

## 6 Additional Personal Information

### 6.1 Address Details

Address details can be obtained from the New Appointment Request Form, section C – personal details.

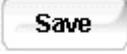
1. Click on the Next Step button, this will present you with the form used to enter an employees address.

Step 2 of 9
Chain: New Person


**Address details: New** Name: Miss Jenny Smith  
Pers ref: 30000008

Address type	Home/ Personal	▼
Mailing address	<input type="checkbox"/>	
House Name	<input style="width: 100%;" type="text"/>	
Number/Street	<input style="width: 100%;" type="text" value="23 West Terrace"/>	
Local Area	<input style="width: 100%;" type="text"/>	
POSTTOWN	<input style="width: 100%;" type="text" value="Cambridge"/>	
COUNTRY	<input style="width: 100%;" type="text"/>	
POSTCODE	<input style="width: 100%;" type="text" value="CB1 6GB"/>	
Country	<input style="width: 100%;" type="text" value="United Kingdom"/>	
Start date	<input style="width: 100%;" type="text" value="16/04/2007"/>	
End date	<input style="width: 100%;" type="text"/>	

2. Home/Personal address is displayed as default and this address is supplied on the New Appointment Request Form CHRIS/10, section C, personal details.  
Correspondence and term time address currently appear in the drop down list but these will disappear post Go Live  
Where only one address is entered the mailing address check box will automatically be checked. However, the UMS address held against position will be used.

3. Key in address details. The COUNTRY field only needs to be filled for an address that is not in the United Kingdom. (Note this field *is* meant to be Country and not County. The Post Office guidelines for writing addresses are that a post town with a postcode is all that is necessary as the County is reflected in the postcode). The Country field will automatically default to United Kingdom.
4. Click the  button

## 6.2 Contact Details

Contact details can be obtained from the New Appointment Request Form CHRIS/10 page 2, section C – Personal Details. Question 18 requests home phone number.

1. Click on the Next Step button
2. Click the drop down arrow and select the appropriate contact type



Step 3 of 9 Chain: New Person

**Contact details: New** Name: Miss Jenny Smith  
Pers ref: 30000008

Means of contact Home telephone

Contact at 01223 567345

Save

3. Key in the details of telephone number
4. Click the  button

### 6.3 Social Security Details

The social security details menu is used to record a persons' National Insurance number. This can be obtained from the New Appointment Request Form CHRIS/10, section C – personal details, question 16 or question 5 of the Certificate of Acceptance CHRIS/20

Where an employee has applied for a National Insurance number this step can be left uncompleted and the details will need to be completed when they are issued with their number.

1. Click on the Next Step button
2. Click the drop down list arrow and select UK legislation.



Step 4 of 9 Chain: New Person

**Social security details: New** Name: Miss Jenny Smith  
Pers ref: 30000008

Legislation

Social security no.

3. Input the National Insurance Number
4. Click the  button

## 6.4 Passport Details

1. Click on the Next Step button



Step 5 of 9 Chain: New Person

**Passport details: New** Name: Miss Jenny Smith  
Pers ref: 30000008

Passport number 434565667

Passport issue date 12/06/2003

Passport expiry date 11/06/2013

Issuing country United Kingdom

Save

2. Key in Passport number, issue date, expiry date and issuing country.

(If no work permit details are required click on the Next Step button  to move to Step 6).

3. Click the  button.

## 6.5 Work Permit Details

Where an employee has a work permit, details can be entered using this option

1. Click on the Next Step button

2. If no work permit details are required click on the Next Step button  to move to Step 7.



The screenshot shows a software interface for entering work permit details. At the top, a blue header bar indicates 'Step 6 of 9' and 'Chain: New Person', with navigation arrows on the right. Below this is a form titled 'Work permit details: New'. The form includes the following fields and controls:

- Name:** Miss Jenny Smith
- Pers ref:** 30000008
- Work permit number:** 45628765
- Work permit issue date:** 01/02/2006 (with a calendar icon)
- Work permit expiry date:** 01/02/2010 (with a calendar icon)
- Buttons:** 'Save' and 'Delete' buttons are located at the bottom of the form.

3. Whether the new person requires a work permit is recorded in the personal details section of the New Appointment Request Form CHRIS/10 or CHRIS/11 or CHRIS/12. Enter the work permit number, issue date and expiry date.
4. Click the  button.

