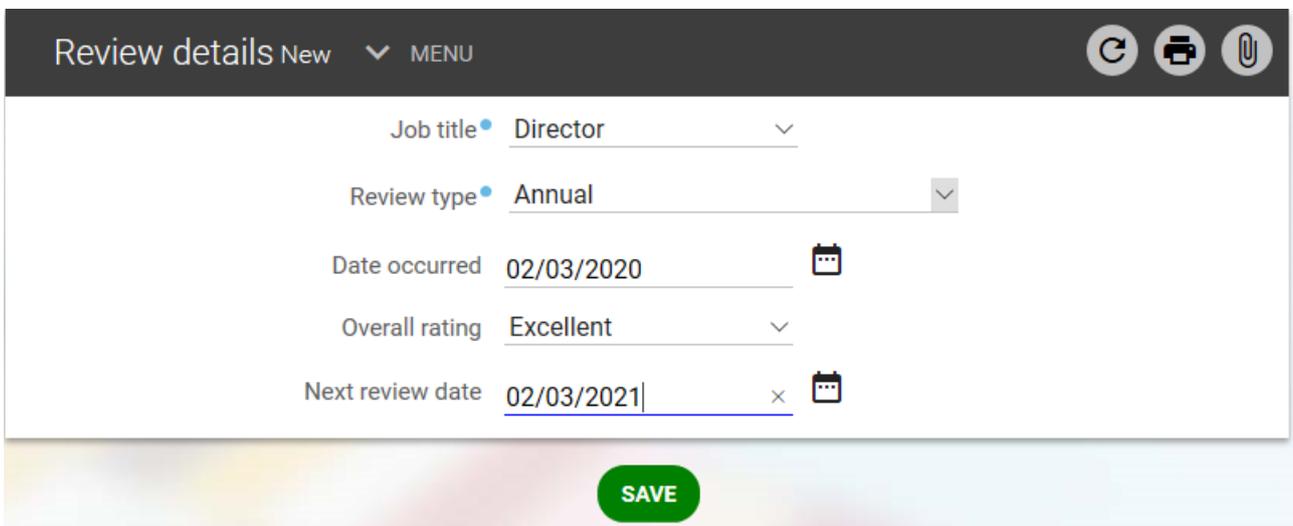
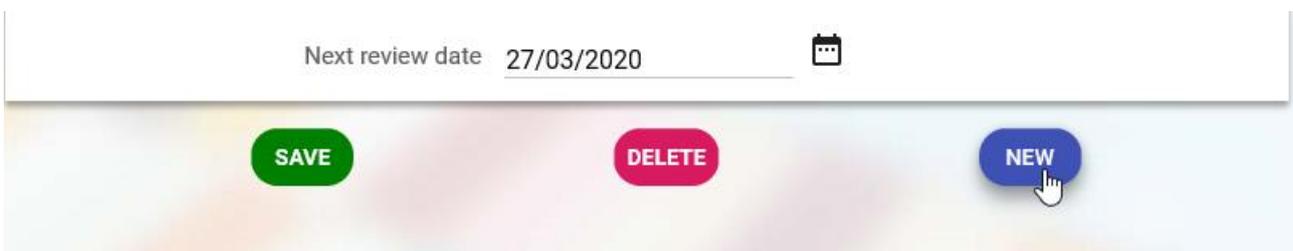
Where no previous review has taken place the screen will appear as below.



If previous reviews have taken place they will be displayed



Enter a new review using the New button



Click on Save



Probationary reviews can also be entered.

