

iTrent Electric People Manager (schools) user guide

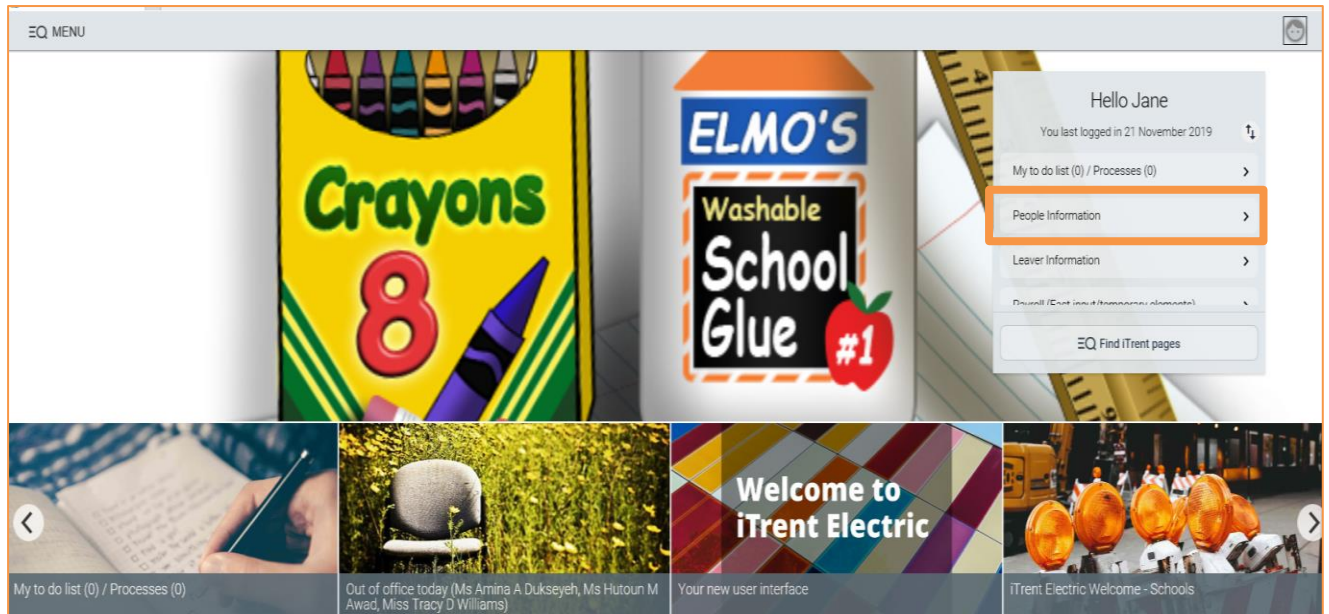
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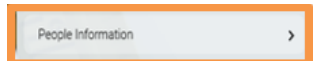
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1. Introduction

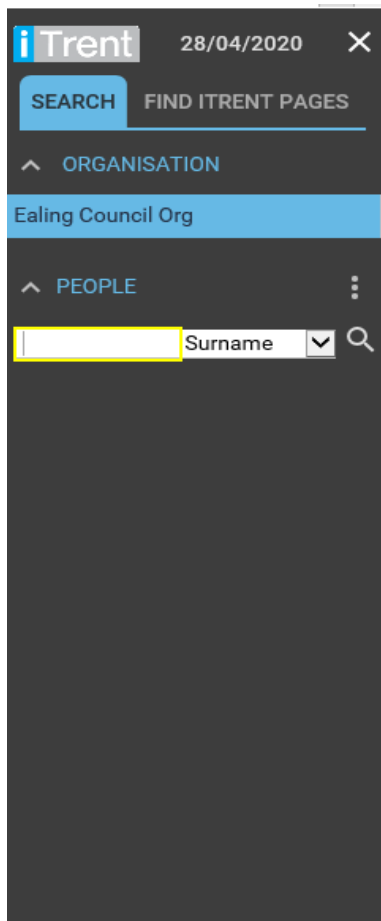
Log in to the home page



To search for an employee, select *People information* as highlighted

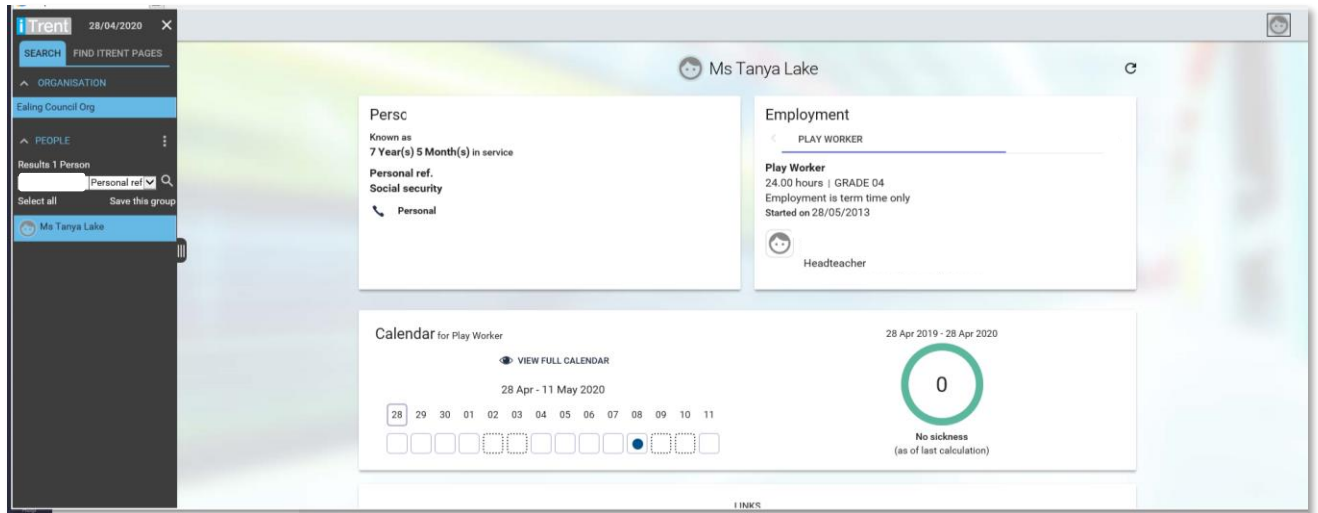


The search panel will appear. Select surname and search by clicking the magnifying glass. You can also search for ALL employees at the school by entering * i.e. blank search to access all staff.



