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1 Introduction

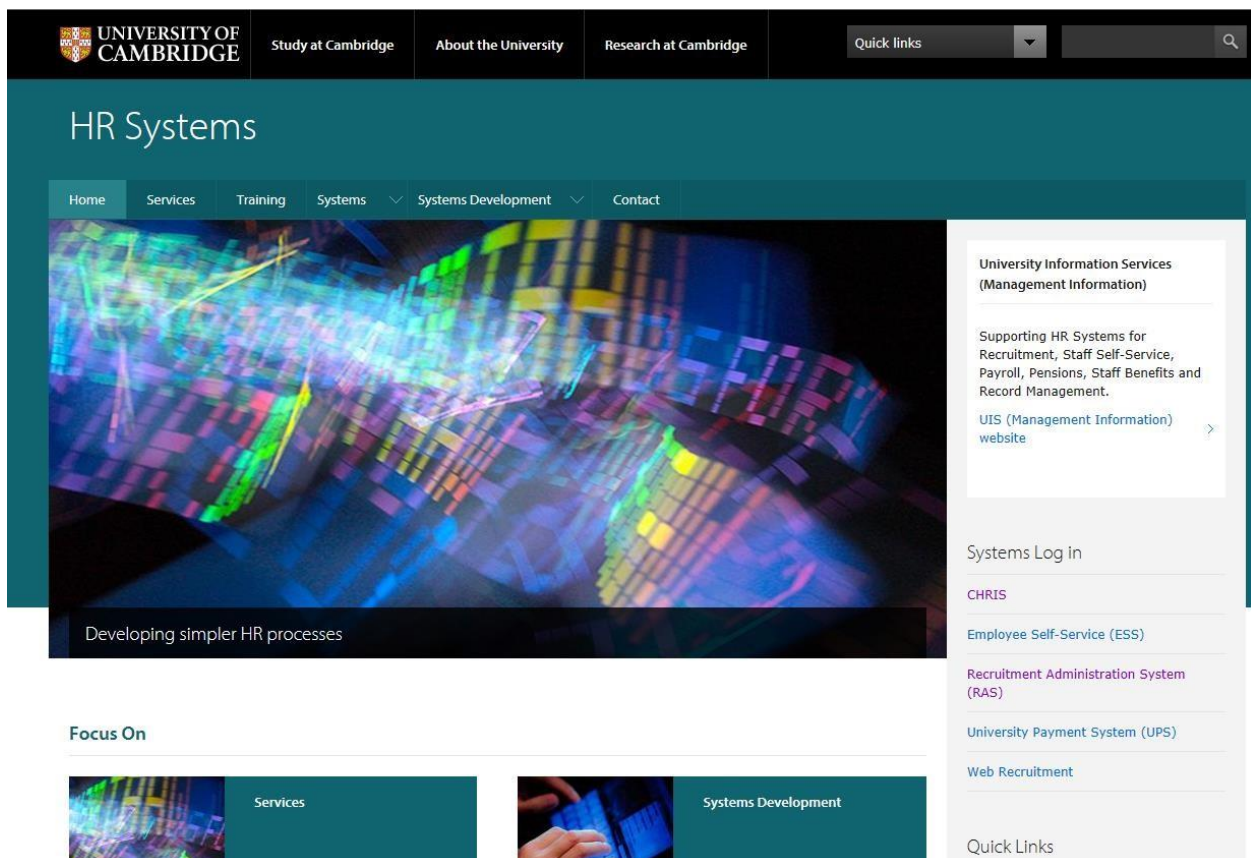
The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called **Cambridge Human Resources Information System (CHRIS)**.

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

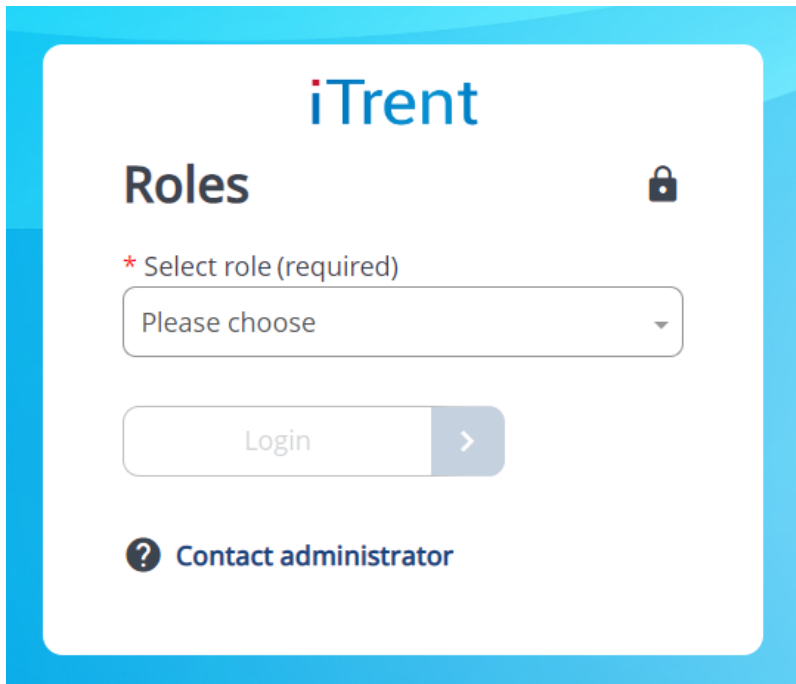
Then click on “log in”

CHRIS for Managers and Administrators

 **Log in:** If you are a registered CHRIS user, please [log in](#).

Do not disclose your Raven password to anyone and only enter it on web pages with URLs that start <https://raven.cam.ac.uk/>.

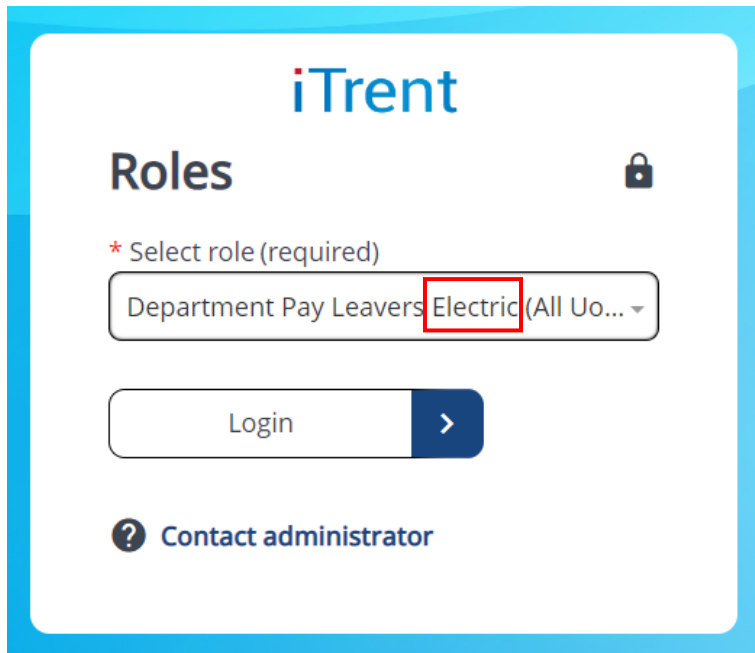
The Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the 'Login' Button.



The login screen for iTrent Roles is displayed within a blue-bordered frame. At the top, the iTrent logo is shown. Below it, the word 'Roles' is displayed next to a lock icon. A red asterisk indicates a required field: '* Select role (required)'. Below this is a dropdown menu with the text 'Please choose' and a downward arrow. A 'Login' button with a right-pointing arrow is positioned below the dropdown. At the bottom, there is a link that says '? Contact administrator'.

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.



The screenshot shows the iTrent 'Roles' selection interface. At the top is the iTrent logo. Below it, the word 'Roles' is displayed next to a lock icon. A red asterisk indicates a required field: '* Select role (required)'. Below this is a dropdown menu with the text 'Department Pay Leavers Electric (All Uo...' and a downward arrow. The word 'Electric' is highlighted with a red box. Below the dropdown is a 'Login' button with a right-pointing arrow. At the bottom, there is a link that says '? Contact administrator'.

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

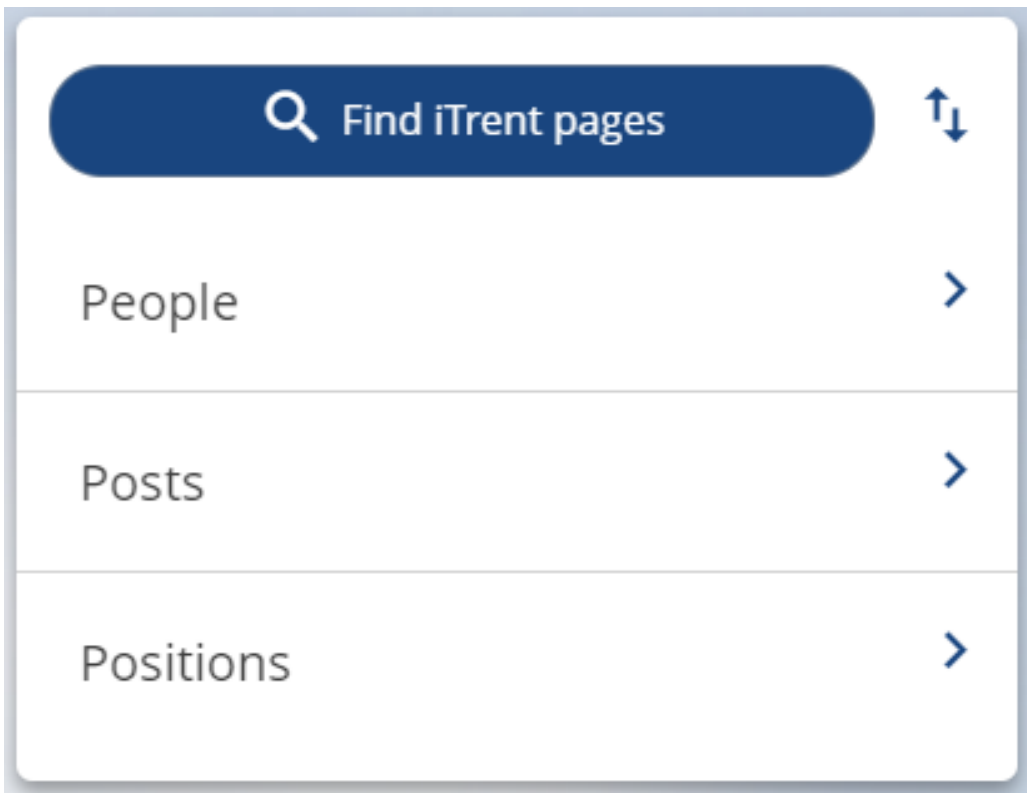


2 Search

You can search by people, posts or positions.

2.1 Searching for employees

Select People.



The screenshot shows a search interface with a dark blue search bar at the top containing a magnifying glass icon and the text "Find iTrent pages". To the right of the search bar is a vertical double-headed arrow icon. Below the search bar are three white rectangular buttons with rounded corners, each containing a label and a right-pointing chevron icon. The buttons are labeled "People", "Posts", and "Positions" from top to bottom.

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

UNIVERSITY OF CAMBRIDGE

02/02/2023

X

SEARCHFIND ITRENT PAGES

Organisation

University of Cambridge

People

Surname

Forena...

Q

+

-

Results 1 Person

Select all

Save this group

Mr

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.

UNIVERSITY OF CAMBRIDGE

02/02/2023

X

SEARCHFIND ITRENT PAGES

Organisation

University of Cambridge

People

Surname

Forena...

