
1 Introduction	2
1.1 The Login screen	2
2 Search	5
2.1 Searching for employees	5
2.2 Searching for leavers	9
2.3 Entering effective date	11
2.4 Employees with more than one position	12
3 Limit of Tenure	15
3.1 Position Details	17
3.2 Position Summary	18
4 Salary Information	19
4.1 Position Salary change history	19
4.2 Payscale values	20
5 Position Summary	21
6 Costing Information	23
7 Finding Post reference number	26
8 User Defined Forms	27
9 Absence	28
10 Contact details	32
11 Entering Probation and review details	34
11.1.1 Probation	34
11.1.2 Reviews	35
12 Training records	37
13 Making a person a Leaver	38
13.1 Entering Holiday Pay	41

1 Introduction

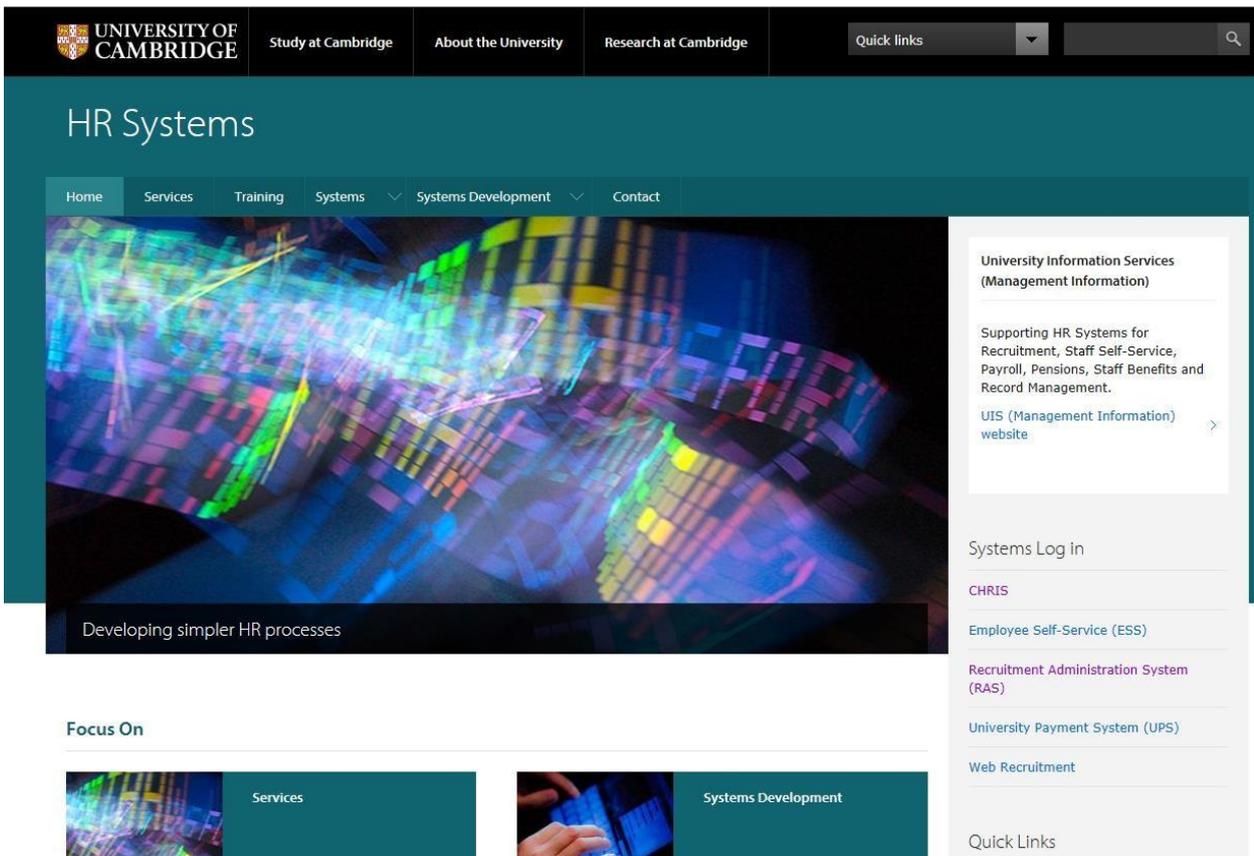
The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called **Cambridge Human Resources Information System (CHRIS)**.

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

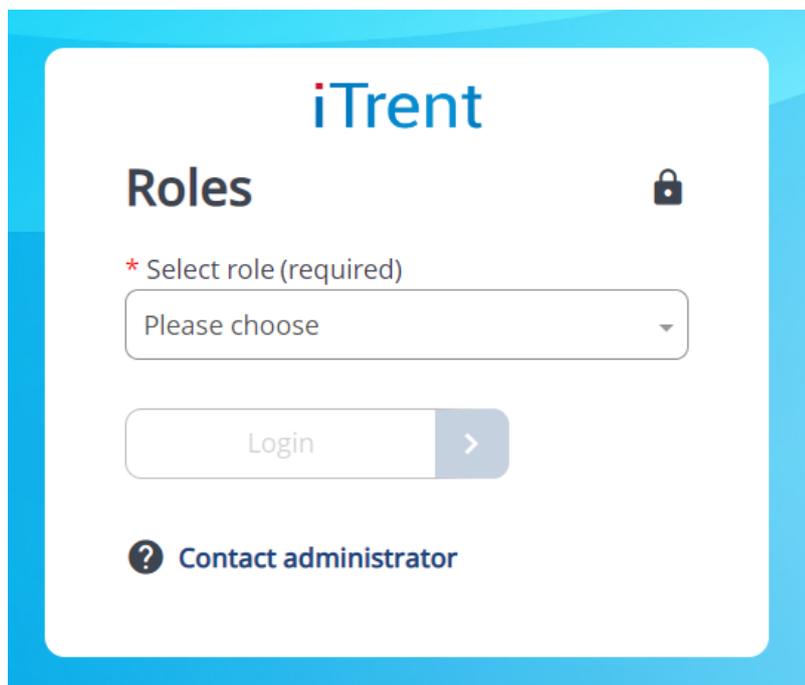
Then click on “log in”

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/>.

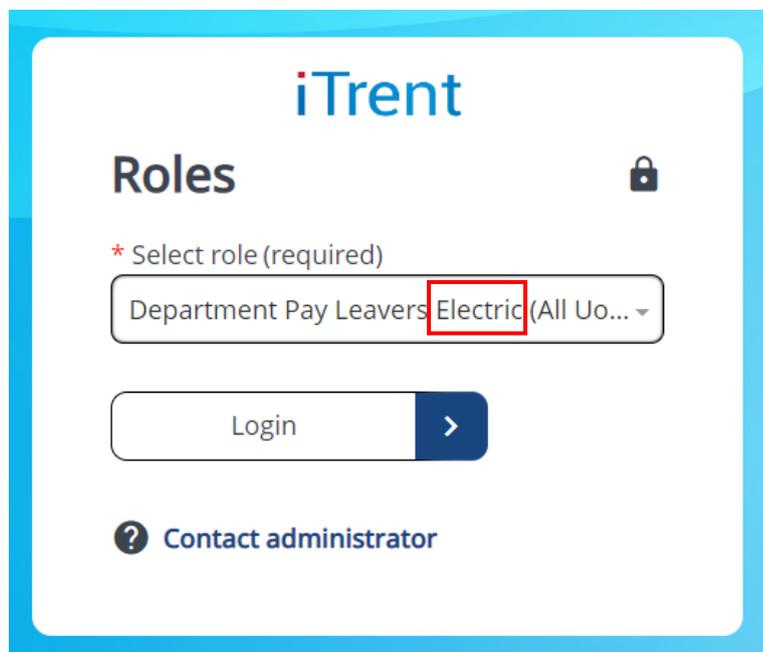
The Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the 'Login' Button.



The image shows a login screen for iTrent. At the top is the iTrent logo. Below it is the heading 'Roles' with a lock icon to its right. A red asterisk indicates a required field: '* Select role (required)'. Below this is a dropdown menu with 'Please choose' and a downward arrow. Underneath the dropdown is a 'Login' button with a right-pointing arrow. At the bottom left, there is a question mark icon followed by the text '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.