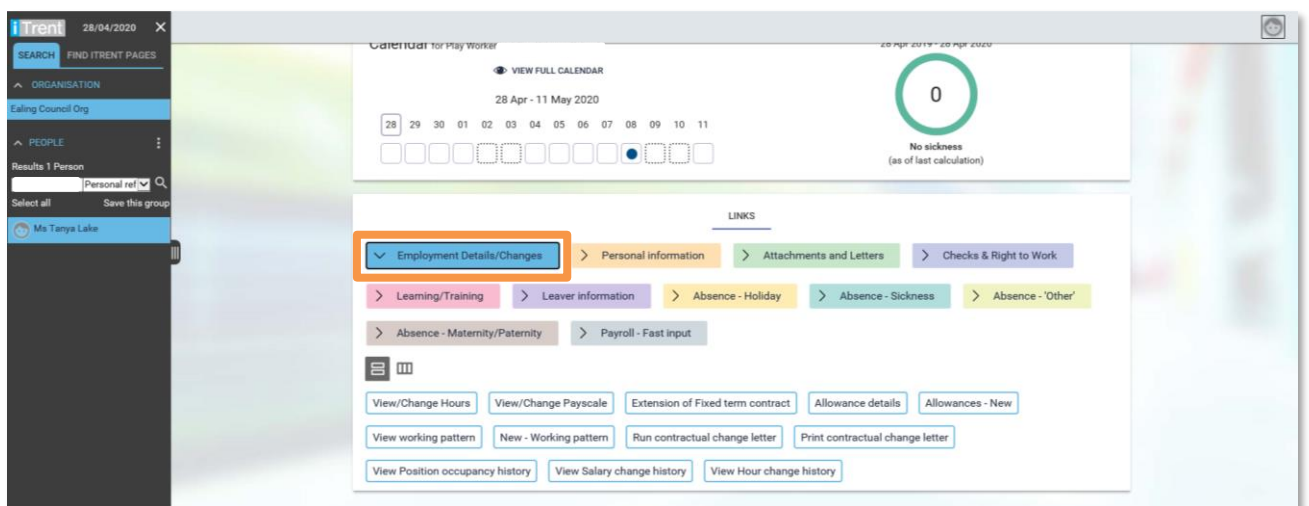
Clicking on the above iTrent icon will take you back to the initial home screen

You can change the search options via the drop-down arrow to search by payroll reference number, forename or job title

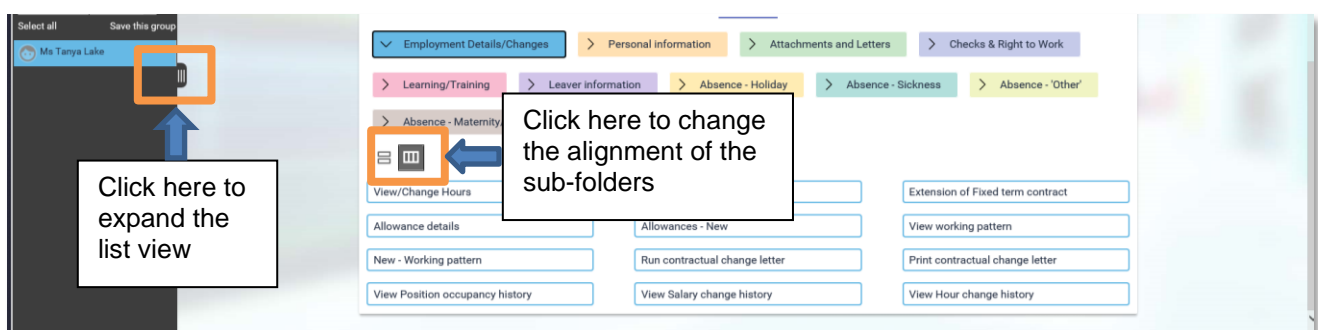


Once you have searched for the employee, the employee summary screen will display.

Scroll down to reveal folders and shortcut links – folders are in colour.



Select a folder e.g. *Employment Details/Changes* and sub folders will display below, enabling quicker navigation to pages within iTrent e.g. change employee hours.



When clicking on any link such as *View/Change Payscale* you can access the other sub links within the link *Employment Details/Changes* tab by clicking on 'menu'. See screenshots below.

Ms Tanya Lake

Payscale values (as of 30/04/2020) Senior Playworker

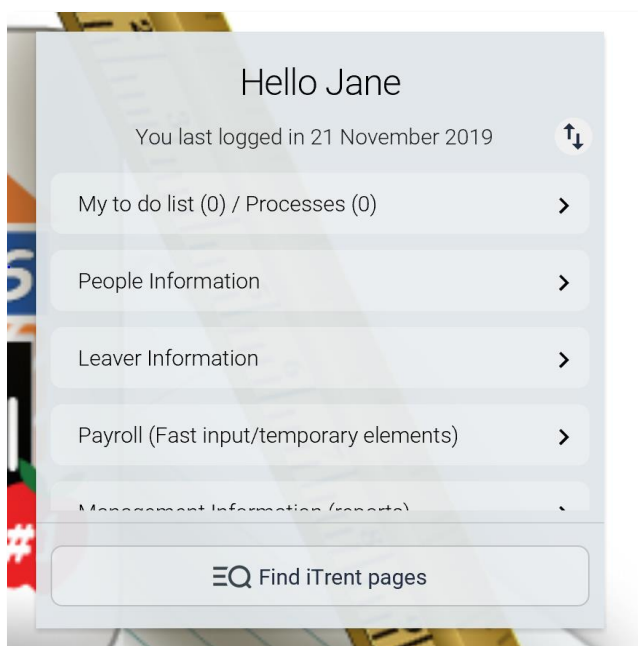
LESS

View/Change Hours	View/Change Payscale	Extension of Fixed term cont...
Allowance details	Allowances - New	View working pattern
New - Working pattern	Run contractual change letter	Print contractual change letter
View Position occupancy his...	View Salary change history	View Hour change history

Grade	GRADE 06	▼ 🔍
FT Salary	19 – 25,776.00	▼
Grade minimum	18 – 25,287.00	
Grade maximum	20 – 26,274.00	
FTE value (rounded to 5 DP)	0.11538	
Pro-rated rate of pay	2,974.15	
Change reason		▼