Q

+

-

Results 1 Person

Select all

Save this group

Mr

Mr

Personal

Known as Kweku born on 10/03/1993
1 Year(s) 4 Month(s) Reasonable service
(Personal ref.)
(Social security)
@yahoo.co.uk (Personal)
@cam.ac.uk (Work)
(Personal)

Employment

Research Associate (41042508) | Not specified | Department of Applied Mathematics and Theoretical Physics
37.00 hours | Unestablished | Non Clinical Researcher | Grade 7 (Research) | Scalepoint 044
Occupancy started on 01/01/2022 | expected occupancy end date 31/12/2024
Reporting manager
Dr Randolph Altmeyer
Assistant Professor

Calendar

VIEW FULL CALENDAR

02 - 15 February 2023

02 03 04 05 06 07 08 09 10 11 12 13 14 15

0

No sickness
(as of last calculation)

LINKS

View employment and pay details

Leaver processing

Record sickness

Other absences

Immigration Details

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

Name: Mr

Unit: Department of Applied Mathematics and Theoretical Physics

Job title: Research Associate

Sex: Male

Date of birth: 10/03/1993

Social security no.:

Personal ref.:

Leaver: No

Position reference: 70087153

Position occupancy reference: 41042508

Payroll: Research & Stipends

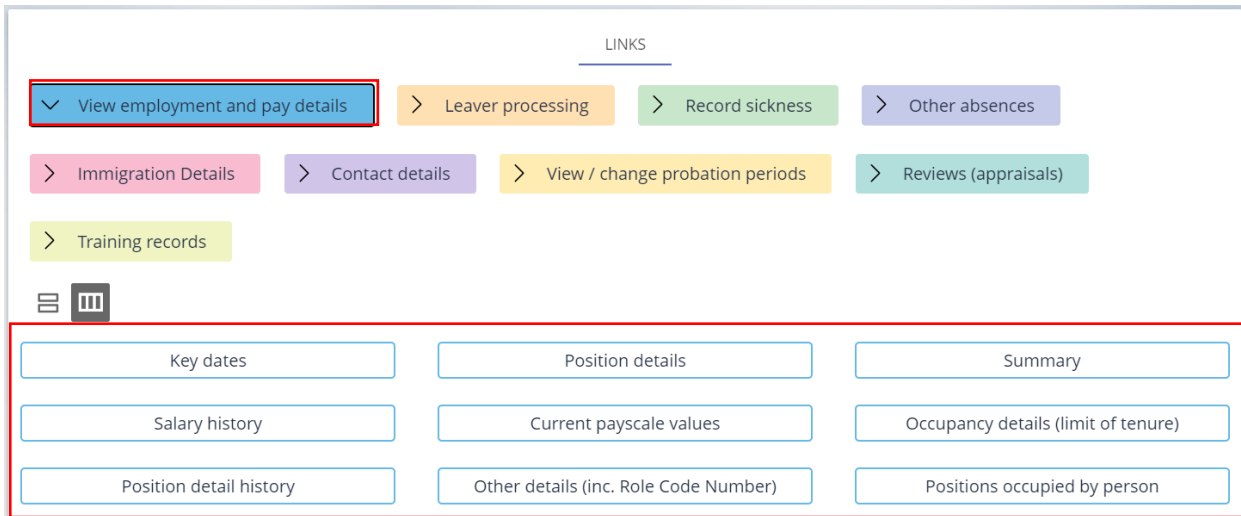
HESA staff id: 2111140509392

Next increment date: 01/10/2023

Grade: Grade 7 (Research)

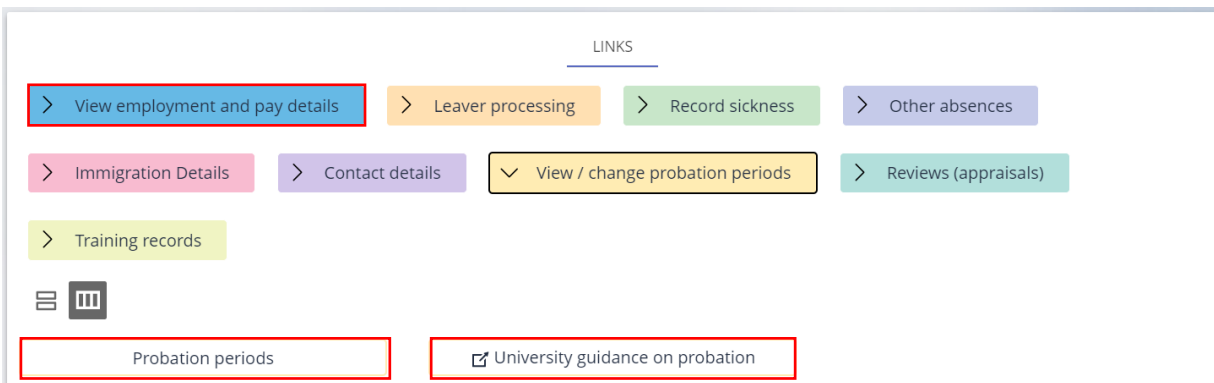
Payment table: National Spine

The options available to your user access are displayed as Links



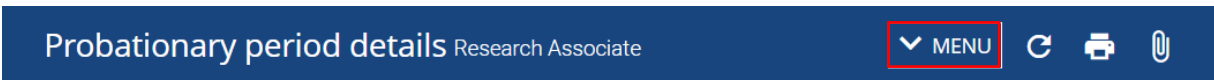
The screenshot shows the 'LINKS' section of the CHRIS interface. A red box highlights the 'View employment and pay details' link, which has a dropdown arrow. Below the links, there is a grid of buttons for various details: Key dates, Position details, Summary, Salary history, Current payscale values, Occupancy details (limit of tenure), Position detail history, Other details (inc. Role Code Number), and Positions occupied by person.

When you select a link, the options are displayed below



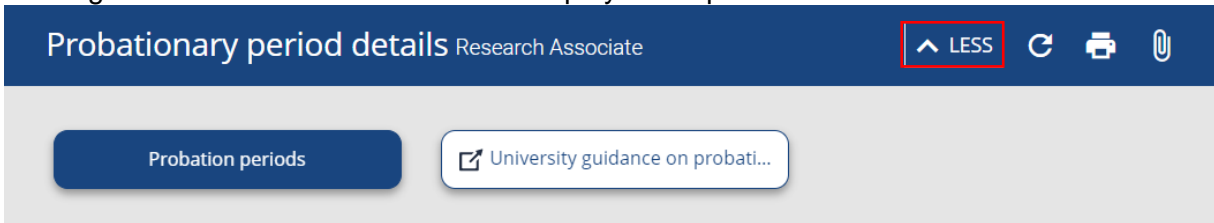
The screenshot shows the 'LINKS' section with 'View / change probation periods' selected. Below the links, there are two buttons: 'Probation periods' and 'University guidance on probation'.

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.



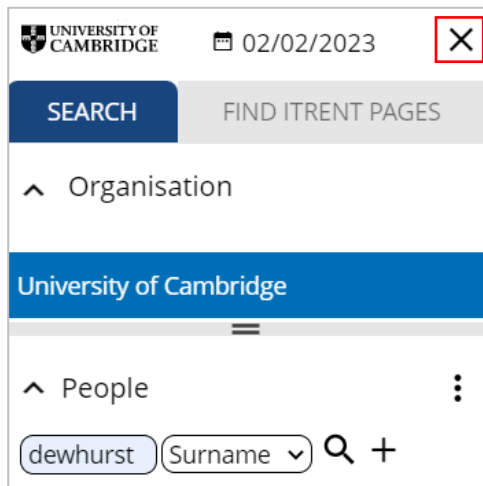
The screenshot shows the 'Probationary period details' page for a 'Research Associate'. A red box highlights the 'MENU' button, which has a dropdown arrow. To the right of the menu button are icons for refresh, print, and download.

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



The screenshot shows the 'Probationary period details' page with the menu open. A red box highlights the 'LESS' button, which has an upward arrow. Below the menu, there are two buttons: 'Probation periods' and 'University guidance on probation'.

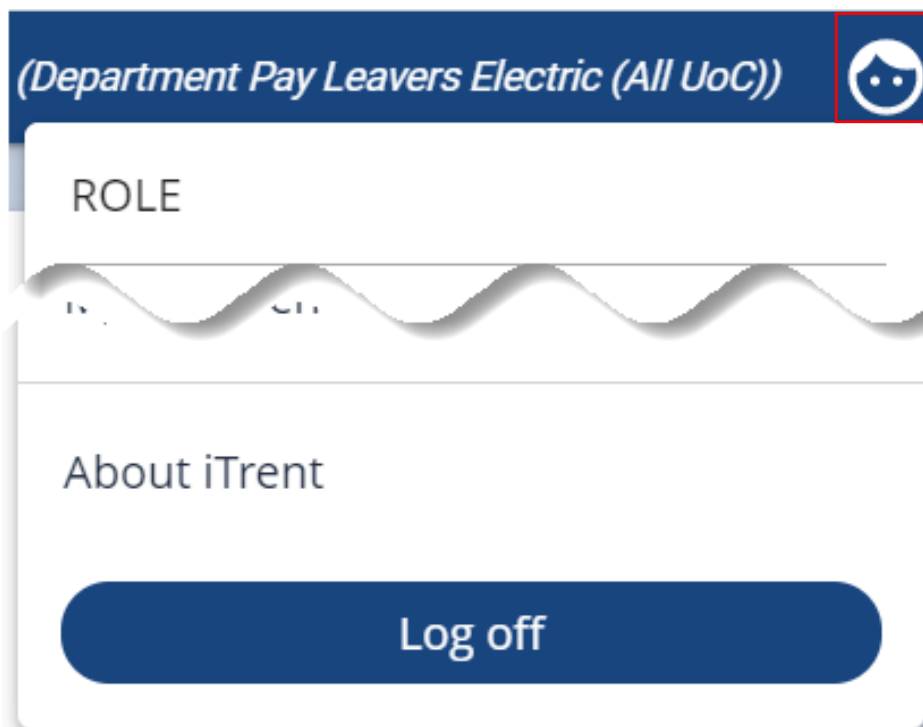
You can hide the search pane here:



And display again by clicking on the Menu button

 MENU

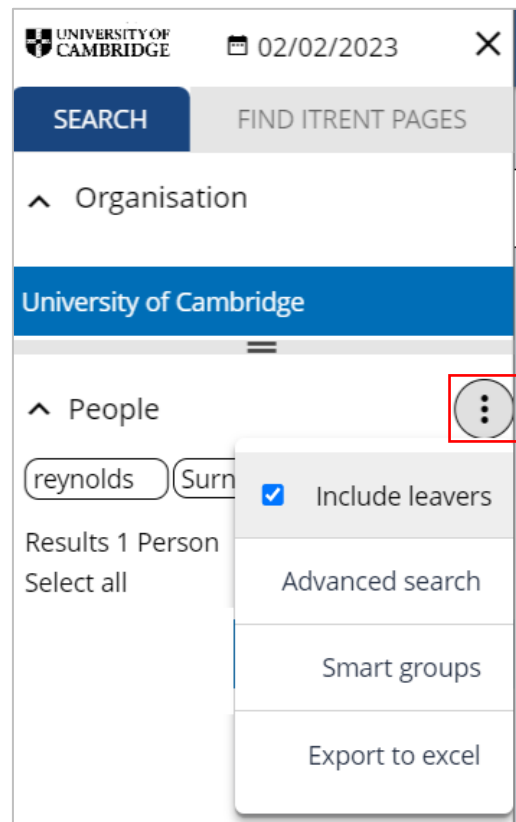
To log off select the button at the top right-hand side of the screen and select Log off.