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

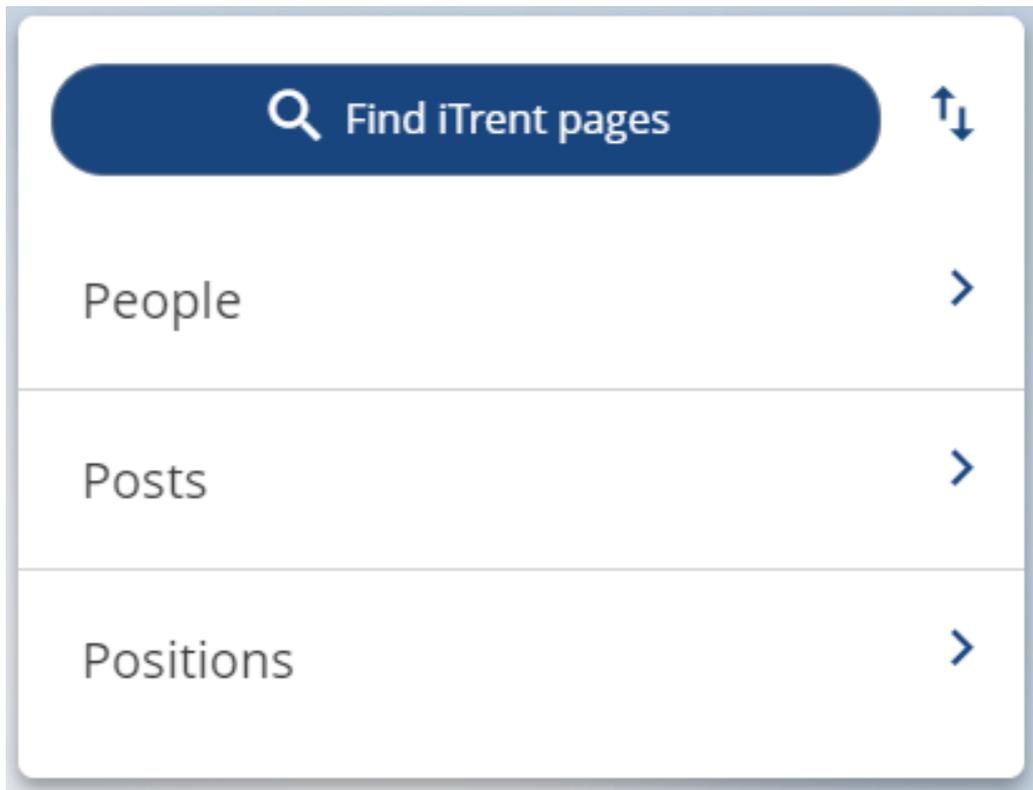


2 Search

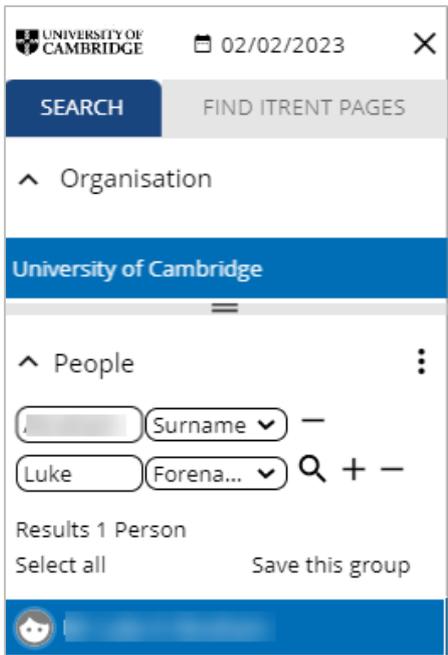
You can search by people, posts or positions.

2.1 Searching for employees

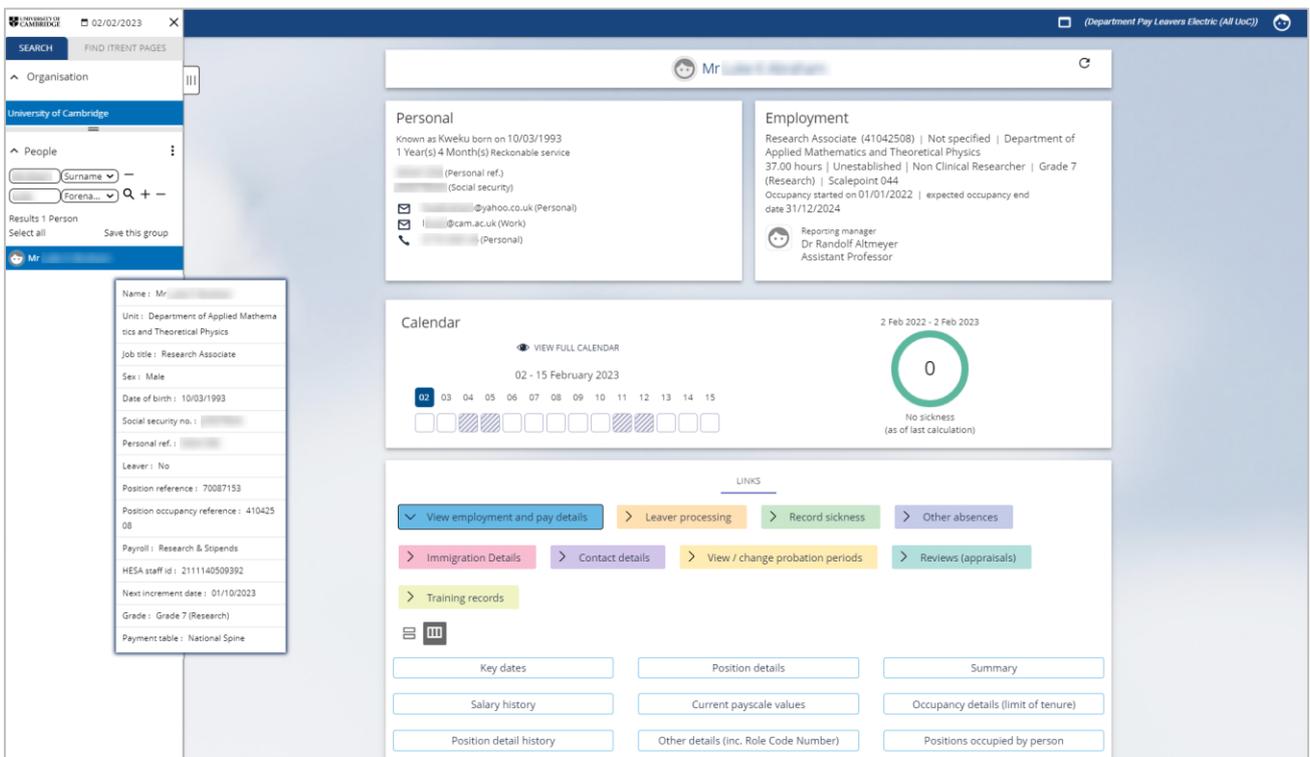
Select People.



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



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



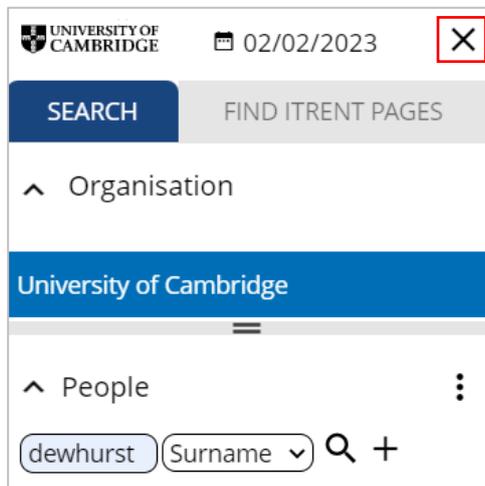
The options available to your user access are displayed as Links

When you select a link, the options are displayed below

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

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

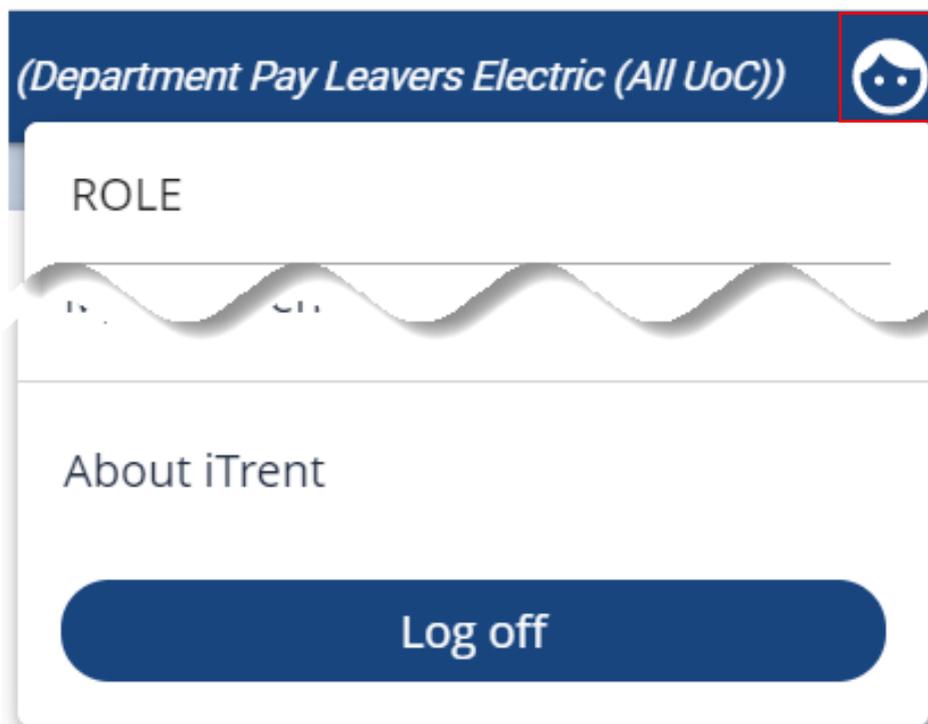
You can hide the search pane here:



