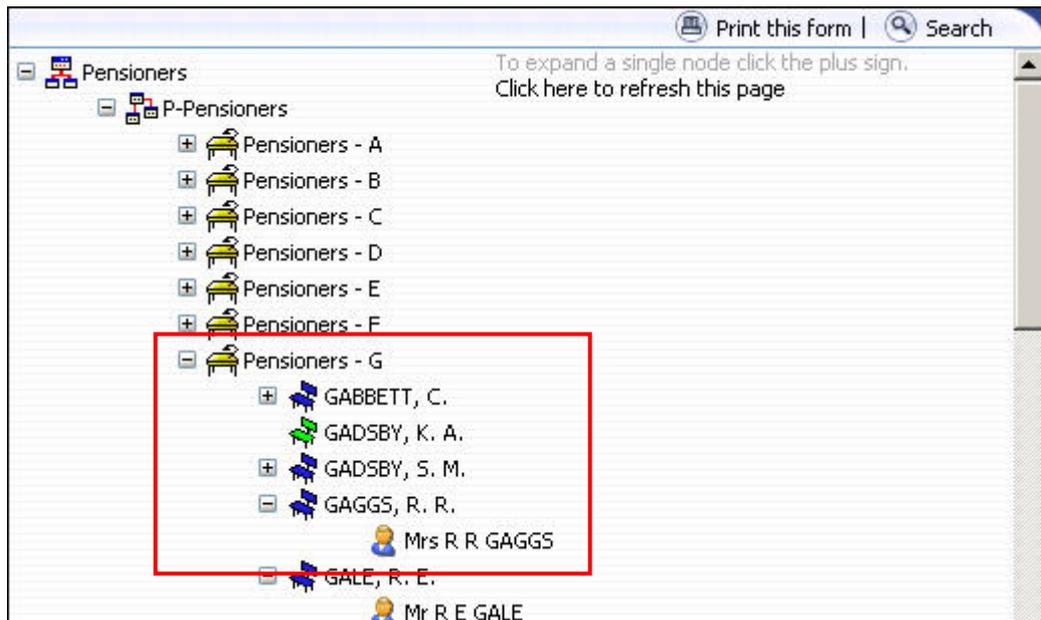


1. Create a position for the individual in the Pension Organisation

The Pension Team will continue to notify the Payroll Team as they do now, by paper form of any new pensioners that require setting up in CHRIS in order to be paid. When this happens a new position will need to be created within the appropriate unit of the Pension Organisation. To assist with location of individuals within each unit posts have been set up for each letter of the alphabet and you will use the pensioner's name as the position title.



Step 1: Create a new position

Navigate: Pension Organisation > organisational explorer (highlight P unit and drill down to the appropriate post) > Create position

- Enter the name for the new position in the following format: 'SURNAME, Initials.'
E.g. PABLO, P.
- Click on SAVE

Create linked item:

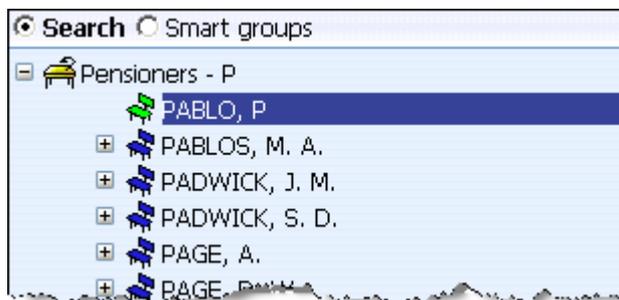
Name	<input style="width: 80%;" type="text" value="PABLO, P."/>
Quantity	<input style="width: 80%;" type="text" value="1"/>

Step 2: Navigate to the new position

A) Once you have created and saved your position as detailed in step 1. Click on the 'mini explorer' menu on the left. This will pictorially display the relevant category of post that you were working within (e.g. in our example 'P').

