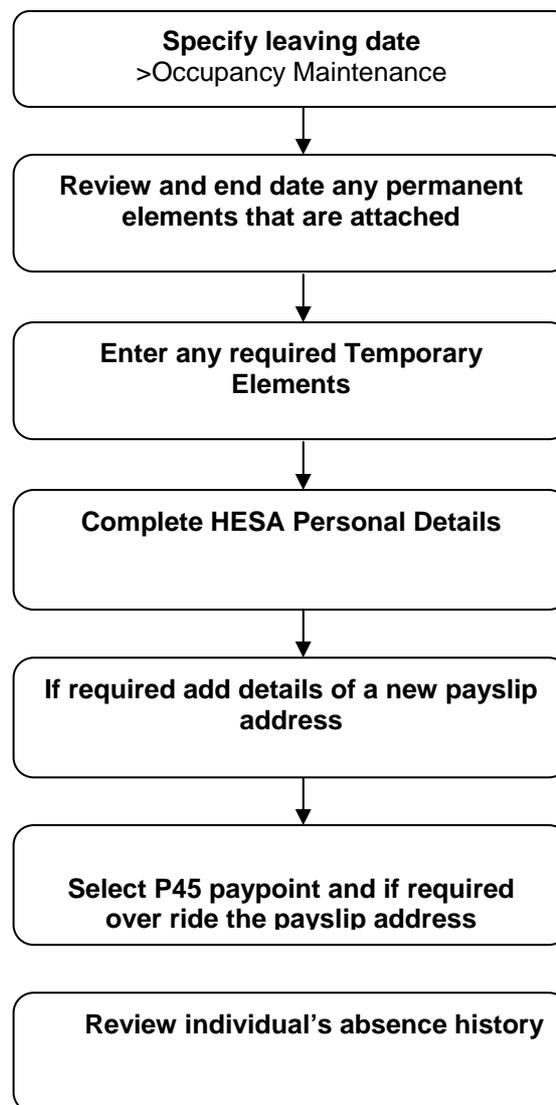


1. The Payroll (Leaver) Process Chain

When an employee leaves an 'Employee Leaver/Transfer' form (CHRIS/40) will be completed by the Institution and forwarded to the East Room who will vet the form to ensure that there are no potential HR issues surrounding their leaving.

They will then pass the form to Payroll for processing on the system. Once notification has been received of a leaver the Payroll Team should work their way through the steps detailed in the process chain **Payroll (Leaver)**.



Navigate: Organisation > People (find person) > Process Chaining > **Process Chaining Form (select Payroll (Leaver))**



Select the leaver process chain from the drop down list



A screenshot of a web form titled 'Process chaining:'. The form has a white background with a thin border. At the top, the title 'Process chaining:' is displayed in a grey header bar. Below the header, there is a label 'Process chain' followed by a dropdown menu. The dropdown menu is open, showing 'Payroll (Leaver)' as the selected option. Below the dropdown menu, there is a 'Start' button with a white background and a grey border.

Click on start

Step 1: Specifying leaving date

The first step is to review the details from the CHRIS/40 and transfer the relevant details to the first screen within the process chain; Occupancy Maintenance.

Current selections will result in this person leaving the organisation.

This person will leave any organisation, contract or position selected.

Step 1 of 6 Chain: Payroll (Leaver)

Occupancy maintenance: Mrs Rosa Alconbury **Name:** Mrs Rosa Alconbury **Job title:** Cleaner (Labs)
Social security number: JJ133456C **Pay ref:** 30000072
Pers ref: 30000072

Leaving details

Leaving date:

Last working day:

Last payment date:

Reason for leaving:

Exit interview complete?

Occupancy details

	University of Cambridge	<input checked="" type="checkbox"/>
	Cleaner (Labs)	<input checked="" type="checkbox"/>
	Cleaner (Labs) (70000062)	<input checked="" type="checkbox"/>

Use the Occupancy Details portion of the screen to indicate whether the person is leaving the organisation (click on the top option – University of Cambridge)

Occupancy details

	University of Cambridge	<input checked="" type="checkbox"/>
	Cleaner (Labs)	<input checked="" type="checkbox"/>
	Cleaner (Labs) (70000062)	<input checked="" type="checkbox"/>

You can also use this process chain to make someone a leaver from one of their positions. Click on the check box next the position that is being vacated. In this instance the employee will not be made a leaver from the organisation.