And display again by clicking on the Menu button



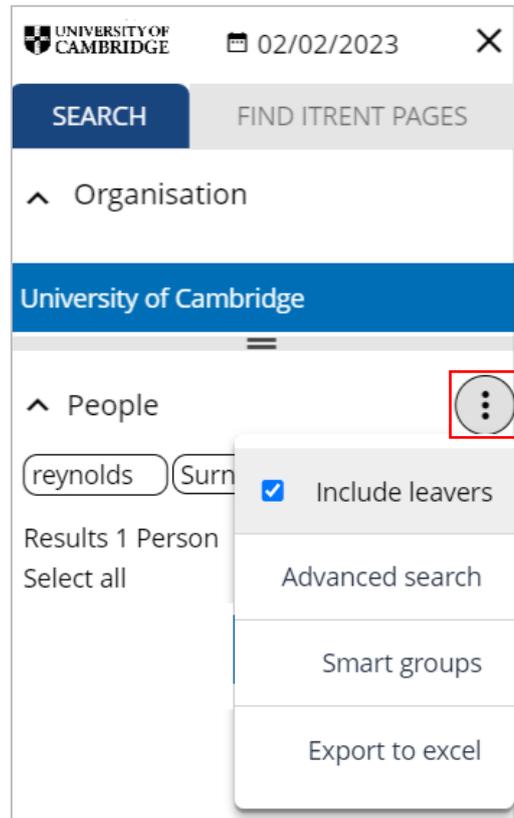
To log off select the button at the top right-hand side of the screen and select Log off.



2.2 Searching for leavers.

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

Click on the 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

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

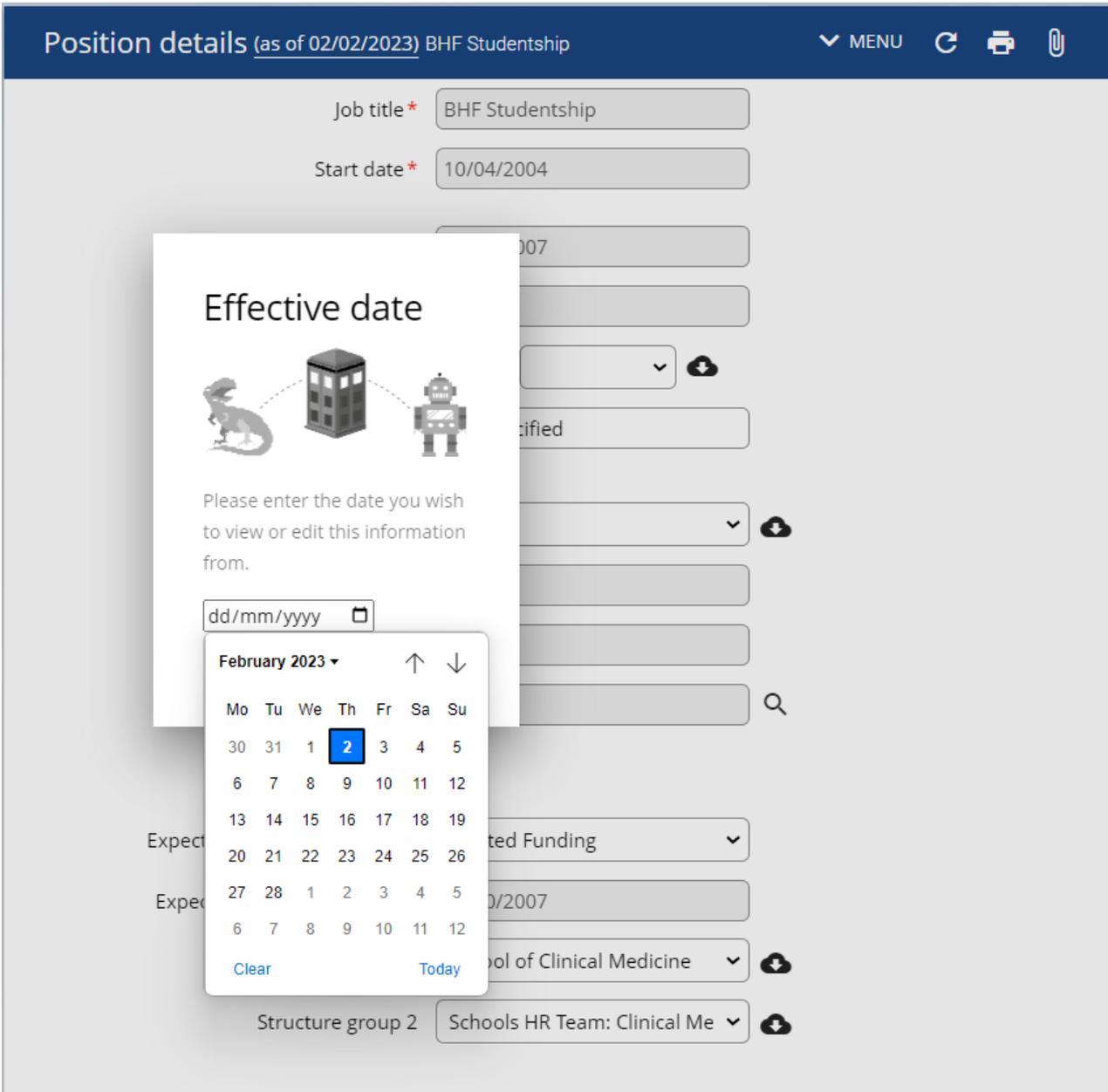
Length of reckonable service 6 year(s) 3 month(s)

Last working day

Save

2.3 Entering effective date

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



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

To return to the Links click on the person's name at the top of the screen:



2.4 Employees with more than one position

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

Employment

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 system interface for an employee. On the left, a navigation menu shows the 'University of Cambridge' and 'People' sections. Under 'People', a search filter is set to 'Surname'. Below this, the 'Positions' section is expanded, showing two roles: 'Building Services Technician' and 'Museum Attendant', with the latter highlighted by a red box. The main content area is divided into two columns: 'Personal' and 'Employment'. The 'Personal' section shows the employee's name, date of birth (12/06/1974), and service length (17 years and 1 month). The 'Employment' section shows the current role as 'Museum Attendant' (40008260) at the Fitzwilliam Museum, with a reporting manager who is 'Vacant'. Below these sections is a calendar for February 2023, showing 24 days off sick. At the bottom, a 'LINKS' section contains several buttons for navigating to different parts of the employee's record. The 'Position detail history' button in the bottom row of this section is highlighted with a red box.

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)

 ▼ MENU

Research Associate (Permission to Fill granted)

Current status

Occupant

Occupancy start

Occupancy end

Position occ. reference

Expected occupancy end date *

Expected occupancy end reason ▼

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 his covering maternity leave:

