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1 General Principles

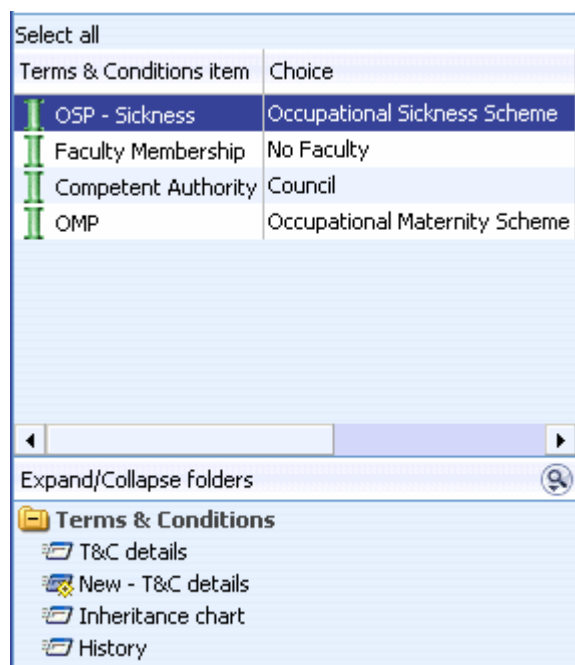
Absence schemes are created in groups. Each group defines a generic type of absence – Holidays, Sickness, Maternity, Paternity and Other.

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 'general sickness' and 'industrial injury sickness' within group 'sickness'). Additionally you can define absence reasons which supply the specific reason why an employee is absent.

People benefit from the absence schemes that are established via their Terms and Conditions. Certain absence schemes e.g. sickness and maternity are attached at the top of the structure and are inherited down to all Units, Posts, Positions and individual people. Other absence schemes will need to be attached to the individual's position if required.

The pages shown in this section are used to input new absences as well as viewing and updating existing absence details.

1.1 Terms and Conditions



| Terms & Conditions item | Choice |
|-------------------------|-------------------------------|
| OSP - Sickness | Occupational Sickness Scheme |
| Faculty Membership | No Faculty |
| Competent Authority | Council |
| OMP | Occupational Maternity Scheme |

Expand/Collapse folders

- Terms & Conditions
 - T&C details
 - New - T&C details
 - Inheritance chart
 - History

People benefit from the absence schemes established via their Terms and Conditions (T&Cs). Terms and Conditions are inheritable items.

This screen shot shows that the Occupational Sickness Scheme and Occupational Maternity Scheme are terms and conditions that are set at Organisation level and inherited down to all Units, Posts and Positions. If the OMP Scheme is not attached until the employee requires a Maternity absence record, it should be added to the employee's Contract and not Position.

Sabbatical leave will be attached at the appropriate Posts. The old pre-January 2004 sickness scheme has been applied where appropriate.

For all other types of leave, it will be necessary to attach the absence scheme to the employees' position the first time that it is required

Those employees who are on the pre 2004 OSP rules will inherit the normal OSP Scheme (Occupational Sickness Scheme), according to the organisation structure. This will be overridden with the correct OSP Scheme (Occ Sickness Scheme (Pre Jan 04) at contract level.)

To attach an absence scheme to an employee use the T&C Details page as shown below.

Navigate: **Organisation > People > (select the person) > Employment > Positions > Terms and Conditions > New – T&C details**

Terms & conditions : New

Name: Miss Jenny M Bosten Job title: Clerk

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

Level

T&C Item

Choice

Notes

Start date

End date

This page allows you to select, record and maintain the details of terms and conditions of employment and is applied to the selected person.

| Terms and Conditions | |
|----------------------|--|
| Field | Comments |
| Level | This field allows you to attach to a contract or a position. Select the employee's position. |
| T & C Item | Select the required item from the drop down list. The list will hold the absence schemes that are available |
| Choice | Select the required choice from the drop down list (there may be only one choice available depending on T & C item selected above) |
| Start date | Enter the date when the terms and conditions are to be effective from. |
| End date | If required, enter the date when these conditions will no longer be applicable. |

Additional absence scheme terms and conditions that are added at position level will then be displayed in the list with a broken pipe to indicate that these are not inherited items.

User name: **Hazel Turton**
 Today: **Mon 15/01/2007**

15/01/2007

[Home](#) > [Organisation : University of Cambridge](#) > [People : Kerr, Kelvin](#) > [Terms & Conditions : Unpaid leave](#) > [T&C details](#)

Select all

| Terms & Conditions item | Choice | Pac |
|-------------------------|----------------------------------|-----|
| OSP - Sickness | Occupational Sickness Scheme | |
| Faculty Membership | No Faculty | |
| Other | Sabbatical Leave | |
| Competent Authority | General Board | |
| OMP | Occupational Maternity Scheme | |
| Final Salary Scheme | USS | |
| OSP - Sickness | Occ Sickness Scheme (Pre Jan 04) | |
| Unpaid leave | Unpaid leave | |

Print this form

X Terms & conditions : Unpaid leave (Unpaid leave)

Name: Mr Kelvin E Kerr **Job title:** Professor

Social Security Number: YA119882N **Pay ref:** X3657465

Pers ref: X3657465

Level:

T&C Item:

Choice:

Notes

Start date: 15/01/2007

End date:

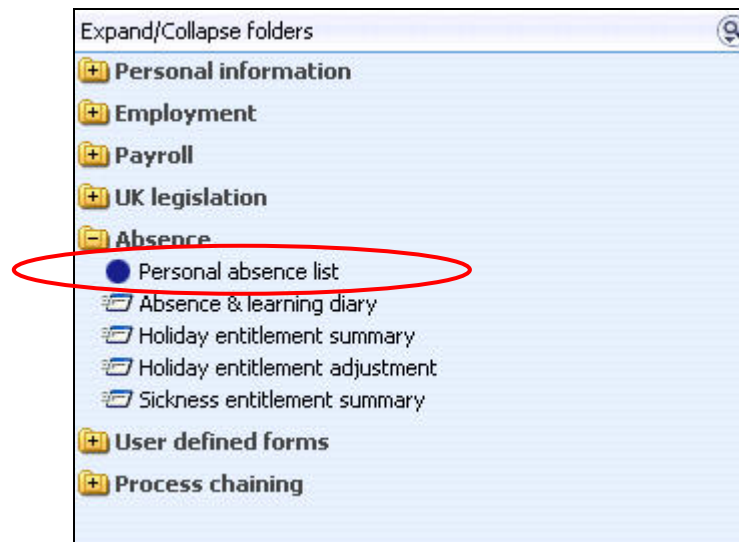
Show favourites Expand/Collapse folders

- Terms & Conditions**
- T&C details
- New - T&C details
- Inheritance chart
- History
- Process chaining**

Organisation e...
Terms & condit..

1.2 Entering New Absence Details

Navigate: **Organisation > People** (select person) > **Absence > Personal absence list > New - Absence details**



1. Use the search facility to locate the person whose details you wish to maintain
2. Click on the Absence folder
3. Select the Personal Absence List option
4. Select the New -Absence details option
5. Select required absence group.

Select Group for New Absence:

Select absence group

The first step in creating an absence is to define what absence group the new absence is associated with. There are 5 groups to choose from:

- Holiday (holidays are not being recorded in Trent in phase 1 of the project)
- Maternity (this option will not appear if the selected person is male)
- Other
- Sickness
- Paternity

Select the required **Absence group** from the drop down list and then click the **create** button.

Trent will then display the relevant absence details page to enable you to record the absence details currently available to you. These are explained in more detail later.

When the absence details have been entered and saved you can then view and maintain them within the Trent navigation.

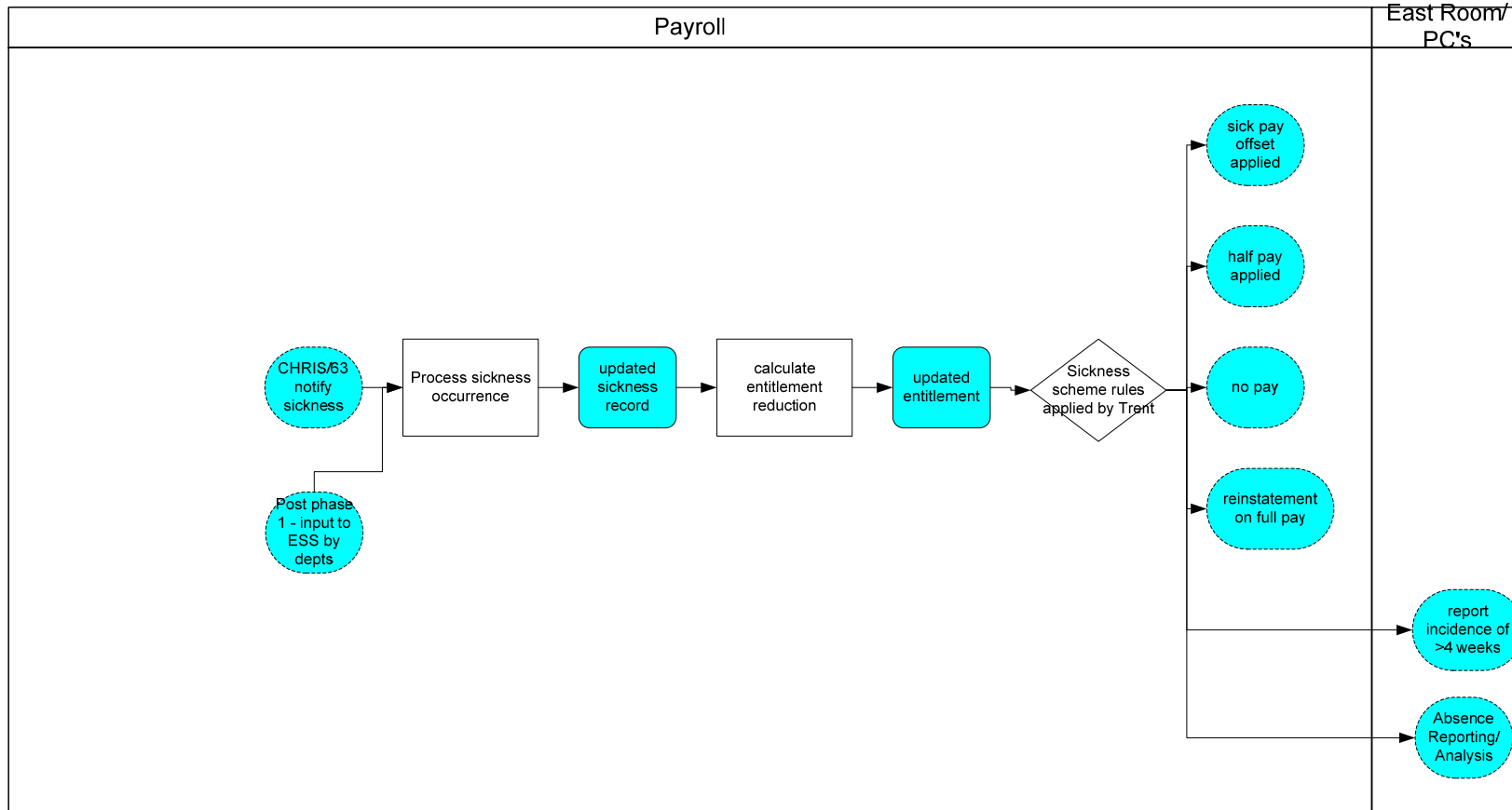
Navigate: **Organisation > Person (find employee) >Absence> Personal absence list > Absence details**

In order to get a full months absence values to match 1/12th of someone's pay we have had to use the pro-rata rules which look at calendar/working days in the period rather than 260/365ths.