SAVE

To return to the summary page of the employee click on the person's name at the top, highlighted above



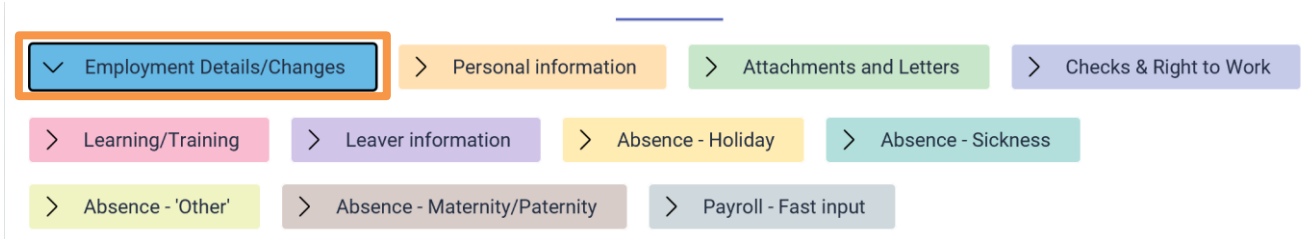
On the initial log in screen (homepage) you will find these shortcut links:

- **To do list** to approve/decline any tasks
- **People information** to view and change staff records
- **Leaver information** to make staff members leavers
- **Payroll** to enter fast input and temporary elements
- **Management information** to run reports
- Useful links and information to view iTrent user guides on EGFL and HR policies and procedures

2. Employment Details/Changes

Payroll is locked during certain times of the month for processing purposes. During this time employee contracts are locked and hours and payscale changes will not be possible.

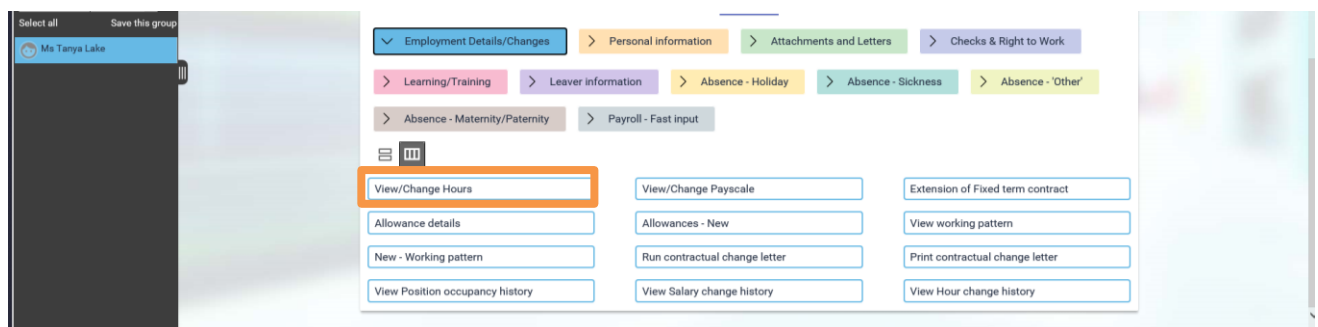
To view and amend employment information, select the *Employment Detail/Changes*. The display pane shows the available actions



In this section you can:

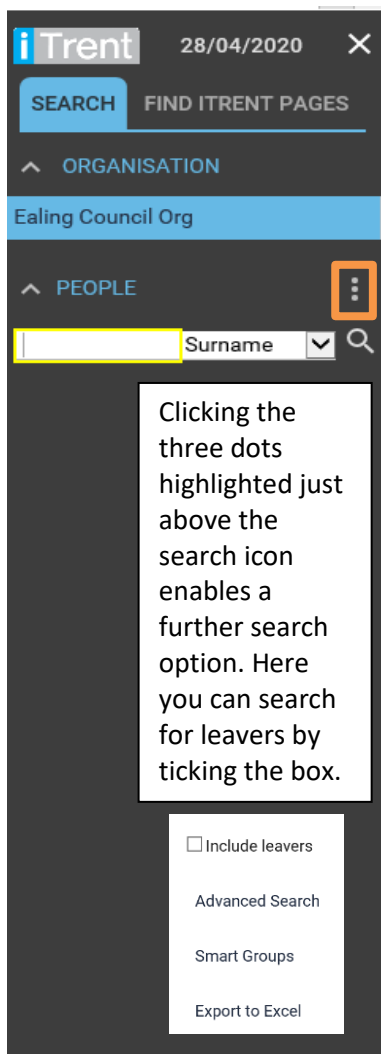
- view/change hours
- view/change payscale
- extend a fixed term contract
- enter new allowances
- view allowance details
- view working pattern
- enter a new working pattern
- run a contractual change letter
- print a contractual change letter
- view position occupancy history
- view salary change history
- view hours change history

2.1 View/Change Hours



Select *View/Change Hours* link in the display pane

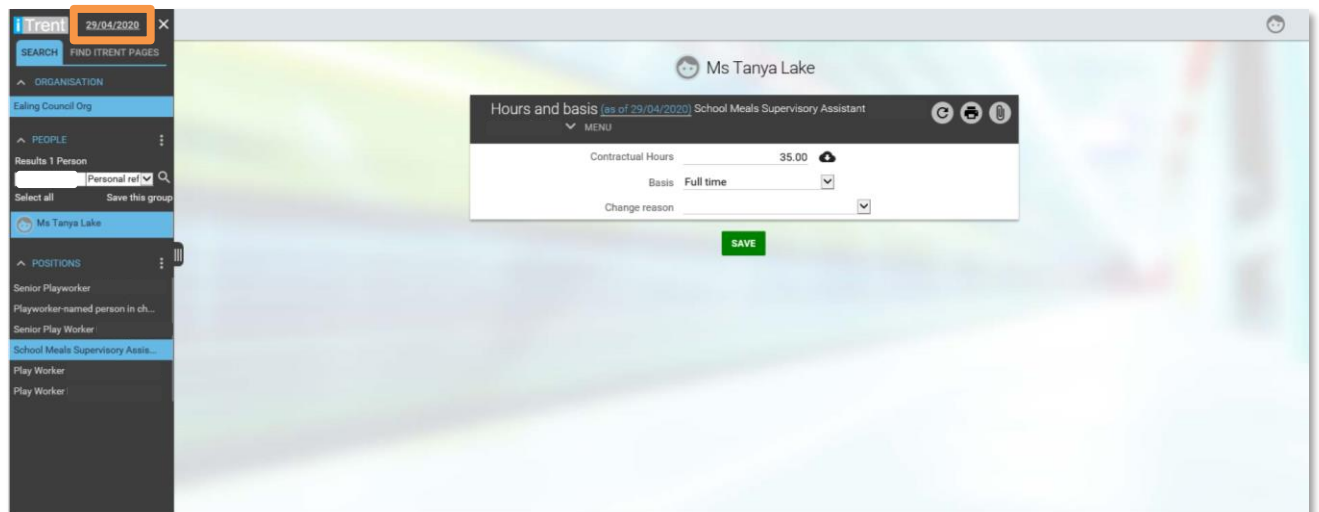
Search for the employee in the object pane if you haven't selected anyone already. The search criteria can be changed from personal reference to surname using the drop-down list.