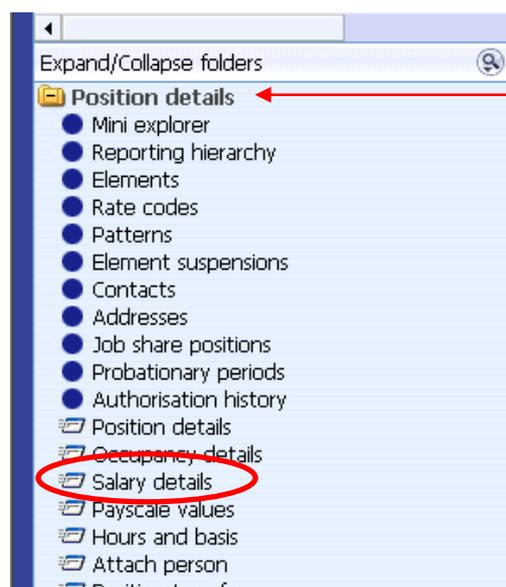


b) Making sure your cursor is in the top left pane, right click on the mouse and select refresh. After a few seconds the view will be refreshed and automatically expanded to show the position that you have just set up (i.e. the green chair).



c) Highlight the position (i.e. the green chair).

Step 3: Enter the annual pension



Important – make sure you are in the **position details** folder (not post details).

- Select the 'salary details' form
- Enter the annual pension entitlement as the FT salary
- Save

II Salary details : PABLO, P

Grade	<input type="text"/>	<input type="button" value="Search"/>
FT Salary	<input type="text" value="12,000"/>	<input type="text" value="Annually"/>
Override minimum	<input type="text"/>	
Override maximum	<input type="text"/>	
Grade minimum	<input type="text"/>	
Grade maximum	<input type="text"/>	
Protected rate of pay	<input type="text"/>	<input type="text"/>
FTE value	<input type="text"/>	
Pro-rated rate of pay	<input type="text"/>	
Change reason	<input type="text"/>	

2. Setting up an individual as a pensioner

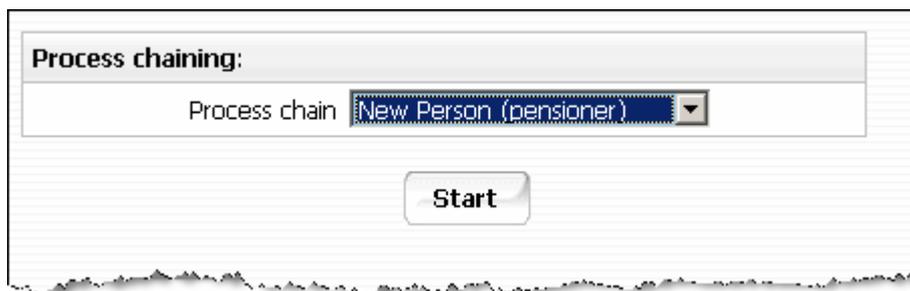
In order for an employee to be recorded as a pensioner they need to be made a leaver from the main University of Cambridge organisation and then set up as a new person within the Pensioners Organisation.

A screen chain is available to take you through setting up:

- The new person
- Attaching them to the position you have just set up
- Attaching them to the pensioners' payroll
- Adding the required payroll details

To get to the start of this chain navigate as follows:

Navigate: Pensioners Organisation> People> Process Chaining> Process Chaining> New person (Pensioner)



Step 1: New Personal Details

Alternatively this form can be navigated directly by going to **Pension Organisation > People > New Personal Details**.

- Key in the surname, first name, first name 2, first name 3 if applicable.
- Click the drop down list arrow and select a title
- Enter preferred name if applicable, sex, previous name, honours and the (pension) organisation start date. Leave workflow group set to Default
- Click the  button. The record will be saved and the new person's details will be displayed in the object pane.

