

Coronavirus Job Retention Scheme (CJRS or 'furlough'): CoreHR system steps



This document provides step-by-step instructions on the actions departments need to take to record details of staff who have been put on furlough.

What's changed?

Updated 1 July 2020 to include guidance on part-time furlough.



Note: You MUST read [Guidance for Managers on the Coronavirus Job Retention Scheme](#) before completing any furlough changes in CoreHR.

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A. Scenarios that must be recorded in CoreHR

1. The start and end of each period of furlough must be recorded as an appointment change in CoreHR following the steps outlined in [section C](#).
2. If a period of furlough is cancelled after the start date has been entered into CoreHR, either because it never started, or the duration was less than the minimum period allowed (21 calendar days for periods that started before 1 July and 7 calendar days for periods from 1 July onwards), it must then be recorded as cancelled in CoreHR.
3. If the reason for a period of furlough changes, this must be recorded as an appointment change using the appropriate furlough reason code, as detailed in [appendix A](#).
4. Casual workers and variable hours workers can be furloughed for the period for which you had committed to give them work. These furlough periods must be recorded in CoreHR following the steps in [section C](#).
5. From 1 July 20, an employee who has completed one 21 day period of furlough by 30 June is eligible to be **part-time furloughed** – i.e. to return to work for part of their hours (see FAQs on the [HR Support website](#)). You must complete the UDF for all part-time (partially) furloughed appointments, as detailed in [section D](#).

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- From 1 July, a member of staff with two or more appointments can be furloughed from one and not the others, provided they have completed at least one 21 day period of furlough by 30 June.
- Refer to the table in [appendix A](#) for guidance on effective dates and **Action** and **Reason Codes**.

B. Users of the HRIS Data Service

If your department uses the HRIS Data Service, please use the Change Request Form to request individual furlough-related changes. If you have multiple changes to be made in the same payroll period, you can use the Furlough Details spreadsheet, available on the [Data Service SharePoint site](#).

C. All furloughed staff - amending the appointment

Navigate to: Personnel > Maintenance > Personal Profile

- Search for the employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.

If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted.



Note: For Fixed Term appointments, click **View Appointment** and make a note of the current **Target End Date**.

- Click the **Amend Appointment** button. The *Amend Appointment Details* window opens:

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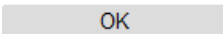
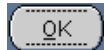


3. Enter the appointment change details as relevant:

Field Name (* mandatory)	Description
Effective Date *	Enter the date that the change will take place (see appendix A for guidance).
Target End Date	For fixed term posts, reapply the current target end date (noted previously). Do NOT record the expected end date of the furlough in this field.
Action *	Always select Furlough
Reason Code *	Enter the relevant reason code (see appendix A)
Comments *	Delete previous comments. For GDPR reasons, do not record the reason for the furlough.



Do not alter hours/FTE. These should remain as-is to ensure the employee continues to receive full pay. If the employee is returning on part-time (partial) furlough, record the details in the UDF following the steps in [section D](#). You do not need to make any changes to the appointment when an employee changes their furloughed hours, provided you have recorded that a period of furlough has started.

4. Click . The *Amend Appointment Details* window closes.
5. A message confirms that changes have been made. Click .
6. Exit all windows back to the Personnel main screen.

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D. Part-time (partially) furloughed staff only – updating the UDF

You must complete a UDF, following the steps in this section, for all appointments that are part-time (partially) furloughed. You do not need to complete the UDF where an employee is furloughed for their full FTE. Please refer to the [FAQs on part-time furlough](#) and note the following key points:

- To be eligible for part-time furlough, the employee must have completed one 21 day period of furlough before 30 June.
- Part-time furlough is not available to casual workers or variable hours employees.
- Employees should not return to work for less than 40% of their contracted FTE in that appointment.
- Wherever possible, departments are asked to avoid changing the number of hours that a staff member works more than once in any one pay period.
- If the number of hours the employee is working changes during the period of part-time (partial) furlough, you must end the UDF for the previous working hours and create a new UDF for the new working hours. Do not simply update the existing UDF as this will erase the history of hours needed for the reclaim.

Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click and open the relevant employee record. The *Personal Profile Maintenance* window opens.
2. Go to **Select Detail** box > **Appointment Details**.
3. If relevant, click into the **Appointment ID** to ensure the correct appointment is highlighted. Click the button. The *Post Appointment Maintenance* window opens.
4. Go to **Selection** box > **User Data**. The *User Maintenance* window opens.
5. Click to display **User Defined Field** List of Values.
6. Select **Appt: Part-time Furlough Weekly Hours**
7. Click

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User Maintenance

User Data

Personnel No: 2018939 Amanda Taylor

Appt.Part-Time Furlough Weekly Hours

Date From: 01-JUL-2020 ?