If the employee has more than one job, select the position you want to amend.

An effective date box will appear. Enter the effective date of the change. This can be in the future or retrospective and select OK

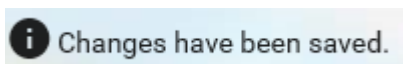
The date format can be entered as *ddmmyy* or just *ddmm* if the change is for the current year.



The effective date can also be amended by clicking on the date highlighted above

Overtyping the existing hours with the new hours in the *Contractual Hours* field. If the new hours are reducing amend the *Basis* to Part time and enter a reason for the change via the drop-down list, then save the record

Once saved a notification message will be generated.



As a result of the hours change a work pattern change may be required. Refer to [section 2.7](#) of this guide.

HR Alert

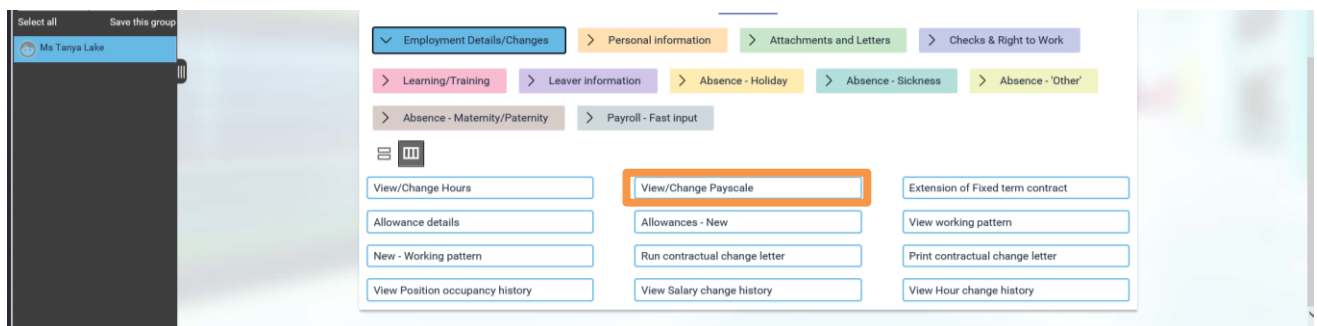
Changing the hours of a position that is a zero-hour casual contract to a position that carries regular hours, should not be changed with this process. A new contract, with different terms and conditions should be arranged through the HRSSC operations team.

This is the same for positions that have contracted hours that are being changed to a zero-hour casual position, changes to working weeks and contract type from/to permanent to fixed term.

You should run a contractual change letter after making this change. Please see [section 2.8](#) ([Run Contractual Change Letter](#)).

2.2 View/Change Payscale

Click the *View/Change Payscale* link and select the employee required using the search facility in the object pane.



If the employee has more than one job, select the correct position. iTrent will prompt you for an effective date, this actual date of the change, enter this date and select OK

A dialog box titled 'Effective date' with a cartoon illustration of a dinosaur, a building, and a robot. The text inside says 'Please enter the date you wish to view or edit this information from.' Below this is a text input field containing '30/04/2020' and a calendar icon. At the bottom are two buttons: 'OK' and 'CANCEL'.

The date format can be entered as *ddmmyy* or just *ddmm* if the change is for the current year.

Change the grade by selecting the drop-down arrow and select the new grade. Ensure the FT salary is selected for the new grade. iTrent will display the minimum and maximum points for the new grade as a guide. Enter a reason for the change from the drop-down list and save.

The screenshot shows the iTrent interface for Ms Tanya Lake. A modal titled 'Payscale values (as of 30/04/2020) Senior Playworker' is open. It contains the following information:

- Grade: GRADE 06
- FT Salary: 19 - 25,776.00
- Grade minimum: 18 - 25,287.00
- Grade maximum: 20 - 26,274.00
- FTE value (rounded to 5 DP): 0.11538
- Pro-rated rate of pay: 2,974.15
- Change reason: Annual Salary Increase

A green 'SAVE' button is located at the bottom right of the modal.

When the actual payscale is being changed, e.g. from an APT&C scale to a Soulbury scale, this should not be changed through the *View/Change Payscale* functionality. A new contract should be arranged through HRSSC operations

2.3 Extension of fixed term contract

When an employee's position is 90 days from the fixed-term end date, an email notification is triggered to the manager. Further notifications are sent on 60 and 30 days.

Select the link *Extension of fixed term contract*.

The screenshot shows the 'LINKS' section of the iTrent interface. The 'Extension of Fixed term contract' button is highlighted with an orange border. Other buttons include:

- Employment Details/Changes
- Personal information
- Attachments and Letters
- Checks & Right to Work
- Learning/Training
- Leaver information
- Absence - Holiday
- Absence - Sickness
- Absence - 'Other'
- Absence - Maternity/Paternity
- Payroll - Fast input

Below the links, there is a grid of buttons for various HR functions:

- View/Change Hours
- View/Change Payscale
- Extension of Fixed term contract (highlighted)
- Allowance details
- Allowances - New
- View working pattern
- New - Working pattern
- Run contractual change letter
- Print contractual change letter
- View Position occupancy history
- View Salary change history
- View Hour change history

Select the person by reference number or surname, by using the drop-down list of the left-hand panel.

If the person has multiple positions, select the position that needs to be extended.

Once a position has been selected there is a prompt to confirm the date. This date has no impact on the fixed term end date extension process, so enter 'T' for today and enter.

Occupancy Details form

Enter the new *Expected occupancy end date*, select a reason and save.