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 3 dots 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 *

04/11/1981

📅

Age

41 year(s) 2 month(s)

Date verified

📅

Expected retirement date

Rule

Date

▼

Age (years)

67

Age (months)

10

Date *

30/09/2049

📅

Organisation

Start date *

20/10/2003

📅 ✕

Length of service

3 year(s) 11 month(s)

Leaving date

09/10/2007

Reckonable service date

18/06/2001

📅

Length of reckonable service

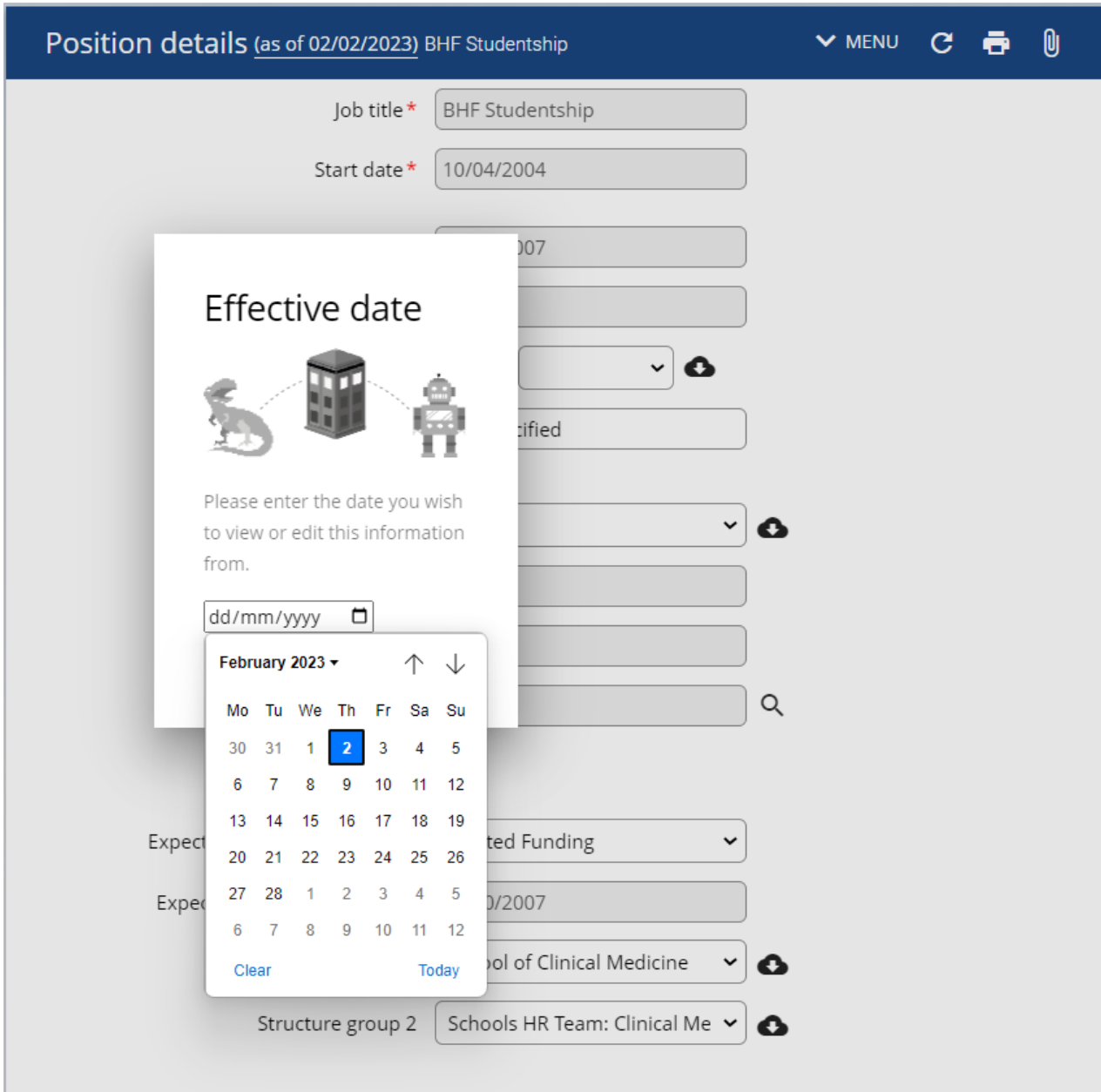
6 year(s) 3 month(s)

Last working day

Save

2.3 Entering effective date

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



Position details (as of 02/02/2023) BHF Studentship

Job title* BHF Studentship

Start date* 10/04/2004

Effective date

Please enter the date you wish to view or edit this information from.

dd/mm/yyyy

February 2023

Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

Clear Today

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:



Mr Eric B Dewhurst

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

MUSEUM ATTENDANT

BUILDING SERVICES TECHNICIAN

Museum Attendant (40008260) | Not specified | Fitzwilliam Museum
0.00 hours | Assistant | Assistant M | Grade 1 | Scalepoint 021
Occupancy started on 06/12/2005

 Reporting manager
Vacant
Visitor Services Manager


Click on the other position title to view details:

Employment

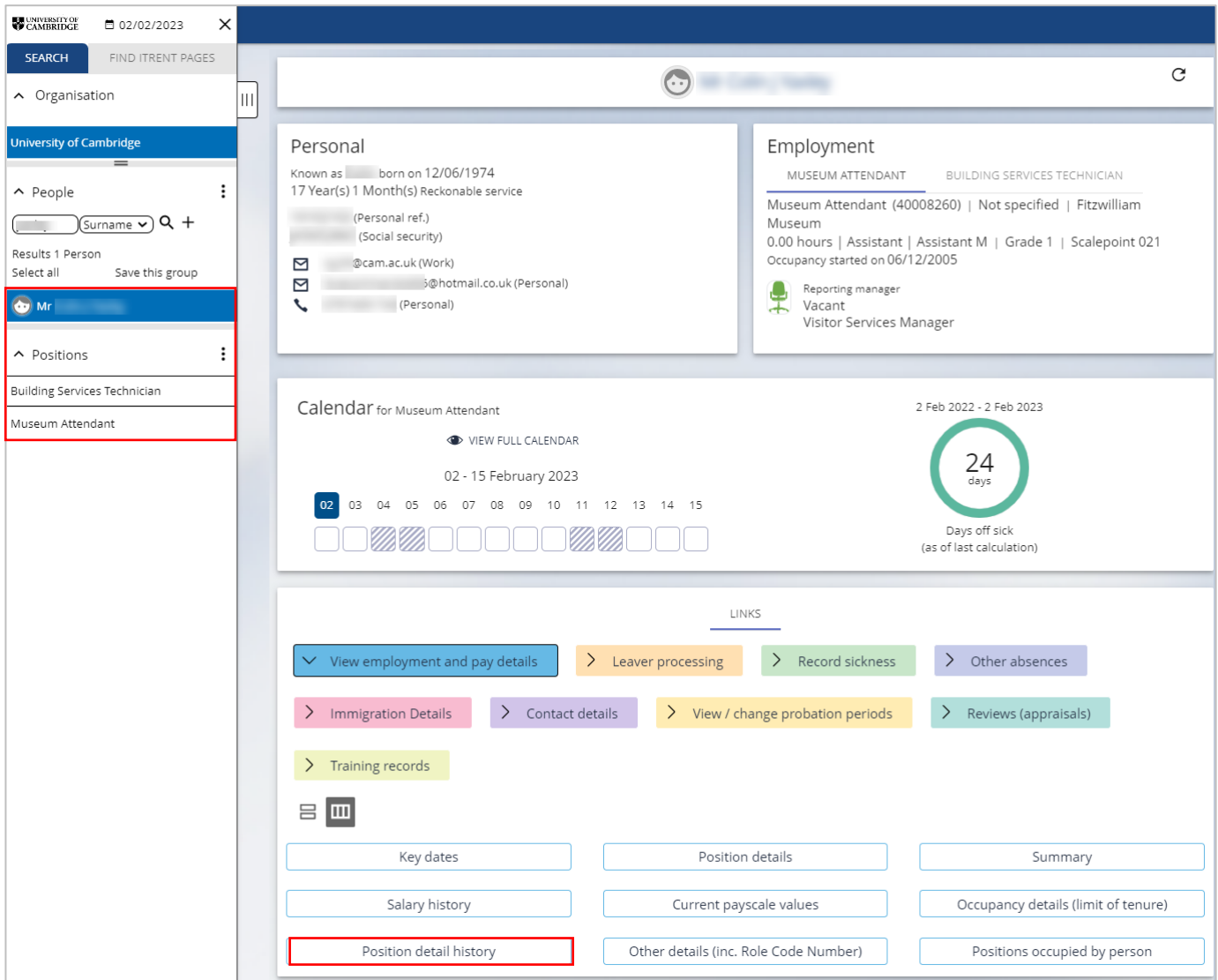
MUSEUM ATTENDANT

BUILDING SERVICES TECHNICIAN

Building Services Technician (41046339) | Not specified | Fitzwilliam Museum
36.50 hours | Assistant | Assistant T | Grade 3 | Scalepoint 024
Occupancy started on 17/10/2022 | expected occupancy end date 16/01/2023

 Reporting manager
Vacant
Facilities Supervisor (Health & Safety, Sustainability and Cleaning)

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



The screenshot displays the CHRIS for Institutions interface. On the left, a sidebar shows the navigation menu with 'People' and 'Positions' sections. The 'Positions' section is expanded, showing 'Building Services Technician' and 'Museum Attendant'. The main content area is divided into two columns: 'Personal' and 'Employment'. The 'Personal' column shows the employee's name, date of birth (12/06/1974), and service length (17 years). The 'Employment' column shows the employee's current position (Museum Attendant) and reporting manager (Vacant). Below these columns is a 'Calendar' section for the Museum Attendant, showing a calendar for February 2023 with a '24 days' indicator. At the bottom, a 'LINKS' section contains various buttons for viewing employment and pay details, leaver processing, record sickness, other absences, immigration details, 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), and positions occupied by person. The 'Position detail history' button is highlighted with a red border.

Personal

Known as [redacted] born on 12/06/1974
17 Year(s) 1 Month(s) Reckonable service
(Personal ref.)
(Social security)
[redacted]@cam.ac.uk (Work)
[redacted]@hotmail.co.uk (Personal)
(Personal)

Employment

MUSEUM ATTENDANT BUILDING SERVICES TECHNICIAN
Museum Attendant (40008260) | Not specified | Fitzwilliam Museum
0.00 hours | Assistant | Assistant M | Grade 1 | Scalepoint 021
Occupancy started on 06/12/2005
Reporting manager
Vacant
Visitor Services Manager

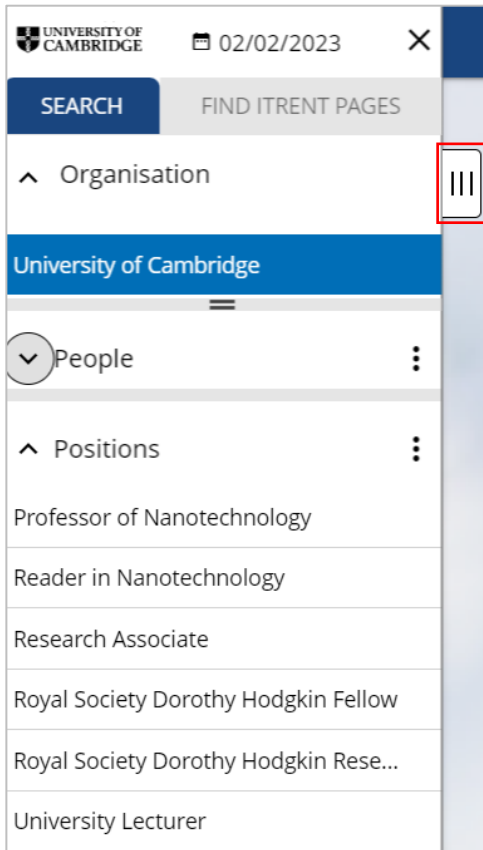
Calendar for Museum Attendant
2 Feb 2022 - 2 Feb 2023
VIEW FULL CALENDAR
02 - 15 February 2023
02 03 04 05 06 07 08 09 10 11 12 13 14 15
[Calendar grid showing days off sick]
24 days
Days off sick (as of last calculation)

LINKS

View employment and pay details Leaver processing Record sickness Other absences
Immigration Details 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

Whereas this employee has more. 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.