Occupancy details		
	University of Cambridge	<input type="checkbox"/>
	L Allhouse	<input type="checkbox"/>
	Head of Department (70000003)	<input type="checkbox"/>
	Clerk (70000035)	<input checked="" type="checkbox"/>

Step 2: Review permanent elements attached

The second step in the process is to enter an end date against each permanent element the employee has attached.

Step 2 of 6 Chain: Payroll (Leaver)

II Element details : Basic Pay

Name: Mrs Rosa Alconbury Job title: Cleaner (Labs)
Social security number: JJ133456C Pay ref: 30000072 Pers ref: 30000072

Level:

Start date: 10/03/2007
End date: 04/05/2007

Element:

Element type: Payment

Cash:

Payment table / rate code:

Membership reference:

In the Options Panel, highlight each individual element and select 'Element Detail'

Review each element. In general any allowances (that are attributed to the position) will automatically show an end date as that being the leave date.

The form will also show any elements that may have an outstanding balance, which should automatically be deducted from their final salary.

Once all elements have been reviewed click on the forward button at the top of the page.

Step 3: Enter any temporary elements that are due.

The CHRIS/40 form details a number of these:

- Holiday pay (question 8)
- Recruitment incentives (question 16)
- Training course reimbursement (question 6)

Step 3 of 6Chain: Payroll (Leaver)◀ ▶

Temporary element details: Holiday Recovery

Name: Mrs Rosa Alconbury Job title: Cleaner (Labs)
Social security number: JJ133456C Pay ref: 30000072
Pers ref: 30000072

Element details

Level:

Payroll:

Payment period:

Element:

Value:

Type:

Override:

Date earned:

Costing details

Credit/Debit:

Rule name:

Cost code:

Percent / value:

Add and save each element in turn, before clicking on the Next button to forward the process to the next step.

Step 4: Completing the HESA details of the new leaver

The fourth step is to add the relevant entry within the 'Destination on Leaving' field on the HESA Personal Details form, using information from question 14 of the CHRIS/40 form.

This only needs to be completed if the person is leaving the organisation, not if they are just leaving one of their positions.

Step 4 of 6 Chain: Payroll (Leaver)