Run a contractual change letter for the employee - *Extension to a fixed term contract*. Please see [section 2.8 \(Run Contractual Change Letter\)](#).

2.4 Allowance details

Click the *Allowance details* link and select the employee required using the search facility in the object pane.

ELEMENTS					
Element	Start date	End date	Cash	Units	Time
TLR2	01/09/2018	31/08/2019	2,721.00		
TLR2	01/09/2019		2,796.00		

Allowances that are already in place are listed in the object pane.

Select the Element to be changed and change the Cash value and Save.

If an element value is changed and it's start date is in the past when the payroll is calculated it will do this retrospectively. Therefore, if for example, a teacher already had a TLR but the value was going up then a new element would be created for this new value.

2.5 Allowances - New

Enter new TLR, recruitment and retention or discretionary allowances as required

LINKS

Employment Details/Changes

Personal information

Attachments and Letters

Checks & Right to Work

Learning/Training

Leaver information

Absence - Holiday

Absence - Sickness

Absence - 'Other'

Absence - Maternity/Paternity

Payroll - Fast input

View/Change Hours

View/Change Payscale

Extension of Fixed term contract

Allowance details

Allowances - New

View working pattern

New - Working pattern

Run contractual change letter

Print contractual change letter



View Position occupancy history

View Salary change history

View Hour change history

Click the *Allowances - New* link and select the employee required using the search facility in the object pane.

Allowances that are already in place are listed in the object pane.

ELEMENTS					
Element	Start date	End date	Cash	Units	Time
 TLR2	01/09/2018	31/08/2019	2,721.00		
 TLR2	01/09/2019		2,796.00		

Complete the page in the display pane. Enter the start date, and end date if known, then select the allowance from the drop-down list in the element field.

Please choose

DISCRETIONARY ALLOWANCE

FIRE AND EVACUATION WARDEN

FIRST AID ALLOWANCE

RECRUITMENT & RETENTION

SPECIAL EDUCATIONAL NEEDS ALLOWANCE

TLR1

TLR2


TLR3

When the element has been selected the element code will automatically populate. Add in the cash value and Save.


Element details FIRST AID ALLOWANCE ▼ MENU 🔄 🖨️ 📎

Start date (required)

01/09/2020




End date



Element (required)

1335

FIRST AID ALLOWANCE ▼



Cash

125.00

SAVE

2.6 View working pattern

A working pattern is a representation of the employee's working week, i.e. the days of the week the employee works, and the hours they worked on each day. Working patterns can be set-up to consider rotational patterns, condensed hours, etc.

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

≡

≡

View/Change Hours

View/Change Payscale

Extension of Fixed term contract

Allowance details

Allowances - New

View working pattern

New - Working pattern

Run contractual change letter

Print contractual change letter

View Position occupancy history

View Salary change history

View Hour change history

The default working pattern is 35-hours a week, 7-hours a day, Monday to Friday. Select the link *View working pattern*. Select the person by reference number or surname, by using the drop-down list.

If the person has multiple positions, ensure you select the correct position. The object pane will display the working patterns.

^ PATTERNS				
Pattern name	Type	Start day	Start date	End date
Allowance Pattern 6 Days	Allowance Pattern	Week 1 / Day 2	01/01/2019	
QP SSP 6 Days	Qualifying Pattern	Week 1 / Day 2	01/01/2019	
35:00 hrs Full Time M-F	Working Pattern	Week 1 / Day 2	01/01/2019	

Highlight the working pattern and view the details on the display screen.

Pattern details Working Pattern MENU

Pattern information

Type (required) Working Pattern

Pattern (required) 35:00 hrs Full Time M-F

Start day (required) Week 1 / Day 2

Start date (required) 01/01/2019

End date

Hours information

Contractual hours 4.50

Pattern days

Current day Week 1 / Day 4

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	07:00	07:00	07:00	07:00	07:00	00:00	00:00	35:00

SAVE

NEW

Note: The working pattern time is displayed as hours and minutes e.g. half-hour = .30 not .50

2.7 New - Working pattern



Select the *New Working pattern* link.

LINKS

[Employment Details/Changes](#) [Personal information](#) [Attachments and Letters](#) [Checks & Right to Work](#)

[Learning/Training](#) [Leaver information](#) [Absence - Holiday](#) [Absence - Sickness](#)

[Absence - 'Other'](#) [Absence - Maternity/Paternity](#) [Payroll - Fast input](#)

View/Change Hours

View/Change Payscale

Extension of Fixed term contract

Allowance details

Allowances - New

View working pattern

New - Working pattern

Run contractual change letter

Print contractual change letter

View Position occupancy history

View Salary change history

View Hour change history

Enter the pattern information in the following order:




Type: Working Pattern

Pattern: Search by using the magnifying glass icon and entering the weekly hours as the search criteria e.g. 21. Working patterns are named by the total hours and the hours by day e.g. 21 Part Time M-7 Tu-7 W-7 T-0 F-0

Start Date: Use the calendar button to select the date, make a note of the actual day.

Start Day: This is the day the pattern starts e.g. if start day is Wednesday then choose Week 1 / Day 3.


Save the pattern and the details are then displayed in *Pattern days*.

Pattern details New  MENU  

Pattern information


Type (required)

Working Pattern




Pattern (required)

21 Part Time Mo-6 Tu-5
We-5 Th-5 Fr-0 Sa-0 Su-0




Start day (required)

Week 1 / Day 3




Start date (required)

08/04/2020



End date



Hours information

Contractual hours

5.25

Pattern days

Current day

Week 1 / Day 4

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	06:00	05:00	05:00	05:00	00:00	00:00	00:00	21:00

2.8 Run contractual change letter

When a contractual change has been made run and print a contractual change letter.

LINKS

✓ Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information



> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input



View/Change Hours

View/Change Payscale

Extension of Fixed term contract

Allowance details

Allowances - New

View working pattern

New - Working pattern

Run contractual change letter

Print contractual change letter

View Position occupancy history

View Salary change history

View Hour change history

Select the *Run contractual change letter* link and search for the employee.

Enter the date of the change in the effective date field and tick or enter to confirm.

Effective date



Please enter the date you wish to view or edit this information from.




OK




CANCEL

It is essential that the effective date represents the date when the change was made. If not, the letter will not merge the correct information

The display pane opens the **Run Document Merge** form.