Position occ. reference

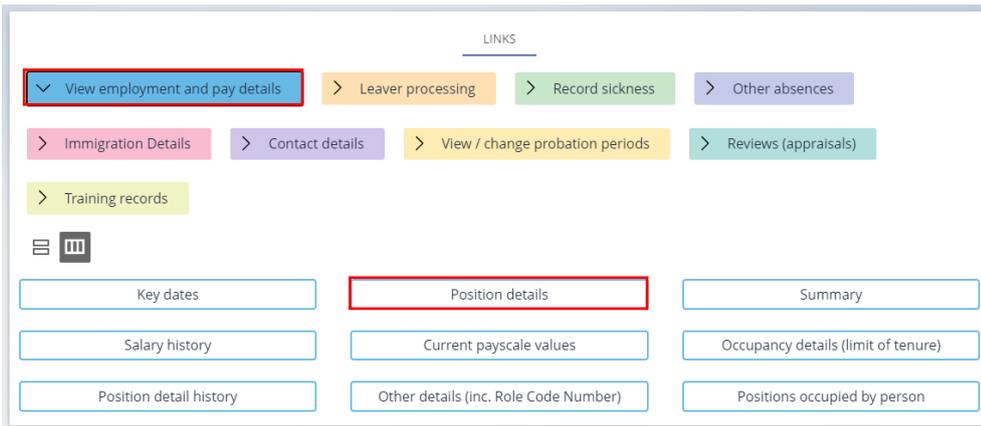
Expected occupancy end date *

Expected occupancy end reason ▼

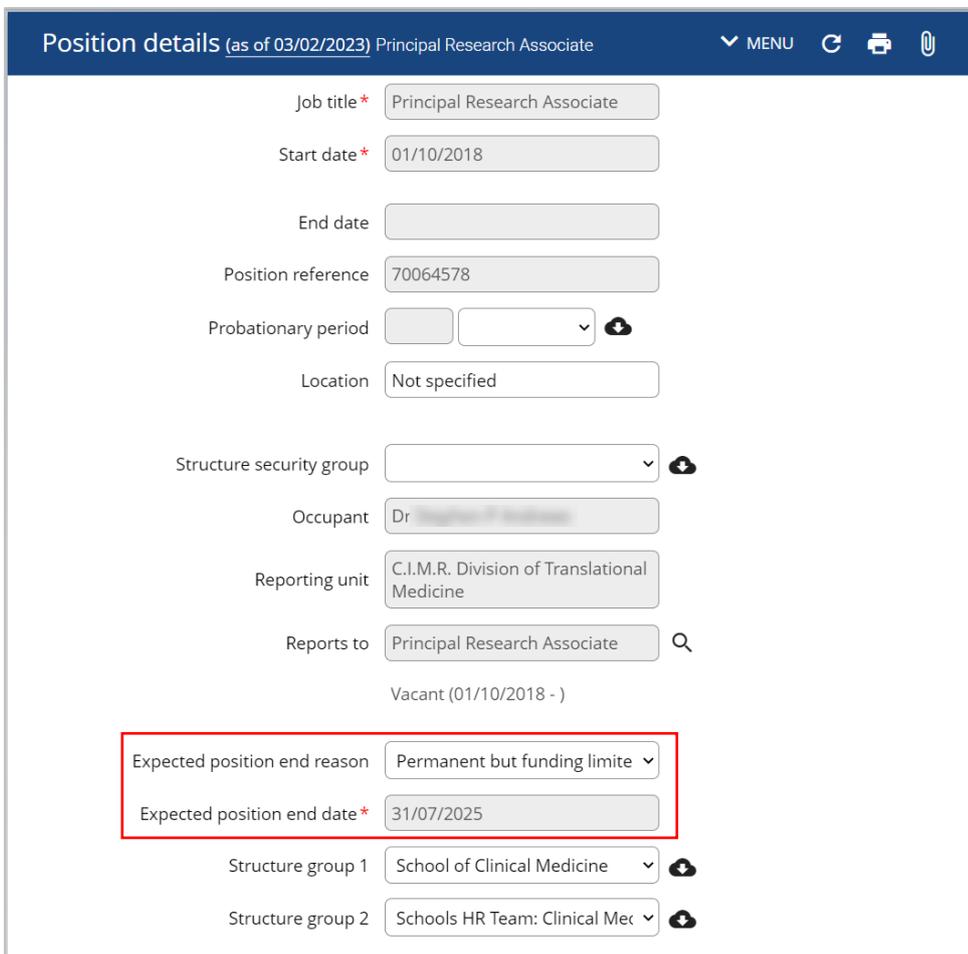
Limit of tenure details can be also be viewed in the Position Details and the Position Summary.

3.1 Position Details

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



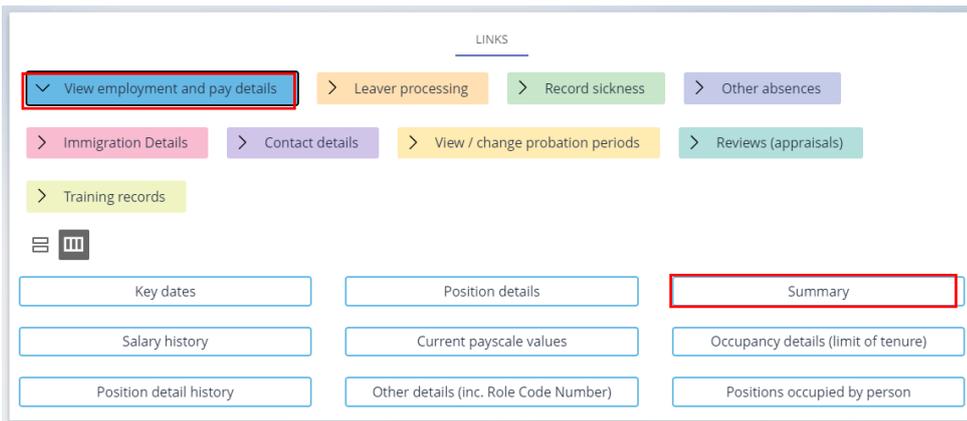
Enter the effective date and the Position details screen will be displayed.



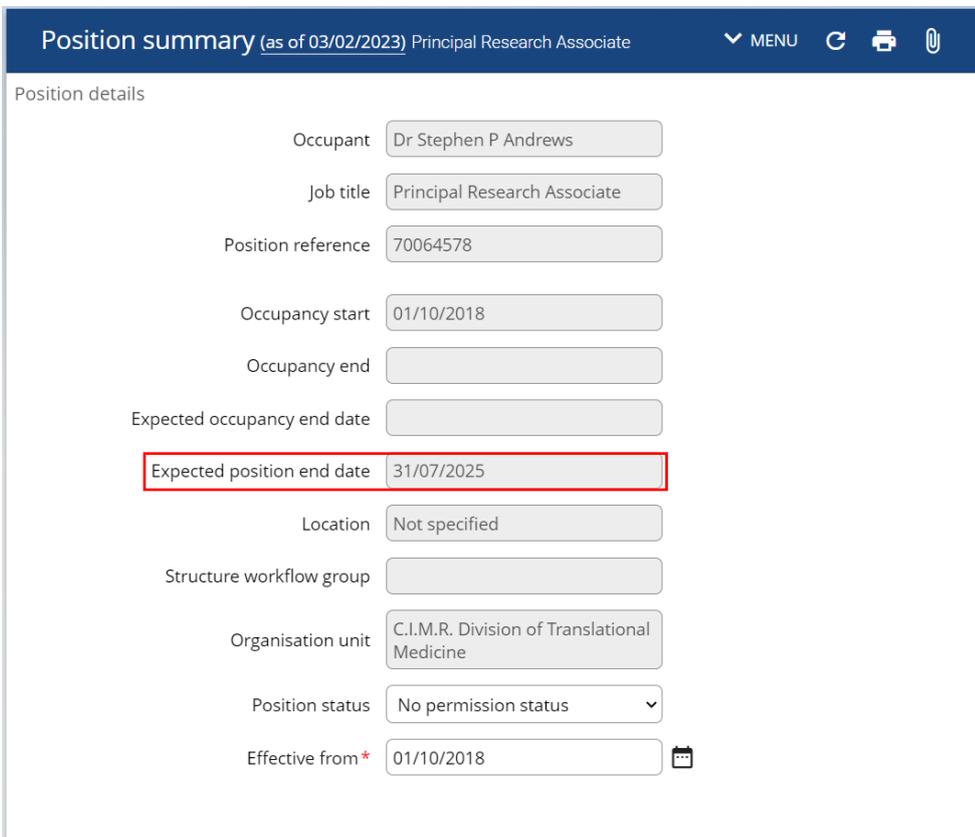
3.2 Position Summary

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

Select Summary from Employment and Pay details:



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

The screenshot shows a 'LINKS' menu with several options. The 'View employment and pay details' link is selected. Below it, the 'Salary history' link is highlighted with a red border. Other links include 'Leaver processing', 'Record sickness', 'Other absences', 'Immigration Details', 'Contact details', 'View / change probation periods', 'Reviews (appraisals)', 'Training records', 'Key dates', 'Position details', 'Summary', 'Current payscale values', 'Occupancy details (limit of tenure)', 'Position detail history', 'Other details (inc. Role Code Number)', and 'Positions occupied by person'.

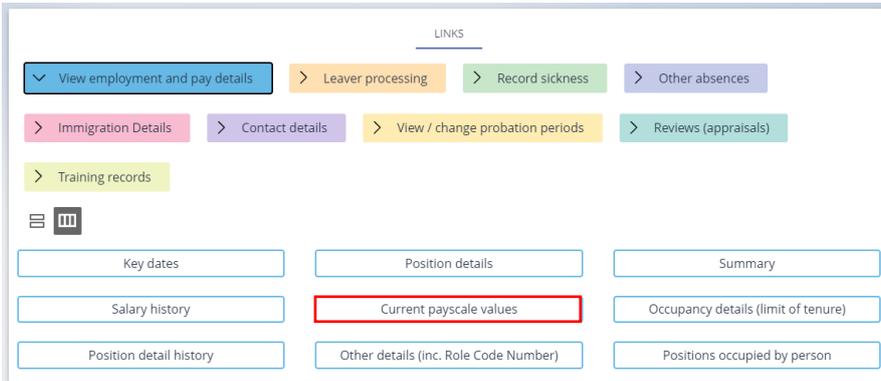
3. The Position salary change history screen will be displayed.