Review details New ▼ MENU ↻ 🖨 📎

Job title • Advanced Research Fellow ▼

Review type • Review meeting during probation pei ▼

Date occurred 04/03/2020 📅

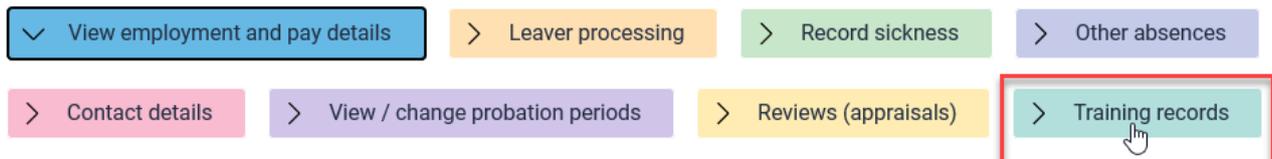
Overall rating Excellent ▼

Next review date 06/04/2020 × 📅

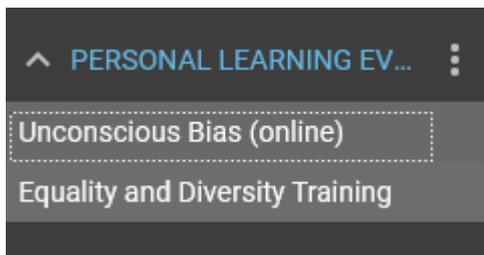
SAVE 🖱

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.



13 Making a person a Leaver

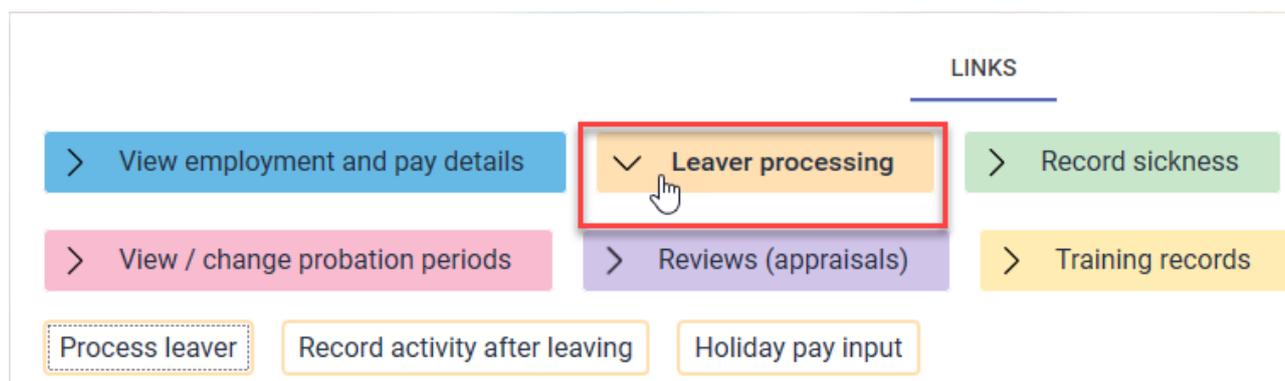
This process should be completed as soon as you know when an individual is leaving.

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



The screenshot shows a 'LINKS' menu with several options. The 'Leaver processing' option is highlighted with a red box and a mouse cursor. Other options include 'View employment and pay details', 'Record sickness', 'View / change probation periods', 'Reviews (appraisals)', 'Training records', 'Process leaver', 'Record activity after leaving', and 'Holiday pay input'.

3. Enter the effective date

4. The Occupancy maintenance screen will be displayed.
5. Enter the Leaving Date

Occupancy maintenance MENU

Leaving details

Leaving date •

Reason for leaving •

Occupancy details

	University of Cambridge
	Asst Monthly
	Accounts Clerk (60000033)

May 2020
✕

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
18					1	2	3
19	4	5	6	7	8	9	10
20	11	12	13	14	15	16	17
21	18	19	20	21	22	23	24
22	25	26	27	28	29	30	31

Today is Mon, 2 Mar 2020

SAVE

6. Enter the Reason for Leaving

Occupancy maintenance (as of 02/03/2020) MENU

Leaving details

Leaving date 31/05/2020

Reason for leaving

Occupancy details	Reason for leaving	
University of Cambridge	Capability	
Asst Monthly	Death	
Accounts Clerk (6000003	Declined re-employment	<input type="checkbox"/>
	Dismissal	<input type="checkbox"/>
	End of Affiliated Lectureship	<input type="checkbox"/>
	End of Apprenticeship	<input type="checkbox"/>
	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

⚠ Current selections will result in this person's contract ending.
⚠ Current selections will result in this person leaving the organisation.
⚠ This person will leave any organisation, contract or position selected.

