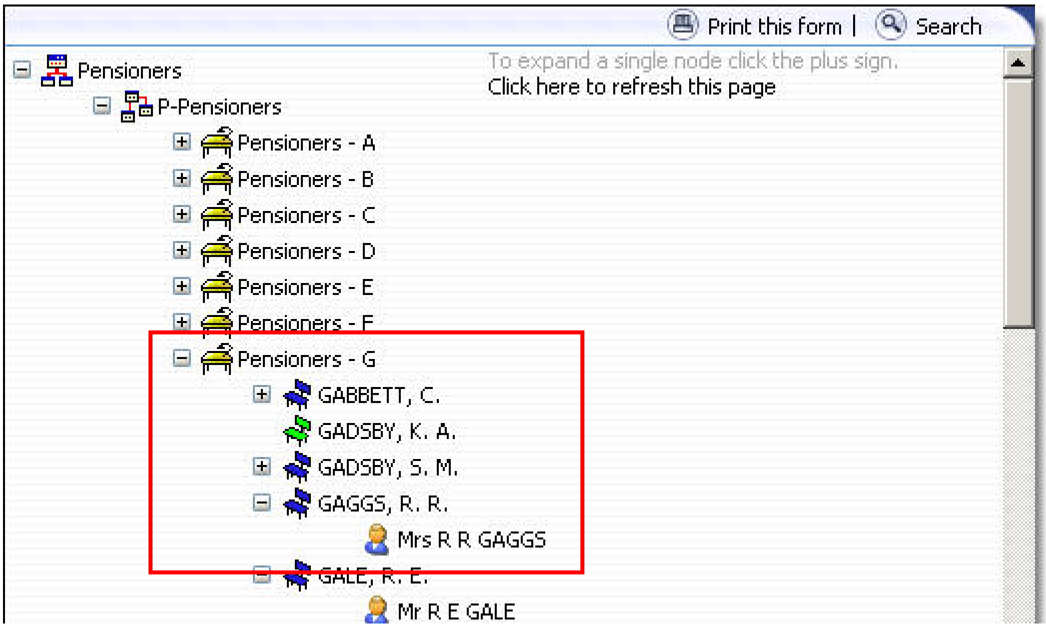
1. Create a position for the individual in the Pension Organisation

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.

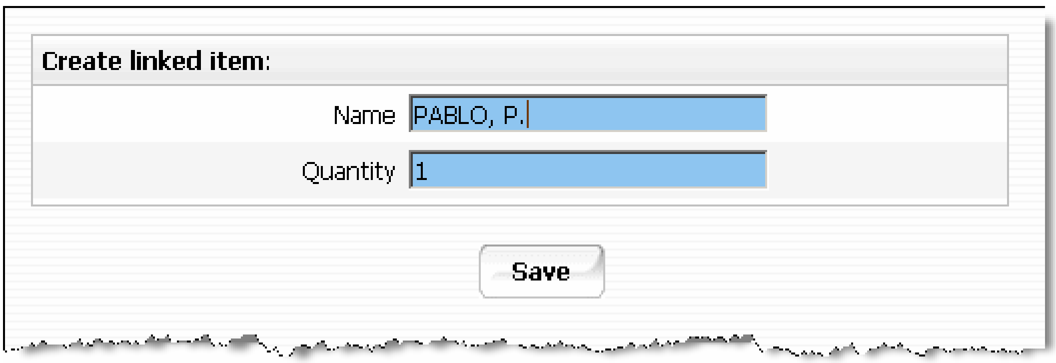


Step 1: Create a new position

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

a) Enter the name for the new position in the following format: 'SURNAME, Initials.' E.g. PABLO, P.

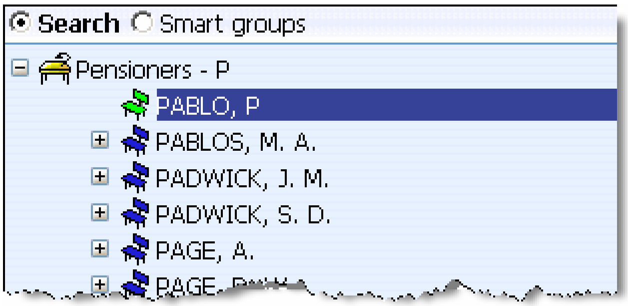
b) Click on SAVE



Step 2: Navigate to the new position

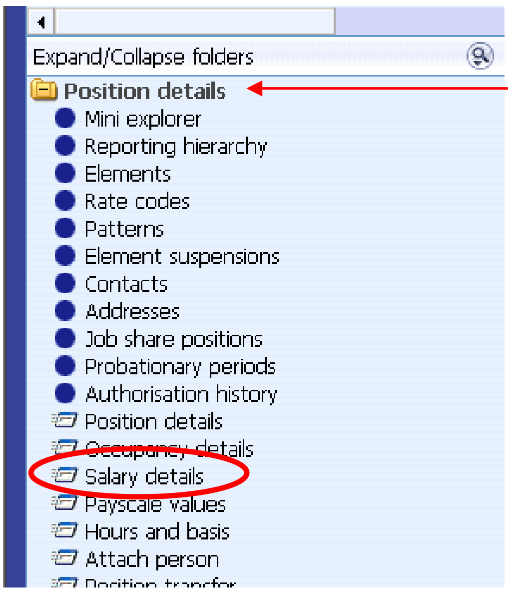
A) Once you have created and saved your position as detailed in step 1. Click on the 'mini explorer' menu on the left. This will pictorially display the relevant category of post that you were working within (e.g. in our example 'P').