Position salary change history											
+	Effective date	- FT Salary	- FTE value (rounded to 5 DP)	- Pro-rated salary	- FTE hours	- Grade	- Payment table	- Scalepoint	- Position	- Position reference	- Change reason
	01/08/2022	36,386.00	1.00000		36.50	Grade 6	National Spine	043	Business Coordinator	77103914	Payment table rate change
	01/07/2022	35,326.00	1.00000		36.50	Grade 6	National Spine	043	Business Coordinator	77103914	Annual increment
	23/01/2022	34,304.00	1.00000		36.50	Grade 6	National Spine	042	Business Coordinator	77103914	Transfer
	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	Contribution increment
	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	Payment table rate change
	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	Annual increment

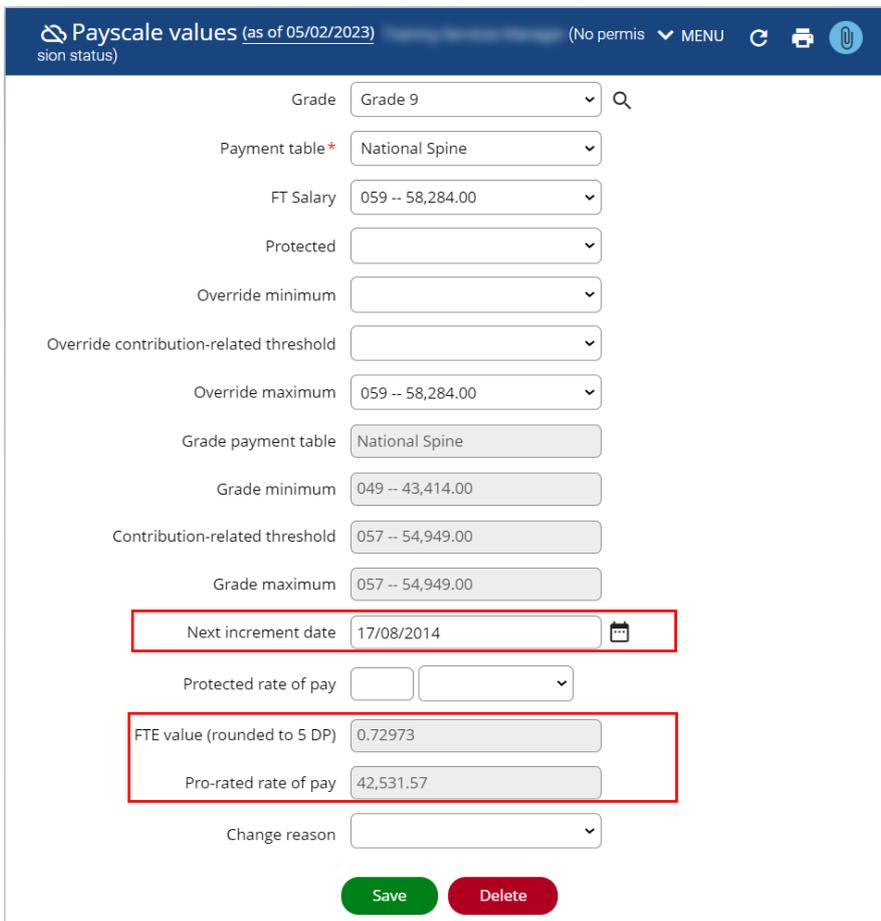
4. Payment table rate change refers to the yearly cost of living increase, this change always has an effective date of 01/08 each year.

4.2 Payscale values

Salary information, along with details of next increment date (where applicable) can be viewed from current payscale values within the View employment and pay details link. This screen shows the grade boundaries – these are the automatic increments, excluding contribution (*) points.



In this example the Next increment date is in the past. This is because the employee has reached the Grade maximum. This employee also works part time and therefore displays the pro-rated rate of pay.



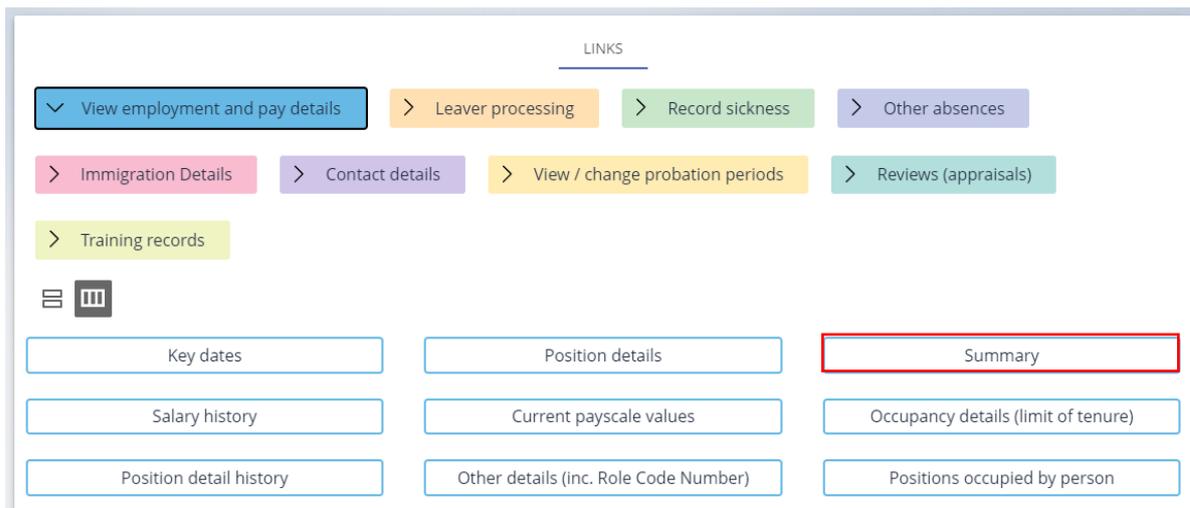
5 Position Summary

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	<input type="text" value="Dr Donald Brown"/>
Job title	<input type="text" value="Research Associate"/>
Position reference	<input type="text" value="90000093"/>
Occupancy start	<input type="text" value="01/02/2018"/>
Occupancy end	<input type="text"/>
Expected occupancy end date	<input type="text"/>
Expected position end date	<input type="text" value="30/04/2021"/>
Location	<input type="text" value="Not specified"/>
Structure workflow group	<input type="text"/>
Organisation unit	<input type="text" value="Department of Training"/>
Position status	<input style="border-bottom: none;" type="text" value="No permission status"/> ▼
Effective from *	<input type="text" value="01/02/2018"/> 📅

[Expand all/collapse all](#)

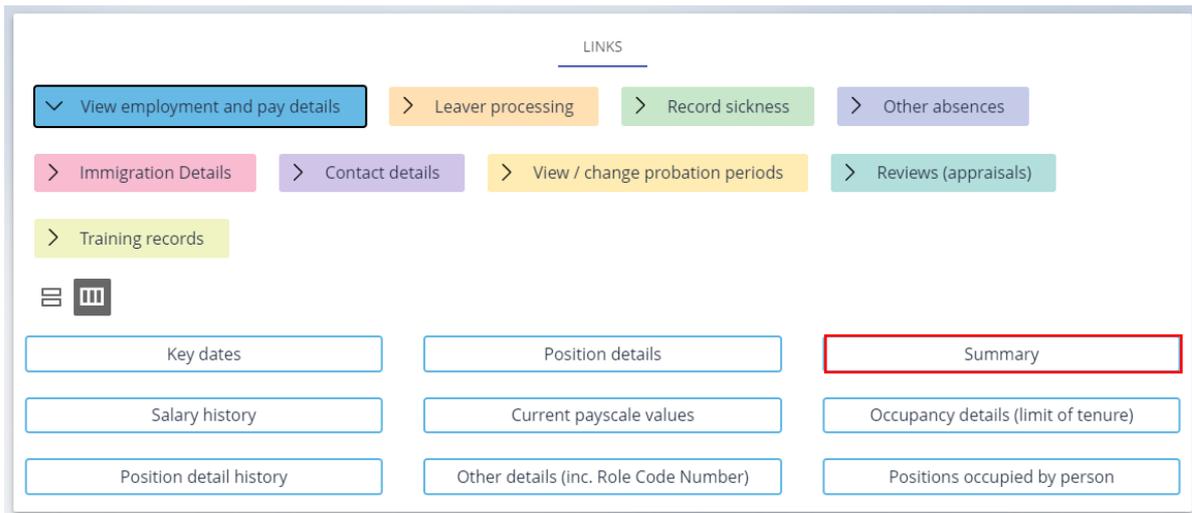
- + Reporting manager
- + History
- + Category, Basis and Type
- + Hours
- + Costing Levels
- + Elements
- + Terms and Conditions
- + Payment Details
- + Structure groups
- + Patterns

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.