Occupancy maintenance (as of 02/03/2020) MENU

Leaving details

Leaving date • 31/05/2020

Reason for leaving • Redundancy - limit of tenure

Occupancy details

	University of Cambridge	<input checked="" type="checkbox"/>
	Asst Monthly	<input checked="" type="checkbox"/>
	Accounts Clerk (60000033)	<input checked="" type="checkbox"/>

SAVE

- 8. Click on Save



9. Changes have been saved message will be displayed. Select Record Activity after leaving.

i Changes have been saved.

⚠ This person will leave any organisation, contract or position selected.

Occupancy maintenance (as of 02/03/2020) MENU

Process leaver
Record activity after leaving
Holiday pay input

Occupancy details

	University of Cambridge	<input type="checkbox"/>
	Asst Monthly	<input type="checkbox"/>
	Accounts Clerk (60000033)	<input type="checkbox"/>

10. Enter the Activity after leaving and Location after leaving details

HESA Personal details (as of 02/03/2020) New MENU

Activity after leaving ▼

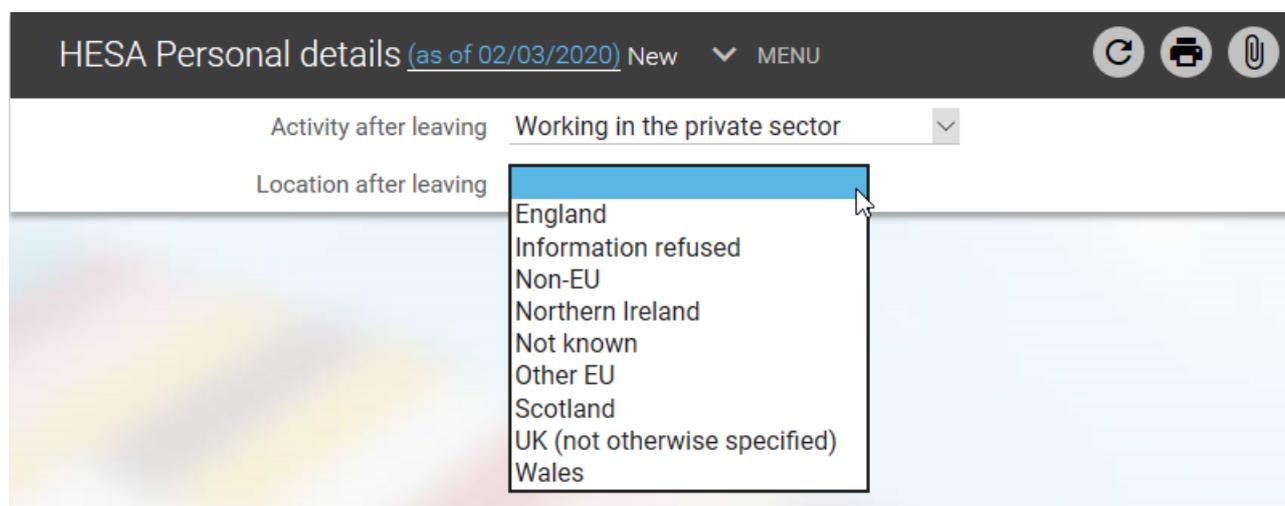
Location after leaving ▼

HESA Personal details (as of 02/03/2020) New MENU

Activity after leaving	<ul style="list-style-type: none"> NHS/General medical practice/General dental practice Not in regular employment Not known Registered as a student Retired Self-employed Working in a higher education institution Working in a research institute (private) Working in a research institute (public) Working in another education institution Working in another public sector organisation Working in the private sector Working in the voluntary sector
Location after leaving	

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.