b) Making sure your curser 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

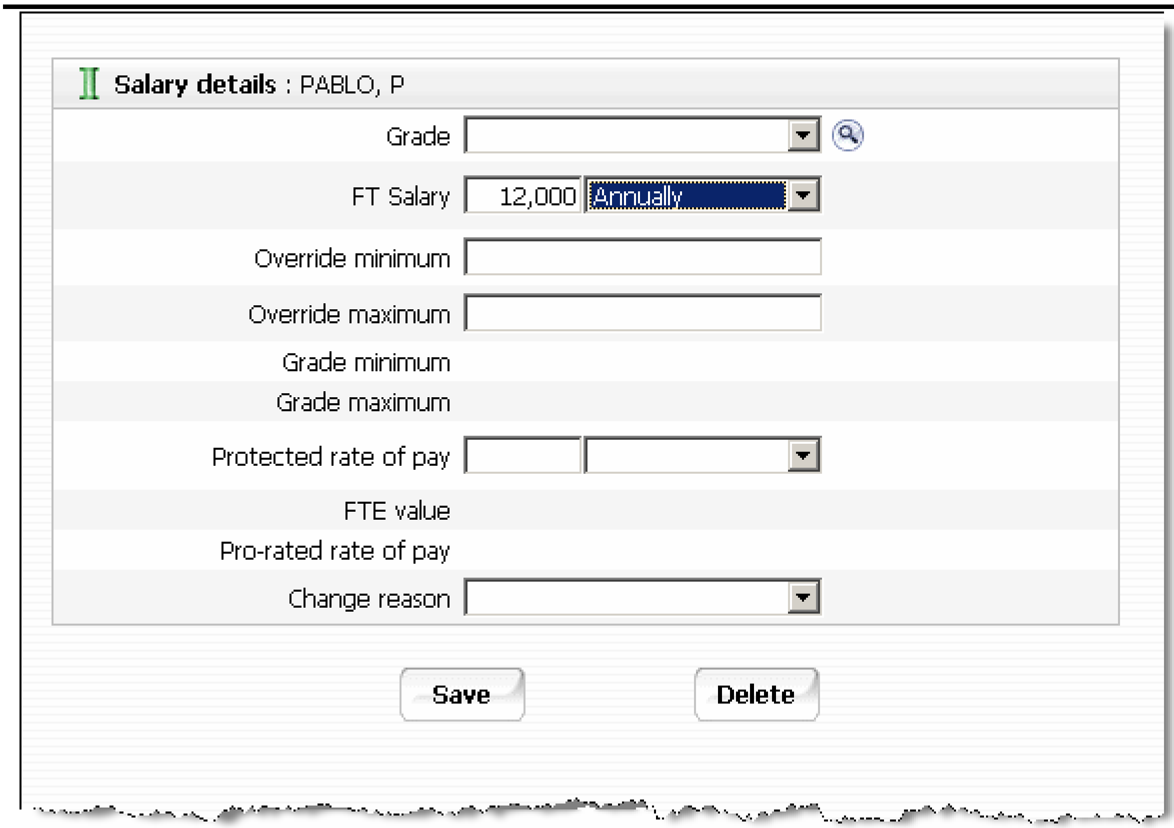


Important – make sure you are in the **position details** folder (not post details).

a) Select the 'salary details' form

b) Enter the annual pension entitlement as the FT salary

c) Save


Salary details : PABLO, P
Grade
FT Salary
12,000
Annually
Override minimum
Override maximum
Grade minimum
Grade maximum
Protected rate of pay
FTE value
Pro-rated rate of pay
Change reason
Save
Delete

2. Setting up an individual as a pensioner

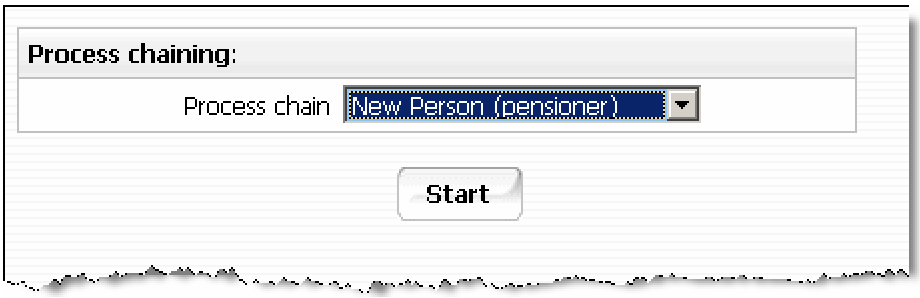
In order for an employee to be recorded as a pensioner they need to be made a leaver from the main University of Cambridge organisation and then set up as a new person within the Pensioners Organisation.