Ms Tanya Lake

Run document merge [\(as of 30/04/2020\)](#)

Template description (required) Q

Position selection

Job Title	Position Reference
Senior Playworker	41114
Play Worker	15766
Plav Worker	15738

RUN

If the employee only has one position, then this does not have to be selected. However, if there is more than one position select the position you have changed

Click on the magnifying glass next to the *Template Description* field to open the search screen. Type SCHOOLS (in capital letters) and click on the magnifying glass or press enter to run the search.

SCHOOLS - Adoption Leave Letter
SCHOOLS - Allowance - Chartered Discretionary
SCHOOLS - Allowance - Recruitment & Retention
SCHOOLS - Allowance - SEN
SCHOOLS - Allowance - TLR Permanent
SCHOOLS - Allowance - TLR Temporary
SCHOOLS - Decrease Hours
SCHOOLS - Extension of Fixed term Contract
SCHOOLS - Increase Hours
SCHOOLS - Long Service Award
SCHOOLS - Pay Change to Grade - Re-graded
SCHOOLS - Pay Change to SCP
SCHOOLS - Pay change to Grade - due to
SCHOOLS - Performance Pay Progression Leadership
SCHOOLS - Performance Pay Progression
SCHOOLS - Performance Threshold Move to next
SCHOOLS - Performance Threshold for Teachers move
SCHOOLS - Teacher Pay Increase following

Select the relevant letter and click

RUN

Once the document merge has completed a notification will show in the bottom right of the screen.

 Document merge – completed

2.9 Print Contractual Change letter



Select this link to print the generated document.

LINKS

[Employment Details/Changes](#) [Personal information](#) [Attachments and Letters](#) [Checks & Right to Work](#)

[Learning/Training](#) [Leaver information](#) [Absence - Holiday](#) [Absence - Sickness](#)

[Absence - 'Other'](#) [Absence - Maternity/Paternity](#) [Payroll - Fast input](#)

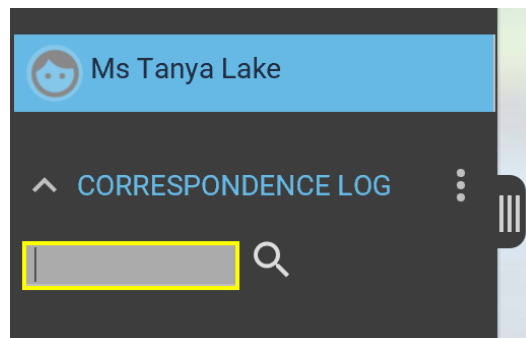
[View/Change Hours](#) [View/Change Payscale](#) [Extension of Fixed term contract](#)

[Allowance details](#) [Allowances - New](#) [View working pattern](#)

[New - Working pattern](#) [Run contractual change letter](#) [Print contractual change letter](#)

[View Position occupancy history](#) [View Salary change history](#) [View Hour change history](#)


Search for the document, enter SCHOOLS and search (click the magnifying glass icon).



Any documents created with this naming convention are returned, select the correct one by checking the generation time and date.

^ CORRESPONDENCE LOG

Results 5 Records



Select all Save this group

Document	Template type	Generated date	Generated time	Effective c
SCHOOLS - Adoption Leave Letter	People	30/04/2020	21:57	30/04/20
SCHOOLS - Increase Hours	People	03/10/2017	11:12	01/09/20
SCHOOLS - Increase Hours	People	03/10/2017	11:08	01/09/20
SCHOOLS - Increase Hours	People	03/10/2017	11:08	01/09/20
SCHOOLS - Increase Hours	People	03/10/2017	11:08	01/09/20

Correspondence details
SCHOOLS - Adoption Leave Letter
MENU

Template

Name
Ms Tanya Lake

Document
SCHOOLS - Adoption Lea

Template type
People


Generated date
30/04/2020

Generated time
21:57

Effective date
30/04/2020

Manual correspondence

Actioned
☐

New upload filename
Browse...


SAVE
DELETE

Click the *Download* icon to the right of *Browse* (highlighted above) and open the document.

If any changes are made to the document, then it must be resaved and uploaded using the *Browse* button in the *New upload filename* field above.

2.10 View position occupancy history (read only)

This section provides a historical summary of the position

LINKS

Employment Details/Changes

Personal information

Attachments and Letters

Checks & Right to Work

Learning/Training

Leaver information

Absence - Holiday

Absence - Sickness

Absence - 'Other'

Absence - Maternity/Paternity

Payroll - Fast input

View/Change Hours

View/Change Payscale

Extension of Fixed term contract

Allowance details

Allowances - New

View working pattern

New - Working pattern

Run contractual change letter

Print contractual change letter

View Position occupancy history

View Salary change history

View Hour change history



Employee details

Organisation start date 22/11/2012

Leaving date

Re-employable

Length of service 7 year(s) 5 month(s)

+ Set search criteria

Occupancy start	Expected occupancy end	Occupancy end	Position	Position status	Position reference	Expected position end	Location	Occupancy type
01/01/2019			Senior Playworker		41114			Stand
			Primary School					
15/02/2016		31/12/2018	Playworker-named person in charge		26600			Stand
			Primary School					

2.11 View salary change history (read only)

This shows a historical breakdown of the salary.

LINKS

[Employment Details/Changes](#)[Personal information](#)[Attachments and Letters](#)[Checks & Right to Work](#)[Learning/Training](#)[Leaver information](#)[Absence - Holiday](#)[Absence - Sickness](#)[Absence - 'Other'](#)[Absence - Maternity/Paternity](#)[Payroll - Fast input](#)[View/Change Hours](#)[View/Change Payscale](#)[Extension of Fixed term contract](#)[Allowance details](#)[Allowances - New](#)[View working pattern](#)[New - Working pattern](#)[Run contractual change letter](#)[Print contractual change letter](#)[View Position occupancy history](#)[View Salary change history](#)[View Hour change history](#)

Position salary change history ▼ MENU

Exclude payment table rate change ☐

Effective date	FT Salary	Rate change	Percent change	FTE value (rounded to 5 DP)	Pro-rated salary	FTE hours	Grade	Payment table	Scalepoint
01/07/2019	25,776.00	489.00	1.93	0.11538	2,974.15	35.00	GRADE 06	APTCPAYSCALE	19
01/04/2019	25,287.00	1,443.00	6.05	0.11538	2,917.73	35.00	GRADE 06	APTCPAYSCALE	18
01/04/2019	21,666.00	1,143.00	5.57				GRADE 04	APTCPAYSCALE	10
01/04/2019	21,666.00	1,143.00	5.57	0.52747	11,428.22	35.00	GRADE 04	APTCPAYSCALE	10

2.12 View hour change history (read only)

This is a breakdown of the employee's contracted hours.