## 6.6 Residency Permit Details

Where an employee has a residency permit, details can be entered using this form

1. Click on the Next Step button



2. If no residency permit details are required click on the Next Step button to move to Step 8.



The screenshot shows a web form titled "Step 7 of 9" with the chain "New Person". The form contains the following fields and buttons:

<b>Residency permit details:</b> New		Name: Miss Jenny Smith	
		Pers ref: 30000008	
Residency permit number	<input type="text" value="278456789"/>		
Residency permit issue date	<input type="text" value="01/02/2006"/>		
Residency permit expiry date	<input type="text" value="01/02/2010"/>		

Below the form are two buttons: **Save** and **Delete**.

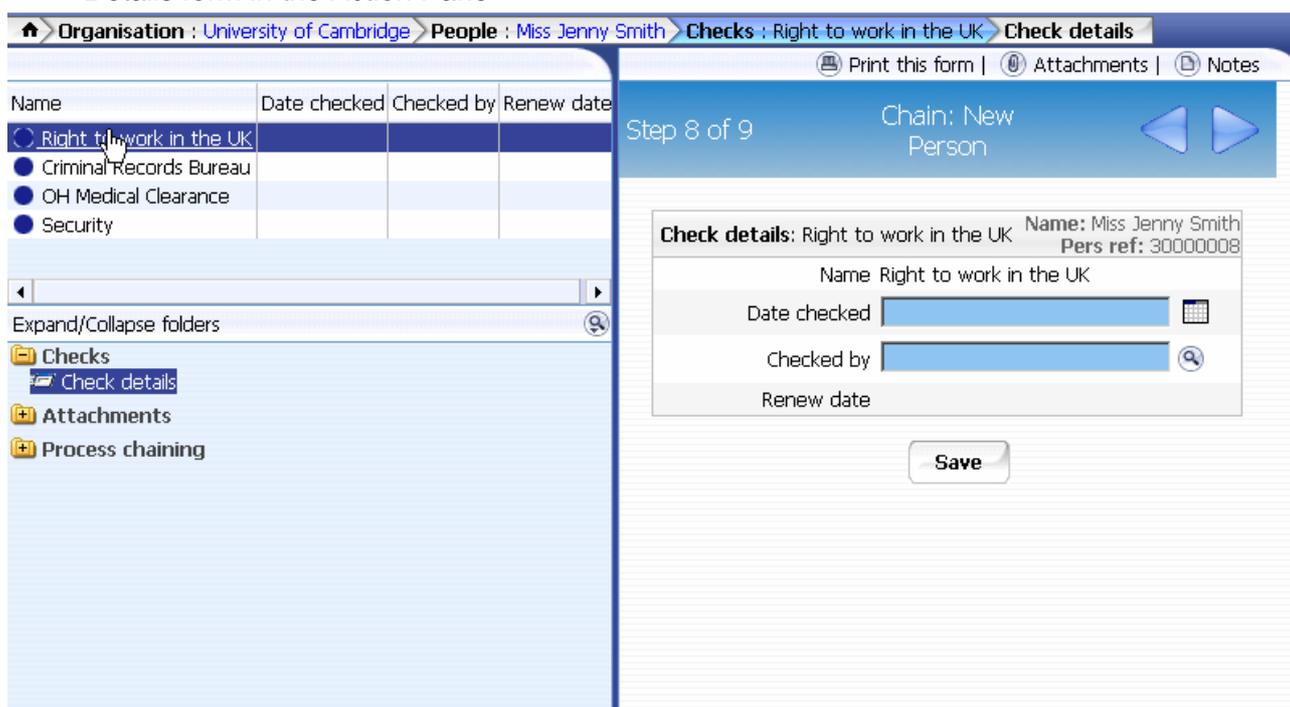
3. Where residency permit details are provided enter the residency permit number, issue date and expiry date
4. Click the  button.

## 6.7 Check Details

The University has a legal obligation to ensure that all employees have a valid entitlement to work and reside in the UK, regardless of nationality. All appointments require a right to work check and the details of this check should be recorded in employee checks.

Where an appointment also requires the occupant to have health, criminal records or security checks these details can also be recorded.

