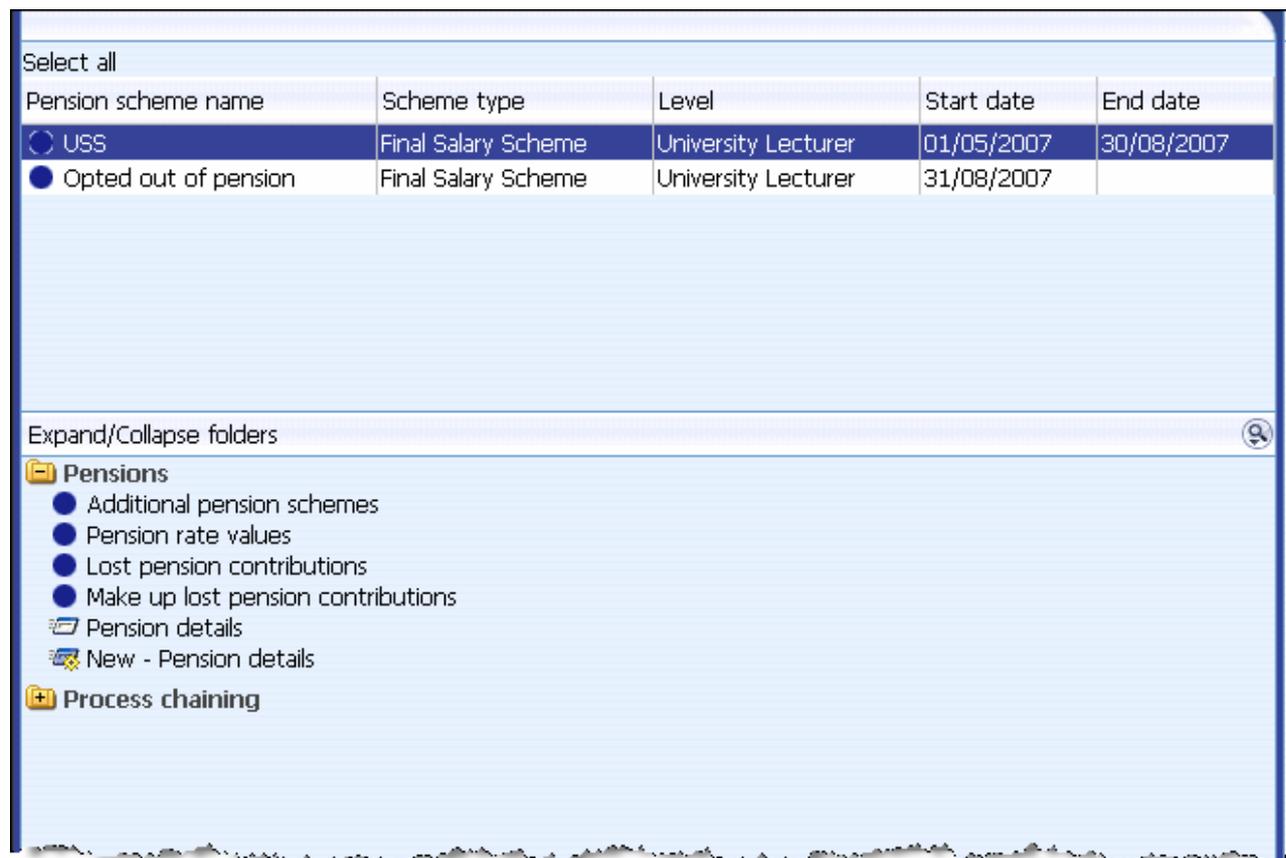


7 Viewing Pension details of current employees

7.1 Identifying which Pension scheme an employee is in

Eligibility of a person to be included within one of the University's final salary scheme is dictated by their position. Within CHRIS this is indicated by a Term and condition called 'Final Salary Scheme' that that is attached to their position.

Navigate: **University Organisation > People (find person) > Payroll > Pensions**



Select all

Pension scheme name	Scheme type	Level	Start date	End date
<input type="radio"/> USS	Final Salary Scheme	University Lecturer	01/05/2007	30/08/2007
<input checked="" type="radio"/> Opted out of pension	Final Salary Scheme	University Lecturer	31/08/2007	

Expand/Collapse folders 

-  Pensions
 - Additional pension schemes
 - Pension rate values
 - Lost pension contributions
 - Make up lost pension contributions
 -  Pension details
 -  New - Pension details
-  Process chaining

7.2 AVCs

If someone has AVCs attached then this will be shown as an ‘Additional Pension scheme’ on Trent. Find the person and highlight their pension as shown above. Then select ‘Additional Pension schemes’.

Navigate: **University Organisation> People (find person) >Payroll> Pensions> Additional Pension schemes**

Select all			
Pension scheme name	Level	Start date	End date
<input checked="" type="radio"/> USS DA AVC (%)	Professor of Classical English	01/06/2007	

7.3 Pensionable posts

An alternative method to view someone’s pension details is to look at their terms and conditions. This is a particularly good way of checking whether a particular position is pensionable or not .