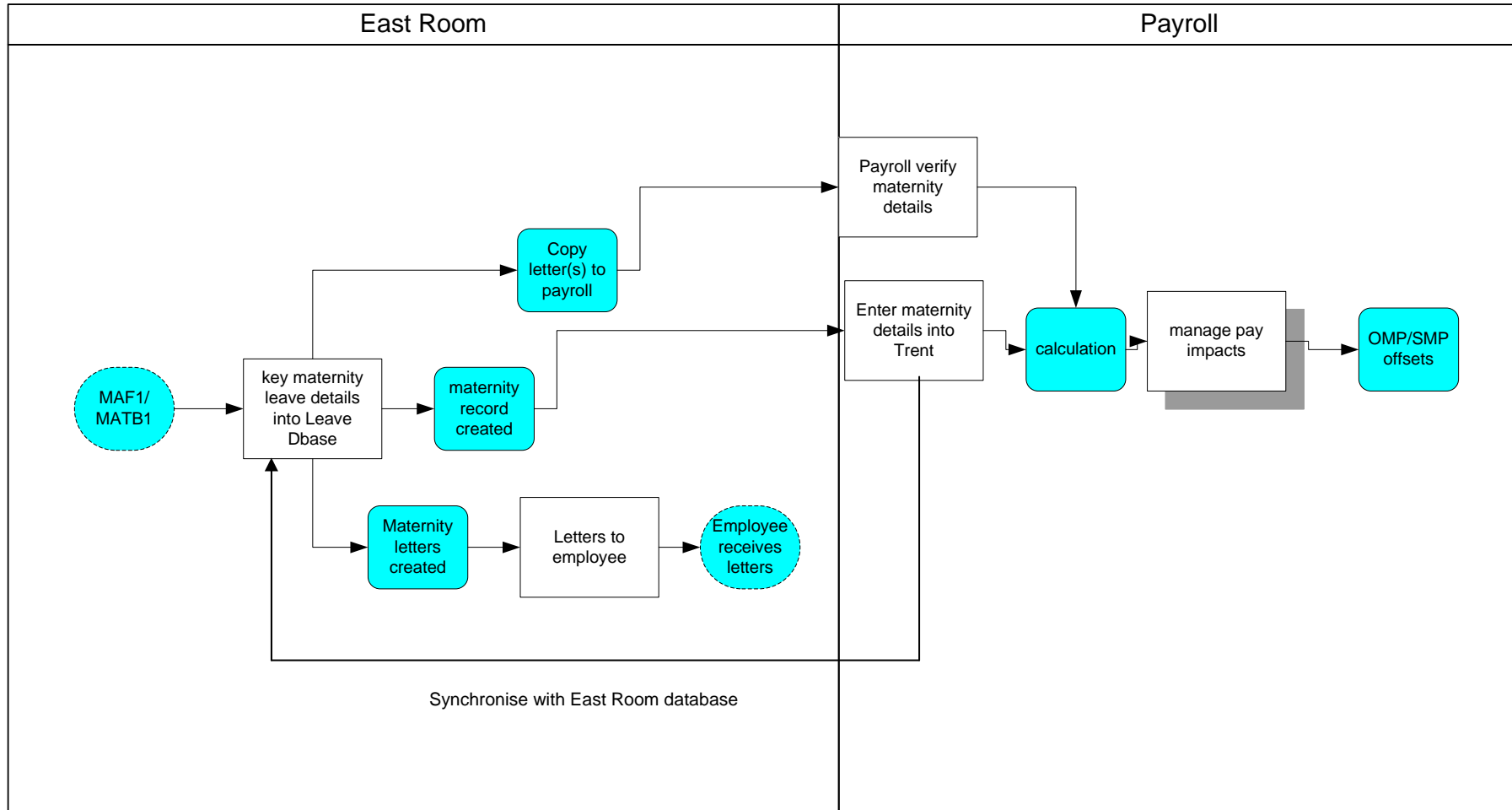
2 Absence Recording Processes

2.1 Sickness

Sickness and Maternity Absences



2.2 Maternity



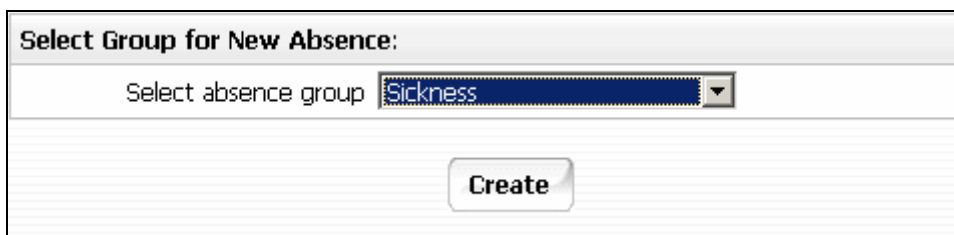
3 Sickness Absences

Information regarding sickness absence policy and procedure can be found at:
<http://www.admin.cam.ac.uk/offices/personnel/policy/leave/sickness/>

Absence will initially be recorded using the Sickness Self Certificate form (CHRIS/62) or for sickness absences of four consecutive days or more the Report of absence due to sickness form (CHRIS/63).

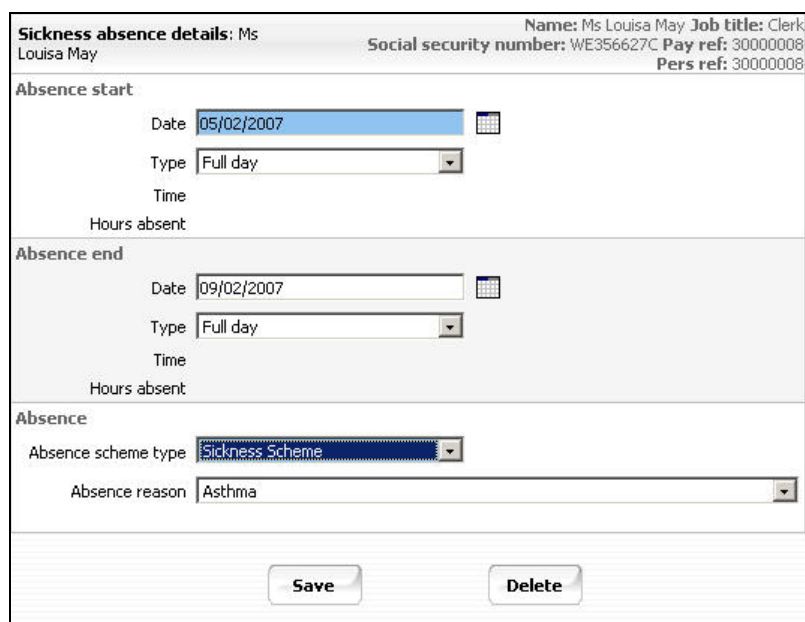
3.1 Recording sickness details

To record the sickness details in Trent follow the initial steps as previously described, ensuring you select the Sickness group.



The screenshot shows a web form titled "Select Group for New Absence:". It contains a label "Select absence group" followed by a dropdown menu with "Sickness" selected. Below the dropdown is a "Create" button.

Trent will display the sickness absence details page.



The screenshot shows a web form titled "Sickness absence details: Ms Louisa May". It includes the following fields:

- Name: Ms Louisa May Job title: Clerk
- Social security number: WE356627C Pay ref: 30000008
- Pers ref: 30000008
- Absence start: Date (05/02/2007), Type (Full day), Time, Hours absent
- Absence end: Date (09/02/2007), Type (Full day), Time, Hours absent
- Absence: Absence scheme type (Sickness Scheme), Absence reason (Asthma)

At the bottom of the form are "Save" and "Delete" buttons.

This page can be used to create and maintain the information already recorded about an absence.

| Sickness Absence Details | |
|--------------------------|--|
| Field | Comments |
| Absence start date | Enter the start date of the absence |
| Type | Select the type from the drop down list for the start of the absence: <ul style="list-style-type: none"> • Full day • Part day • Half day – PM • Half day - AM |
| Time | If you selected any option other than Full day, you can enter the start time of the absence. |
| Hours absent | If you selected any option other than Full day, you can enter the number of hours absent on the first day. |
| Absence end date | Enter the end date of the absence if known. |
| Type | Select the type from the drop down list for the end of the absence: <ul style="list-style-type: none"> • Full day • Part day • Half day – PM • Half day – AM |
| Time | If you selected any option other than Full day, you can enter the end time of the absence. |
| Hours absent | If you selected any option other than Full day, you can enter the number of hours absent on the last day |
| Absence type | Select the absence type from the drop down list. (This will only ever say 'sickness scheme' as an option) |
| Absence reason | Select the absence reason from the drop down list |

Enter the absence details and click on the Save button.

Important Note: Do not forget to enter the absence end date once you have the details. Otherwise the absence will remain open indefinitely.

3.2 Person Absence Calculation

After an absence has been entered a personal absence calculation should be run which enables the results of calculations to be checked. In order to see the impact on pay you can run the payroll calculation.

Navigate: **Organisation > People > select the person >Absence >Personal Absence List > Person absence calculation**

Launch absence calculation: Ms Louisa May (Sickness)

Calculate from

Date type Start of current absence

Date from 05/02/2007

Calculate to

Date type End of current absence

Date to 09/02/2007

This page is used to initiate the absence calculation for an individual absence

| Launch Absence Calculation | |
|----------------------------|--|
| Field | Comments |
| Date type | Select the type calculation from the drop down list: <ul style="list-style-type: none"> Start of current absence (almost always use this one) Start of first absence requiring calculation Manually Input date Note: the selections available will depend on the type of absence you have selected. |
| Date from | This field will display the actual calculate from date which will be used. If you selected Manually input date you will be able to enter the start date. |
| Date type | Select the type calculation from the drop down list: <ul style="list-style-type: none"> End of current absence Manually input date Note: the selections available will depend on the type of absence you have selected. |
| Date to | This field will display the actual calculate to date which will be used. If you selected Manually input date you will be able to end the end date. For currently open-ended absences, you will have to enter a date. It is recommended that you use the last day of the current pay period. |

As well as being able to calculate from the start and end of individual absences, it is possible to calculate to any date you wish (typically to the end of a pay period). To do this change the calculate To option to 'Manually input date', then specify the date to which the system is to calculate.

Launch absence calculation: Miss Jenny M Bosten (Sickness)


Calculate from

Date type

Date from 16/02/2007

Calculate to

Date type

Date to 

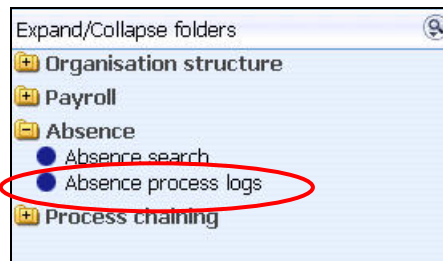
This will have the effect of calculating (or re-calculating) absences up to the end of the period. Especially useful when entering an absence dated prior to the current one.

Absence Process Logs

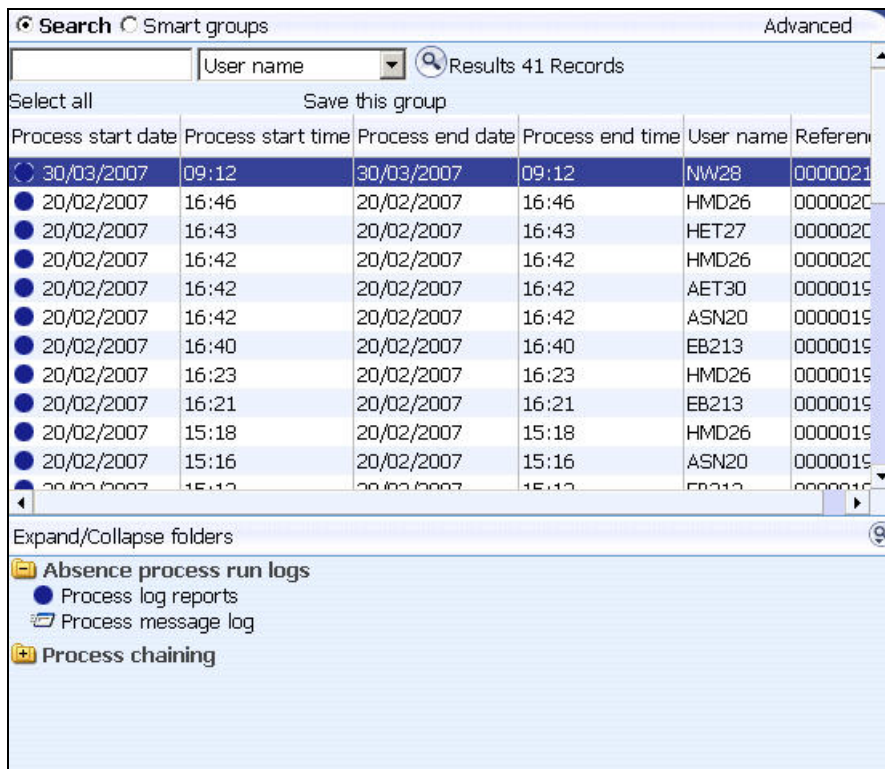
Once the calculation has finished it is always useful to view the process log generated by the calculation. This will highlight any errors and exceptions that need to be acted upon.