1. Click on the Next Step button
2. Select Right to Work from the check types displayed and then click on Check Details form in the Action Pane



The screenshot shows a web-based interface for managing employee checks. The breadcrumb trail at the top reads: Organisation : University of Cambridge > People : Miss Jenny Smith > Checks : Right to work in the UK > Check details. Below this, there are links for 'Print this form', 'Attachments', and 'Notes'. A table lists check types with radio buttons: 'Right to work in the UK' (selected), 'Criminal Records Bureau', 'OH Medical Clearance', and 'Security'. The 'Check details' form on the right includes the following fields:

Name	Date checked	Checked by	Renew date
<input type="radio"/> Right to work in the UK			
<input type="radio"/> Criminal Records Bureau			
<input type="radio"/> OH Medical Clearance			
<input type="radio"/> Security			

The 'Check details' form also displays: 'Step 8 of 9', 'Chain: New Person', 'Name: Miss Jenny Smith', and 'Pers ref: 30000008'. The form fields are: 'Name Right to work in the UK', 'Date checked' (with a calendar icon), 'Checked by' (with a search icon), and 'Renew date'. A 'Save' button is located at the bottom of the form.

3. Enter details of date checked and who checked by. The checked by name should be the name of the person who signs the paperwork as a true copy.
4. Click the  button.

5. If you are required to also add details of additional checks, click the



button to return to the previous step.



6. Click the button to move back to checks option.  
7. Select the check type (for example Criminal Records Bureau) from the Options Pane.  
8. Click on the Check Details form in the Action Pane



The screenshot shows a form titled 'Step 8 of 9' with 'Chain: New Person' and navigation arrows. The form is for 'Check details: Criminal Records Bureau' for 'Name: Miss Jenny Smith' and 'Pers ref: 30000008'. The form fields are: 'Name: Criminal Records Bureau', 'Date checked' (with a calendar icon), 'Checked by' (with a search icon), and 'Renew date'. A 'Save' button is at the bottom.

9. Enter the Date checked and Checked by details. For OH Medical Clearance, CRB and Security checks the 'checked by' name should be the person who signs the CHRIS/10.  
10. Click the  button.

## 6.8 Key Date Details

1. Click on the Next Step button

Step 9 of 9
Chain: New Person
▶

<b>Key dates:</b> Miss Jenny Smith	<b>Name:</b> Miss Jenny Smith <b>Pers ref:</b> 30000008
<b>Personal</b>	
Date of birth	<input type="text" value="15/06/1968"/>
Age	
Date verified	
<b>Expected retirement date</b>	
Basis	<input type="text" value="UK Legislation"/> ▼
Age (years)	
Age (months)	
Date	
<b>Organisation</b>	
Start date	<input type="text" value="01/05/2007"/>
Length of service	
Leaving date	
Reckonable service date	<input type="text"/>
Length of reckonable service	
Last working day	
Re-employable	No

2. Enter Date of Birth
3. Enter expected retirement date. Select "Date" from the Basis drop down list and input 30 September of the academic year in which the individual turns 65 (Unestablished/Assistants) or 67 (Established)
4. To save calculating this date first enter expected retirement date basis of Age and type in 65 if an unestablished or assistant position or 67 if established.

**Personal**

Date of birth  

Age 37 year(s) 8 month(s)

Date verified  

**Expected retirement date**

Basis

Age (years)

Age (months)

Date

5. Click on the  button

**Expected retirement date**

Basis

Age (years) 65

Age (months) 0

Date  

6. This will automatically calculate the correct year, for those people with a birthday on or before 30<sup>th</sup> September which can then be manually changed to the 30<sup>th</sup> of September for that academic year. For those birthdays after 30<sup>th</sup> September, the year will need to be changed to the following year.

**Expected retirement date**

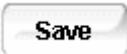
Basis

Age (years) 65

Age (months) 3

Date  

Enter this date and click on the Save button.

7. Enter Reckonable service date. This will be the same as the organisation start date except where an employee is joining under TUPE conditions or some other arrangement where previous service is to be recognised. This field *must* be completed for reporting purposes and Trent will not pick up the organisation start date if it is left blank.
8. Click the  button  
Check that the age calculated is “sensible” as a way of verifying your entry. There is no validation of the age within Trent. It is possible to enter any date of birth.