^ Positions			
Job title	Start date	End date	Contract
Professor of Nanotechnology	01/10/2016		RS Monthly
Reader in Nanotechnology	01/10/2012	30/09/2016	RS Monthly
Research Associate	01/02/2005	30/09/2006	RS Monthly
Royal Society Dorothy Hodgkin Fellow	01/09/2008	30/09/2010	RS Monthly
Royal Society Dorothy Hodgkin Research Fellow	01/10/2006	31/08/2008	RS Monthly
University Lecturer	01/09/2008	30/09/2012	RS Monthly

Read more about the [Changes to academic titles in 2021/2022](#)

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 (41042508) | Not specified | Department of Applied Mathematics and Theoretical Physics
37.00 hours | Unestablished | Non Clinical Researcher | Grade 7 (Research) | Scalepoint 044

Occupancy started on 01/01/2022 | expected occupancy end date 31/12/2024



Reporting manager
Dr Randolph Altmeyer
Assistant Professor

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

Other absences



Immigration Details

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

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 02/02/2023)
Research Associate (Permission to Fill granted)

▼ MENU ↺ 🖨️ 📎

Current status

Live

Occupant

RESEARCH ASSOCIATE

Occupancy start

01/01/2022

Occupancy end

Position occ. reference

41042508

Expected occupancy end date *

31/12/2024

📅

Expected occupancy end reason

Limited Funding ▼

Save

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:

Position occ. reference

41042991

Expected occupancy end date *

19/06/2023

📅

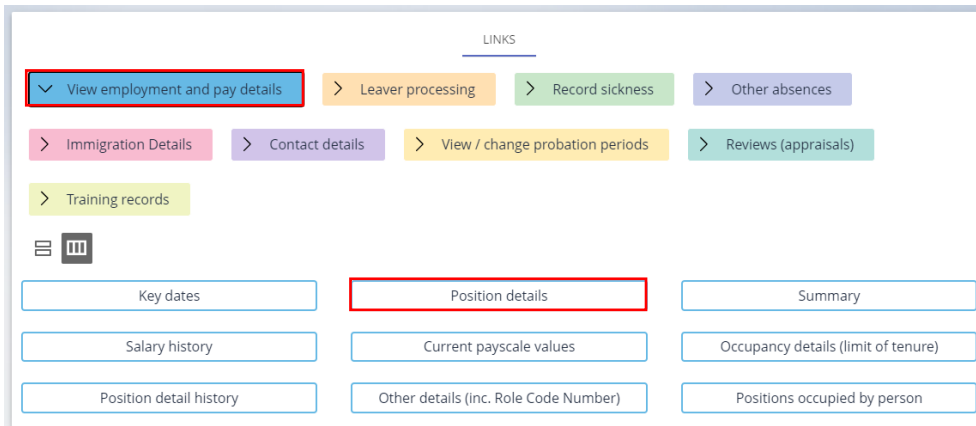
Expected occupancy end reason

Maternity Cover ▼

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.



LINKS

- View employment and pay details
- Leaver processing
- Record sickness
- Other absences
- Immigration Details
- Contact details
- View / change probation periods
- Reviews (appraisals)
- Training records

Key dates

Position details

Summary

Salary history

Current payscale values

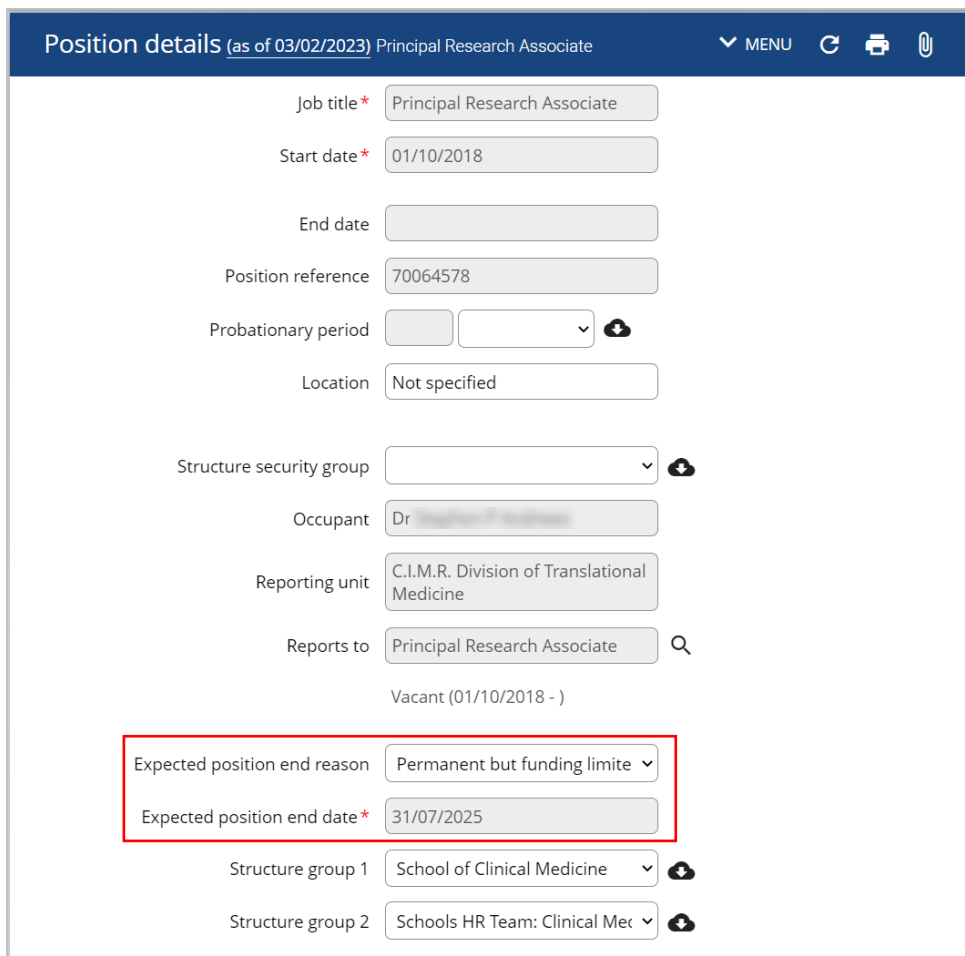
Occupancy details (limit of tenure)

Position detail history

Other details (inc. Role Code Number)

Positions occupied by person

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



Position details (as of 03/02/2023) Principal Research Associate

Job title * Principal Research Associate

Start date * 01/10/2018

End date

Position reference 70064578

Probationary period

Location Not specified

Structure security group

Occupant Dr

Reporting unit C.I.M.R. Division of Translational Medicine

Reports to Principal Research Associate

Vacant (01/10/2018 -)

Expected position end reason Permanent but funding limite

Expected position end date * 31/07/2025

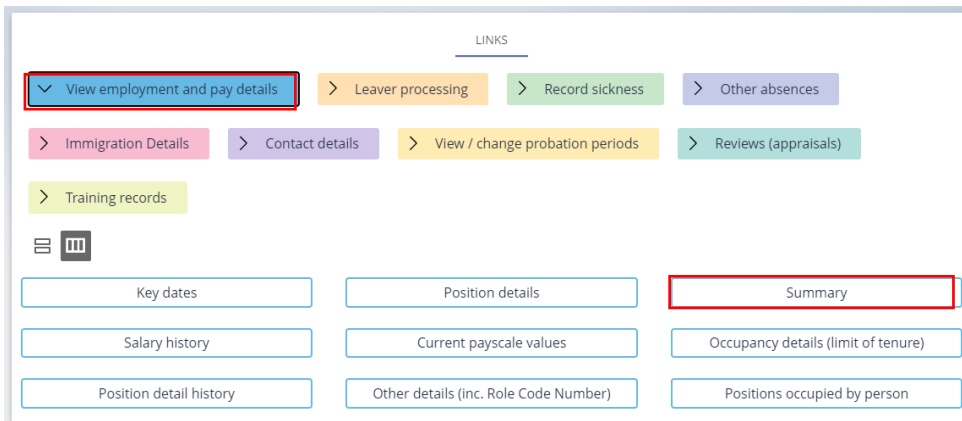
Structure group 1 School of Clinical Medicine

Structure group 2 Schools HR Team: Clinical Mec

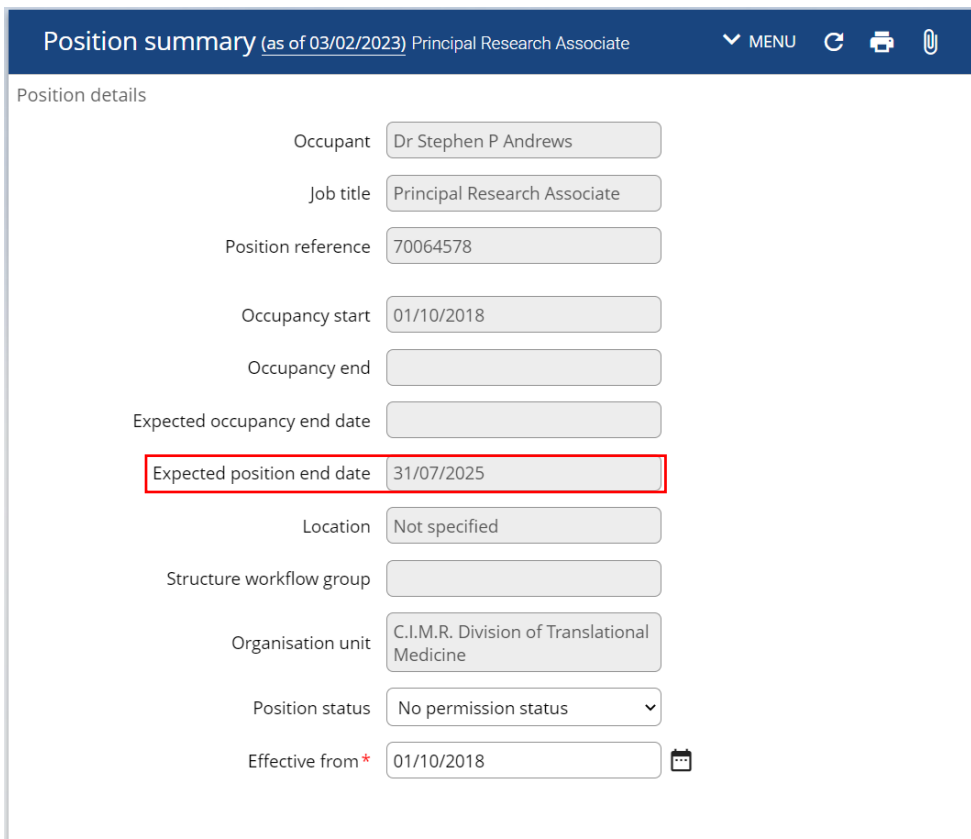
3.2 Position Summary

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 as shown above.