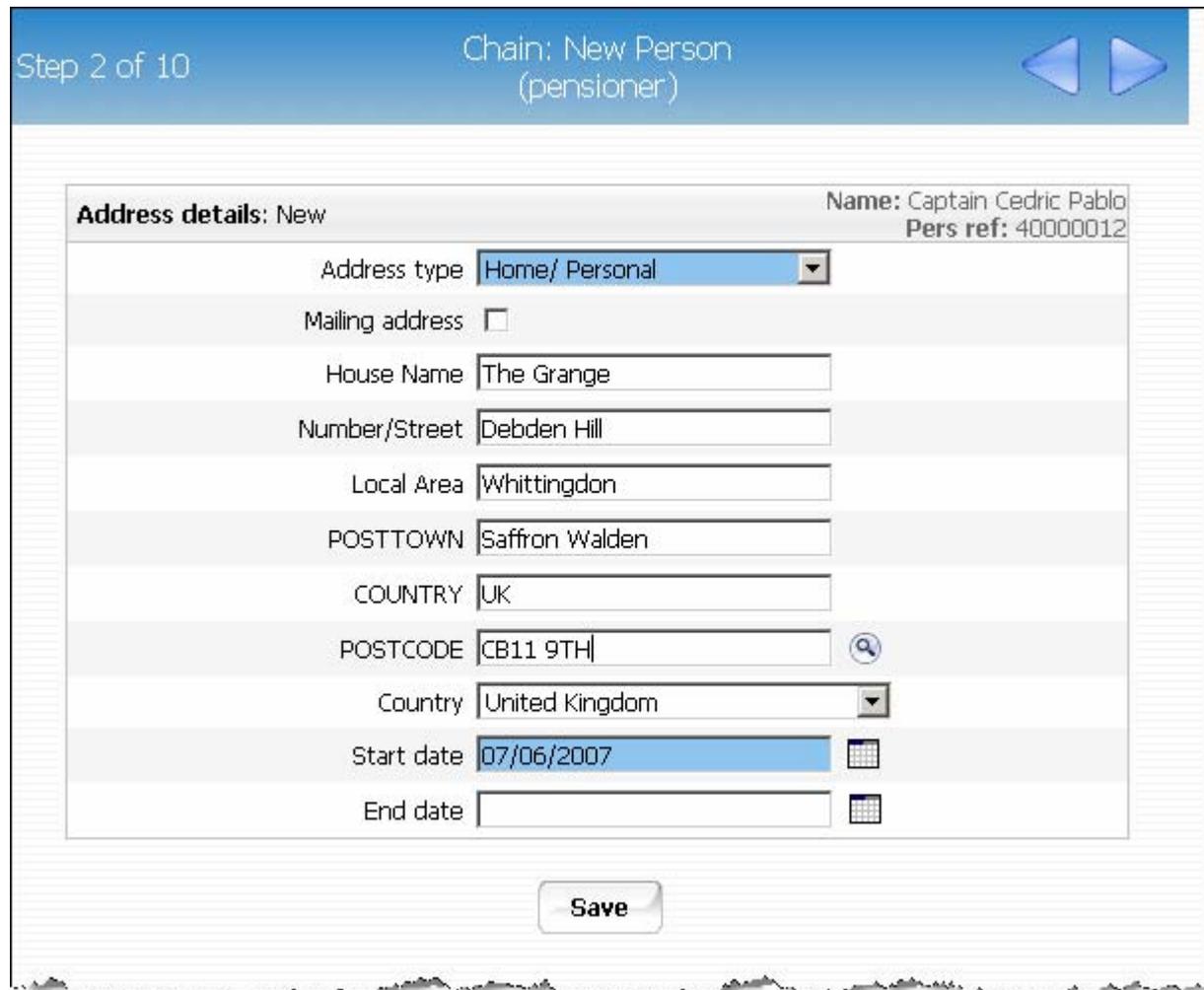
Step 1 of 10 Chain: New Person (pensioner) 

Personal details: Captain Cedric Pablo Name: Captain Cedric Pablo
Pers ref: 40000012

Surname	<input type="text" value="Pablo"/>
Forename	<input type="text" value="Cedric"/>
Forename 2	<input type="text"/>
Forename 3	<input type="text"/>
Title	<input type="text" value="Captain"/>
Preferred name	<input type="text"/>
Sex	<input type="text" value="Male"/>
Previous surname	<input type="text"/>
Honours	<input type="text"/>
Personal ref.	40000012
Start date	<input type="text" value="07/06/2007"/> 
Workflow group	<input type="text" value="DEFAULT"/>

Step 2: Enter home address

Alternatively this form can be navigated directly by going to **Pension Organisation > People(find person) > Addresses > Address details-New**



Step 2 of 10 Chain: New Person (pensioner)

Address details: New Name: Captain Cedric Pablo
Pers ref: 40000012

Address type	Home/ Personal
Mailing address	<input type="checkbox"/>
House Name	The Grange
Number/Street	Debden Hill
Local Area	Whittingdon
POSTTOWN	Saffron Walden
COUNTRY	UK
POSTCODE	CB11 9TH
Country	United Kingdom
Start date	07/06/2007
End date	

Save

Complete the necessary fields and save, before you move onto the next step.