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.**

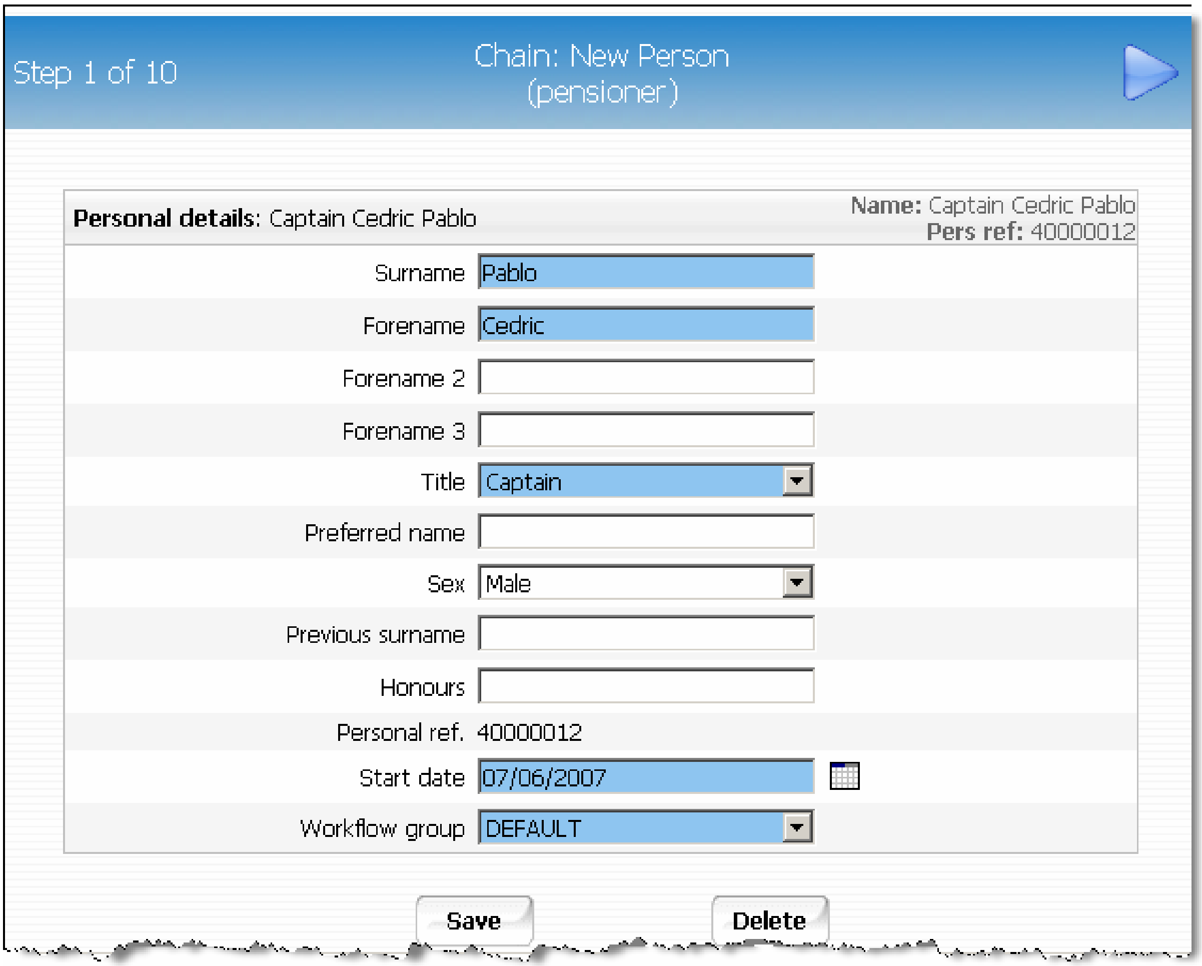
a) Key in the surname, first name, first name 2, first name 3 if applicable.

b) Click the drop down list arrow and select a title

c) Enter preferred name if applicable, sex, previous name, honours and the (pension) organisation start date. Leave workflow group set to Default