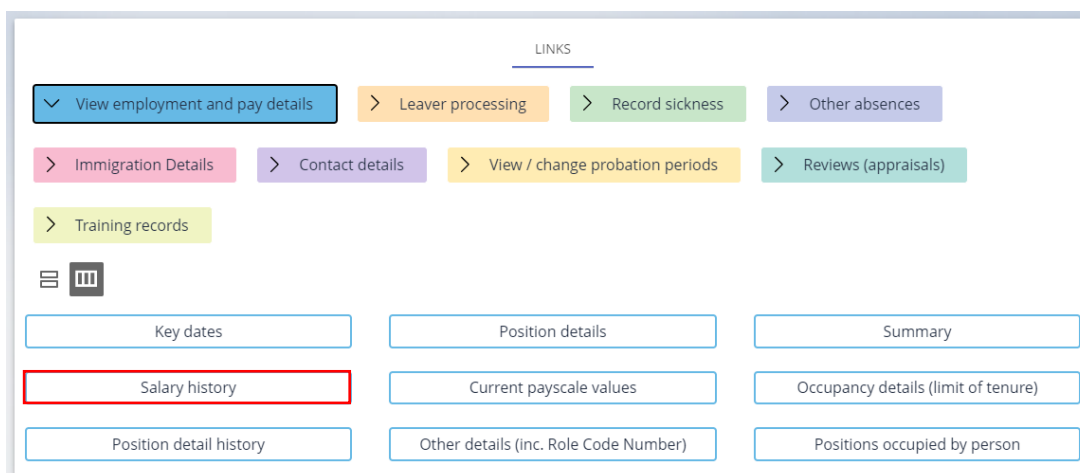


4 Salary Information

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



LINKS

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

[Immigration Details](#)
[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](#)

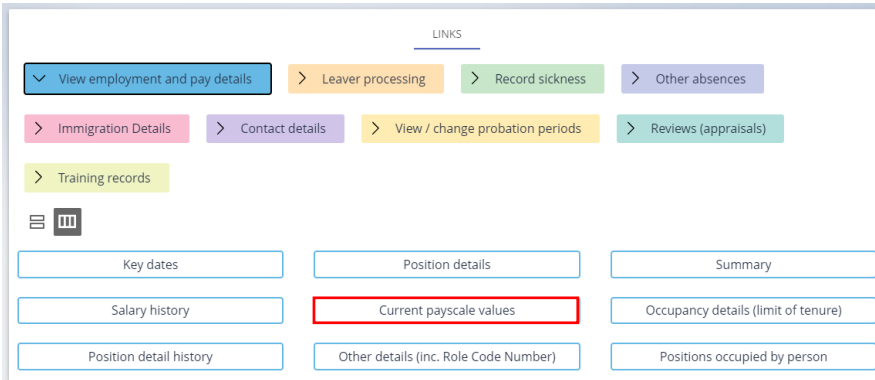
3. The Position salary change history screen will be displayed.

Position salary change history										
Exclude payment table rate change <input type="checkbox"/>										
+	Effective date	- FT Salary	- FTE value (rounded to 5 DP)	- Pro-rated salary	- FTE hours	- Grade	- Payment table	- Scalepoint	- Position	- Position reference
	01/08/2022	36,386.00	1.00000		36.50	Grade 6	National Spine	043	Business Coordinator	77103914
	01/07/2022	35,326.00	1.00000		36.50	Grade 6	National Spine	043	Business Coordinator	77103914
	23/01/2022	34,304.00	1.00000		36.50	Grade 6	National Spine	042	Business Coordinator	77103914
	01/01/2022	34,304.00	1.00000		36.50	Grade 6	National Spine	042	E A to Head of Talent Management and Director of Advancement Services	41359
	01/08/2021	33,309.00	1.00000		36.50	Grade 6	National Spine	041	E A to Head of Talent Management and Director of Advancement Services	41359
	01/07/2021	32,816.00	1.00000		36.50	Grade 6	National Spine	041	E A to Head of Talent Management and Director of Advancement Services	41359

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
- Immigration Details
- Contact details
- View / change probation periods
- Reviews (appraisals)
- Training records

Key dates

Position details

Summary

Salary history

Current payscale values

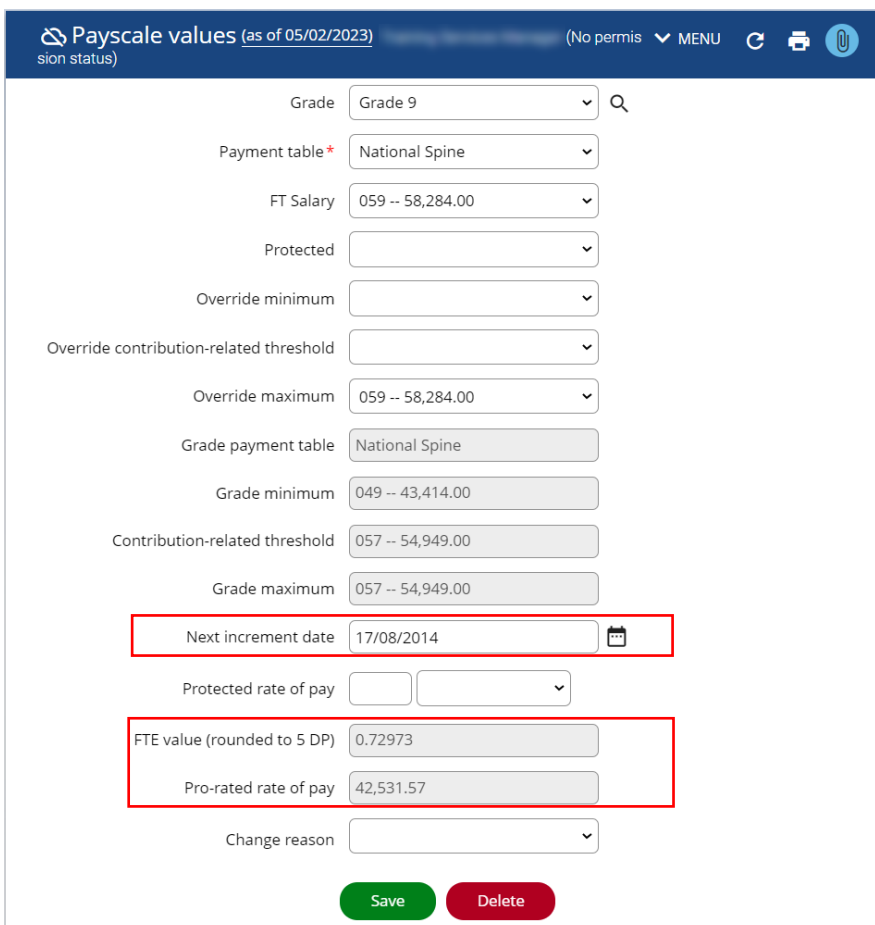
Occupancy details (limit of tenure)

Position detail history

Other details (inc. Role Code Number)

Positions occupied by person

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.



Payscale values (as of 05/02/2023) (No permis MENU)

Grade Grade 9

Payment table * National Spine

FT Salary 059 -- 58,284.00

Protected

Override minimum

Override contribution-related threshold

Override maximum 059 -- 58,284.00

Grade payment table National Spine

Grade minimum 049 -- 43,414.00

Contribution-related threshold 057 -- 54,949.00

Grade maximum 057 -- 54,949.00

Next increment date 17/08/2014

Protected rate of pay

FTE value (rounded to 5 DP) 0.72973

Pro-rated rate of pay 42,531.57

Change reason

Save Delete

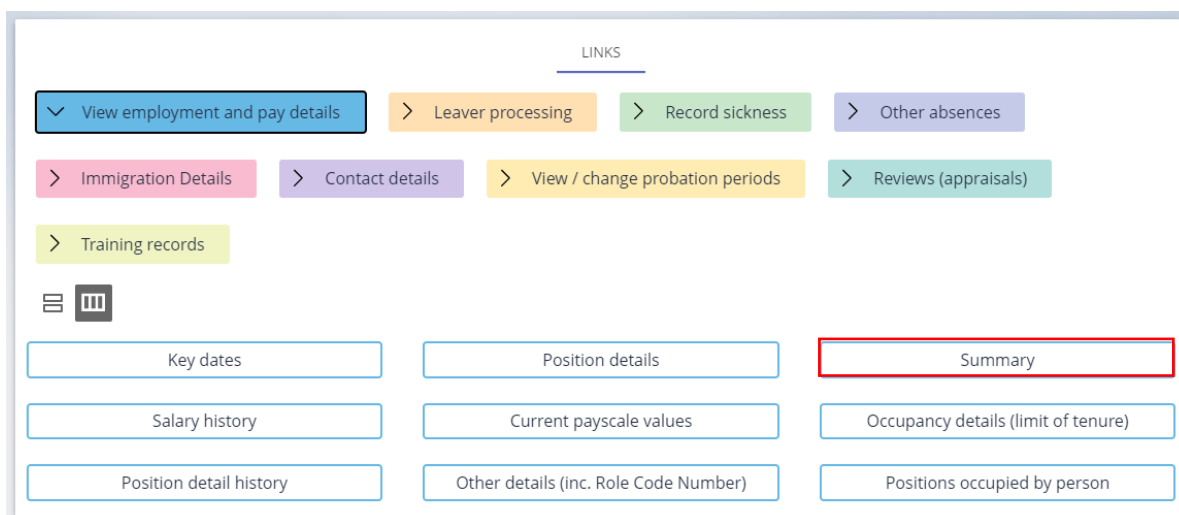
5 Position Summary




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.



Position summary (as of 03/02/2023) 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
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

+ Structure groups

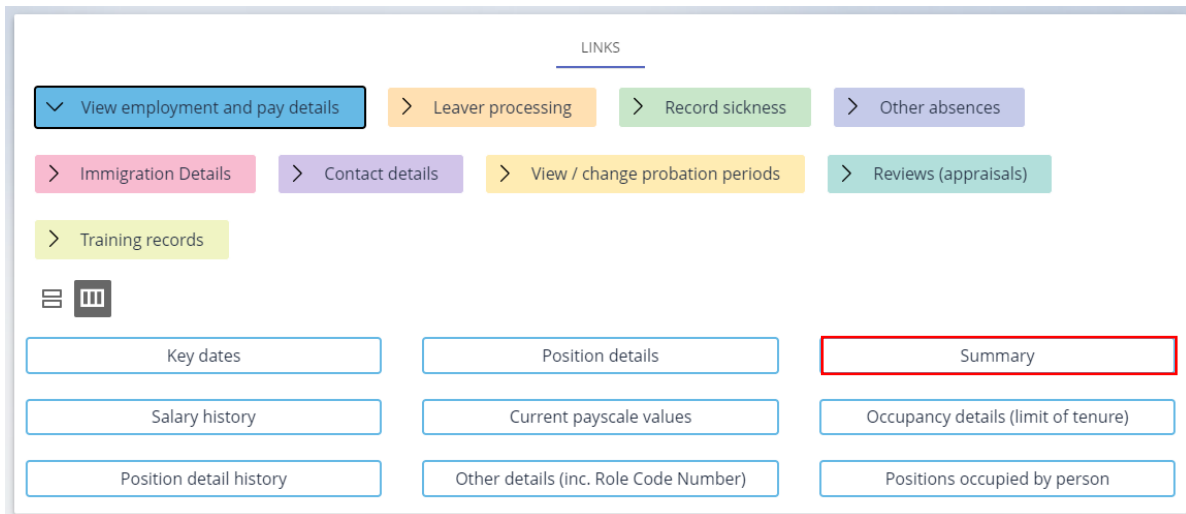
+ Patterns

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.