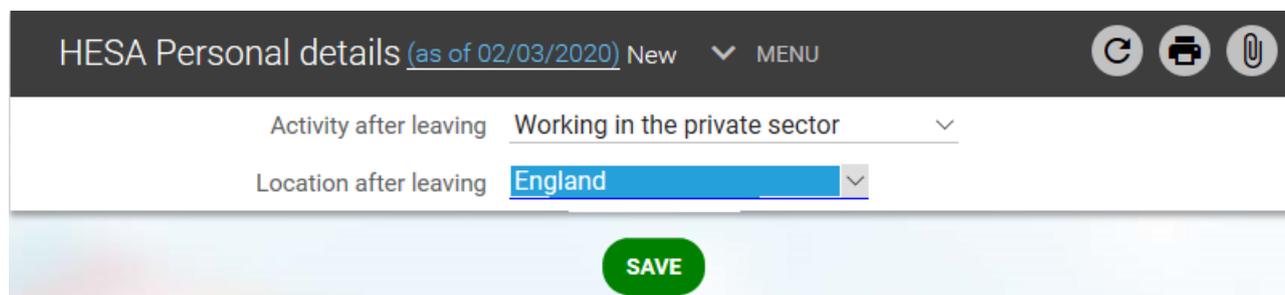


HESA Personal details (as of 02/03/2020) New ▼ MENU

Activity after leaving Working in the private sector ▼

Location after leaving

- England
- Information refused
- Non-EU
- Northern Ireland
- Not known
- Other EU
- Scotland
- UK (not otherwise specified)
- Wales



HESA Personal details (as of 02/03/2020) New ▼ MENU

Activity after leaving Working in the private sector ▼

Location after leaving England ▼

SAVE

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

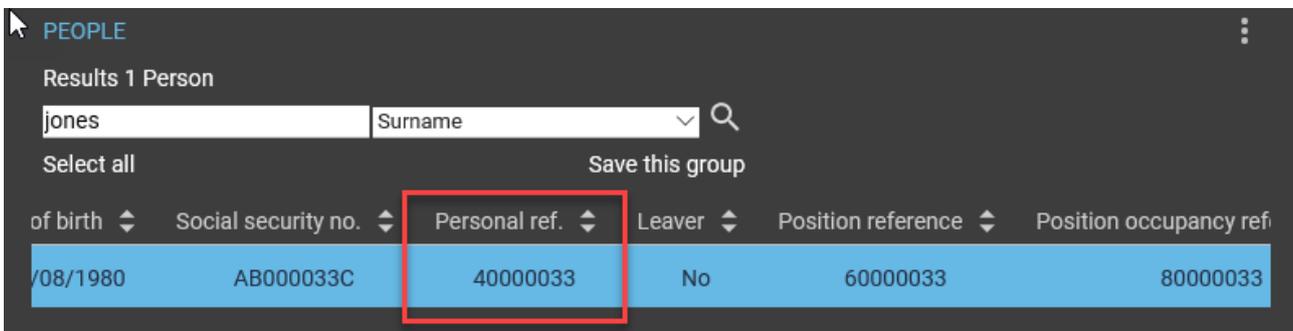
A fast input screen has been created for entering Holiday Pay. This must only be used for a person who is a leaver. It **must not** be used where an employee is transferring to another University department as their leave records must transfer with them. Leave and sickness records should be transferred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



of birth	Social security no.	Personal ref.	Leaver	Position reference	Position occupancy ref
/08/1980	AB000033C	40000033	No	60000033	80000033

Or from the person summary screen here:

Personal

Known as **Carl**

2 Year(s) 1 Month(s) in service

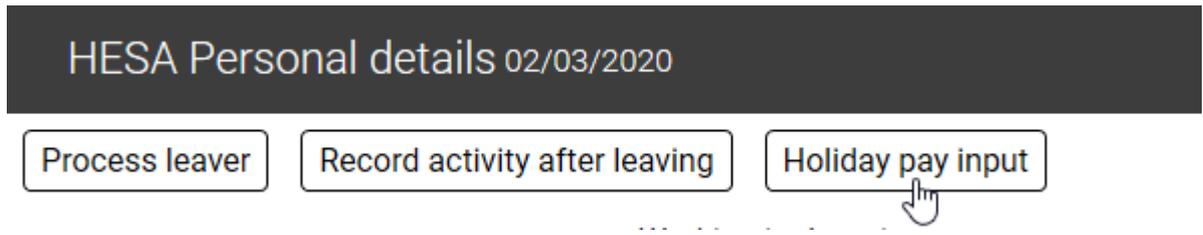
40000033 (Personal ref.)

AB000033C (Social security)

Select the Holiday pay input option from leaver processing.