The Absence Process Logs option can be accessed from the main Absence folder on the Trent home page.

Navigate: **Organisation > Absence> Absence process logs**



The next step is to search for, and highlight, the process log you wish to view.



Use the Process Message Log option to view the details online.

| Person name | Message | Other data | Process start date | Severity | Number |
|-------------|---|---|--------------------|----------|--------|
| | Process Started. | | 30/03/2007 09:12 | 4 | 1 |
| | Absence calculation performed for the following | 05/02/2007,09/02/2007,Sickness,One Person | 30/03/2007 09:12 | 4 | ABS9 |
| | Number of people processed | 1 | 30/03/2007 09:12 | 4 | ABS3 |
| May Louisa | Person Process Started | | 30/03/2007 09:12 | 4 | ABS1 |
| May Louisa | Absence calculated between dates | 05/02/2007,09/02/2007 | 30/03/2007 09:12 | 4 | ABS6 |
| May Louisa | Absence calculated between dates | 05/02/2007,09/02/2007 | 30/03/2007 09:12 | 4 | ABS6 |
| May Louisa | No qualifying pattern attached, so working pattern used instead | 03/02/2007 | 30/03/2007 09:12 | 4 | ABS15 |
| May Louisa | Absence exclusion | 05/02/2007 | 30/03/2007 09:12 | 4 | ABS19 |
| May Louisa | Person Process Finished | | 30/03/2007 09:12 | 4 | ABS2 |
| | Process Completed. | | 30/03/2007 09:12 | 4 | 2 |

Go to page Page 1 of 1

Use the Process OLog Reports to run the Absence Messages report, which can be viewed online and/or extracted for external use.

Navigate: Organisation > Absence > Absence process logs > Process log reports > Run report



The first step is to run the report. Click on the Run report option, complete the necessary parameters and click on the Run button.

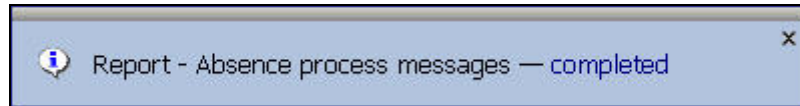
Absence process messages:

Error level: Include Severe → Change to read 'All messages'

Output type: PDF File

Report run comments:

Trent will inform you when the report has been generated





Click on the Download Output option and click on the latest download button to extract the data.

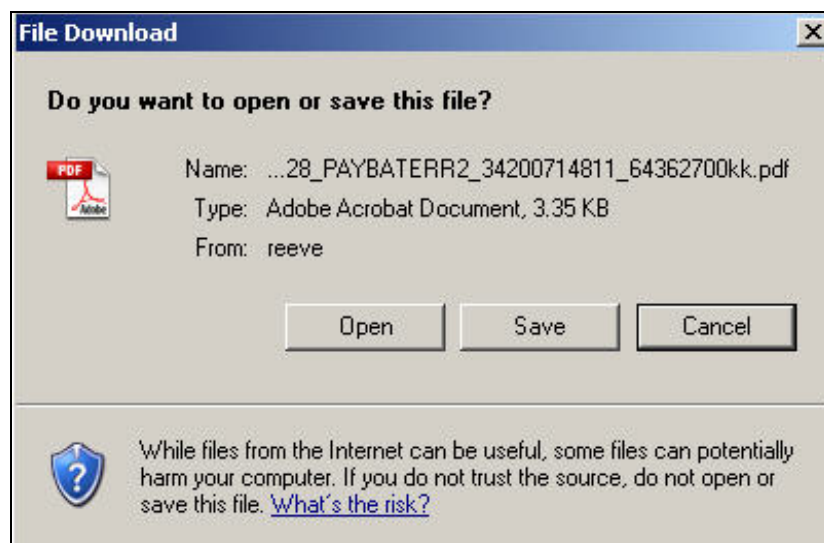
Download output: Absence messages

View output from: Today

Available report outputs
Default path: /d01/hr_trn_/db/reports/

| Run date & time | Comments | Download | Delete |
|------------------|----------|--|-------------------------------------|
| 03/04/2007 14:08 | |  | Select all <input type="checkbox"/> |
| 03/04/2007 14:05 | |  | <input type="checkbox"/> |

The system will wait for you to specify whether you want to open the report or save it externally.



Sickness and Maternity Absences



The report (PDF output) will look like:

| Trent | | Absence Calculation - Errors & Warnings | | | University of Cambridge |
|------------------------|-----------------|---|---|---|-------------------------|
| Date: | 30/03/2007 | Time: | 09.12.39 | Username: | NW28 |
| Error Level: | All Messages | | | Reference: | 00000215 |
| Employee Name | Absence | Scheme | Message | Other Data | |
| | | | Process Started. | | |
| | | | Process Started | | |
| | | | Absence calculation performed for the following | 05/02/2007,09/02/2007,Sickness,One Person | |
| | | | Number of people processed | 1 | |
| May Louisa | | | Person Process Started | | |
| May Louisa | Sickness Scheme | OSP_SICK | Absence calculated between dates | 05/02/2007,09/02/2007 | |
| May Louisa | Sickness Scheme | SSP | Absence calculated between dates | 05/02/2007,09/02/2007 | |
| May Louisa | Sickness Scheme | SSP | No qualifying pattern attached, so working pattern used instead | 03/02/2007 | |
| May Louisa | Sickness Scheme | SSP | Absence exclusion | 05/02/2007 | |
| May Louisa | | | Person Process Finished | | |
| | | | Process Completed. | | |
| 03/04/2007 14:08:15 | | | | | Page: 1 |

3.4 Payroll Calculation

To check the impact on pay from the person absence calculation you will also need to run the payroll calculation.

Navigate: **Organisation > People > select the person > Payroll > Pay history (select current pay period) > Calculate pay**

6. Use the search facility to locate the person whose pay details you wish to view
7. Choose the Payroll menu
8. Select Pay history
9. Select the current pay period from the list (i.e. the top one)
10. Select calculate pay, the pay period control form will be displayed

Pay period control: New Name: Ms Louisa May Job title: Clerk
Social security number: WE356627C Pay ref: 30000008
Pers ref: 30000008

Payroll

Not paid

Lock contracts on calculation

Select people

Smart group name

Calculate **Rollback** **Cleardown**

11. Click on calculate
12. The following message will be displayed

The payroll calculation process has started. You will be notified when this process has been completed.

13. When complete a confirmation message will be displayed

Payroll calculation — completed x

14. Select Pay details and the payslip for the individual will be displayed.

| Pay details: Assistants, 31/05/2007 09:00 | | | | | | | Name: Mr Herbet Hondorus Job title: Junior Accounts Clerk 1 | |
|--|-------------------------|---------------------|-----------------------|------------------------|--------------------------------|---------|--|--|
| | | | | | | | Social security number: AB987456C Pay ref: 30000129 Pers ref: 30000129 | |
| Tax code: 503L Cumulative | | Tax month: 2 | NI category: D | Legislation: UK | Currency: British Pound | | | |
| Payment/Benefit | Job title | Paid from | Paid to | Units | Rate | Cash | | |
| First Aid (NP) | Junior Accounts Clerk 1 | 24/05/2007 | 31/05/2007 | | | 10.00 | Total payments: | |
| Basic Pay | Junior Accounts Clerk 1 | 24/05/2007 | 31/05/2007 | | | 133.65 | 143.65 | |
| Basic Pay (Abs. offset) | Junior Accounts Clerk 1 | 25/05/2007 | 31/05/2007 | | | -133.65 | Total deductions: | |
| Basic Pay (Abs. payment) | Junior Accounts Clerk 1 | 25/05/2007 | 31/05/2007 | | | 133.65 | 8.02 | |
| | | | | | | | Net pay: | |
| | | | | | | | 135.63 | |
| Deduction | | | | | | Cash | | |
| Tax | | | | | | 0.00 | B/F: C/F: | |
| Opted out of pension | | | | | | 0.00 | 0.00 0.00 | |
| NI - D | | | | | | 0.00 | | |
| CPS | | | | | | 8.02 | Rounded net: | |
| | | | | | | | 135.63 | |

3.4.1 Long Term Sickness

To suppress the processing of tax refunds for an employee is on a long term sickness, you would normally apply a contract suspension. However, in doing so this would prevent normal payments via Temporary Element input, which might be required for the therapeutic return to work cases.

In order to work around this, contract suspension will not be used for long term sickness, ensuring that all relevant temporary data can be entered.

3.4.2. New Starters

If the payroll details for a new starter are entered onto CHRIS and on the same day they have some sickness absence allocated against them they will receive no SSP. This is because until the payroll has been 'calculated' (which will happen every night) the system has no YTD pay figures available and hence will exclude the individual from the absence calculation. This will also be highlighted on the errors and warnings report.

4 Maternity Absences

Information regarding maternity leave policy and procedure can be found at:
<http://www.admin.cam.ac.uk/offices/personnel/policy/maternity.shtml>


Information for an employee who is going on maternity leave will be recorded on the Maternity Leave Application form CHRIS/60. The details will be recorded in the Maternity Leave Database in order to produce the employees' letters. A copy of the form and letter is sent to Payroll, who enters the details into Trent.

An automatic synchronisation process will be run to report on any discrepancies between the two systems.

4.1 To record the maternity details in Trent

Follow the initial steps as previously described, ensuring you select the Maternity group.







Navigate: **Organisation > People** (find individual) > **Absence > Personal Absence list > New Absence details**



Trent will display the maternity absence details page.

This page is used to create and maintain the information recorded about a maternity absence or to update the recorded dates and details. You can record the following information:

- Expected birth date
- Issue date of MATB1 (medical evidence of the pregnancy)
- Maternity absence start and end dates
- Date of childbirth
- Amend the MPP(Maternity Payment Period) start date if required

| | | |
|---|---|---|
| Maternity absence details: | Name: | Job title: Research Associate |
| | Social security number: | Pay ref: 10103030 |
| | | Pers ref: 10103030 |
| Absence dates | | |
| Expected birth date | <input type="text" value="03/05/2007"/> |  |
| Issue date of MATB1 | <input type="text" value="18/01/2007"/> |  |
| Calculated maintenance details | | |
| Expected week of childbirth | 29/04/2007 | |
| Earliest MPP start | 11/02/2007 | |
| Qualifying week commences | 14/01/2007 | |
| Earliest allowed MATB1 date | 10/12/2006 | |
| Key maternity dates | | |
| Maternity absence start date | <input type="text" value="29/04/2007"/> |  |
| Maternity absence end date | <input type="text"/> |  |
| MPP start date | <input type="text" value="29/04/2007"/> |  |
| MPP end date | 26/01/2008 | |
| OML end date | 27/10/2007 | |
| AML end date | 26/04/2008 | |
| Additional information | | |
| Actual date of childbirth | <input type="text"/> |  |
| Stillbirth | <input type="checkbox"/> | |
| Absence scheme type | <input type="text" value="Maternity Scheme"/> | |
| Reason for early absence | <input type="text"/> | |
| <input type="button" value="Save"/> <input type="button" value="Delete"/> | | |

Trent calculates and displays the following dates used in SMP (Statutory Maternity Pay) processing:

- Expected week of childbirth
- Qualifying week
- Earliest MPP (Maternity Payment Period)
- Earliest allowed MATB1

4.2 Additional Maternity Information

Maternity is covered by statutory regulations that determine whether a woman is entitled to receive SMP payments from her employer for her maternity leave. Use the Maternity Absence page to enter information, as it becomes available, during the course of a woman's pregnancy.