The screenshot shows a 'LINKS' menu with the following options:

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

Below the menu is a grid of buttons:

Key dates	Position details	Summary (highlighted with a red border)
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](#)
[Refresh](#)
[Print](#)
[Attachment](#)

Position details

Occupant	<input type="text" value="Dr Donald Brown"/>
Job title	<input type="text" value="Research Associate"/>
Position reference	<input type="text" value="90000093"/>
Occupancy start	<input type="text" value="01/02/2018"/>
Occupancy end	<input type="text" value=""/>
Expected occupancy end date	<input type="text" value=""/>
Expected position end date	<input type="text" value="30/04/2021"/>
Location	<input type="text" value="Not specified"/>
Structure workflow group	<input type="text" value=""/>
Organisation unit	<input type="text" value="Department of Training"/>
Position status	<input style="border: 1px solid #ccc;" type="text" value="No permission status"/>
Effective from *	<input type="text" value="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

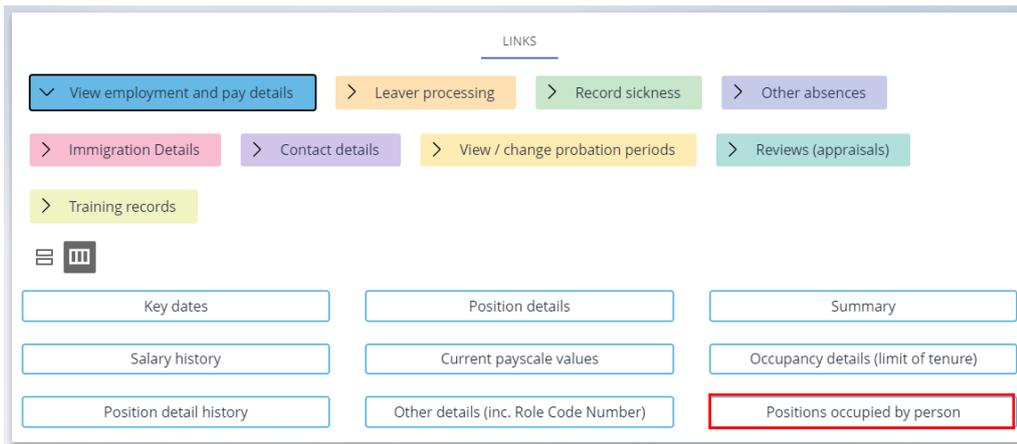
Project Code	Task	Award	Transaction Code
AAAG/001.	01.	RG12345.	ABAE

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

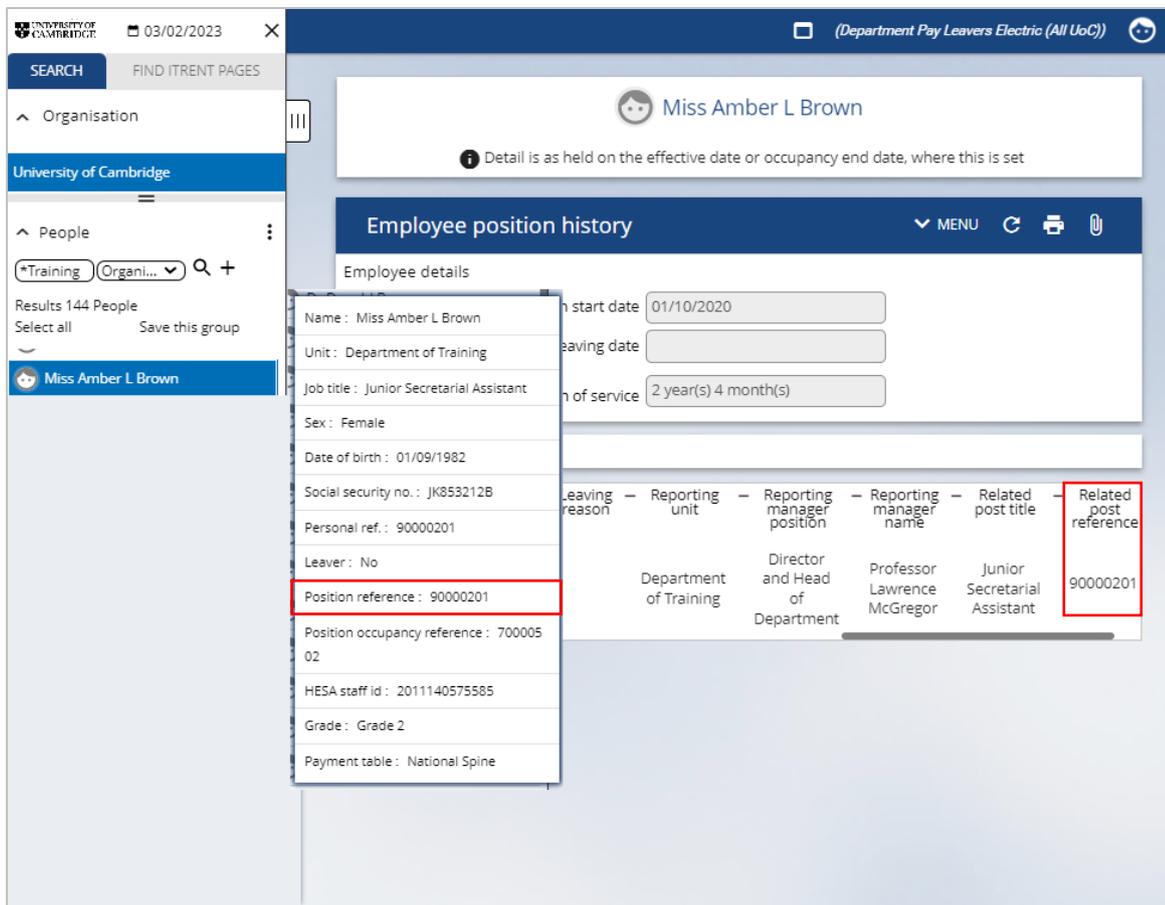
- Costing Levels				
Status	Start date	End date	Type	Value
	01/10/2019	31/03/2020	Structure	1: (65 % / RHAG/321.05.RG85698.ADJA)
	01/10/2019	31/03/2020	Structure	2: (35 % / RHZF/001.01.RG88620.ADJA)
	01/07/2018		Costing Rule	UC1

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



This reference number is required on certain CHRIS forms.



8 User Defined Forms

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

The screenshot shows a 'LINKS' menu with several options. The 'Record sickness' link is highlighted with a red box. Below the menu, there are several buttons: 'Record sickness' (highlighted with a red box), 'Person Entitlement summary', 'Sickness Entitlement End date', 'University sickness absence policy', and 'Download self certificate form'.

The screenshot shows a section titled 'Sickness absence list' with a 'Show all' button and a date '28/07/2022'.

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 X timer

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: More than one day

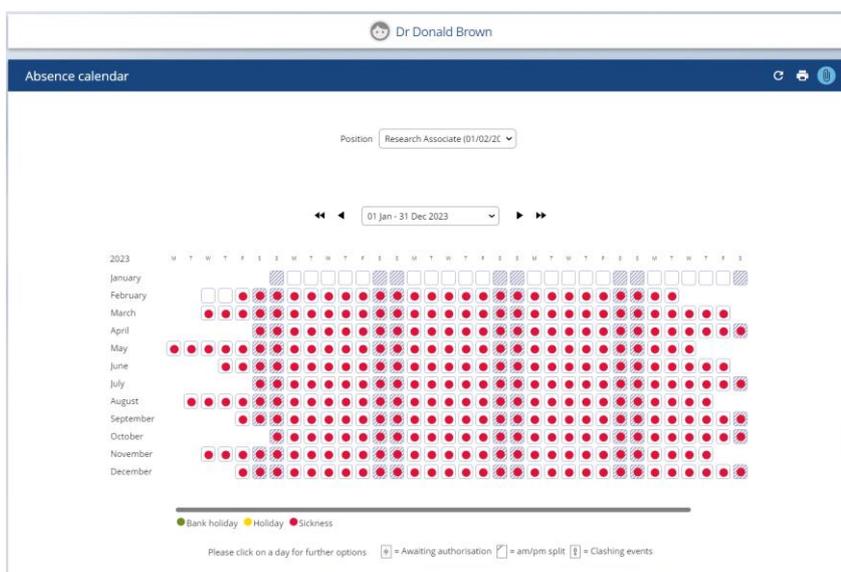
Absence start: 03/02/2023, Full day

Absence end: (highlighted in red), Full day

Absence type: Sickness Scheme
Absence reason: Cold or Flu
Position: Research Associate (Department of Training, 01/02/2018) (Current)