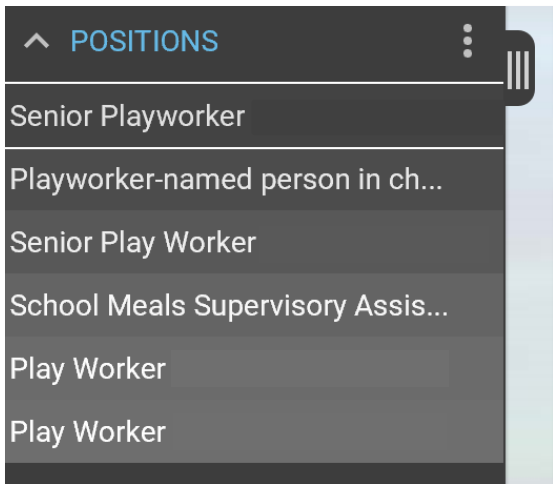
LINKS

- ▼ Employment Details/Changes
- > Personal information
- > Attachments and Letters
- > Checks & Right to Work
- > Learning/Training
- > Leaver information
- > Absence - Holiday
- > Absence - Sickness
- > Absence - 'Other'
- > Absence - Maternity/Paternity
- > Payroll - Fast input



View/Change Hours	View/Change Payscale	Extension of Fixed term contract
Allowance details	Allowances - New	View working pattern
New - Working pattern	Run contractual change letter	Print contractual change letter
View Position occupancy history	View Salary change history	View Hour change history

If the person has multiple positions, select the correct position



When you select the position on the right-hand panel, you will see two fields group and item. In the group drop-down menu you should see two options – 'Contracted hours' and 'Payment details'. You can select which you would like to view.

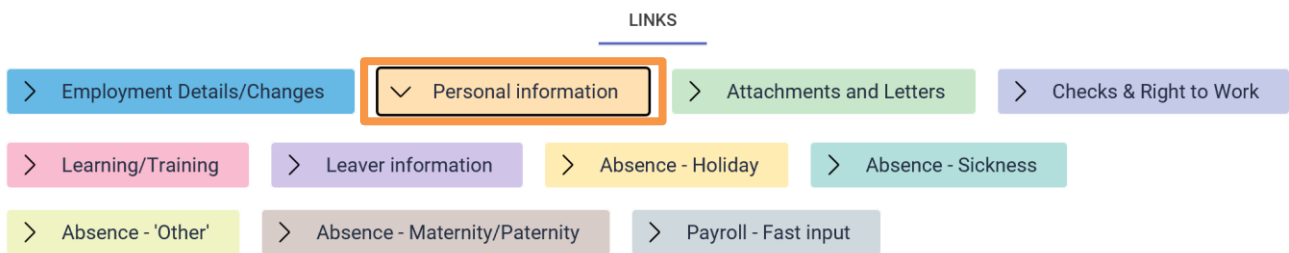
Example:

A screenshot of the "History Senior Playworker" form. The form has a dark grey header with the title "History Senior Playworker" and a "MENU" button. Below the header, there are two dropdown menus: "Group" and "Item". The "Group" dropdown is currently set to "<Please select group>" and the "Item" dropdown is set to "<All>".

A screenshot of the "History Senior Playworker" form, showing the "Contracted Hours" table. The form has a dark grey header with the title "History Senior Playworker" and a "MENU" button. Below the header, there are two dropdown menus: "Group" and "Item". The "Group" dropdown is set to "Contracted Hours" and the "Item" dropdown is set to "<All>". Below the dropdowns, there is a table with two columns: "Effective date" and "Contracted Hours".

Effective date	Contracted Hours
04/02/2019	5.25 / Change reason: Increase in hours
01/01/2019	4.5 / Change reason: Decrease in hours

3. Personal information



Certain links within the *People information* tab are for reference only, so the information can be viewed but not changed.

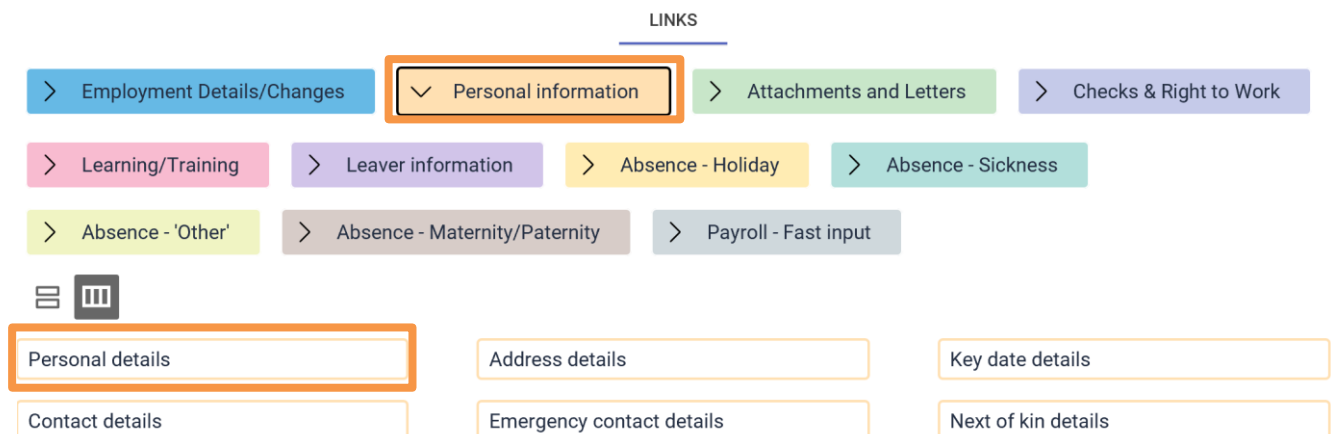
Employees should be encouraged to update their own personal information using Employee Self Service.

In this section you can:

- view/amend personal details
- view/amend address details
- view key date details
- view contact details
- view next of kin and emergency contact details

3.1 Personal Details

In the *Personal details* screen all fields can be updated and changed except for personal reference and start date.