1. To enter the expected birth date:

The first step in recording a woman's maternity details will usually be to record the date on which she expects to give birth. Once you have entered this date, Trent can calculate the other dates that decide whether she qualifies for SMP and when she can start to receive it.

2. To enter MATB1 details:

After the 20th week of a woman's pregnancy she will be issued a MATB1 certificate by her doctor or midwife. Once she has received it she must pass it on to her employer. You can then record the details in Trent.

3. To enter maternity absence dates:

Once an employee has informed you of the dates she intends to take her maternity leave, you can enter them on the Maternity Absence page. If the woman is not intending to return to work for you, she may only provide you with an absence start date. It is recommended that you only put in a start date initially and that the end date is added when the person actually returns.

4. To enter the actual date of childbirth:

When the employee has informed you of the date she gave birth you can enter this on the Maternity Absence page.

5. To enter maternity absence dates for an early birth:

If the employee gives birth either in or before the 15th week of before the baby's due date, maternity leave and the SMP pay period will start on the day after the date of the birth. Enter the actual date of the birth and select 'Premature birth' from the pick list of early absences.

However, if the baby is born after the 15th week before it is due, but before the employee was due to start her maternity leave (including where she had not yet advised when her maternity leave would start) the MPP starts on the day after the date of birth. Additionally in

this case no entry needs to be recorded in the 'Reason for Early Absence' type field. Trent will then complete the MPP start and end dates as appropriate.

6. Pregnancy-related illness

If the employee is off work sick because of her pregnancy and the absence continues into or starts within the four week period starting on the Sunday of the 4th week before the baby is due, the MPP and her maternity leave start on the day after the first complete day of absence from work within the four week period.

You should enter the Maternity absence start date and select 'Pregnancy-related illness' from the drop down list under Reason for early absence. Trent will then complete the MPP start and end dates as appropriate.

7. To enter a stillbirth:

If an employee's baby is stillborn she may still qualify for SMP. In some cases SSP may be payable instead.

8. The system will not always assume that a change to the Maternity start date is to be reflected against the MPP start date. If this is the case, a manual change will be necessary.

4.3 Personal Absence Calculation

Once you have saved the absence details, click **Person Absence Calculation** (as the absence is open-ended at this stage, use the last day of the current pay period as the 'calculate to' date) and then click the Calculate button and Trent will calculate the payment values for the absence.

Important Note:

Do not forget to enter the maternity absence end date once you have the details. Otherwise the absence will remain open indefinitely.

4.4 Keeping In Touch Days (KIT)

A member of staff whose baby is born on or after 1 April 2007 may, with the agreement of her Head of Department, carry out up to 10 days' work during her statutory maternity leave period without bringing her maternity leave to an end. In accordance with legislation, any work carried out on any day shall constitute a full day's work. This provision does not apply during the two week period commencing on and including the day on which childbirth occurs.

Work means any work done under the contract of employment and may include training, attending meetings and committees or any activity undertaken for the purposes of keeping in touch with the workplace.

It should be noted however, that this provision does not confer any right on the Institution concerned to require any work to be carried out during the statutory maternity leave period, nor any right on a member of staff to request work during this period. Also, there is no obligation on either the Institution or the member of staff to make use of these days.

Any days' work carried out will not have the effect of extending the total statutory maternity leave period.

Within Trent you can record details of any KIT days for which you will pay the female.

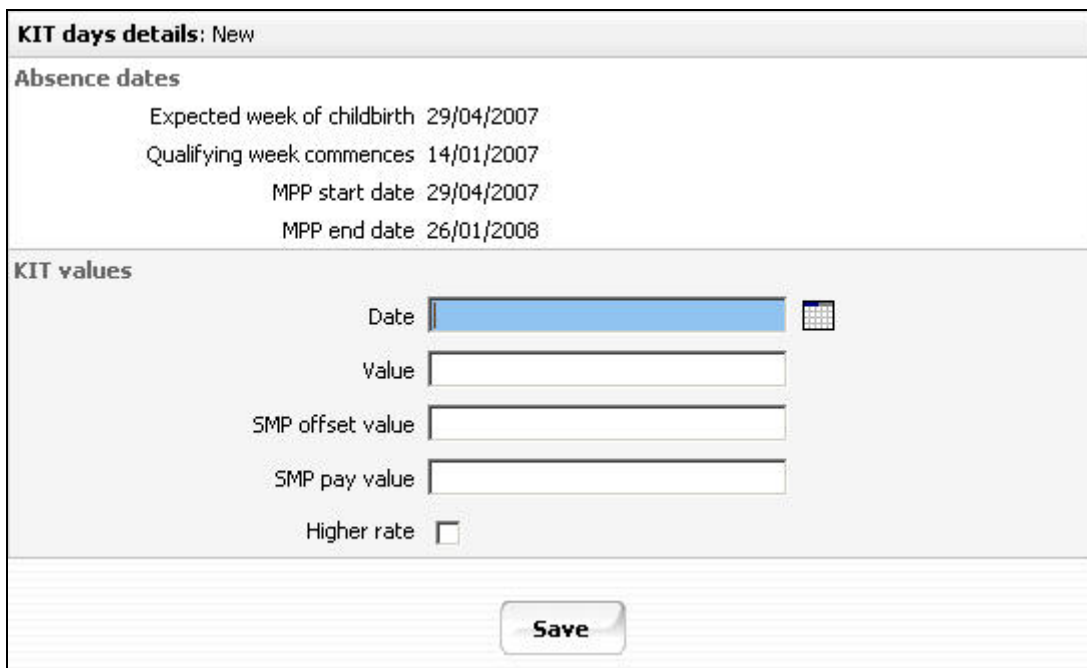
4.4.1 To Record Maternity Keeping in Touch (KIT) days

To enter KIT information you can use either of the navigation options shown:

Navigate: **Organisation>People(Select a woman)>Absence>Personal absence list(Select the Maternity absence)>Maternity KIT days>New – KIT days details**

Or

Navigate: **Organisation>Absence>Absence search(Select the maternity absence)>Maternity KIT days>New – KIT days details**



This form is used to record KIT days that you are paying the woman.

| Recording KIT Days | |
|-----------------------------|---|
| Field | Comments |
| Expected week of childbirth | Displays the recorded week of childbirth |
| Qualifying week commences | Displays the date when the SMP entitlement will start |
| MPP Start date | Maternity payment period start date |
| MPP End date | Maternity payment period end date |
| Date | The field holds the date of when the woman attended work as part of her KIT days |
| Value | Enter the value of the payment made to the woman for this KIT day. (see note 1 overleaf) |
| SMP Offset value | Enter the value of the offset required against the SMP (see note 2) |
| SMP Pay value | This field is for the input of any SMP payments required after the end of the absence (but before the end of the MPP) which Trent will not automatically calculate. Where KIT days are being paid during the absence, Trent automatically calculates the SMP payments, but these will not be displayed here. See note |
| Higher rate | Tick this check box if the SMP payment or Offset is at the Higher rate. |

Notes:

1. KIT days are paid in the next payroll after they have been entered and thus not necessarily in the pay period that includes the KIT date.
2. Each KIT day worked is to be paid individually. If a full week of KIT days are being paid then you need to enter separate values for each day for KIT and SMP offset value. Each entry you make will appear separately on the provisional payslip.
3. One aspect of the changes arising from the Work and Families act will not initially be supported in Trent. This is the **optional** splitting of weekly payments of SMP. HMRC have clarified that SMP is still calculated, due and payable for whole weeks, but a rule change will allow a particular week's SMP to be split over two payment periods by dividing the weekly rate of SMP by 7 to provide a notional daily rate.

This is intended to make it easier for employers to align SMP payments with the pay practice in the employment. For example where an SMP pay week is split between two calendar months, the relevant number of days can be paid with each salary payment - two sevenths with the May salary, five sevenths with the June salary. On the face of it, allowing odd days of SMP to be paid would remove some of the anomalies in the area of offsetting Occupational Maternity Pay (OMP) against SMP.

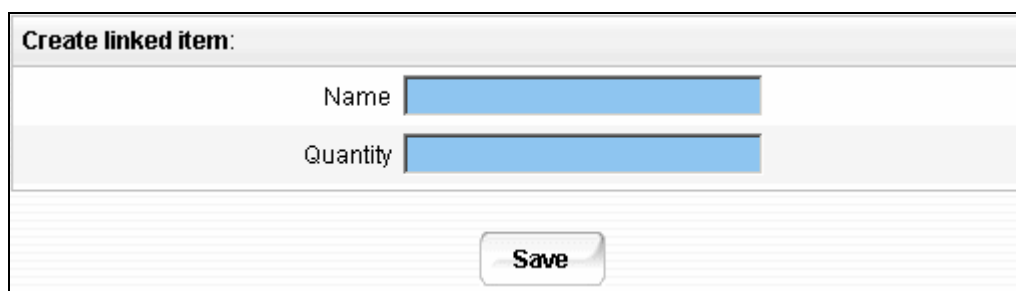
4.5 Maternity Cover

When an employee is absence on Maternity Leave, you may need to take the necessary steps to cover that period absence. To achieve this once agreed, you need to create a new position within the relevant part of the organisation structure for the temporary employee. In addition you need to indicate on the existing position that the person is on Maternity leave, by changing the position title.


4.5.1 Creating the Temporary Position

Navigate: Organisation > Posts > Create Position

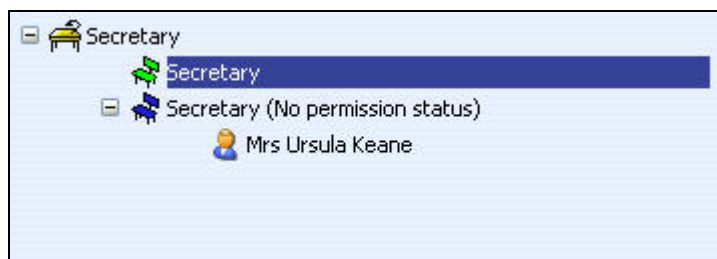
1. With the University of Cambridge selected in the object pane, click on Organisation explorer in the action pane.
2. Enter the effective date on which the new position comes into existence
3. Click Posts in the action pane and then search for the post (if you have made a note of the Post reference number in the previous step this will be the best way to search!) under which you wish to create the new Position.
4. Choose the post and open the mini explorer
5. Click the Create Position option in the Action Pane. Trent opens the Create linked item page in the display pane



| Create linked item: | |
|-------------------------------------|----------------------|
| Name | <input type="text"/> |
| Quantity | <input type="text"/> |
| <input type="button" value="Save"/> | |

6. Enter a name for the new position
7. Enter a quantity of 1
8. Click the  button on the create linked item page to save your changes. Trent adds the new Position to the Organisation structure and the explorer diagram is updated accordingly.

9. You should end up with two positions within the same post. One is occupied by the employee who is on Maternity Leave, the other is vacant.



To finalise the temporary position details it is necessary to also make use of Expected Position End Date and Expected Position End Reason fields, within position details.

1. Select the position created from the mini explorer
2. Select position details from the action pane
3. Enter the date when the position is expected to end. This information should be taken from the permission to fill form and is the equivalent in SECQUS of entering a post expiry date. The date is for information purposes and will not end the position at that date. The information source is the post creation form or NARF.
4. Enter the reason for the position ending by selecting from the drop down box. Click on the Save button.