Step 3: Enter their National Insurance number

Alternatively this form can be navigated directly by going to **Pension Organisation > People (find person) > Personal Information> Social Security Details> New_Social Security details.**



Step 3 of 10 Chain: New Person (pensioner)

Social security details: Captain Cedric Pablo

Name: Captain Cedric Pablo
Social security number: AB546789C
Pers ref: 40000012

Legislation: UK Legislation

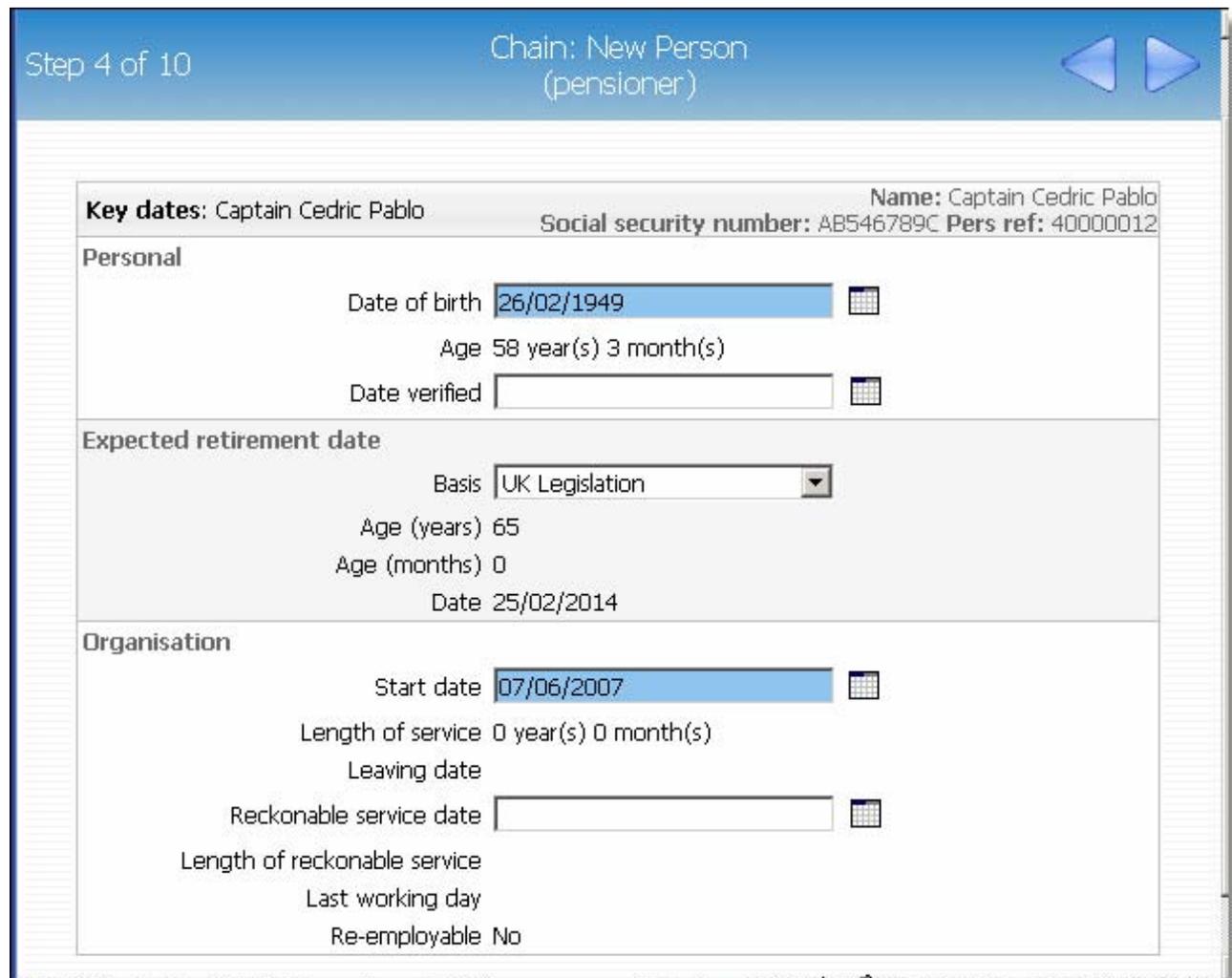
Social security no. AB546789C

Save Delete

- a) Select UK legislation from the drop down list
- b) Enter the individual's NI number.
- c) Save

Step 4: Enter date of birth

Alternatively this form can be navigated directly by going to **Pension Organisation > People (find person) > Personal Information > Key Dates.**



Step 4 of 10 Chain: New Person (pensioner)

Key dates: Captain Cedric Pablo **Name:** Captain Cedric Pablo
Social security number: AB546789C **Pers ref:** 40000012

Personal

Date of birth 
Age 58 year(s) 3 month(s)
Date verified 

Expected retirement date

Basis 
Age (years) 65
Age (months) 0
Date 25/02/2014

Organisation

Start date 
Length of service 0 year(s) 0 month(s)
Leaving date
Reckonable service date 
Length of reckonable service
Last working day
Re-employable No

- a) Enter their date of birth
- b) Save. Once you have saved this form Trent will work out and display the individual's current age.