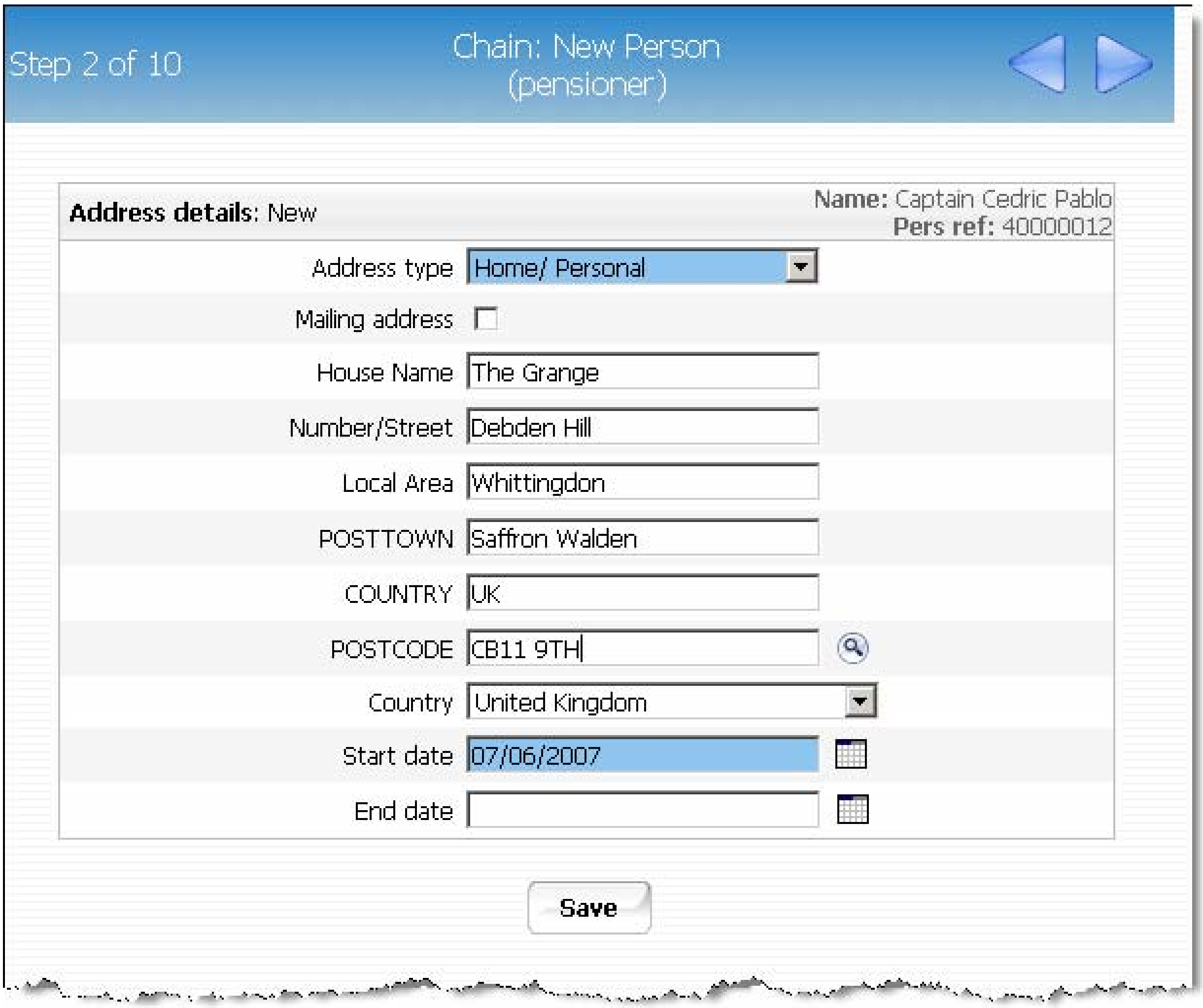
d) Click the 

button. The record will be saved and the new person's details will be displayed in the object pane.