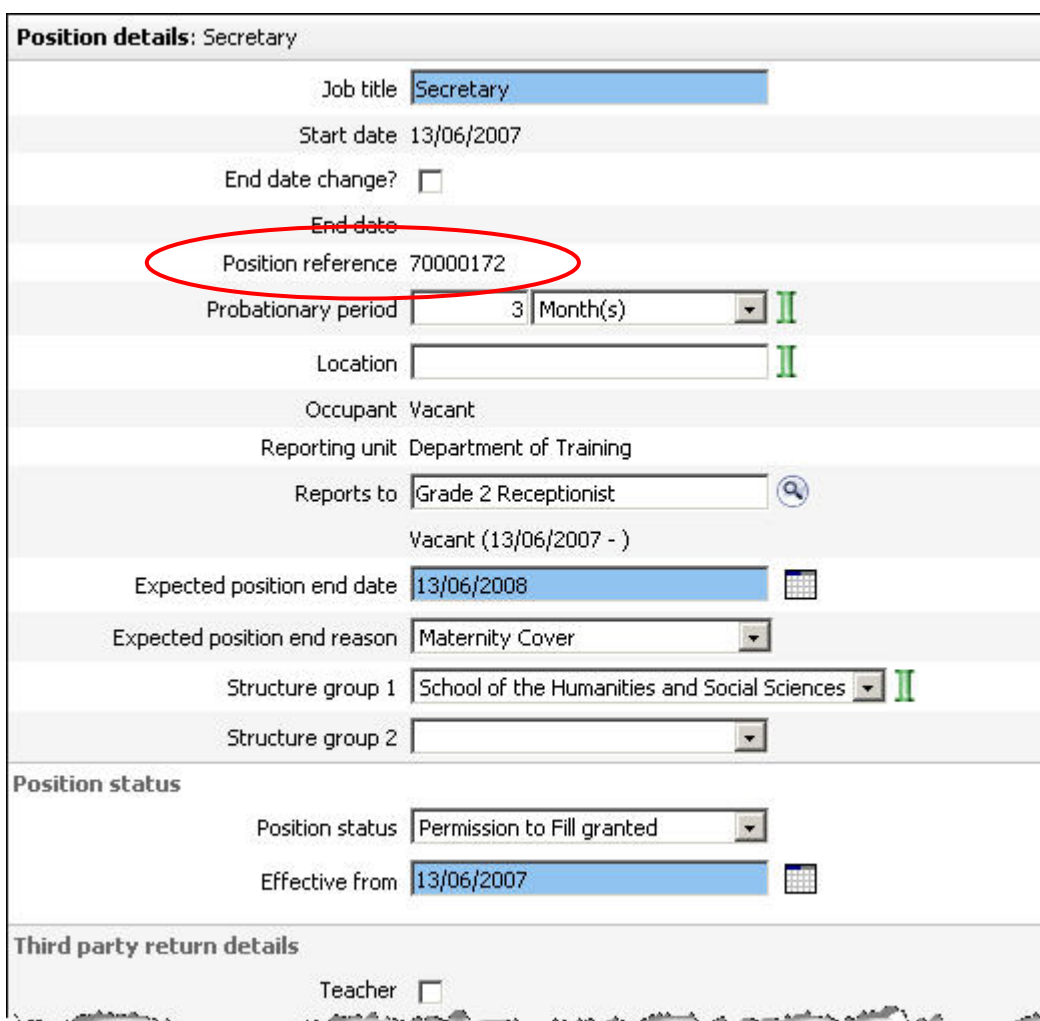
Position details: Secretary

| | |
|-----------------------------------|--|
| Job title | Secretary |
| Start date | 13/06/2007 |
| End date change? | <input type="checkbox"/> |
| End date | |
| Position reference | 70000172 |
| Probationary period | 3 Month(s) |
| Location | |
| Occupant | Vacant |
| Reporting unit | Department of Training |
| Reports to | Grade 2 Receptionist |
| | vacant (13/06/2007 -) |
| Expected position end date | 13/06/2008 |
| Expected position end reason | Maternity Cover |
| Structure group 1 | School of the Humanities and Social sciences |
| Structure group 2 | |
| Position status | |
| Position status | Permission to Fill granted |
| Effective from | 13/06/2007 |
| Third party return details | |
| Teacher | <input type="checkbox"/> |

4.5.2 Position Reference number

A position reference number is automatically generated by Trent when a position is created. To enable you to easily identify this position when attaching a person it is advised that you make a note of the position number once you have created it.

5. Select the position created from the mini explorer.
6. Select position details from the action pane
7. View and record the position reference number



Position details: Secretary

Job title: Secretary

Start date: 13/06/2007

End date change?

End date:

Position reference: 70000172

Probationary period: 3 Month(s) II

Location: II

Occupant: Vacant

Reporting unit: Department of Training

Reports to: Grade 2 Receptionist

Vacant (13/06/2007 -)

Expected position end date: 13/06/2008

Expected position end reason: Maternity Cover

Structure group 1: School of the Humanities and Social Sciences II

Structure group 2:

Position status

Position status: Permission to Fill granted

Effective from: 13/06/2007

Third party return details

Teacher

In addition to creating and filling a temporary position to cover maternity, you also need to indicate that the original position is being filled by an employee on Maternity Leave. This will explain why there are two positions in the same Post and that one of them is temporary.

To achieve this simply open up the Position Details form for the position being occupied by the employee on Maternity Leave and change the title by adding 'On Maternity'.

Position details: Secretary

Job title **Secretary 'On Maternity'**

Start date 01/03/2007

End date change?

End date

Position reference 70000086

Probationary period 3 Month(s)

Location

Occupant Mrs Ursula Keane

Reporting unit Department of Training

Reports to Senior Accounts Clerk
Mr Ronald Baba (01/03/2007 -)

Expected position end date

Expected position end reason

Structure group 1 School of the Humanities and Social Sciences

Structure group 2

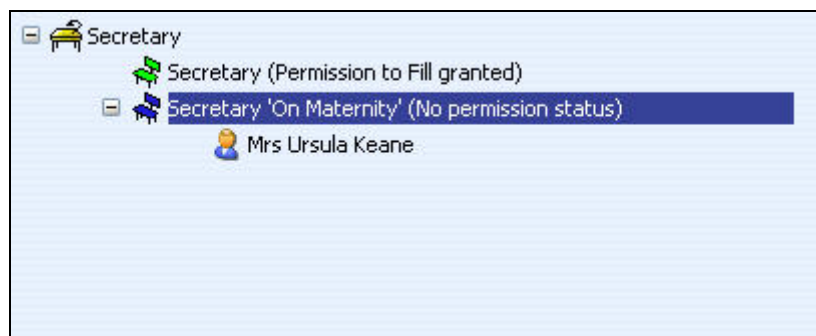
Position status

Position status No permission status

Effective from 01/03/2007

Third party return details

Teacher



4.6 Non Return from Maternity Leave

There may be times when employees decide they do not wish to continue employment following a period of maternity leave. In order for Payroll to spot whether a leaver is/was on Maternity Leave they will need to check the last 4 pay periods for the payment of SMP/OMP.

This will then allow for the recovery of OMP overpayments, where necessary.

To help with this, the Payroll (Leaver) process chain also includes the Absence Calendar so that the user can see whether the employee is/has been on Maternity leave.

5 Paternity and Adoption Absences

In relation to Maternity absences, you may need to record periods of Paternity and Adoption leave, along with the appropriate payments. Both of these options are available as absence types within CHRIS and can be used whenever necessary.

Once the basic details are entered you will need to calculate the absence in the same way that Sickness and Maternity are calculated for the relevant values to be applied.

5.1 Paternity Leave

1. Go to the employee's Personal Absence List
2. Click on the New – Absence Details action.
3. Select the Paternity option from the list of absence groups.
4. Click on the Create button.

Select Group for New Absence:

Select absence group Paternity

5. Record the necessary data on the resulting screen.
6. Click on the Save button to add the entry to the employee's absence history

Paternity absence details: Name: Captain Keith Bridge Job title: Reader

New Social security number: AB456542A Pay ref: 30000110

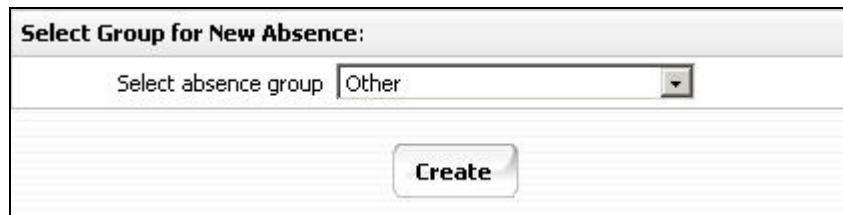
Pers ref: 30000110

| | | |
|------------------------------|---|---|
| Expected birth date | <input type="text" value="15/07/2007"/> | <input type="button" value="Calendar"/> |
| Type | Paternity Leave | |
| Paternity absence start date | <input type="text" value="16/07/2007"/> | <input type="button" value="Calendar"/> |
| Paternity absence end date | <input type="text" value="27/07/2007"/> | <input type="button" value="Calendar"/> |
| Actual date of childbirth | <input type="text"/> | <input type="button" value="Calendar"/> |
| Stillbirth | <input type="checkbox"/> | |

5.2 Adoption Leave

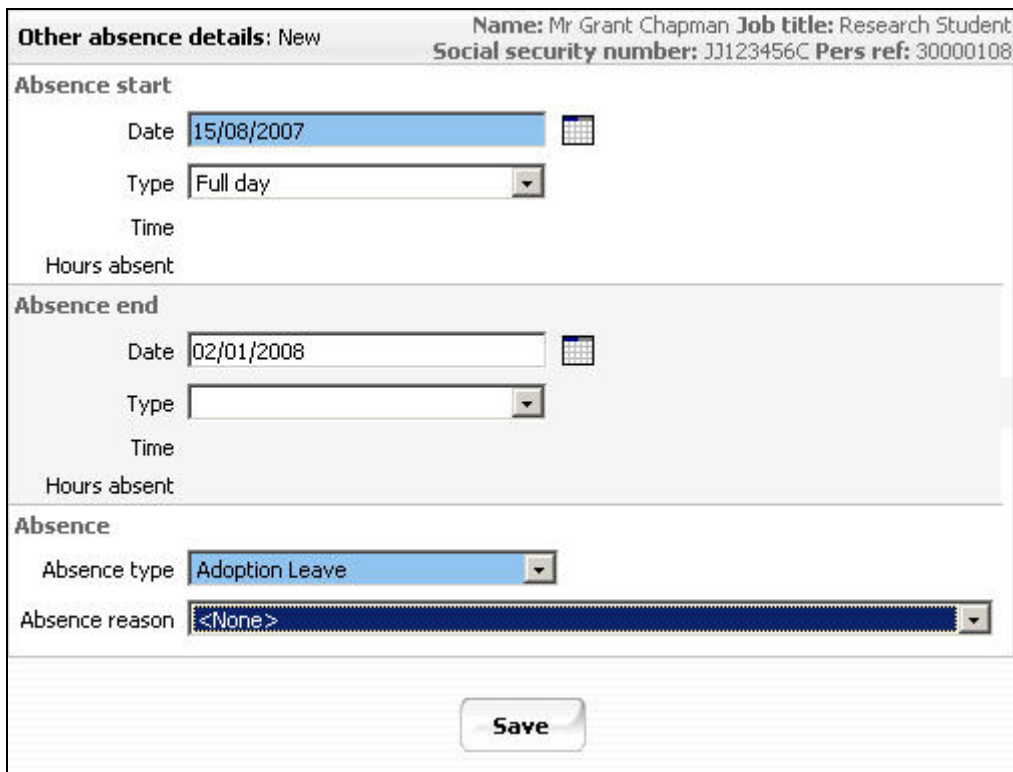
To enter a period of Adoption leave

1. Go to the employee's Personal Absence List.
2. Click on the New – Absence Details action.
3. Select the Other option from the list of absence groups
4. Click on the Create button.