LINKS

View employment and pay details > Leaver processing > Record sickness > Other absences

> Immigration Details > 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

Position summary (as of 03/02/2023) 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

Position status

No permission status ▼

Effective from *

01/02/2018 

[Expand all/collapse all](#)

+ Reporting manager

+ History

+ Category, Basis and Type

+ Hours

– Costing Levels

Status	Start date	End date	Type	Value
	01/02/2018		Structure	1: (100 % / ZXAG/089.11.RG12364.ABAE)
	01/02/2018		Costing Rule	UC1

5. Expand the Costing details to view.

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

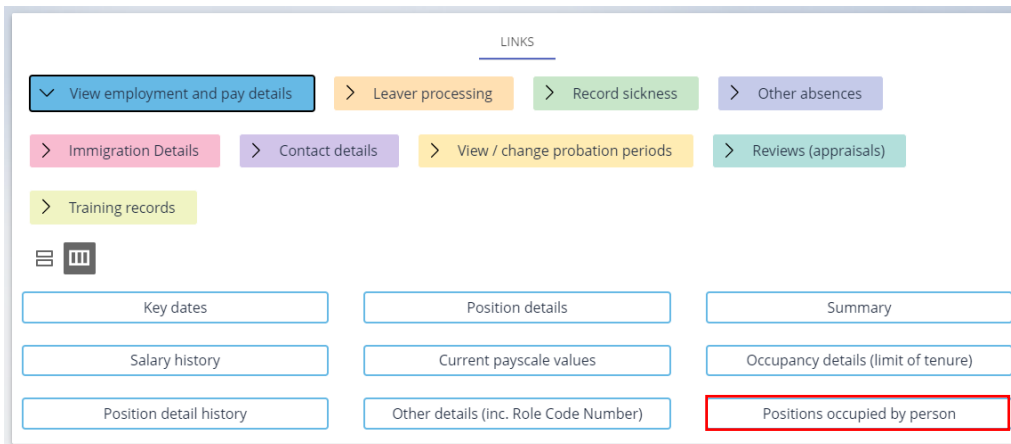
Project Code	Task	Award	Transaction Code
AAAG/001.	01.	RG12345.	ABAE

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



LINKS

- View employment and pay details
- Leaver processing
- Record sickness
- Other absences
- Immigration Details
- Contact details
- View / change probation periods
- Reviews (appraisals)
- Training records

Key dates

Position details

Summary

Salary history

Current payscale values

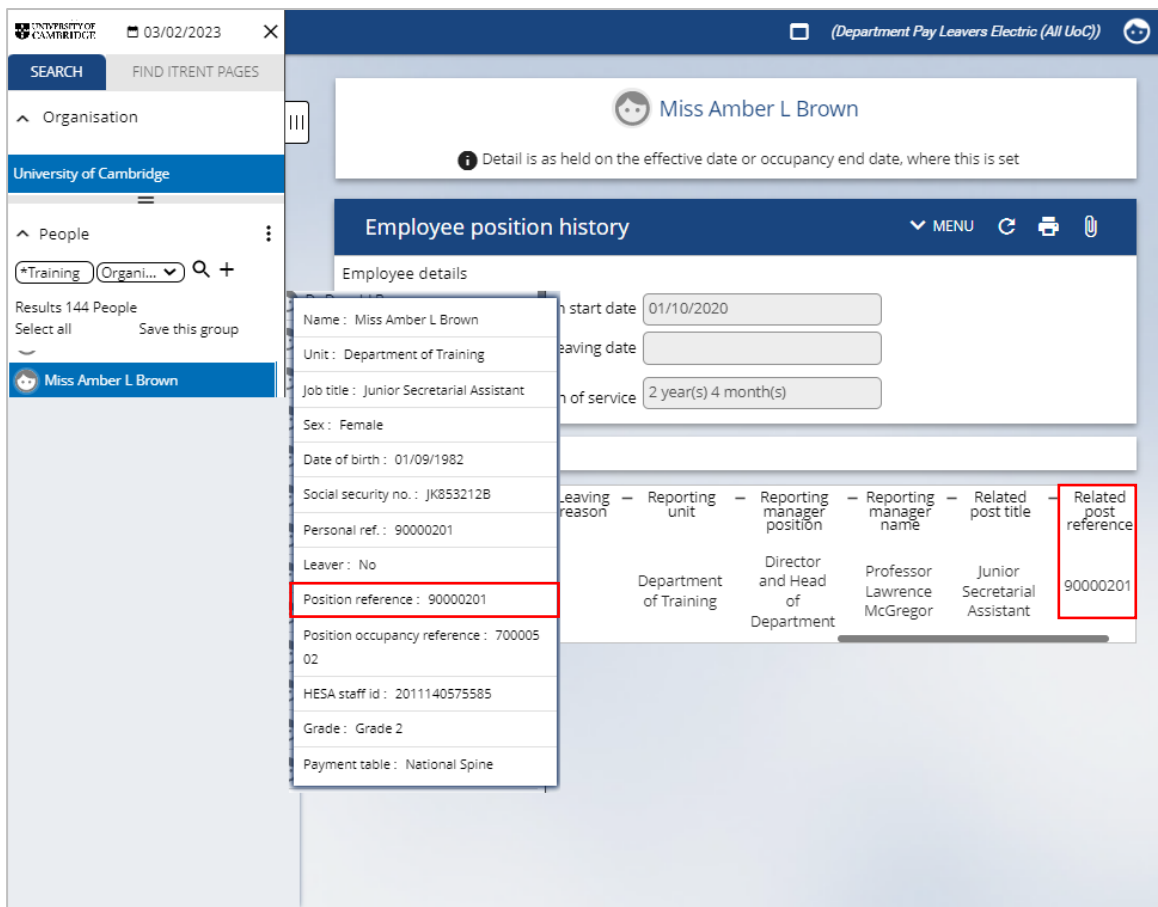
Occupancy details (limit of tenure)

Position detail history

Other details (inc. Role Code Number)

Positions occupied by person

This reference number is required on certain CHRIS forms.



University of Cambridge 03/02/2023

SEARCH FIND ITRENT PAGES

Organisation

University of Cambridge

People

*Training Organ... Q +

Results 144 People

Select all Save this group

Miss Amber L Brown

Miss Amber L Brown

Detail is as held on the effective date or occupancy end date, where this is set

Employee position history

Employee details

Name: Miss Amber L Brown

Unit: Department of Training

Job title: Junior Secretarial Assistant

Sex: Female

Date of birth: 01/09/1982

Social security no.: JK853212B

Personal ref.: 90000201

Leaver: No

Position reference: 90000201

Position occupancy reference: 70000502

HESA staff id: 2011140575585

Grade: Grade 2

Payment table: National Spine

Start date: 01/10/2020

Leaving date:

Length of service: 2 year(s) 4 month(s)

Leaving reason	Reporting unit	Reporting manager position	Reporting manager name	Related post title	Related post reference
	Department of Training	Director and Head of Department	Professor Lawrence McGregor	Junior Secretarial Assistant	90000201

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' An example of usage is the Furlough scheme.

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

Other details (inc. Role Code Number)

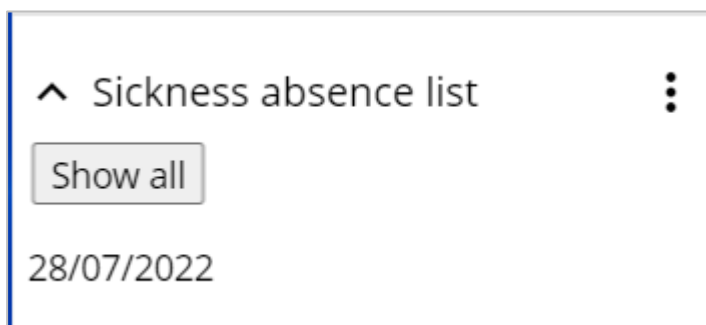
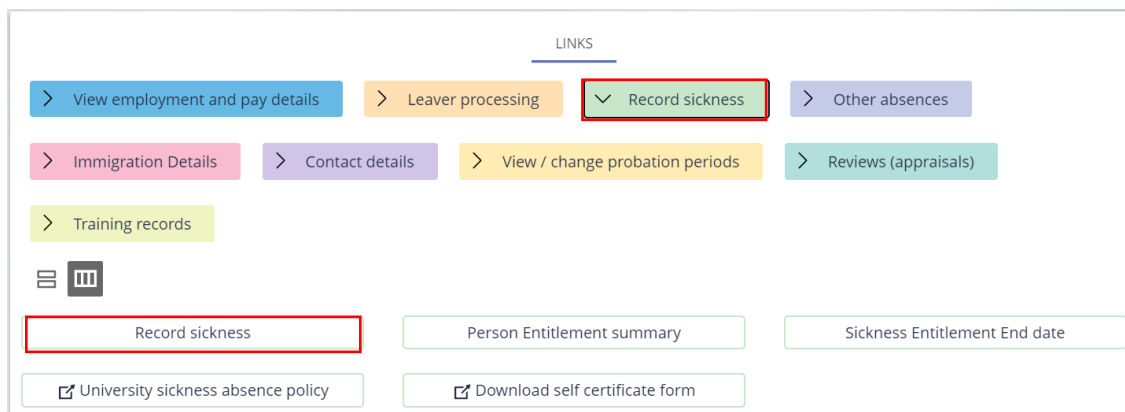
^ UDF Categories (Position)	:
Furlough scheme	
Invigilator Rate	
NHS Trust Information	
Permission to create	
Role Code Number	
Role Code number (new)	
Term-time only details	
University Office	
Variable Time Employment	

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.

^ Sickness absence list

Show all

28/07/2022

Start date : 28/07/2022

Day : Thu

End date : 03/08/2022

Day : Wed

Type : Sickness Scheme

Position : [REDACTED]

Reason : Covid-19 (Coronavirus)

Current status : Processing complete

Working days lost : 5

Authorisation status : Not applicable

Contract level : Linked contracts

Information can be viewed from expanding the pane as well as from the popup.

UNIVERSITY OF CAMBRIDGE 04/02/2023

SEARCH FIND ITRENT PAGES

^ Organisation

University of Cambridge


^ People

^ Sickness absence list

Show recent

Start date	Day	End date	Day	Type	Position	Reason	Current status	Working days lost
28/07/2022	Thu	03/08/2022	Wed	Sickness Scheme	[REDACTED]	Covid-19 (Coronavirus)	Processing complete	5
15/04/2016	Fri	15/04/2016	Fri	Sickness Scheme	[REDACTED]	Cold or Flu	Processing complete	1
14/10/2013	Mon	14/10/2013	Mon	Sickness Scheme	[REDACTED]	Cold or Flu	Processing complete	1

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 *

More than one day ▼

Absence start
Absence start date *

Part day
Full day
More than one day

📅
Absence start type

Full day ▼

Absence end
Absence end date 📅
Absence end type

Full day ▼


Absence
Absence type *

Sickness Scheme ▼

 Set as default ☐
Absence reason

<None> ▼

Save

 Dr Donald Brown

Sickness absence details New ▼ MENU ↺ 🖨 📎

Sickness period
Sickness period *

More than one day ▼

Absence start
Absence start date *

03/02/2023

📅
Absence start type

Full day

Absence end
Absence end date 📅
Absence end type

Full day

Absence
Absence type *

Sickness Scheme ▼

 Set as default ☐
Absence reason


Cold or Flu ▼

Save

February 2023

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

Today is Sat, 4 Feb 2023

 Dr Donald Brown

Changes have been saved.