Date To: 31-AUG-2020 ?

Weekly Hours Worked: 22.00 ?

8. Complete the fields as below:

Field Name (* mandatory)	Description
Date From	Enter the effective date of the employee starting this period of part-time furlough. This should always be the Monday at the start of the week in which they returned to work for part of their working hours/started working a different number of weekly hours.
Date to	The end date of this period of part work/part-furlough. This should always be the Sunday at the end of their last week of working this particular part-time FTE. If the end date of the period of part-time furlough at these hours is not yet known then leave the "Date To" blank. When the period of part-time furlough ends, either through returning to full time furlough, changing the hours of part-time furlough, or returning from furlough completely, you must ensure an end date is recorded against every period of part-time furlough.
Weekly Hours Worked*	The number of hours per week that the employee will be <u>working</u> . Enter in the following numeric form: 00.00, with part hours represented as a proportion of the hour, e.g. 22.50.

9. Click OK. A 'transaction complete' message will appear. Click OK.



Weekly Hours Worked: Where an employee works a different number of hours each week, you will need to calculate the average working hours per week. E.g. if they are returning on an alternating pattern of 15 hours one week and 22.5 hours the next, the average weekly hours of 18.75 should be entered into the UDF.

Contact the HRIS Support Centre for guidance on term-time only part-time furlough.

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E. Off system activities



Letters: A letter to confirm the change should be sent to the individual. Template letters are available on the [HR Support website](#).



Casual/variable hours payments: You must complete a [Furlough Payment Spreadsheet](#) every month, including details of all furloughed casual and variable hours staff. Follow the guidance on tabs 2 and 3 of the spreadsheet and refer to the [relevant FAQs](#) on the HR Support webpages.

Useful reports: Run [PERDEP 91 Furlough Monitoring](#) to check the dates of furlough periods for staff in your department and to highlight any potential data issues that need correcting in CorHR.

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Appendix A: Guidance on data entry for appointment changes

	Notes	Effective date	Action	Reason Code (select appropriate option)*
Period of furlough starts	<p>An employee may have several separate periods of furlough. Each one should be recorded as a separate episode in CoreHR.</p> <p>If an employee starts a new appointment and will be furloughed in that new appointment from day one, the action and reason code should reflect this.</p> <p>If an employee is moving from full furlough to part-time (partial) furlough, you do not need to create a new appointment change, just update the UDF (section D).</p>	The first day of this period of furlough. Expected to be no earlier than 17 March (speak to your HR contact if special circumstances meant the staff member stopped working prior to 17 March).	Furlough	FURLOUGH START - REMOTE WORK NOT POSSIBLE FURLOUGH START - REDUCED TEAM WORKLOAD FURLOUGH START - CARING RESPONSIBILITY
Period of furlough ends	Only update the appointment once the furlough period has ended.	The date on which the employee returns to work (if returning on part-time/partial furlough, do not create an appointment change, just complete the UDF (see section D)).	Furlough	FURLOUGH END - REMOTE WORK NOT POSSIBLE FURLOUGH END - REDUCED TEAM WORKLOAD FURLOUGH END - CARING RESPONSIBILITIES

* In all cases, select the Reason Code that matches the original reason for furloughing. This consistent approach assists with efficient reporting.

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	Notes	Effective date	Action	Reason Code (select appropriate option)*
Period of furlough cancelled	<p>If a period of furlough does not proceed as planned, or it ends before the minimum period, it should be recorded as cancelled only if the start of the furlough period has already been recorded in the system.</p> <p>To minimise the number of cancelled furlough periods, only record the furlough start once a period has been agreed and is expected to meet the minimum period. PERDEP 91 Furlough Monitoring will highlight where a furlough period is less than the minimum allowable period.</p>	Date on which the cancellation was effective (if furlough didn't take place at all, this should be the date after the effective start date of furlough recorded in the system).	Furlough	FURLOUGH CANCELLED - REMOTE WORK NOT POS FURLOUGH CANCELLED - REDUCED TEAM WORKLOAD FURLOUGH CANCELLED - CARING RESPONSIBILITY
Reason for period of furlough changes	<p>If the reason for the furlough changes during a continuous period of furlough, two appointment changes are required.</p> <p>Firstly the end date of the current reason for furlough must be recorded as an appointment change.</p> <p>Then the new reason for furlough must be recorded as another appointment change, following the guidance above, on "Period of furlough starts".</p>	The last date on which the previous reason for furlough is still applicable (i.e. the day before the new reason for furlough applies).	Furlough	FURLOUGH - CHANGE OF REASON