Step 2: Enter home address

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



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.**

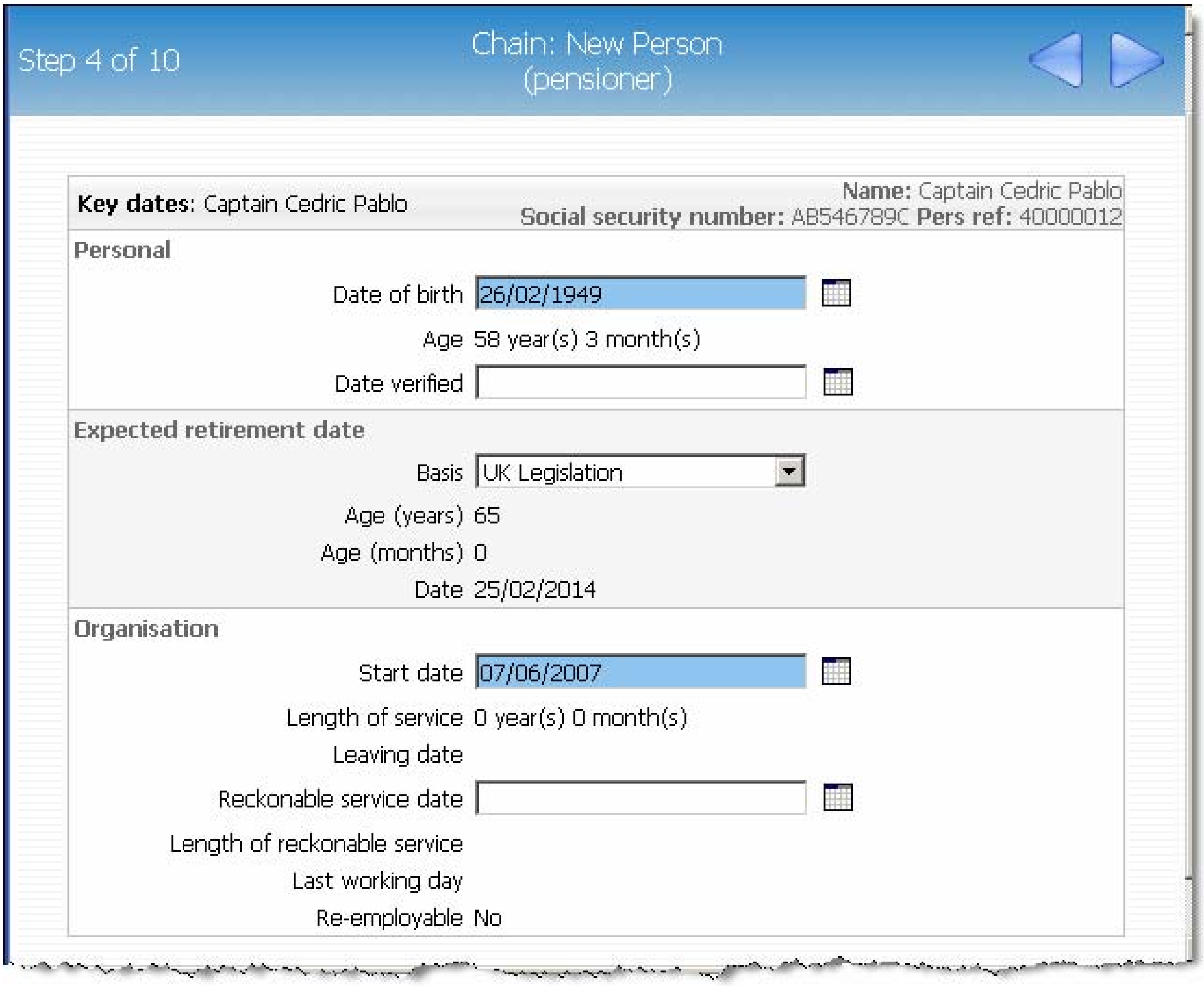
a) Select UK legislation from the drop down list

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	26/02/1949
Age	58 year(s) 3 month(s)