Sickness absence details Dr Donald Brown

Sickness period

Sickness period * More than one day

Absence start

Absence start date * 03/02/2023

Absence start type Full day

Absence end

Absence end date

Absence end type Full day

Absence

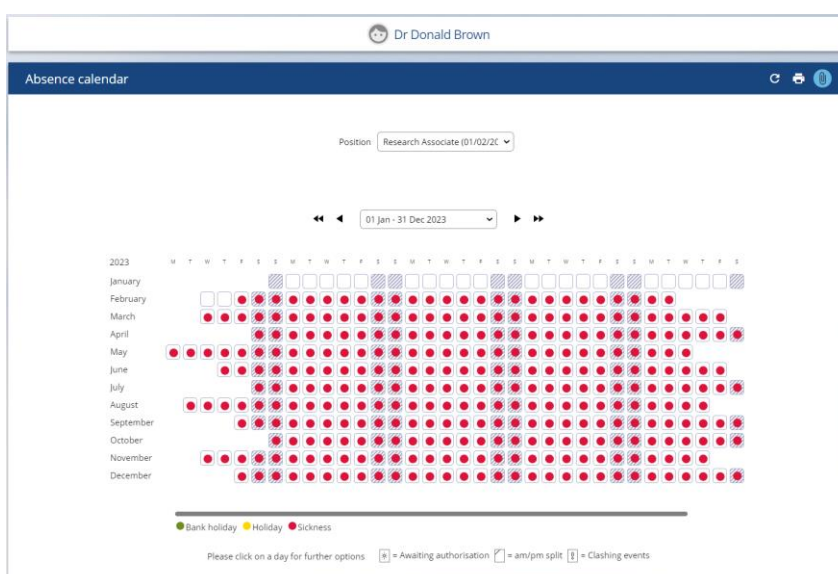
Absence type * Sickness Scheme

Absence reason Cold or Flu

Position Research Associate (Department of Training, 01/02/2018) (Current)

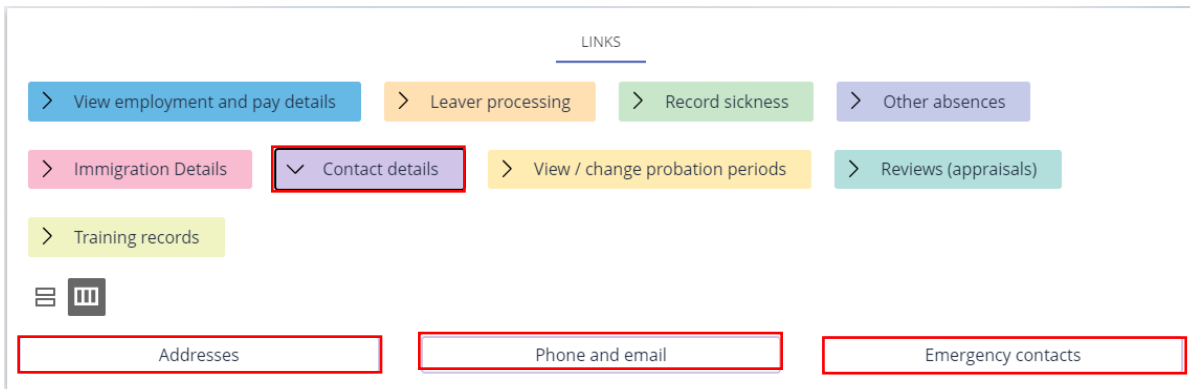
Save Delete New

If the end date is not entered, the sickness calendar records ongoing sickness:



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.

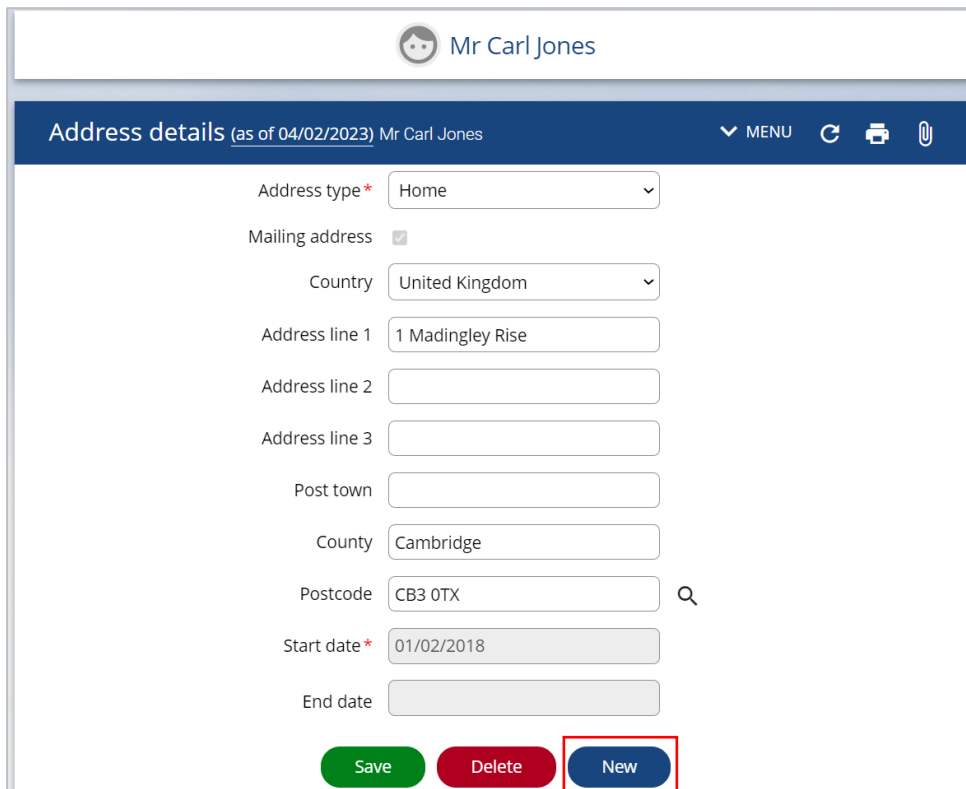


LINKS

- > View employment and pay details
- > Leaver processing
- > Record sickness
- > Other absences
- > Immigration Details
- ▼ Contact details
- > View / change probation periods
- > Reviews (appraisals)
- > Training records

Addresses Phone and email Emergency contacts

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



Mr Carl Jones

Address details (as of 04/02/2023) Mr Carl Jones

Address type * Home

Mailing address ☒

Country United Kingdom

Address line 1 1 Madingley Rise

Address line 2

Address line 3

Post town

County Cambridge

Postcode CB3 0TX


Start date * 01/02/2018




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.

 Mr Carl Jones

Address details (as of 04/02/2023) New ▼ MENU   

Address type * Home ▼

Mailing address ☐

Country United Kingdom ▼


Address line 1 197 Kimbolton Lodge


Address line 2


Address line 3

Post town Cambridge




County

Postcode CB1 2CB 




Start date * 04/02/2023 

End date 

Save

Address details (as of 04/02/2023) Mr Carl Jones ▼ MENU   

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

Address details (as of 04/02/2023) Mr Carl Jones ^ LESS   

Addresses Phone and email Emergency contacts

11 Entering Probation and review details

LINKS

> View employment and pay details

> Leaver processing

> Record sickness

> Other absences



> Immigration Details

> Contact details


> View / change probation periods

> Reviews (appraisals)

> Training records



Probation periods

 University guidance on probation


11.1.1 Probation


Where a new appointment has successfully been completed the probationary period details should be updated.


Probationary period details

HR Transformation Programme Learning and Development Consultant

▼ MENU







Job title *

HR Transformation Programme

Reason *


New appointment

Complete

☐


Start date *

20/06/2022



End date *

20/03/2023



Save


New


Select the complete tick box and click on save.


Probationary period details

HR Transformation Programme Learning and Development Consultant

▼ MENU







Job title *

HR Transformation Programme

Reason *


New appointment

Complete

☒


Start date *

20/06/2022



End date *

20/03/2023

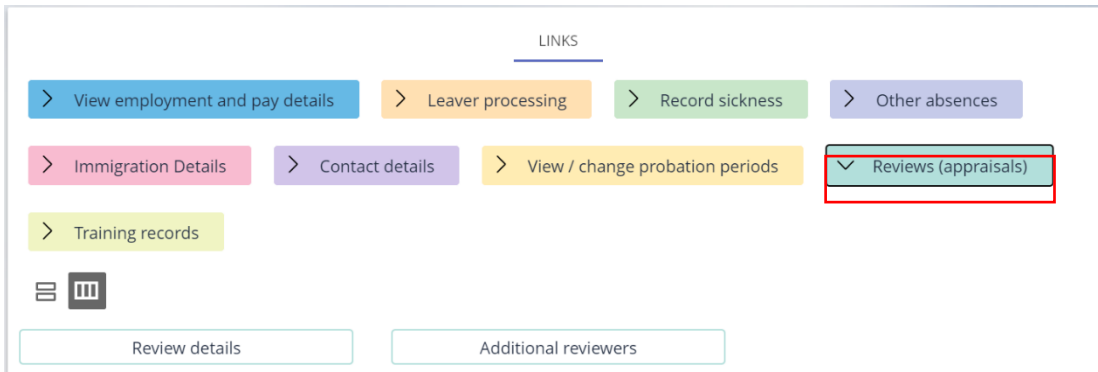


Save

New

11.1.2 Reviews

Select Reviews



LINKS

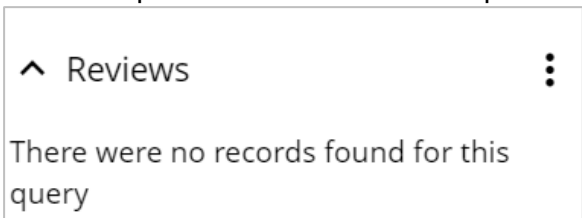
> View employment and pay details > Leaver processing > Record sickness > Other absences

> Immigration Details > Contact details > View / change probation periods **> Reviews (appraisals)**

> Training records

Review details Additional reviewers

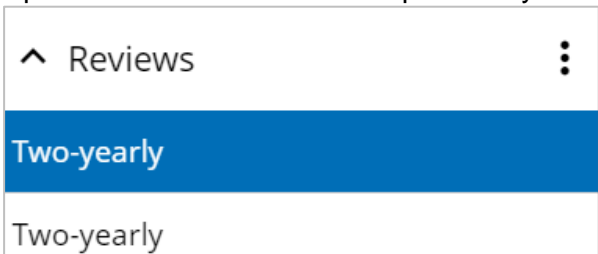
Where no previous review has taken place the screen will appear as below.