The screenshot shows a dialog box titled "Select Group for New Absence:". It contains a dropdown menu labeled "Select absence group" with "Other" selected. Below the dropdown is a "Create" button.

5. Record the necessary data on the resulting screen.
6. Click on the Save button to add the entry to the employee's absence history



The screenshot shows the "Other absence details: New" form. At the top right, it displays employee information: "Name: Mr Grant Chapman Job title: Research Student" and "Social security number: JJ123456C Pers ref: 30000108". The form is divided into sections: "Absence start" with fields for Date (15/08/2007), Type (Full day), Time, and Hours absent; "Absence end" with fields for Date (02/01/2008), Type, Time, and Hours absent; and "Absence" with fields for Absence type (Adoption Leave) and Absence reason (<None>). A "Save" button is located at the bottom of the form.

6 Other Absence Types

All other Absence types will be entered by the East Room users, but there are some that will have a direct impact on Payroll in that they will offset Basic Pay. These include the 'Unpaid Leave' and 'Unauthorised Absence' options.

| Select all | | |
|--|---------------------------------|------------------|
| Scheme name | Scheme type | Entitlement type |
| <input type="radio"/> Ac-rel & Research personal holiday | Personal holiday | (Table) |
| <input checked="" type="radio"/> Academic Personal Holiday | Personal holiday | (Table) |
| <input checked="" type="radio"/> Adoption leave | Adoption leave | |
| <input checked="" type="radio"/> Jury Service | Jury service | |
| <input checked="" type="radio"/> Occ Sickness Scheme (Pre Jan 04) | OSP - Sickness | (Simple Table) |
| <input checked="" type="radio"/> Occupational Maternity Scheme | OMP | (Simple Table) |
| <input checked="" type="radio"/> Occupational Sickness Scheme | OSP - Sickness | (Simple Table) |
| <input checked="" type="radio"/> Paid leave - Compassionate | Compassionate leave | |
| <input checked="" type="radio"/> Paid leave - Paternity Leave | Paternity leave | |
| <input checked="" type="radio"/> Paid leave - Short Leave | Short Leave | |
| <input checked="" type="radio"/> Paid leave - Statute D,II,6,b | Paid leave - Statute D,II,6,b | |
| <input checked="" type="radio"/> Paid leave - Study Leave | Study Leave | |
| <input checked="" type="radio"/> Paid leave - Substitute Residence | Substitute Residence | |
| <input checked="" type="radio"/> Sabbatical Leave | Other | |
| <input checked="" type="radio"/> Statutory Maternity Scheme | SMP | |
| <input checked="" type="radio"/> Statutory Sickness Scheme | SSP | |
| <input checked="" type="radio"/> Unauthorised absence | Unauthorised absence | |
| <input checked="" type="radio"/> Unpaid leave - Other | Unpaid leave | |
| <input checked="" type="radio"/> Unpaid leave - Parental Leave | Parental leave | |
| <input checked="" type="radio"/> Unpaid leave - Statute D,II,6,b | Unpaid leave - Statute D,II,6,b | |

The absence is entered as normal by the East Room, and when calculated it will automatically deduct the equivalent salary from the employee's pay.

Whenever, such unpaid or unauthorised leave is entered the Payroll Team will receive an automated email via Workflow informing them of this although they will not be required to take any action.

The following example shows a single Unpaid Leave day and it's impact on the employee payslip once calculated.

Sickness and Maternity Absences



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

Absence start
 Date: 09/02/2007
 Type: Full day
 Time:
 Hours absent:

Absence end
 Date: 09/02/2007
 Type:
 Time:
 Hours absent:

Absence
 Absence scheme type: Unpaid leave - Other
 Absence reason: <None>

Pay details: Research & Stipends, 31/05/2007 09:00 **Name:** Miss Gemma Colling **Job title:** Research Assistant
Social security number: AB658947B **Pay ref:** 30000105
Pers ref: 30000105

Tax code: 503L Cumulative **Tax month:** 2 **NI category:** D **Legislation:** UK **Currency:** British Pound

| Payment/Benefit | Job title | Paid from | Paid to | Units | Rate | Cash |
|-------------------------|--------------------|------------|------------|-------|------|---------|
| Basic Pay | Research Assistant | 01/05/2007 | 31/05/2007 | | | 1754.17 |
| Basic Pay (Abs. offset) | Research Assistant | 05/05/2007 | 31/05/2007 | | | -565.86 |

| | |
|--------------------------|---------------|
| Total payments: | 1,188.31 |
| Total deductions: | 274.70 |
| Net pay: | 913.61 |
| B/F: | 0.00 |
| C/F: | 0.00 |
| Rounded net: | 913.61 |

| Deduction | Cash |
|-----------|--------|
| USS | 75.46 |
| Tax | 129.36 |
| NI - D | 69.88 |

7 Additional Absence Details

In addition to recording the basic details of an absence (i.e. Start Date, End Date, Reason, etc) there are other areas that may be completed, including:

- Average Earnings
- Exclusions
- Absence Values
- Entitlement Summaries and Adjustments
- Working Patterns

This section explains fully, how each of these areas is accessed and maintained

7.1 Average Earnings Summary

Average earnings are based on the two months (or 8 weeks) pay immediately prior to the Qualifying Week (which is 15 weeks before the Expected Week of Confinement). It will be necessary to enter average earnings for Maternity for approximately 6 months after live migration.

For initial maternity leave and sickness absences that is entered onto Trent it will be necessary to enter average earnings as the system will be unable to calculate this until 2 months of payroll historical data is available. This will be a Payroll task.

The errors and warnings for absence report will be run on a regular basis and anyone who is excluded from SMP due to low earnings (or no average earnings) will be highlighted on this report. Additionally, there will be a process log message of No Average Earning found where the SSP calculation excludes an employee for insufficient earnings and where this results from there being **no** average earnings.

On an on-going basis this will be any person who has not worked for the university for long enough to have historical data – i.e. someone who joins and then goes on sick leave.

To enter average earnings:

Navigate: **Organisation > Absence > Absence search** (select the absence and person) > **Average Earnings summary**

| Average earnings summary: | |
|-------------------------------------|-------------------------------------|
| Total earnings | |
| Calculated value | 0.00 |
| Override value | <input type="text"/> |
| Last value used | |
| Average earnings | |
| Calculated value | 0.00 |
| Override value | <input type="text" value="190.00"/> |
| Last value used | 190.00 |
| Eligibility | |
| Calculated value | Yes |
| Override value | LEL = 84 |
| Last value used | Yes |
| <input type="button" value="Save"/> | |

This page allows you to view the average earnings calculation for a person in respect of Statutory Sick Pay and Statutory Maternity Pay and, if required, enter an override value for the payment value shown. The page also shows the person's eligibility status for SSP, SMP or SPP. The page is populated by Trent after the absence dates have been entered and payments calculated.

| Average Earnings Summary | |
|--|---|
| Field | Comments |
| <u>Total Earnings</u> Calculated Value Override Value Last Value used | The displayed value is based on Trent payment data You can manually input a value here if required This field displays the appropriate one of the above two values |
| <u>Average Earnings</u> Calculated value Override value Last value used | The displayed value is based on Trent payment data You can manually input a value here if required. This field displays the appropriate one of the above two values |
| <u>Eligibility</u> Calculated value Override value Last value used | The displayed value is based in Trent payment data. This field shows the LEL value used to determine eligibility Based on the last calculation. |

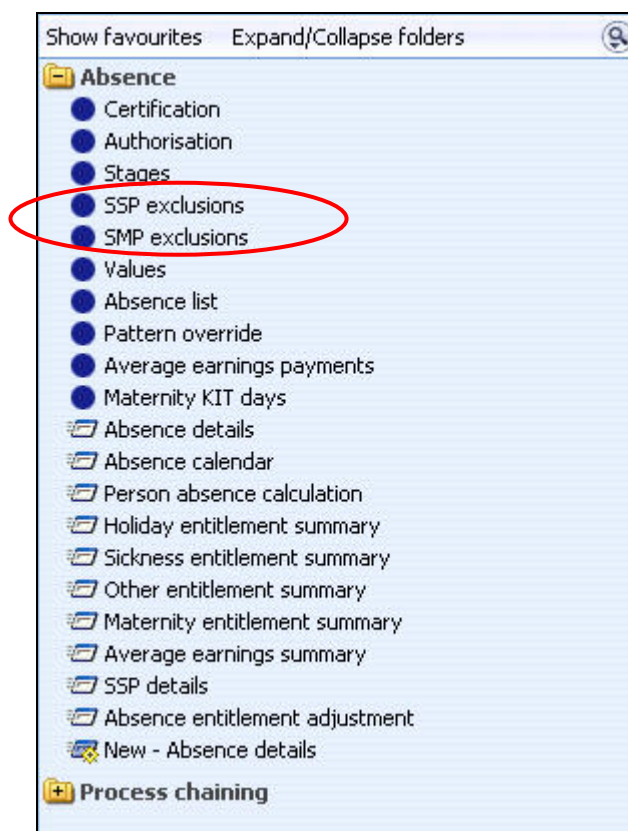
It should be noted that if average earnings need to be manually overridden, the sickness or maternity absence will need to be recalculated to take this change into consideration.

7.2 Absence Exclusions

Whenever an absence period is calculated, Trent will apply standard rules to ascertain whether a payment is due, or whether to exclude the period from payments. It is also possible to manually set an exclusion rule prior to the calculation, to force Trent not to calculate any payments.

One of the most common exclusion codes encountered is 'You have not earned enough money to qualify for SSP'. This is usually in relation to a new starter who has had a period on a Sickness absence shortly after commencing employment. The absence calculation will require a certain number of weeks payment for the average weekly earnings to be calculated. For a new starter this is not likely to be the case as they may not have been paid yet.





To view or set exclusions for an entered absence use the SSP Exclusions or SMP Exclusions options found in the Absence folder within the People menu.



Clicking on the relevant option will provided list of system generated exclusions (if applicable) in the Options Pane, and will allow you to add an exclusion manually.

| Start date | Exclusions |
|------------|---|
| 15/01/2007 | E - You have not earned enough money to qualify for SSP |

Show favourites Expand/Collapse folders

-  **SSP Exclusion Details**
 -  [SSP exclusion details](#)
 -  [New - SSP exclusion details](#)
-  **Process chaining**

Further clicking on an individual exclusion, in the list, will provide the details in a form.

| | |
|--|---|
| Exclusion details: Miss Laura Smith ((15/01/2007 - 03/02/2007) - (Sickness Scheme)) | |
| Exclusions | E - You have not earned enough money to qualify for SSP |
| Always from the start | <input checked="" type="checkbox"/> |
| Start date | |
| This exclusion was generated by the system. | |

Trent holds a list of all the statutory exclusion codes, which can be viewed from the UK Legislation folder.