Step 5: Attach the person to the vacant position in the organisation

Alternatively this form can be navigated directly by going to **Pension Organisation > People (find person) > Employment>Attach person to structure.**

Step 5 of 10 Chain: New Person (pensioner)

Attach person:

Person

Name

Attach to

Select contract

Create a contract

always leave this box with the text that has defaulted in

Click on the magnifying glass

Enter the pensioner's surname and then click on the magnifying glass to find the corresponding position you set up earlier.

Vacant position search Close x

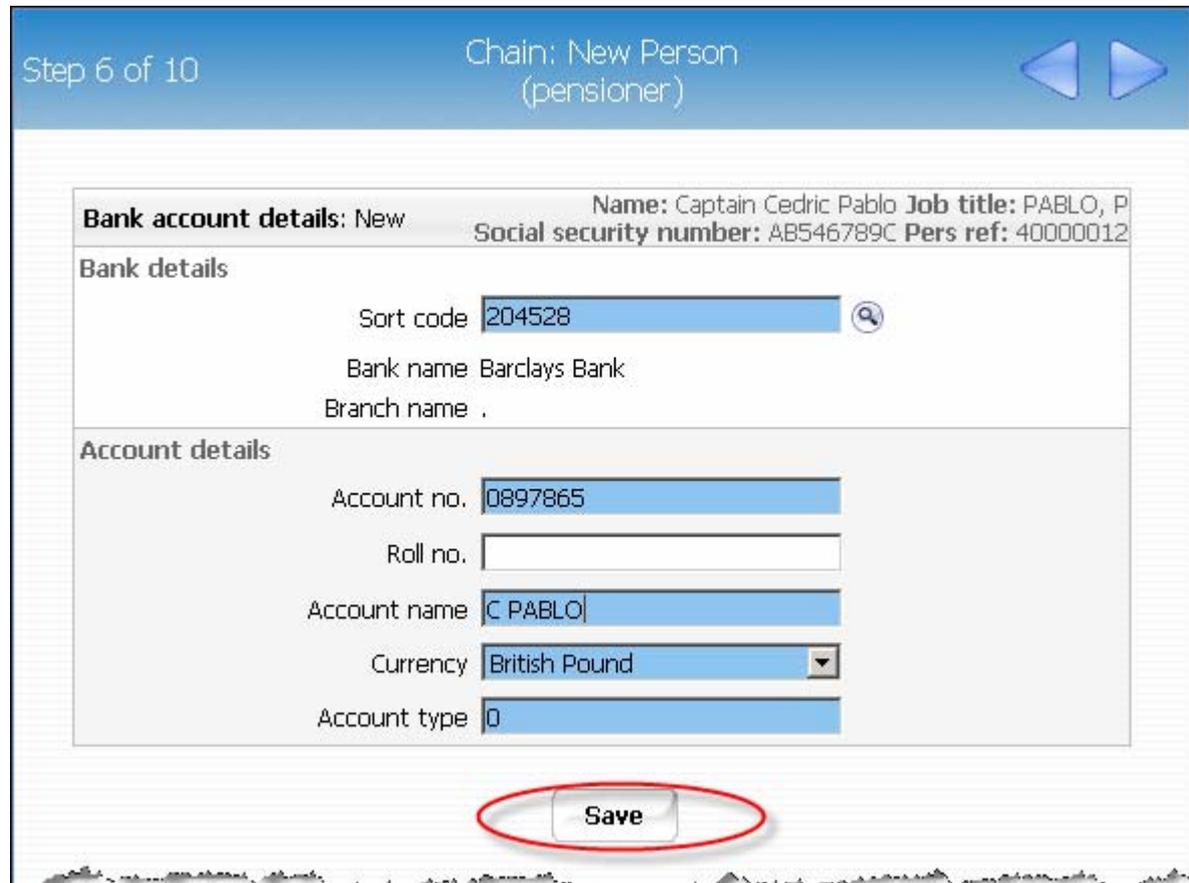
Results 1 Record

Job title	Post	Organisation unit	Position reference	Occupancy type	Job shar
<input checked="" type="radio"/> PABLO, P	Pensioners - P	P-Pensioners	80000012	Standard	No

- a) Find the vacant position that you created earlier
- b) Save

Step 6: Enter bank account details

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > Payroll > Bank accounts > New_Bank Account Details**.