^ Reviews

There were no records found for this query

If previous reviews have taken place they will be displayed:

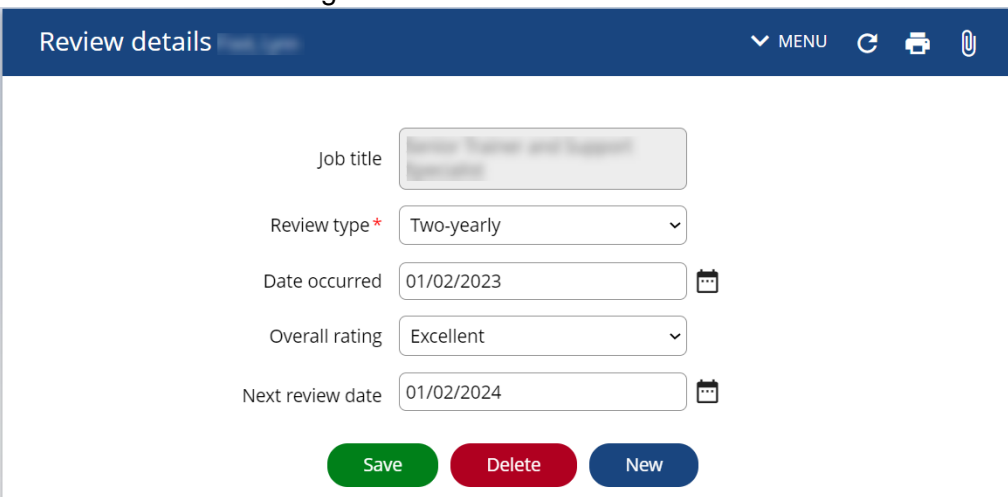


^ Reviews

Two-yearly

Two-yearly

Enter a new review using the New button:



Review details

Job title

Review type * Two-yearly

Date occurred 01/02/2023

Overall rating Excellent

Next review date 01/02/2024

Save Delete New

Click on Save:

Review details New

▼

MENU

Job title *

Senior Tutor and Support

▼

Review type *

Two-yearly

▼

Date occurred

01/02/2023

Overall rating

Excellent

▼

Next review date

01/02/2024

Save

Probationary reviews can also be entered:

Review details New

▼

MENU

Job title *

Senior Tutor and Support

▼

Review type *

Review meeting during probat

▼

Date occurred

01/02/2023

Overall rating

Excellent

▼

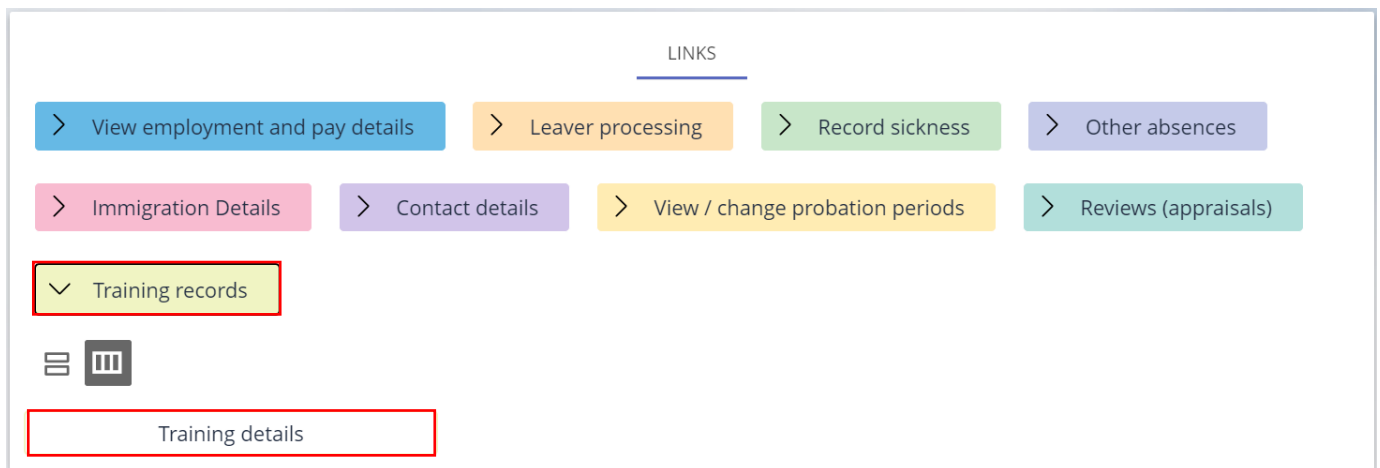
Next review date

03/04/2023

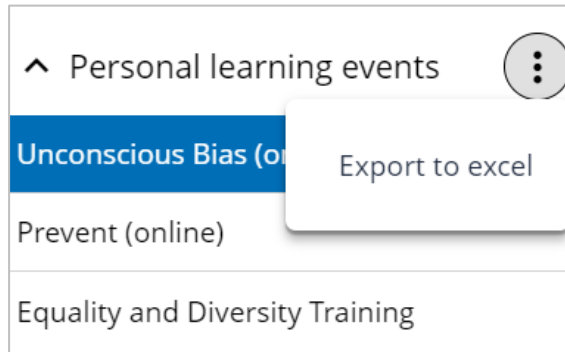
Save

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

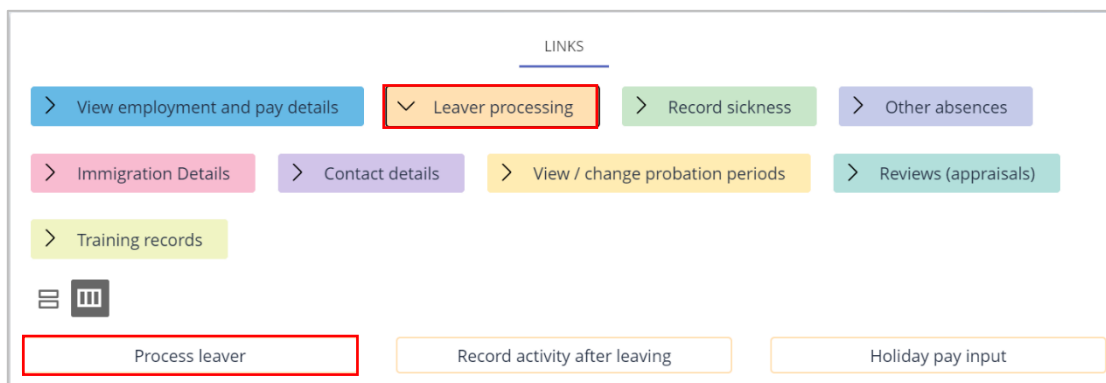
This process should be completed as soon as you know when an individual is leaving.

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 01223 (3)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:



LINKS

> View employment and pay details **▼ Leaver processing** > Record sickness > Other absences


> Immigration Details > Contact details > View / change probation periods > Reviews (appraisals)

> Training records

☰ ☐

Process leaver Record activity after leaving Holiday pay input

3. Enter the effective date.
4. The Occupancy maintenance screen will be displayed.
5. Enter the Leaving Date.
6. Enter the Reason for Leaving.
7. Select the position that they are leaving. If they hold one position this will automatically also select their Payroll and University of Cambridge.

 **Mr. John T. Doe**



⚠ Current selections will result in this person leaving the organisation.

⚠ Temporary input has been made in the current period for this person. Check that this input is still valid for leavers.


⚠ This person has future absences. Are you sure that this leaving date is correct?

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

Occupancy maintenance (as of 03/02/2023)




▼ MENU  

Leaving details

Leaving date * 

Reason for leaving * ▼

Occupancy details

	University of Cambridge	<input checked="" type="checkbox"/>
	RS Monthly	<input checked="" type="checkbox"/>
	Senior Tutor and Deputy Vice-Chancellor	<input checked="" type="checkbox"/>

Save

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

Occupancy maintenance (as of 03/02/2023) LESS Refresh Print

Process leaver

Record activity after leaving

Holiday pay input

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.

HESA Personal details 04/09/2019 Refresh Print Attach

Gender identity

Gender identity is the same as: ▼

Disability 2

▼

Disability 3

▼

Activity after leaving

Retired ▼

Location after leaving

UK (not otherwise specified) ▼

Save

New

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

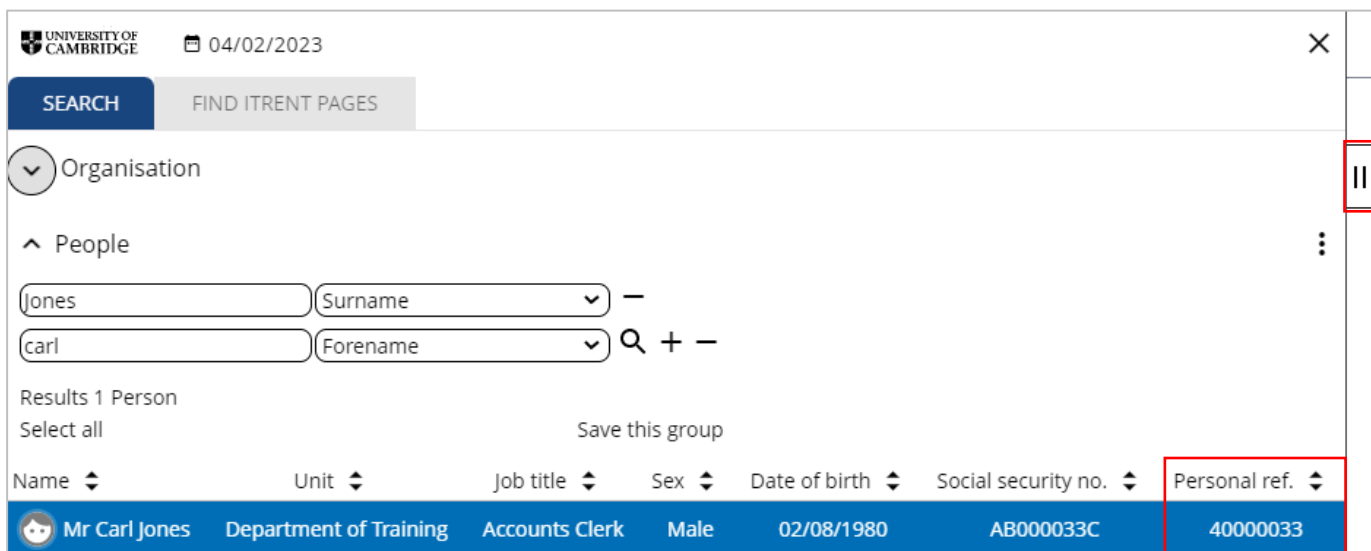
A fast input screen has been created for entering Holiday Pay. This must only be used for a person who is a leaver. It **must not** be used where an employee is transferring to another University department as their leave records must transfer with them. Leave and sickness records should be transferred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



UNIVERSITY OF CAMBRIDGE 04/02/2023

SEARCH FIND ITRENT PAGES

Organisation

People



Search: Surname: Jones Forename: carl

Results 1 Person

Select all Save this group

Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal ref.
Mr Carl Jones	Department of Training	Accounts Clerk	Male	02/08/1980	AB000033C	40000033

Or from the person summary screen here:


 Mr Carl Jones 

Personal
Known as Carl born on 02/08/1980

40000033 (Personal ref.)

AB000033C (Social security)

Employment
Accounts Clerk (80000033) | Not specified | Department of Training
36.50 hours | Assistant | Assistant CS | Grade 4
Occupancy started on 01/02/2018

 Reporting manager
Mr Paul Herbert
Chief Library Assistant

Select the Holiday pay input option from leaver processing.

LINKS

> View employment and pay details

> Leaver processing

> Record sickness

> Other absences



> Immigration Details

> Contact details

> View / change probation periods

> Reviews (appraisals)

> Training records

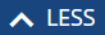




Process leaver

Record activity after leaving

Holiday pay input

Or from the shortcut menu

Occupancy maintenance (as of 03/02/2023)   

Process leaver

Record activity after leaving

Holiday pay input

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.

Fast input details Holiday pay

MENU

Payroll

Validate Save

Employee payroll number	Employee name	Job	Days of leave - Please enter leaving date	Date earned	
40000033	Mr Carl Jones	(Contract)	0.00		<div> </div> ✓ + -

The employee name and job will appear, enter the number of days leave.

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

Fast input details Holiday pay

MENU

Payroll

Validate Save

Employee payroll number	Employee name	Job	Days of leave - Please enter leaving date	Date earned	
40000033	Mr Carl Jones	Accounts Clerk (Department)	3.00		<div> </div> ✓ + -
37102072	Mrs Julie Smith	Administrative Assistant (MRI)	2.00		<div> </div> ✓ + -

Click on Save.