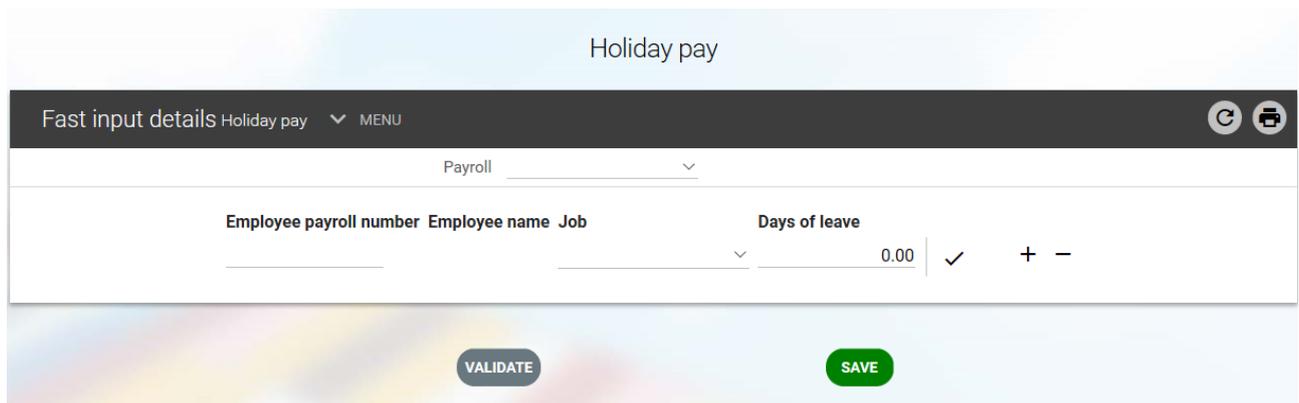


Or from the shortcut menu

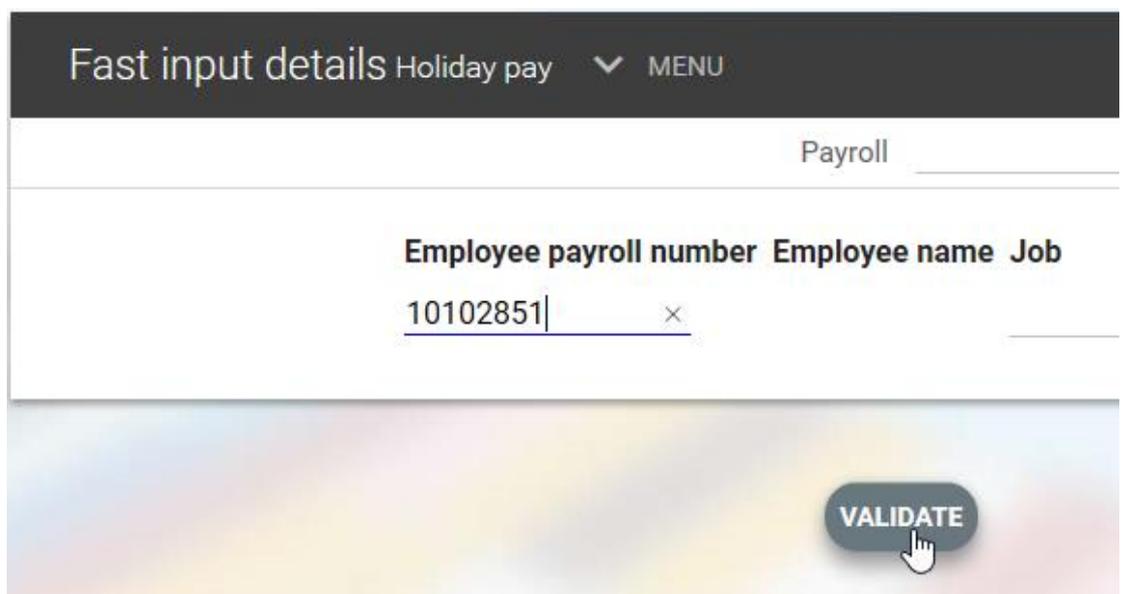


The fast input details screen will be displayed.

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

Employee payroll number	Employee name	Job	Days of leave			
10102851	Mrs Hazel E Turton	CHRIS Trainer (Human Resources Di	3	✓	+	-

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

Employee payroll number	Employee name	Job	Days of leave			
10102851	Mrs Hazel E Turton	CHRIS Trainer (Human Resources Di	3	✓	+	-
			0	✓	+	-

Click on Save