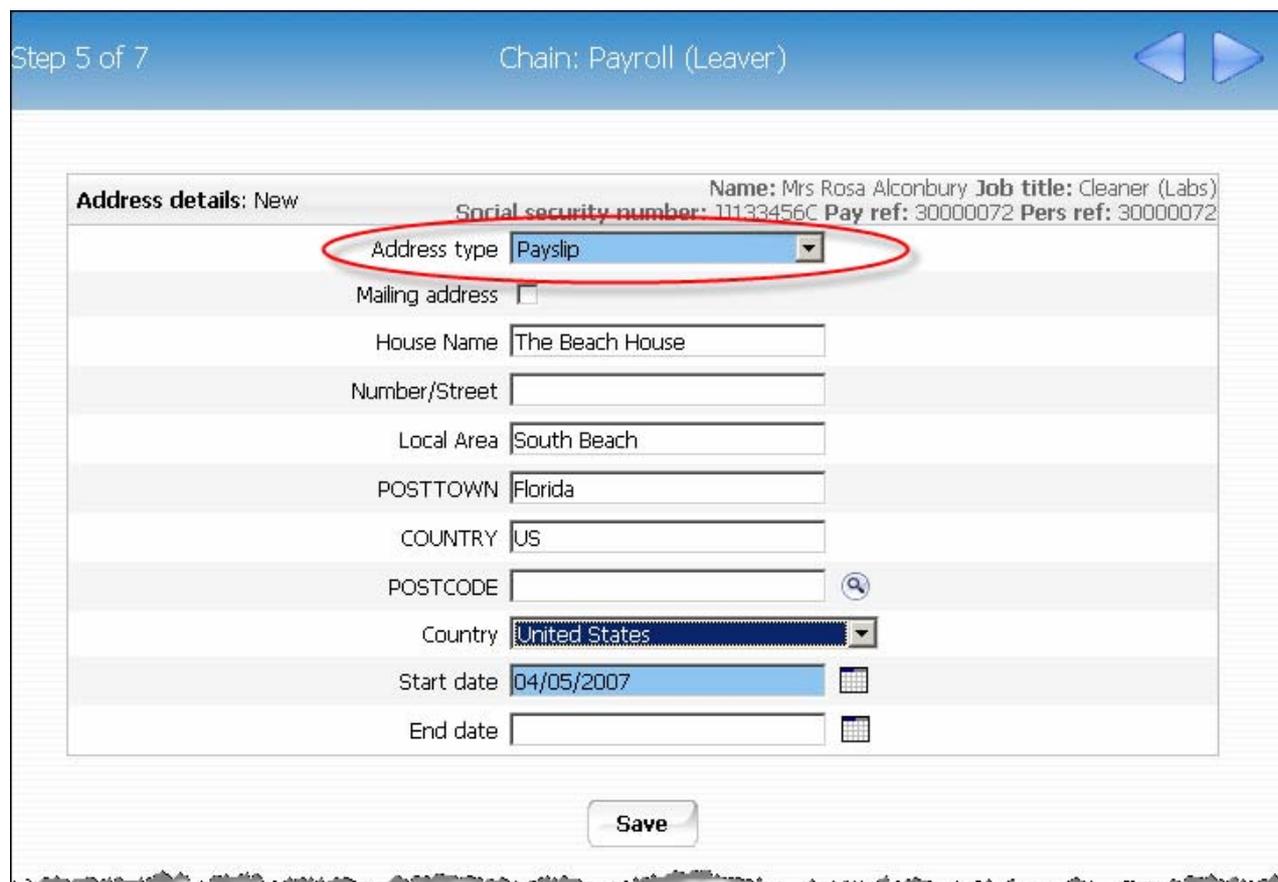
HESA Personal details: New Name: Mrs Rosa Alconbury Job title: Cleaner (Labs)
Social security number: JJ133456C Pay ref: 30000072 Pers ref: 30000072

Staff identifier	<input type="text"/>
Nationality	<input type="text"/>
Previous employment	<input type="text"/>
Previous HEI	<input type="text"/>
Destination on leaving	<input type="text"/>
Highest qualification held	<input type="text"/>
Regulatory body	<input type="text"/>
Academic discipline 1	<input type="text"/>
Academic discipline 2	<input type="text"/>
Active in 2001 RAE	<input type="text" value="Not employed by this HEI"/>
RAE Unit of assessment	<input type="text"/>

Step 5: Setting up a new payslip address

This step of the process chain allows you to set up an alternative address for the payslip if this has been specified in question 15 of the CHRIS/40 form.

- a) Change the address type to 'Payslip'
- b) Type in the required address
- c) Save



Step 5 of 7 Chain: Payroll (Leaver)

Address details: New Name: Mrs Rosa Alconbury Job title: Cleaner (Labs)
Serial security number: 11133456C Pay ref: 30000072 Pers ref: 30000072

Address type: Payslip

Mailing address:

House Name: The Beach House

Number/Street:

Local Area: South Beach

POSTTOWN: Florida

COUNTRY: US

POSTCODE:

Country: United States

Start date: 04/05/2007

End date:

Save

Step 6: Selecting a pay point and choosing the alternative payslip address

- a) Using the magnifying glass select 'P45 due' as the pay point. This will group together all the leavers payslips when the pay roll is run, hence making it easier to tie them up with their P45s.
- b) If the individual has specified in question 15 of their CHRIS/40 form that they wish their payslip to be forwarded to a different address, ensure that the new address has been set up on the previous step and then select 'Payslip(person)' from the drop down list.
- c) Save