Step 6 of 10 Chain: New Person (pensioner)

Bank account details: New Name: Captain Cedric Pablo Job title: PABLO, P
Social security number: AB546789C Pers ref: 40000012

Bank details

Sort code 

Bank name Barclays Bank

Branch name .

Account details

Account no.

Roll no.

Account name

Currency

Account type

Save

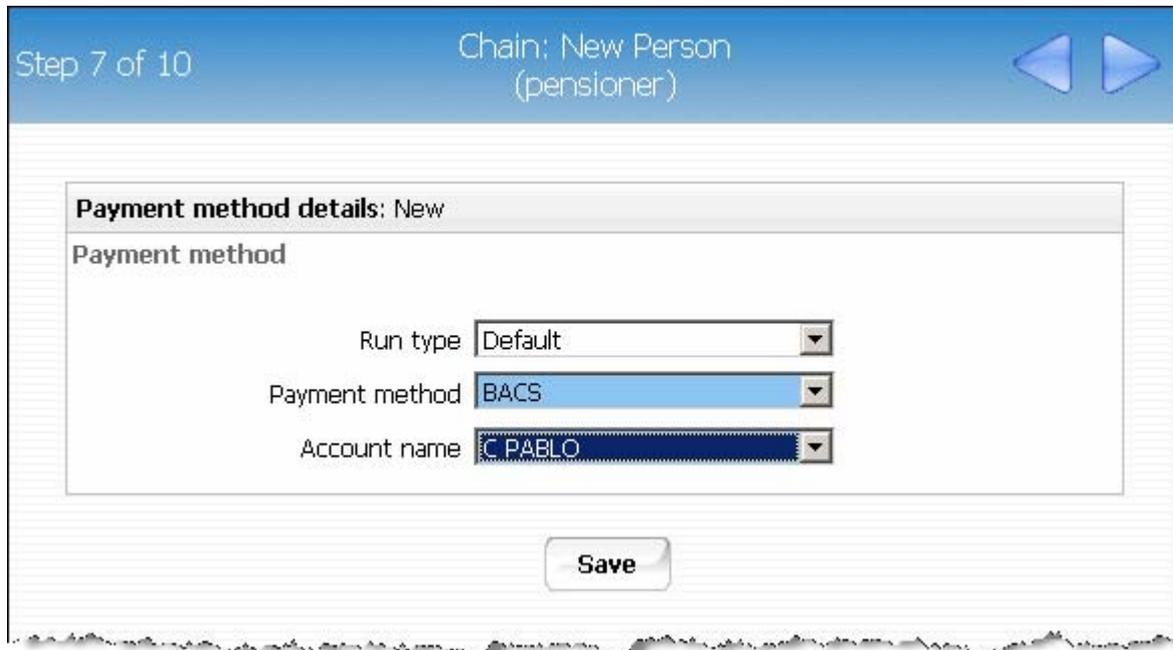
a) Either use the magnifying glass to search for the sort code number (or alternatively just type straight into the field. If you do the latter please note that the system performs no verification on the sort code entered and the bank's name will not be displayed underneath.

b) Enter the account number (and roll number if it is a building society account) and the full account name.

c) Save.

Step 7: Enter payment method

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > Payroll > Payment methods > New_Payment methods.**



Step 7 of 10 Chain: New Person (pensioner)