7.2.1 SSP Exclusion Codes

| Select all | | |
|---|------|---|
| Legislation | Code | Description |
| <input type="radio"/> UK Legislation | A | You claimed Incapacity Benefit or Severe Disablement Allowance during the |
| <input checked="" type="radio"/> UK Legislation | B | Your contract of employment has expired |
| <input checked="" type="radio"/> UK Legislation | C | Your contract of employment has been brought to an end |
| <input checked="" type="radio"/> UK Legislation | D | You have already had, or will soon have been getting, SSP for 28 weeks |
| <input checked="" type="radio"/> UK Legislation | E | You have not earned enough money to qualify for SSP |
| <input checked="" type="radio"/> UK Legislation | F | You are aged 65 or over |
| <input checked="" type="radio"/> UK Legislation | G | You are expecting a baby soon or you have just had a baby |
| <input checked="" type="radio"/> UK Legislation | H | You have already been sick on and off for 3 years |
| <input checked="" type="radio"/> UK Legislation | I | You were away from work because of a trade dispute on the first day you w |
| <input checked="" type="radio"/> UK Legislation | J | You were in legal custody or you were serving a term of imprisonment wher |
| <input checked="" type="radio"/> UK Legislation | K | You were working outside the UK on the day you first became sick and I wa |
| <input checked="" type="radio"/> UK Legislation | L | You have not started working for me yet |
| <input checked="" type="radio"/> UK Legislation | Z | Now obsolete |

7.2.2 SMP/SPP Exclusion Codes

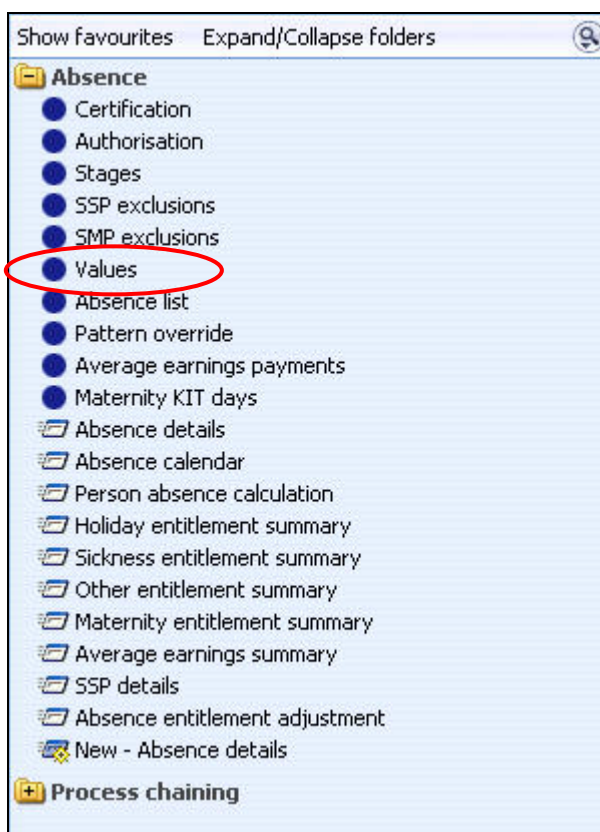
| Select all | |
|---|--|
| Legislation | Description |
| <input type="radio"/> UK Legislation | You were not employed by me for long enough |
| <input checked="" type="radio"/> UK Legislation | Your earnings were too low |
| <input checked="" type="radio"/> UK Legislation | You did not tell me soon enough that you would be away from work |
| <input checked="" type="radio"/> UK Legislation | You did not give me medical evidence soon enough |
| <input checked="" type="radio"/> UK Legislation | You did not tell me soon enough that your baby had been born |
| <input checked="" type="radio"/> UK Legislation | You were in legal custody |

7.3 Absence Values

Once an absence has been calculated, the values can be viewed to ascertain how many days/hours have been lost to the organisation and, where appropriate, the payment values that can be passed to the Payroll module.

To access the details,

Navigate: **Organisation > People (select person) > Absence > Personal Absence List > Values**



The details shown include a summary of SSP and, if used OSP, values

| Select all | | | | | |
|------------------|----------------|------------------|-----------|--------------------------------------|---------------------------|
| Scheme type | Band / Rate | Entitlement used | Time lost | Job / Contract name | Scheme name |
| ● SSP | 3 waiting days | - | - | - | Statutory Sickness Scheme |
| ● SSP | 1: 70.05 GBP | 2.4 Weeks | - | - | Statutory Sickness Scheme |
| ● OSP - Sickness | - | - | 15 Hours | Administrative Officer Grade I (Job) | - |

Sickness and Maternity Absences

The University has decided to allocate a notional 1 hour per day as time lost, as we are not going to the level of detail of holding actuals worked for every person.

Each entry on the summary can be further analysed by selecting the Values (Daily Breakdown) option from the menu.



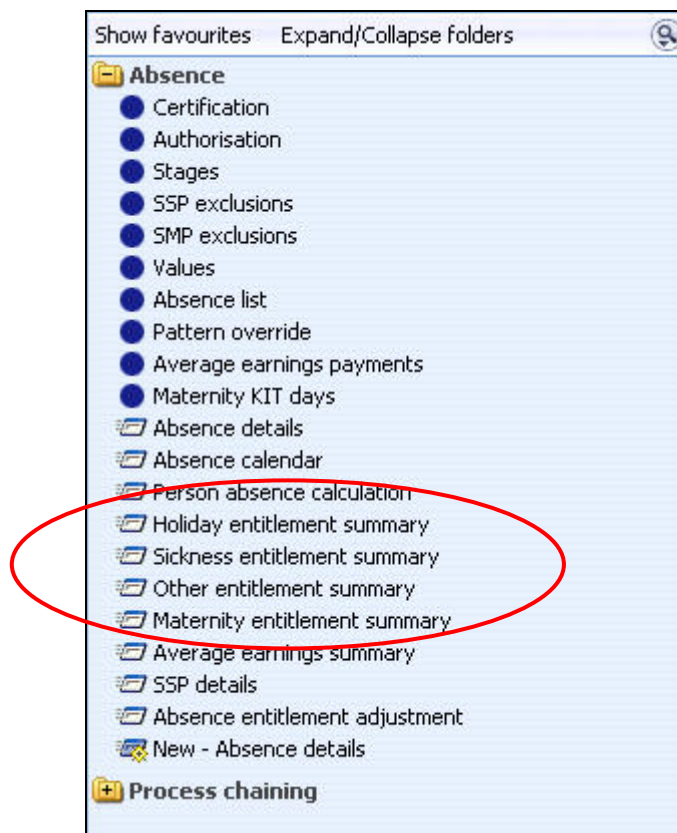
The resulting list shows a day by day breakdown of the values.

| Select all | | | | | |
|------------|--------------|------------------|-----------|---------------------|---------------------------|
| Date | Band / Rate | Entitlement used | Time lost | Job / Contract name | Scheme name |
| 15/01/2007 | Waiting day | - | - | - | Statutory Sickness Scheme |
| 16/01/2007 | Waiting day | - | - | - | Statutory Sickness Scheme |
| 17/01/2007 | Waiting day | - | - | - | Statutory Sickness Scheme |
| 18/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 19/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 20/01/2007 | 1: 70.05 GBP | - | - | - | Statutory Sickness Scheme |
| 21/01/2007 | 1: 70.05 GBP | - | - | - | Statutory Sickness Scheme |
| 22/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 23/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 24/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 25/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 26/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 27/01/2007 | 1: 70.05 GBP | - | - | - | Statutory Sickness Scheme |
| 28/01/2007 | 1: 70.05 GBP | - | - | - | Statutory Sickness Scheme |
| 29/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 30/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 31/01/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 01/02/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 02/02/2007 | 1: 70.05 GBP | 0.2 Weeks | - | - | Statutory Sickness Scheme |
| 03/02/2007 | 1: 70.05 GBP | - | - | - | Statutory Sickness Scheme |

7.4 Entitlement Summaries

In order to keep a track on how many days an employee has taken out of their annual entitlement, Trent provides several entitlement summary forms. These are found in the menu options within the Absence folder in the People module.

Navigate: **Organisation> Person (find employee)> Absence> Personal absence list**



Whichever summary is selected, you will be presented with summary of what entitlement has been used by each period of absence and how much remains for the year.

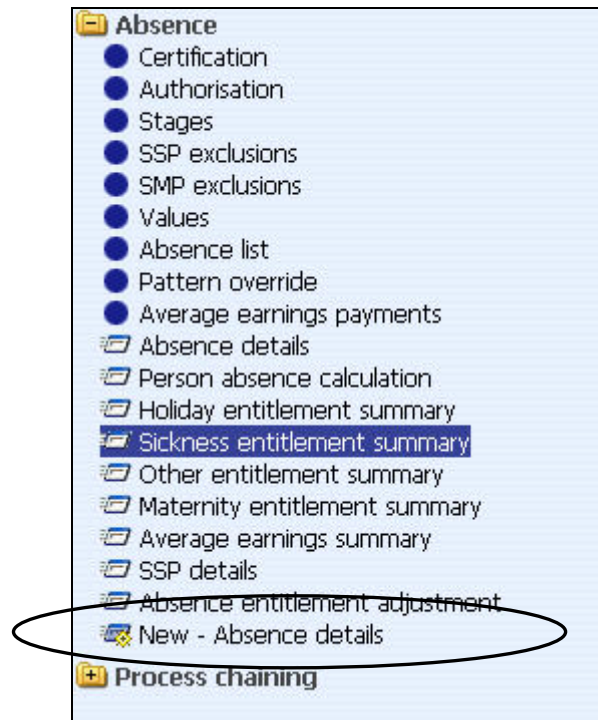
| Sickness entitlement summary: | | | | | |
|---------------------------------------|---------------------------|--------------|-----------|-----------------|------------------|
| Employment details | | | | | |
| Contract | S J Arbuthnot | | | | |
| Position | Research Associate | | | | |
| Period details | | | | | |
| Absence scheme type | SSP - Sickness | | | | |
| Length of service at start of absence | | | | | |
| Scheme name | Statutory Sickness Scheme | | | | |
| Membership dates | - | | | | |
| Band/Rate | Full | Already used | Available | Used by absence | Available at end |
| 1 | 28 weeks | 0 | 28 | 2.2 | 25.8 |

| Maternity entitlement summary: | | | | | |
|---------------------------------------|--------------------------------|--------------|-----------|-----------------|------------------|
| Employment details | | | | | |
| Contract | S J Arbuthnot | | | | |
| Position | Research Associate | | | | |
| Period details | | | | | |
| Absence scheme type | OMP | | | | |
| Length of service at start of absence | 0 year(s) 9 month(s) 28 day(s) | | | | |
| Scheme name | Occupational Maternity Scheme | | | | |
| Membership dates | 01/07/2006 - | | | | |
| Band/Rate | Full | Already used | Available | Used by absence | Available at end |
| 1: 100 | 126 days | 0 | 126 | 33 | 93 |

7.4.1 Entitlement Adjustments

There may also be times when an entitlement needs to be manually adjusted. For instance a Manager may grant additional sickness or holiday days. This is achieved using the Absence Entitlement Adjustment option from the Absence folder.

Navigate: **Organisation > People** (Select an employee) **> Absence > Personal Absence List**
 > Select the Absence > Absence entitlement adjustment



When you select the option you will have the opportunity to increase or decrease the absence entitlement as necessary.

Sickness Example:

| Adjustment of absence entitlement: | | |
|---|----------|-------------------------------------|
| Reason for adjustment <input type="text" value="Manager's Discretion"/> | | |
| Band/Rate | Full | Adjustment |
| 1: 100 Percent | 130 Days | <input type="text" value="3"/> Days |
| 2: 50 Percent | 130 Days | <input type="text"/> Days |
| <input type="button" value="Save"/> <input type="button" value="Delete"/> | | |

Maternity example

| Adjustment of absence entitlement: | | |
|---|----------|------------|
| Reason for adjustment: Returned from M/L for 2 months only | | |
| Band/Rate | Full | Adjustment |
| 1: 100 Percent | 126 Days | -84 Days |
| <input type="button" value="Save"/> <input type="button" value="Delete"/> | | |

In the above example an adjustment of 84 days has been made because the employee returned for 2 months not 6 months

This is used where you can adjust the standard entitlement in a specific case e.g. where a person does not wish to be paid their OMP entitlement in case they do not come back

The result is that the absence summary is automatically adjusted to take the adjustment into account.