Step 6 of 7 Chain: Payroll (Leaver)

Contract details: Cleaner (Labs) **Name:** Mrs Rosa Alconbury **Job title:** Cleaner (Labs)
Social security number: JJ133456C **Pay ref:** 30000072 **Pers ref:** 30000072

Details

Name: Cleaner (Labs)
Start date: 10/03/2007
End date: 04/05/2007
Pay point: P45 Due  
Payslip address override: Payslip (Person) 
Contract locked:

TPA details

GTC allowance paid date: 

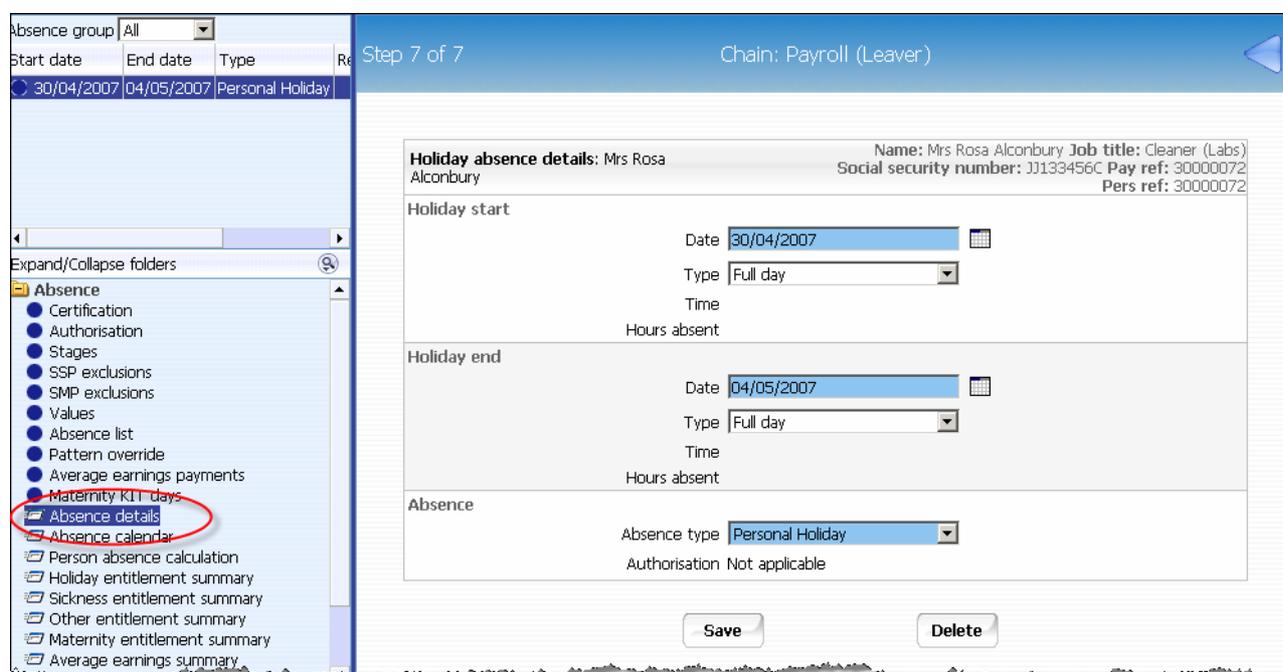
Leaver details

Leaving date: 04/05/2007
Last working day: 04/05/2007 
Last payment date: 
Exit interview complete?
Reason for leaving: Resignation 

Step 7: Review employee's absences

The next option encountered is a summary of an employee's absence record. You can review the detail of each absence listed in the top left pane by clicking on 'Absence Detail'.

The University is not planning to use CHRIS during Phase 1 to record holidays. However we will be recording sickness, maternity and paternity pay. If the employee has no absences recorded against them, then this last step will not be displayed.



This view should be considered in light of the items listed in the following section and will assist you in determining whether for example that a SPP1(L) form needs to be issued to the employee.

It should be noted that all future absences will be automatically deleted when the leaving date is entered and saved.

Once this step has been completed the process is finished.