Date verified	

Expected retirement date

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

Organisation

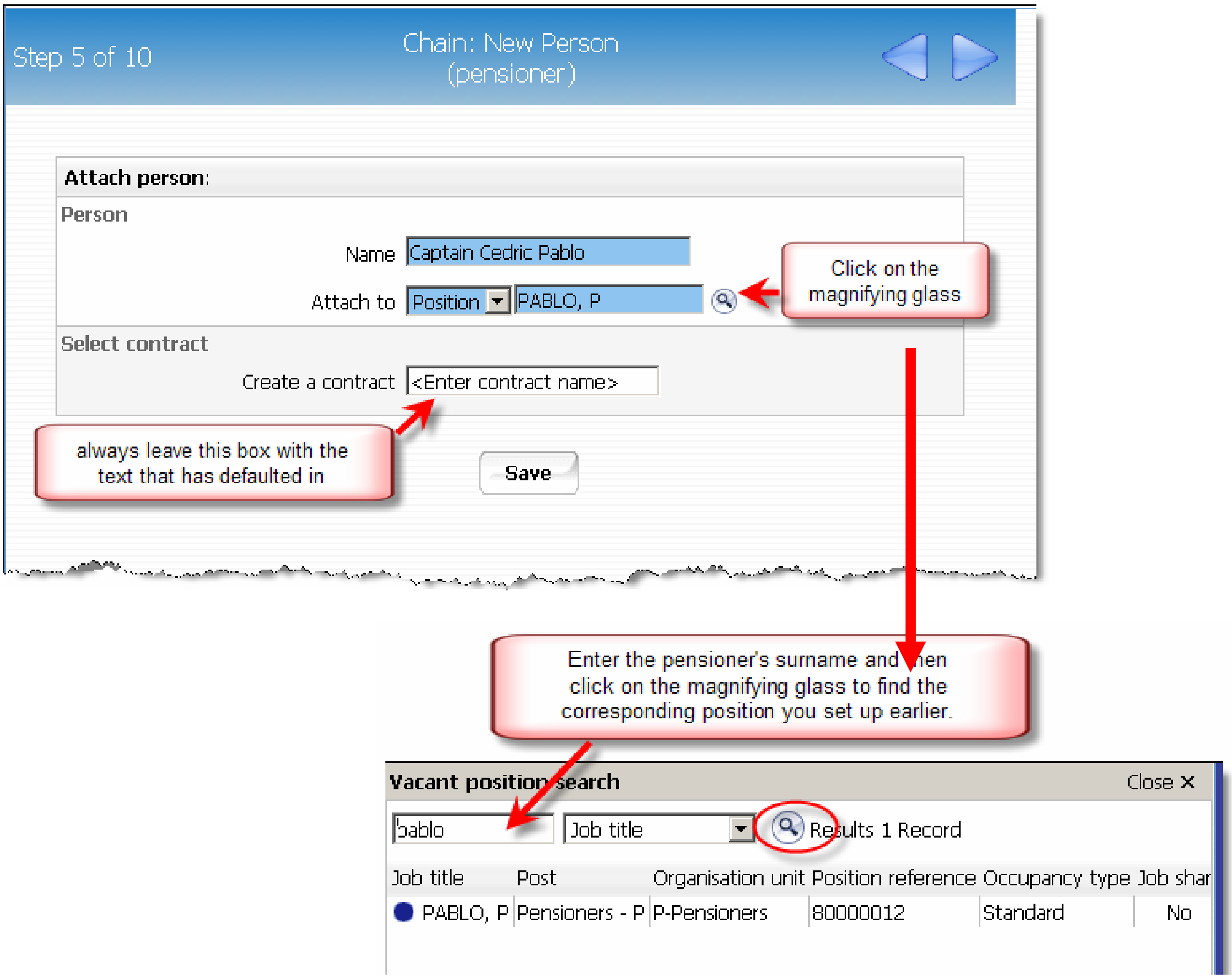
Start date	07/06/2007
Length of service	0 year(s) 0 month(s)
Leaving date	
Reckonable service date	
Length of reckonable service	
Last working day	
Re-employable	No