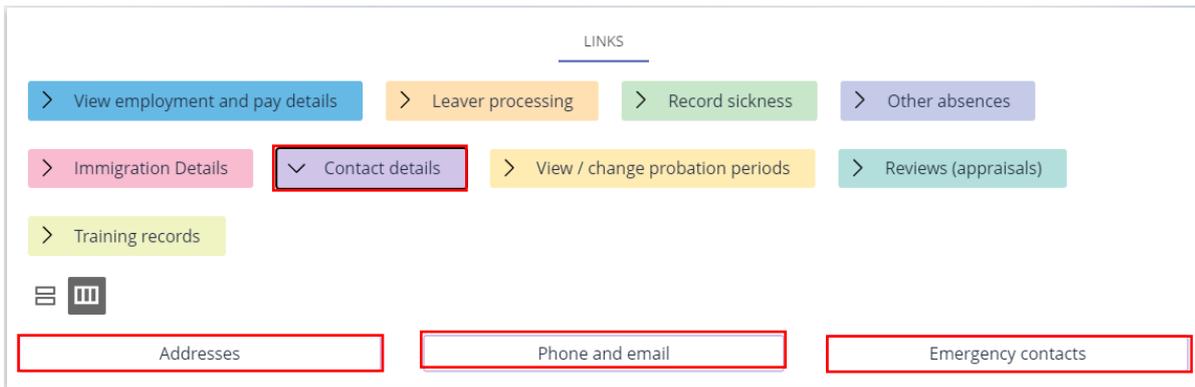
Save Delete New

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

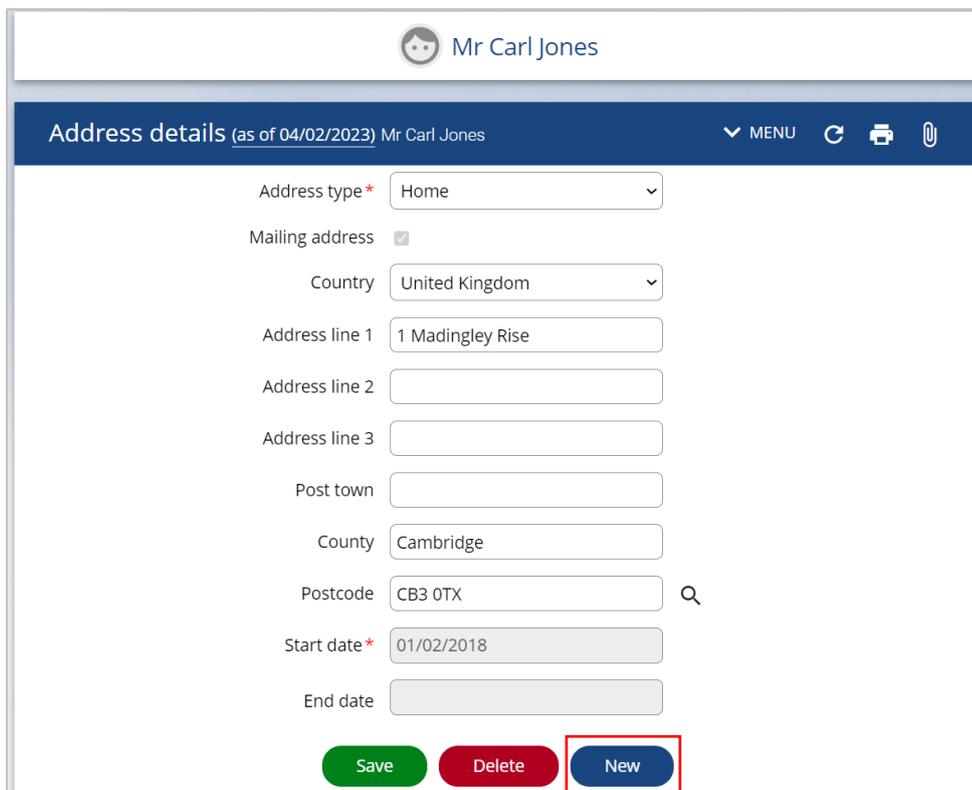


10 Contact details

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



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



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

Add the new address details and click on Save.

Mr Carl Jones

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

Address type* ▼

Mailing address

Country ▼

Address line 1

Address line 2

Address line 3

Post town

County

Postcode 🔍

Start date* 📅

End date 📅

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 ↻ 🖨 📎

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

 ▼ MENU ↻ 🖨 📎

HR Transformation Programme Learning and Development Consultant

Job title*

Reason*

Complete

Start date* 📅

End date* 📅

Save
New

Select the complete tick box and click on save.

Probationary period details

 ▼ MENU ↻ 🖨 📎

HR Transformation Programme Learning and Development Consultant

Job title*

Reason*

Complete

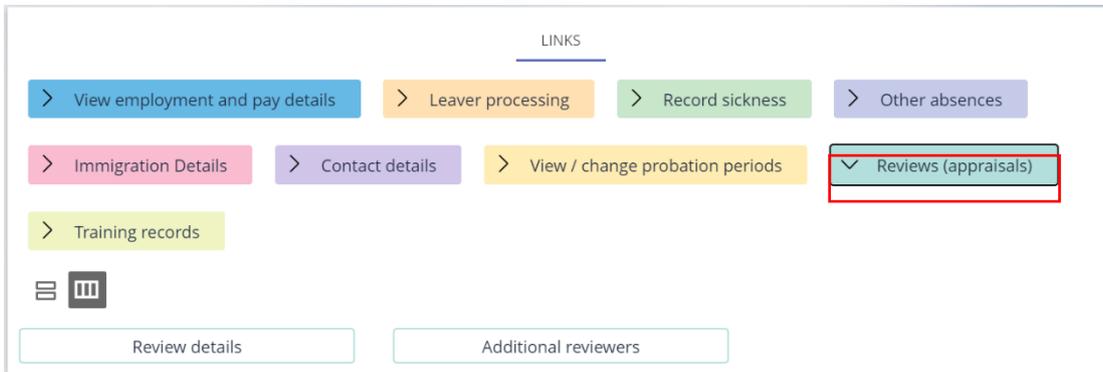
Start date* 📅

End date* 📅

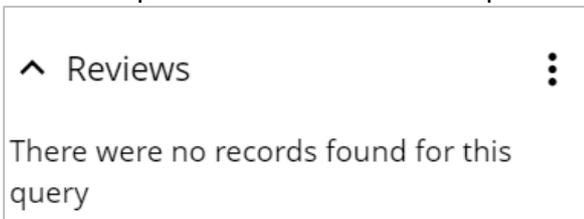
Save
New

11.1.2 Reviews

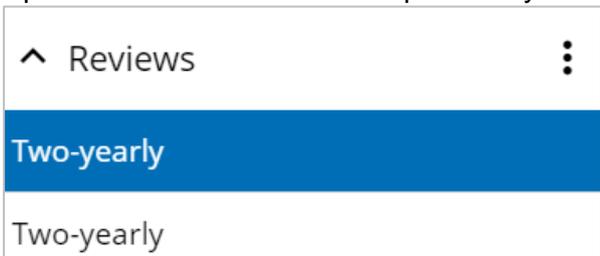
Select Reviews



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



If previous reviews have taken place they will be displayed:



Enter a new review using the New button:

Click on Save:

Review details New ▼ MENU ↻ 🖨 📎

Job title* ▼

Review type* ▼

Date occurred 📅

Overall rating ▼

Next review date 📅

Probationary reviews can also be entered:

Review details New ▼ MENU ↻ 🖨 📎

Job title* ▼

Review type* ▼

Date occurred 📅

Overall rating ▼

Next review date 📅

12 Training records

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

The screenshot shows a 'LINKS' menu with several options. The 'Training records' option is highlighted with a red box. Below it, there are icons for a list and a grid, and a 'Training details' button, also highlighted with a red box.

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

☰ ☐

Training details

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

The screenshot shows a dropdown menu for 'Personal learning events'. The first item is 'Unconscious Bias (online)', which is highlighted in blue. A context menu is open over this item, showing an 'Export to excel' option. Other items in the list include 'Prevent (online)' and 'Equality and Diversity Training'.

^ Personal learning events

- Unconscious Bias (online) - Export to excel
- Prevent (online)
- Equality and Diversity Training

13 Making a person a Leaver

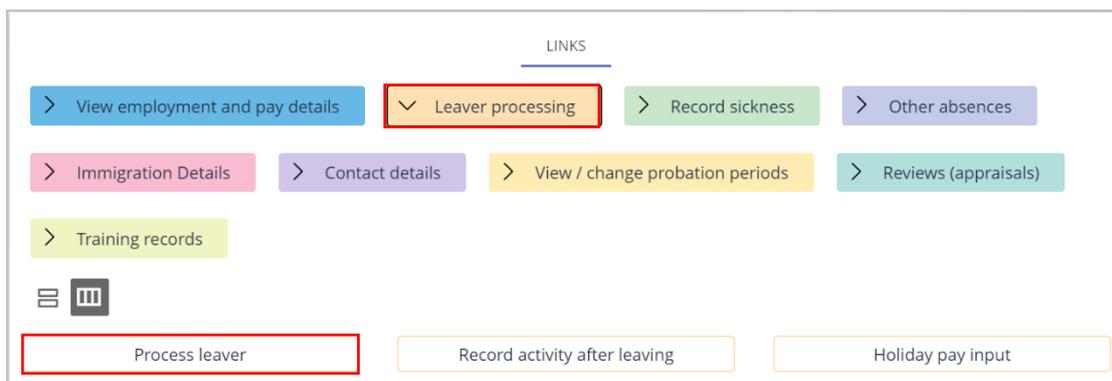
This process should be completed as soon as you know when an individual is leaving.