Payment method details: New

Payment method

Run type: Default

Payment method: BACS

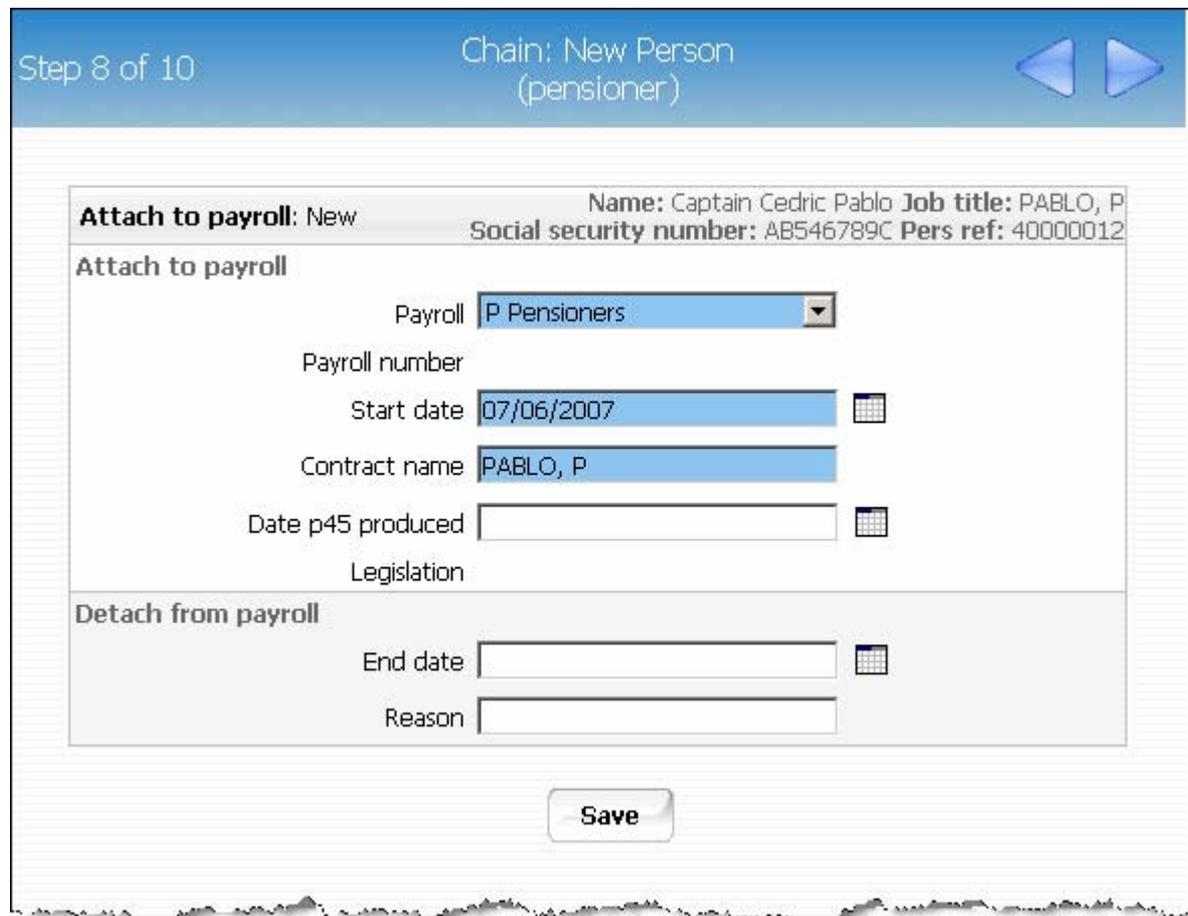
Account name: C PABLO

Save

- a) Always leave the run type as 'default'.
- b) Select from the drop down list BACS as the payment method
- c) Select the bank account name that you set up in the previous step from the drop down list.
- d) Save

Step 8: Attach to payroll

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > Payroll > Attach to Payroll > Attach contract to Payroll**.



Step 8 of 10 Chain: New Person (pensioner)

Attach to payroll: New Name: Captain Cedric Pablo Job title: PABLO, P
Social security number: AB546789C Pers ref: 40000012