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.**

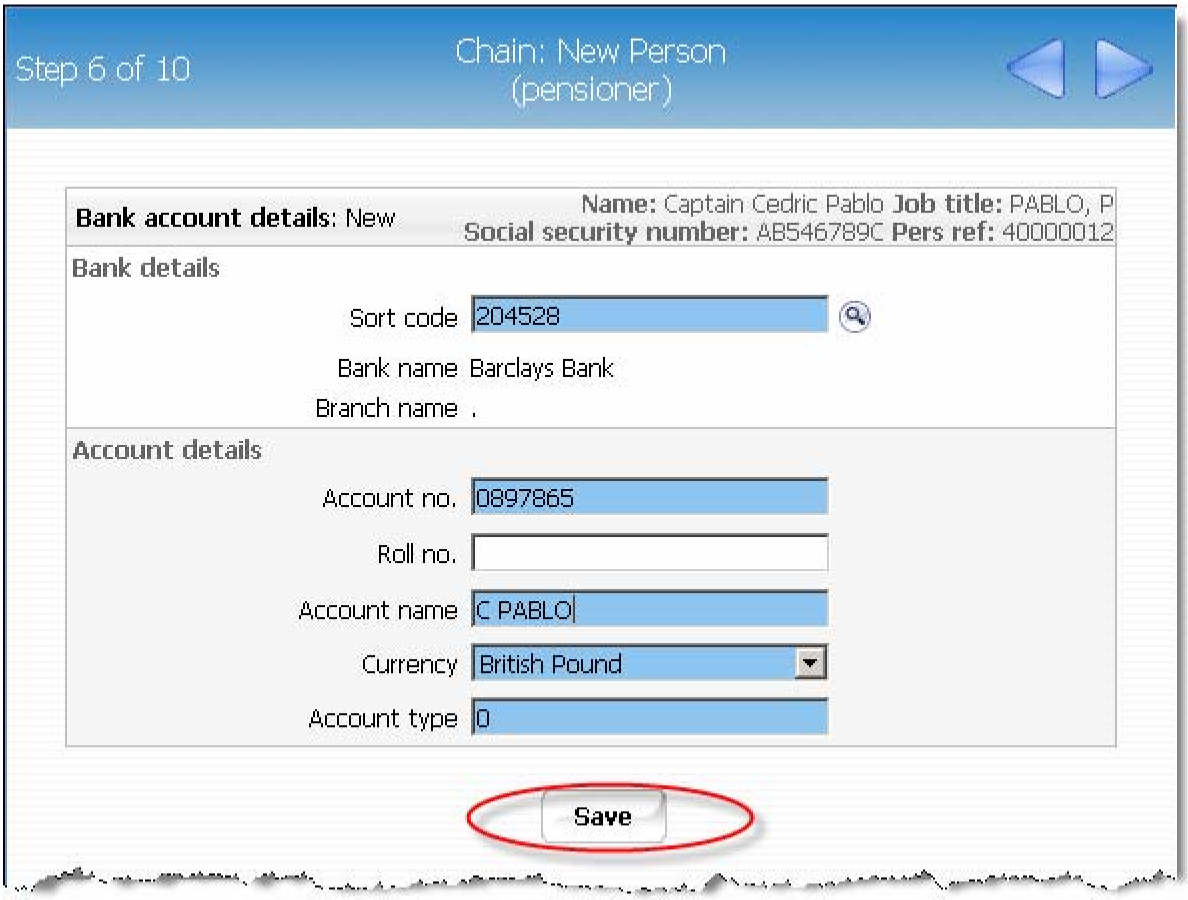


a) Find the vacant position that you created earlier

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.**



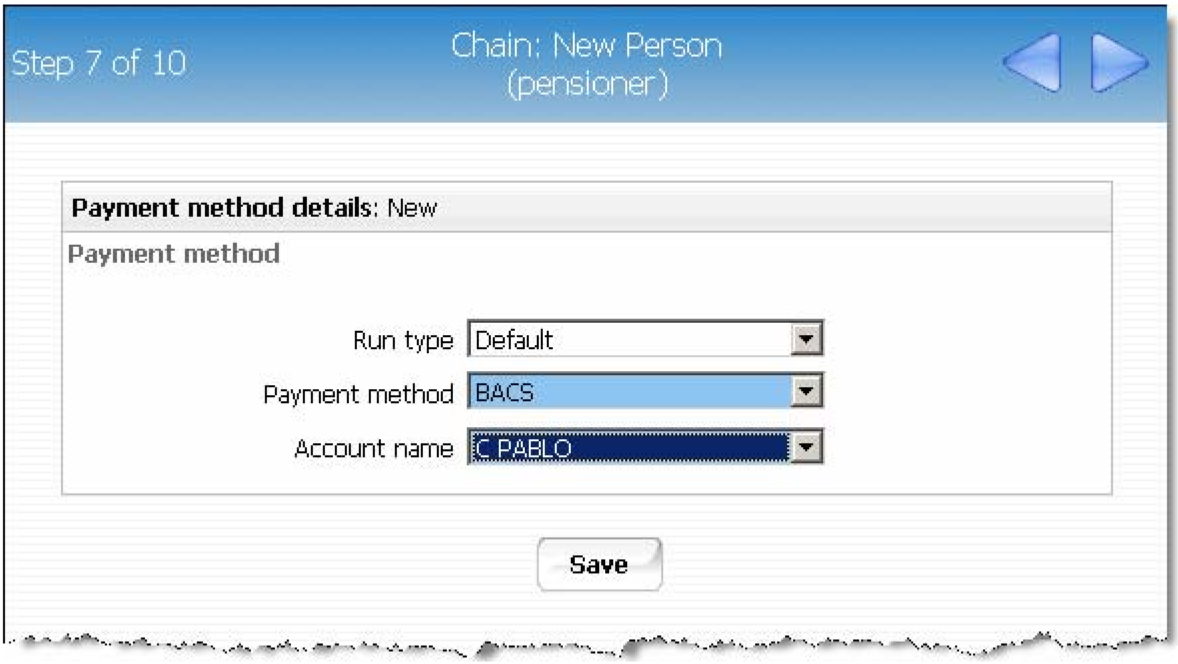
a) Either use the magnifying glass to search for the sort code number (or alternatively just type straight into the field. If you do the latter please note that the system performs no verification on the sort code entered and the bank's name will not be displayed underneath.