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

If you are notified after the payroll deadline that someone is leaving in the current month, then you should contact payroll immediately on extension 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:



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.

Miss Lynn T Frost

▲ 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 *

27/02/2023
📅

Reason for leaving *

Retirement
▼

Occupancy details

	University of Cambridge	<input checked="" type="checkbox"/>
	RS Monthly	<input checked="" type="checkbox"/>
	Senior Tutor and Support Specialist (2023)	<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

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 Attachment

Gender identity

Disability 2

Disability 3

Activity after leaving

Location after leaving

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

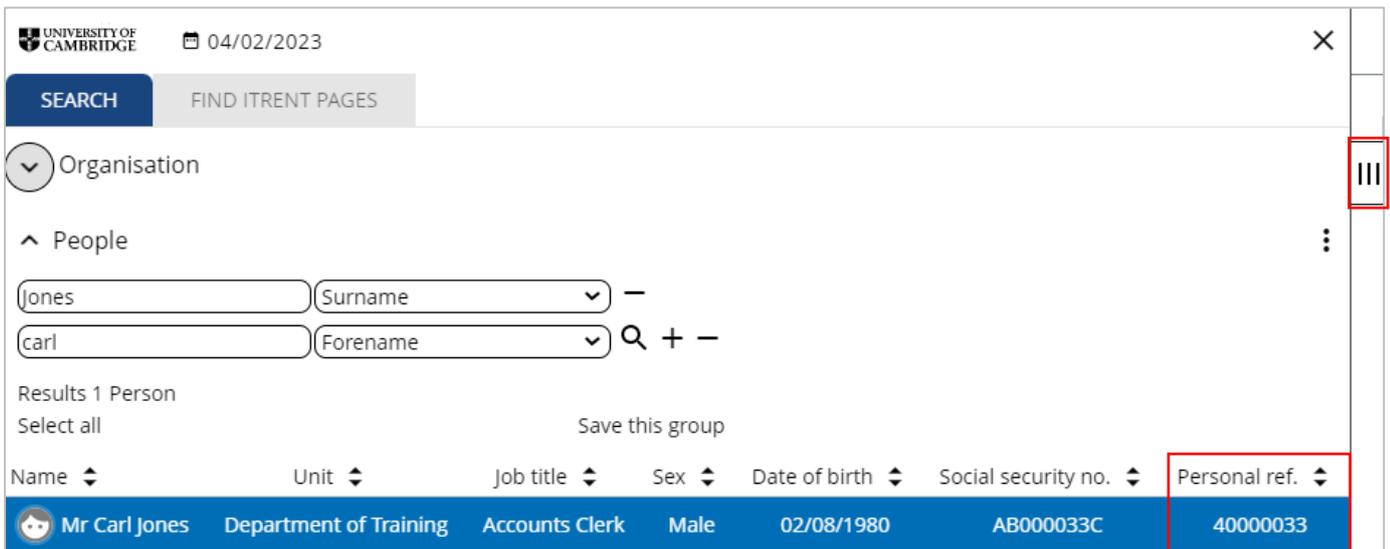
A fast input screen has been created for entering Holiday Pay. This must only be used for a person who is a leaver. It **must not** be used where an employee is transferring to another University department as their leave records must transfer with them. Leave and sickness records should be transferred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



The screenshot shows the CHRIS system interface for the University of Cambridge. At the top, it displays the university logo, the date '04/02/2023', and a search bar with 'SEARCH' and 'FIND ITRENT PAGES' buttons. Below the search bar, there are sections for 'Organisation' and 'People'. The 'People' section contains search filters for 'Surname' (with 'Jones' entered) and 'Forename' (with 'Carl' entered). Below these filters, it shows 'Results 1 Person' and a table of search results. The table has columns for Name, Unit, Job title, Sex, Date of birth, Social security no., and Personal ref. The 'Personal ref.' column for 'Mr Carl Jones' is highlighted with a red box, showing the value '40000033'.

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

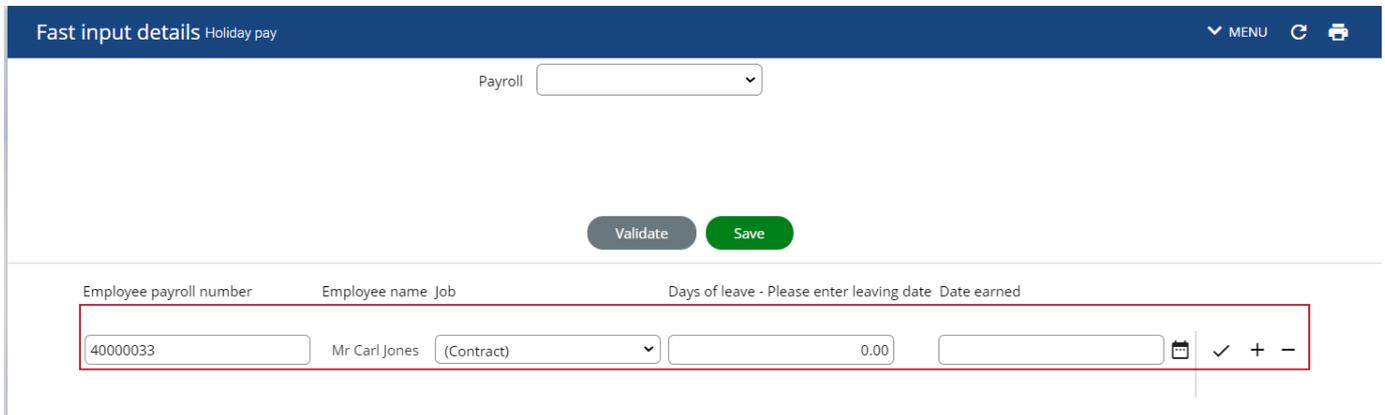
Or from the shortcut menu

Occupancy maintenance (as of 03/02/2023) ^ LESS ↻ 🖨

Process leaver Record activity after leaving Holiday pay input

The fast input details screen will be displayed.

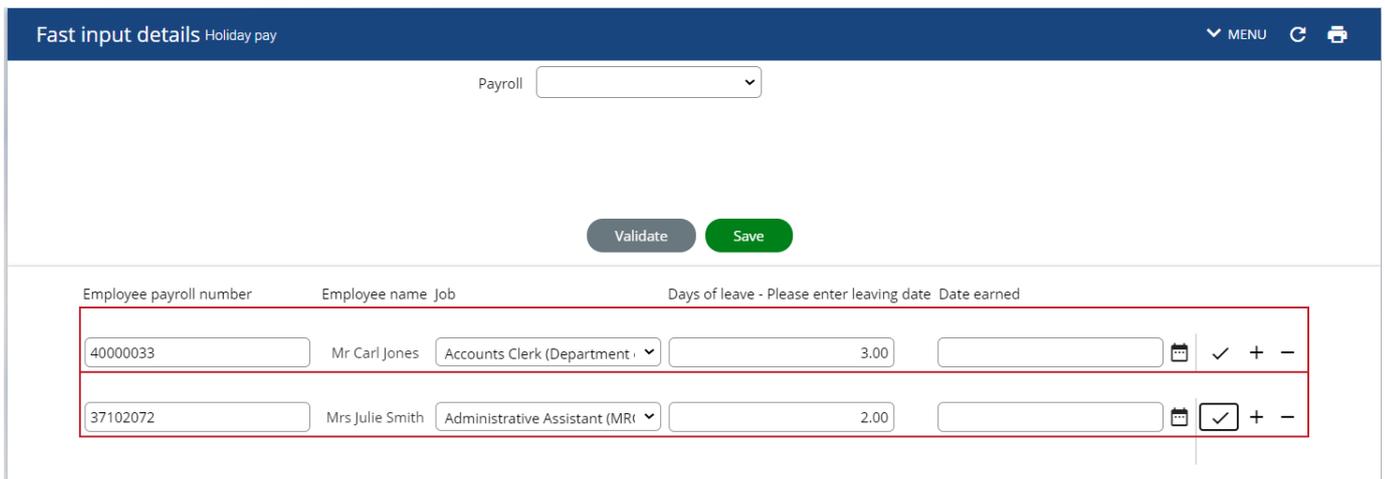
Do not enter anything into the Payroll field unless the person has more than one payroll.
Enter the Employee payroll number and click on validate.



Employee payroll number	Employee name	Job	Days of leave - Please enter leaving date	Date earned
40000033	Mr Carl Jones	(Contract)	0.00	

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:



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

Click on Save.