Sickness Example:

| Sickness entitlement summary: | | | | | | |
|------------------------------------|----------|--------------------------------|------------|-----------|-----------------|------------------|
| Employment details | | | | | | |
| Contract | | Administrative Officer Grade I | | | | |
| Position | | Administrative Officer Grade I | | | | |
| Period details | | | | | | |
| Absence type | | OSP - Sickness | | | | |
| Length of service at start of year | | 5 year(s) 7 month(s) 11 day(s) | | | | |
| Scheme name | | Occupational Sickness Scheme | | | | |
| Membership dates | | 01/01/2006 - | | | | |
| Band/Rate | Full | Already used | Adjustment | Available | Used by absence | Available at end |
| 1: 100 | 130 days | 0 | 3 | 133 | 0 | 133 |
| 2: 50 | 130 days | 0 | 0 | 130 | 0 | 130 |

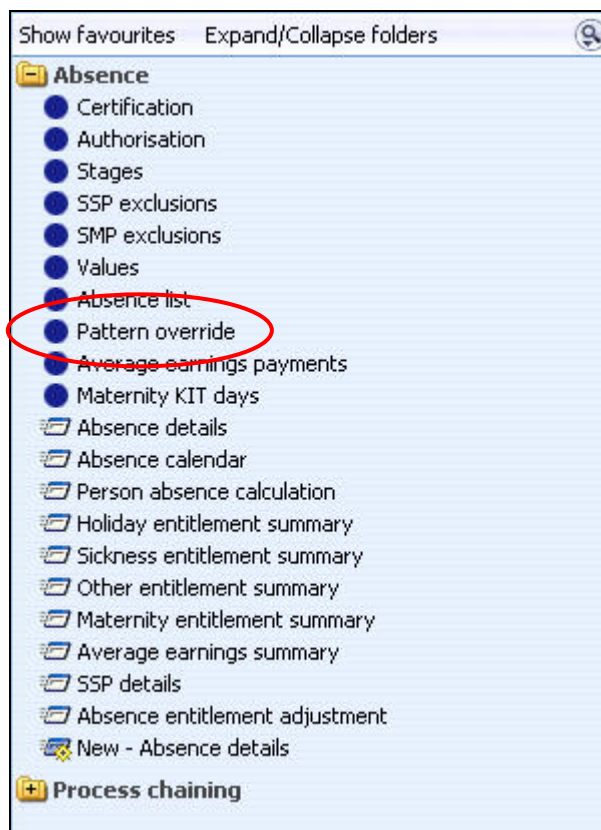
Maternity Example:

| Maternity entitlement summary: | | | | | | |
|---------------------------------------|--------------------------------|--------------|------------|-----------|-----------------|------------------|
| Employment details | | | | | | |
| Contract | S J Arbutnot | | | | | |
| Position | Research Associate | | | | | |
| Period details | | | | | | |
| Absence scheme type | OMP | | | | | |
| Length of service at start of absence | 0 year(s) 9 month(s) 28 day(s) | | | | | |
| Scheme name | Occupational Maternity Scheme | | | | | |
| Membership dates | 01/07/2006 - | | | | | |
| Band/Rate | Full | Already used | Adjustment | Available | Used by absence | Available at end |
| 1: 100 | 126 days | 0 | -84 | 42 | 33 | 9 |

7.5 Working Patterns

In order for Trent to calculate the number of days lost for a period of absence and how many days to count towards their entitlements, working patterns need to be attached to the employee. From time to time certain employee's may change their working patterns temporarily.

In order for the absence to be recorded accurately, you can override the employee's pattern using the Pattern Override option in the Absence folder in the People module.





The form opened will show the pattern used for the absence, according to the employee's set pattern.

Pattern override details: Pattern Override 08/01/2007 - 13/01/2007

Pattern information

Pattern type

From date 

To date 

No of days in this pattern

Pattern date details

| | Mon | Tue | Wed | Thu | Fri | Sat | Total |
|-------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|------------------------------------|-------|
| Week1 | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text" value="01:00"/> | <input type="text" value="00:00"/> | 5:00 |

The pattern can be overridden as necessary by typing in a '1' for each day of the week that the person would have worked and a '0' if they were not due to work on any particular day.

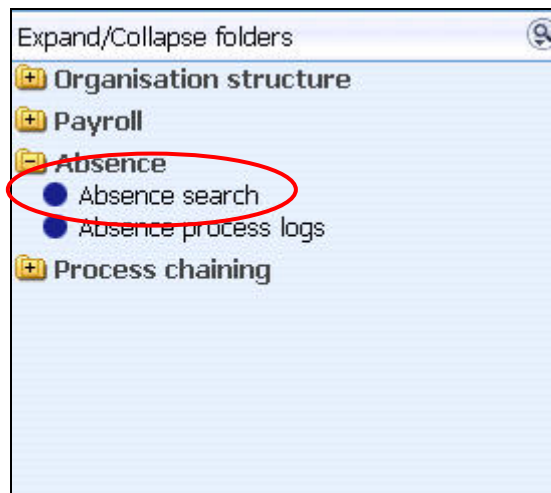
The absence will then need to be re-calculated so that the overridden pattern is used instead of the employee's normal pattern.

8 Searching for Absences (Non Person)

When maintaining absence records there will be a need find the required record(s). This can be easily achieved using the absence options in the People folder and searching for the appropriate person/absence.

However, there may be the need to search for records that meet a criteria, which is not person based. For example, you may wish to search for all sickness absences in a certain date range, or you may wish to list all the absences for a certain type of sickness, etc.

This is achieved using the Absence Search option, found in the main Absence folder from the Trent home page.



Use the basic and advanced search options available to search for the relevant records. You will then be granted access to the absence forms, in the Actions Pane, used to maintain the records.

9 Absence Summaries

9.1 Absence Calendar

The absence calendar allows you to view the absence record for an individual or group of employees.

Navigate: **Organisation >People** (Select an employee) **>Absence > Absence Calendar**

Or

Navigate: **Organisation >People** (Select an employee) **>Absence > Personal Absence List > Absence Calendar**

Absence calendar:

Display period

Period from 01/01/2007

Period to 31/01/2007

Position

Position reference Y9640504

Position occ. reference 42033590

Reporting unit Department of 236

Reports to Research Associate

| | | January | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------|--|---------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|--|--|
| | | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | |
| James Brown | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Bank holiday
 Company holiday
 Personal holiday
 Sickness
 Learning activity
 Other
 Maternity / Paternity

Refresh

Sickness and Maternity Absences



A group of employees may be selected by first displaying a list of people and then selecting specific individuals by holding the Ctrl key down and then clicking on the name.

For example

| | | |
|-------------------|-------------------|-----------|
| Boyer, Ivor | Department of 236 | Researc |
| Boyer, Jack | Department of 236 | Researc |
| Brooks, Alexander | Department of 236 | Payroll C |
| Brooks, Stephen | Department of 236 | Payroll C |
| Brown, Amanda | Department of 236 | Researc |
| Brown, James | Department of 236 | Researc |
| Brown, Tracey | Department of 236 | Payroll C |
| Brown, Valentine | Department of 236 | Lecture |
| Butcher, Leslie | Department of 236 | Researc |
| Butcher, Malcolm | Department of 236 | Researc |
| Butler, Keith | Department of 236 | Researc |
| Butler, Kevin | Department of 236 | Researc |

The names highlighted in blue are the selected employees for the calendar display. You can, if you wish, de-select any of the people listed by holding the Ctrl key down and clicking on their name in the object pane.



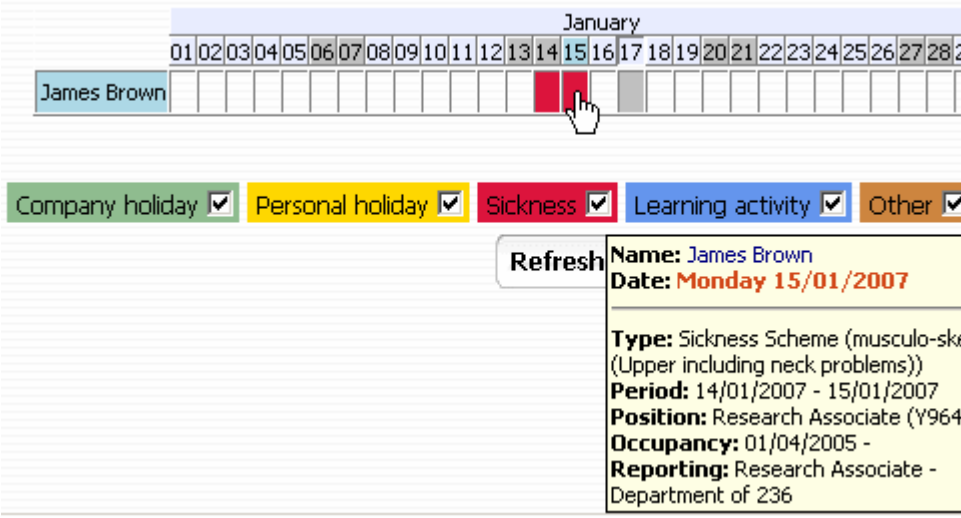
The calendar shows all absences (Bank holiday, company holiday, Personal holiday, Sickness, Learning Activity, Other absences, Maternity/Paternity) by default but you can change the filter to show specific types of absence if required by clicking in the tick check box to deselect the tick.

Bank holiday
 Company holiday
 Personal holiday
 Sickness
 Learning activity
 Other
 Maternity / Paternity

| Absence Calendar | |
|--------------------|--|
| Field | Comments |
| Display Period | Select on of the following from the drop down list: <ul style="list-style-type: none"> Month from today This week This quarter Quarter from today Specific date range |
| Period from | This field will display the selected period start date or, if you have selected Specific date range it will allow you to enter the end date. |
| Period to | This field will display the selected period end date or, if you have selected Specific date range it will allow you to enter the end date. |
| Position | This drop down list can be used to select a specific position if an employee holds more than one. This field is then followed by the position and reporting details for the position. The default is All jobs. |
| Absence tick boxes | Tick the required type of absence to be displayed. |

Sickness and Maternity Absences



| | |
|---|---|
|  | <p>If you change any of the selection ticks or the date range you will need to click the Refresh button to have the displayed details refreshed to match your selection.</p> |
|  | <p>If the date range is wider than the display area you can move backwards or forwards through the selected dates using the Back and Forward buttons or move the slide between these buttons.</p> |
| <p>Pop ups</p> | <p>When you place the cursor on an absence date cell the system will display a pop up information message which provides more information about the absence. For example:</p>  <p>If there are overlapping absences on the same day then the date cell will display an exclamation mark.</p> |

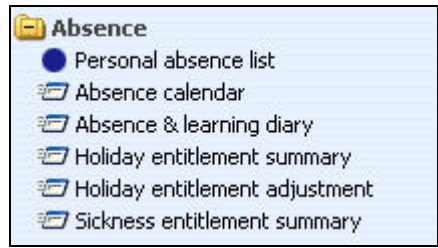
If you selected more than one employee then the display will list them:

| | January | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------|---------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|--|
| | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | |
| Malcolm Butcher | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Jack Boyer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| James Brown | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

9.2 Absence & Learning Diary

As well as the Calendar option you can view an individual employee's absences using the Diary. This is accessed from the main Absence folder within the People module.

Navigate: **Organisation >People (Select an employee) >Absence > Absence & Learning Diary**



The diary view shows the current and next months, but other months can be viewed using the scroll options at the top of the current month's calendar.

Absence & training diary: Dr Sharon J Arbuthnot **Name:** Dr Sharon J Arbuthnot **Job title:** Research Associate
Social security number: NW827547C **Pay ref:** 10103030 **Pers ref:** 10103030

Personal holiday
 Learning activity
 Maternity / Paternity
 Sickness
 Bank holiday
 Company holiday
 Other

March 2007

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

April 2007

| Wk | M | T | W | T | F | S | S |
|----|----|----|----|----|----|----|----|
| 13 | | | | | | | 1 |
| 14 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 15 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 17 | 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 18 | 30 | | | | | | |

20 selected date, 20 actual date

Fri, 30 Mar 2007

| | |
|-------|---|
| 00:00 | Name : Dr Sharon J Arbuthnot |
| 01:00 | Position : Research Associate 01/07/2006 |
| 02:00 | |
| 03:00 | Type : Sickness Scheme |
| 04:00 | Reason : |
| 05:00 | Start date : 30/03/2007 |
| 06:00 | End date : 18/04/2007 |
| 07:00 | |

The calendar shows all days that the employee is absence with a closed square according to the legend at the top of the form. Clicking on an absent date will show the absence in more detail underneath.