Navigate: **University Organisation> People (find person) > Employment> Positions**
 > Terms & conditions> Terms & Conditions

Select all				
Terms & Conditions item	Choice	Package	Start date	End date
<input type="checkbox"/> OSP - Sickness	Occupational Sickness Scheme (Officers)		01/03/2007	
<input type="checkbox"/> Faculty Membership	Faculty of Education		01/03/2007	
<input type="checkbox"/> Competent Authority	General Board		01/03/2007	
<input type="checkbox"/> OMP	Occupational Maternity Scheme		01/03/2007	
<input checked="" type="checkbox"/> Final Salary Scheme	USS		01/03/2007	

The green ‘pipe’ indicates that the final salary scheme has been inherited down to their position from their post. If you want to see where it has inherited from then you can review this by looking ensuring that you have the ‘Final Salary Scheme’ highlighted and selecting ‘Inheritance chart’ option.

Inheritance chart: University Senior Lecturer [Terms and Conditions] (No permission status)

Level	Final Salary Scheme
University of Cambridge	
Council & General Board	
General Board	
School of Arts and Humanities	
Faculty of Modern and Medieval Languages	
Department of French	
Academic Posts	USS
Senior Lecturers	
University Senior Lecturer	<input checked="" type="checkbox"/> USS
University Senior Lecturer	USS

Save

7.3.1 Opt Outs

If an individual decides to opt out of one of the salary schemes, then Payroll will action this upon receiving instructions from the Pension Team.

Terms & Conditions item	Choice	Package	Start date	End date
OSP - Sickness	Occupational Sickness Scheme (Officers)		01/05/2007	
Faculty Membership	Faculty of Education		01/05/2007	
Competent Authority	General Board		01/05/2007	
OMP	Occupational Maternity Scheme		01/05/2007	
<input checked="" type="checkbox"/> Final Salary Scheme	Opted out of pension		01/05/2007	

This way you can see that the original position was pensionable but that the current job holder has decided to opt out.

7.4 Key Dates

The system records all on the 'Key Dates' page the following information for an individual:

- Date of birth
- Expected retirement date
- Reckonable service date

Navigate: **University Organisation > People (find person) > Key Dates**

Key dates: Dr Kevin Henry	Name: Dr Kevin Henry	Job title: Professor of Classical English
	Social security number: AB265397C	Pay ref: 30000061
		Pers ref: 30000061
Personal		
Date of birth	<input type="text" value="10/06/1965"/>	
Age	42 year(s) 0 month(s)	
Date verified	<input type="text"/>	
Expected retirement date		
Basis	<input type="text" value="Date"/>	
Age (years)	65	
Age (months)	3	
Date	<input type="text" value="30/09/2030"/>	
Organisation		
Start date	<input type="text" value="01/03/2007"/>	
Length of service	0 year(s) 3 month(s)	
Leaving date	<input type="text"/>	
Reckonable service date	<input type="text"/>	
Length of reckonable service	<input type="text"/>	
Last working day	<input type="text"/>	
Re-employable	No	
<input type="button" value="Save"/>		

7.5 Identifying those that have retired

For an individual

The Leavers Information page will indicate that someone has retired and the date that this took effect.

Navigate: University Organisation > People (find person) > Employment > Leaver Information

Start date	Leaving date	Reason for leaving	Re-employable	Exit interview complete?	Last working day	Last
01/03/2007	30/06/2007	Retirement	No	No		

For a group

There is a standard Trent report entitled 'Leavers' that can be run for either the whole University or just a department, for whichever time period that you choose.

Navigate: University Organisation > Management Information > People Reports

Report name	Status	Last run date	Last run time
Age Analysis By Organisation Unit	Complete	08/06/2007	16:05
Age Analysis By Sex			
Disability Analysis By Organisation Unit	Complete	08/06/2007	16:28
Employee Information Check			
Ethnic Origin Analysis			
H & S Event Renewals Pending			
Leavers	Complete	11/06/2007	12:32
Length Of Service By Organisation Unit			
Length Of Service By Sex			

Leavers:

Organisation start point: Department of Training

Start date: 01/06/2007

End date: 30/06/2007

Organisation view: Show all data by unit

Show details:

Full path display:

Output type: PDF File

Report run comments:

The report gives the name of the individual and their reason for leaving but doesn't indicate which if any pension scheme they were in.

Trent		Organisation Leavers					University of Cambridge	
Start Date:	01/06/2007	Organisation Start Point:	Department of Training		Organisation View:	Full		
End Date:	30/06/2007				Path Display:	Partial		
Organisation Unit	Job Title	Leaving Date	Last Working Date	Reason for Leaving	Exit I-view Done	Length of Service	New Employer	
Department of Training								
Henry Kevin	Professor of Classical English	30/06/2007		Retirement	No	0 yrs 3mths		
Li James	Professor of Classical Music	30/06/2007		Redundancy	No	0 yrs 3mths		
Lin Huai-Xue	Junior Research Lab	03/06/2007		Not known	No	12 yrs 5mths		
Parry Claire	Junior Research Lab	01/06/2007		Resignation	No	0 yrs 1mths		
Overall Totals		4						

7.6 Pension Reports & Interfaces

A number of bespoke reports and interfaces for the Pension Team are currently being worked on. Initially during parallel running phase of the project the Pension Team will continue to receive exactly the same reports as they do so currently. Gradually new reports will be phased in over this period. The intention is to give the Pension team copies of both the new and the existing reports to allow comparison's to be made.