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.**



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

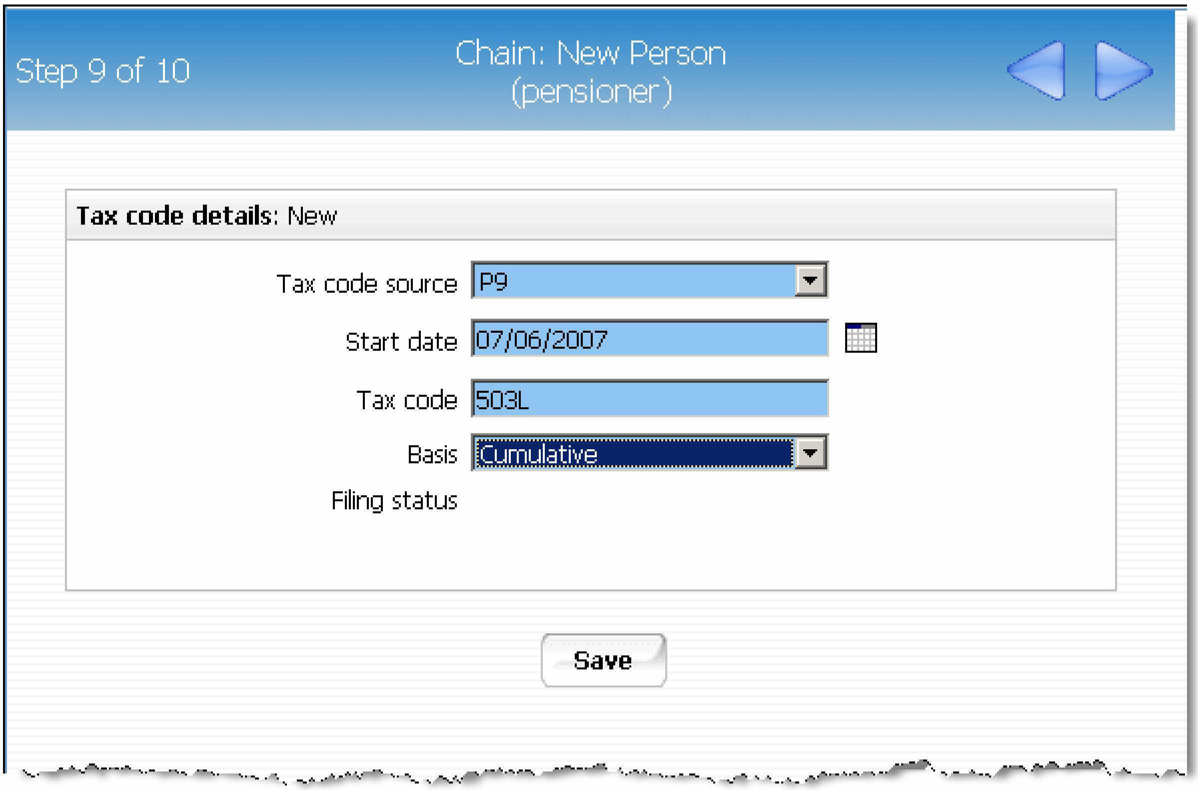
Alternatively this screen can be navigated to directly by going to **Pensioners Organisation >People (find person) > Payroll> Attach to Payroll> Attach contract to Payroll.**

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.**



a) Complete the fields as appropriate

b) Save

Step 10: Enter the NI category

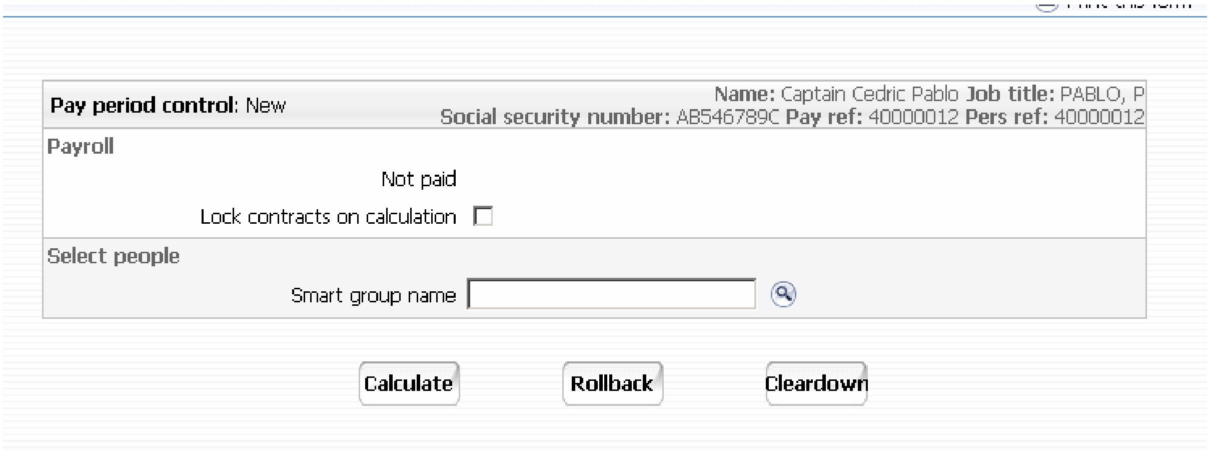
Alternatively this screen can be navigated to directly by going to **Pensioners Organisation >People (find person) > UK Legislation> National Insurance> National Insurance details-new.**

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

b) Save

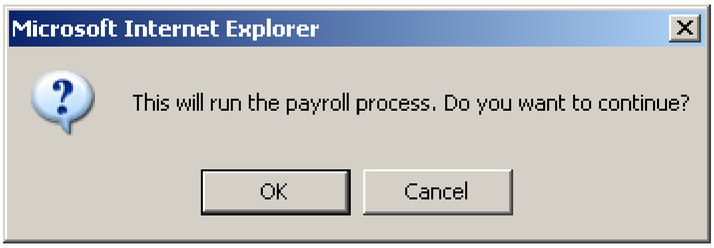
Step 11: Calculate Pay

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



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
Pension Payment	PABLO, P	07/06/2007	30/06/2007			1600.00

Deduction	Cash
Tax	34.00
NI - X	0.00

Total payments: 1,600.00

Total deductions: 34.00

Net pay: 1,566.00

B/F:	C/F:
0.00	0.00

Rounded net: 1,566.00