Attach to payroll

Payroll

Payroll number

Start date

Contract name

Date p45 produced

Legislation

Detach from payroll

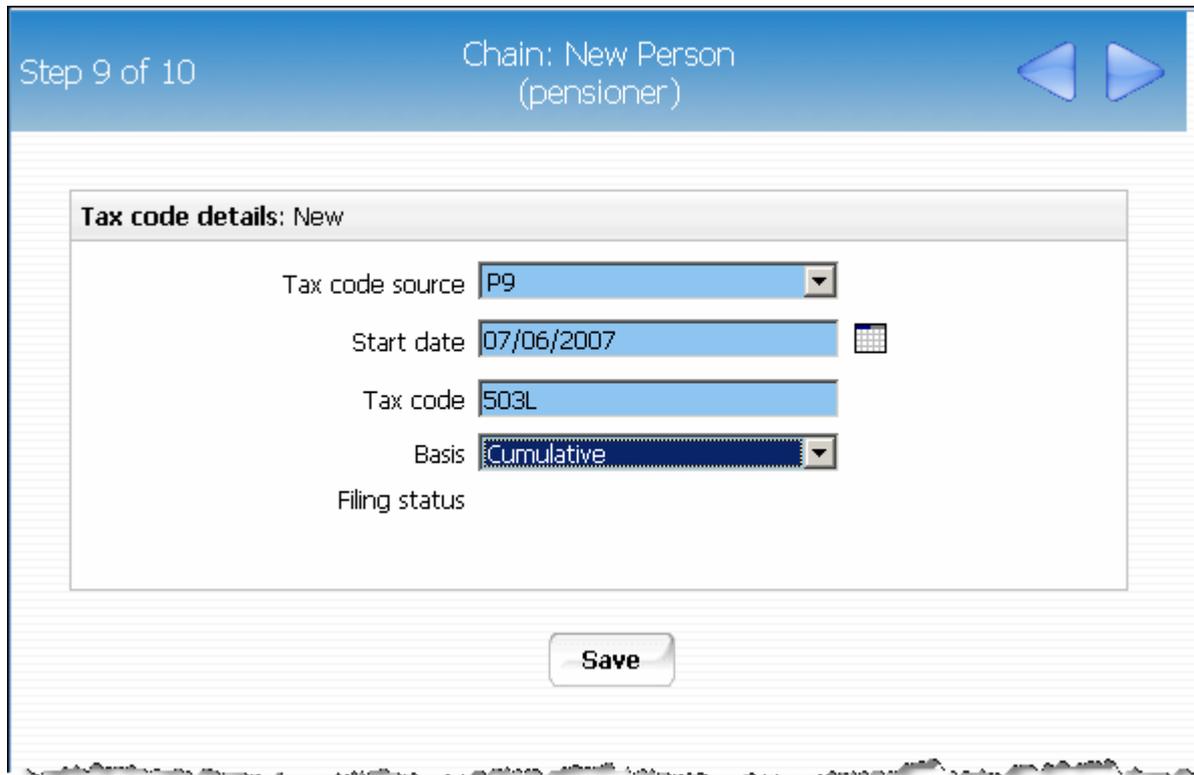
End date

Reason

- a) Select the 'P Pensioners' payroll from the drop down list
- b) Save

Step 9: Enter tax code details

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation >People (find person) > UK Legislation> Tax codes> Tax code details_new.**



Step 9 of 10 Chain: New Person (pensioner)

Tax code details: New

Tax code source: P9

Start date: 07/06/2007

Tax code: 503L

Basis: Cumulative

Filing status:

Save

- a) Complete the fields as appropriate
- b) Save

Step 10: Enter the NI category

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > UK Legislation > National Insurance > National Insurance details-new.**



Step 10 of 10 Chain: New Person (pensioner)

National Insurance details: New

Level

NI category ← Select appropriate category from the drop down list

Description No contributions due

Effective date

- a) Select the relevant NI category X from the drop down list
- b) Save

Step 11: Calculate Pay

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > Payroll > Pay History > Calculate Pay.**



Pay period control: New Name: Captain Cedric Pablo Job title: PABLO, P
Social security number: AB546789C Pay ref: 40000012 Pers ref: 40000012

Payroll
Not paid
Lock contracts on calculation

Select people
Smart group name

Calculate Rollback Cleardown

- a) Click on 'calculate'
- b) Say Ok to continuing



- c) Wait until the pop up message telling you the payroll has been calculated appears.

Step 12: View on-line payslip

Alternatively this screen can be navigated to directly by going to **Pensioners Organisation > People (find person) > Payroll > Pay History > Pay Details**

NB. Ensure that pay has been calculated for the individual before you view this screen.

Pay details: P Pensioners, 30/06/2007 09:00		Name: Captain Cedric Pablo Job title: PABLO, P Social security number: AB546789C Pay ref: 40000012 Pers ref: 40000012						
Tax code: 503L Cumulative	Tax month: 3	NI category: X	Legislation: UK	Currency: British Pound				
Payment/Benefit	Job title	Paid from	Paid to	Units	Rate	Cash	Total payments: 1,600.00	
Pension Payment	PABLO, P	07/06/2007	30/06/2007			1600.00		
Deduction							Cash	Total deductions: 34.00
Tax							34.00	Net pay: 1,566.00
NI - X							0.00	B/F: 0.00 C/F: 0.00
								Rounded net: 1,566.00