When changing an employee's surname please record the previous surname in the *Previous Surname* field. If this field already contains information type a comma at the end of the existing content and add the next surname.

When a change of name is recorded it must be verified by original document (birth certificate, deed poll, marriage certificate, divorce certificate, etc.).

Make a copy of this documentation, and sign as a declaration that the original has been verified and scan this to a secure network for attachment.

Ms Tanya Lake

Personal details ▾ MENU

Surname (required)

Forename (required)

Forename 2

Forename 3

Title (required) ▾

Preferred name

Sex ▾

Previous surname

Honours

Personal ref.

Start date (required)

Workflow group (required) ▾

Data retention policy (required) ▾

SAVE **DELETE**

3.2 Address details

Select *Address details* link and select the employee required using the search facility in the object pane.

LINKS

> Employment Details/Changes ▾ Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday > Absence - Sickness

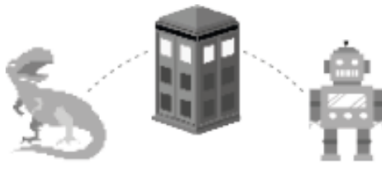
> Absence - 'Other' > Absence - Maternity/Paternity > Payroll - Fast input

Personal details **Address details** Key date details


Contact details Emergency contact details Next of kin details

The effective date box will pop up, enter the date, either 'T' for today or the date format can be *ddmmyy* or just *ddmm* if the change is for the current year.

Effective date



Please enter the date you wish to view or edit this information from.



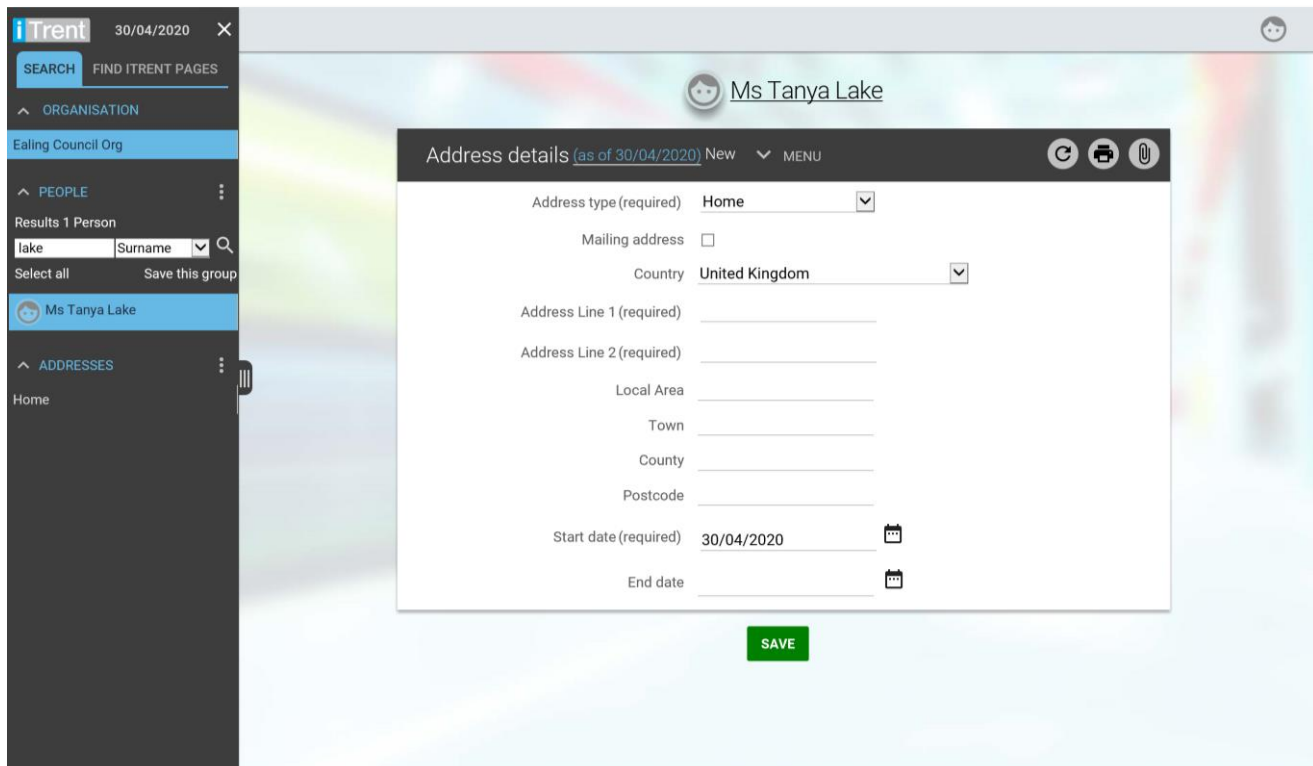
OK CANCEL

To enter a new address, click the *New* button

NEW

The effective date box will appear, enter the date, either 'T' for today or the date format can be *ddmmyy* or just *ddmm* if the change is for the current year.

Enter the new address and ensure the mandatory ('*required*') fields are populated, then Save.



The screenshot shows the iTrent People Manager interface. On the left is a sidebar with navigation options: ORGANISATION (Ealing Council Org), PEOPLE (Results 1 Person, search for 'lake'), and ADDRESSES (Home). The main content area displays the profile of 'Ms Tanya Lake'. A modal window titled 'Address details (as of 30/04/2020)' is open, showing a form with the following fields: Address type (required) set to 'Home'; Mailing address checkbox; Country set to 'United Kingdom'; Address Line 1 (required); Address Line 2 (required); Local Area; Town; County; Postcode; Start date (required) set to '30/04/2020'; and End date. A green 'SAVE' button is at the bottom of the modal.

3.3 Key date details


These are read-only fields and include date of birth, start date and length of service.

LINKS

[> Employment Details/Changes](#) [▼ Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)



Personal details

Address details

Key date details

Contact details

Emergency contact details

Next of kin details

3.4 Contact details


Click the *Contact details* link and select the employee required using the search facility in the object pane.

LINKS

[> Employment Details/Changes](#) [▼ Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)



Personal details

Address details


Key date details

Contact details

Emergency contact details

Next of kin details

Contacts can only be viewed, not altered or added to.

 Ms Tanya Lake

Contact details Ms Tanya Lake ▼ MENU

Means of contact (required) Mobile Telephone number ▼

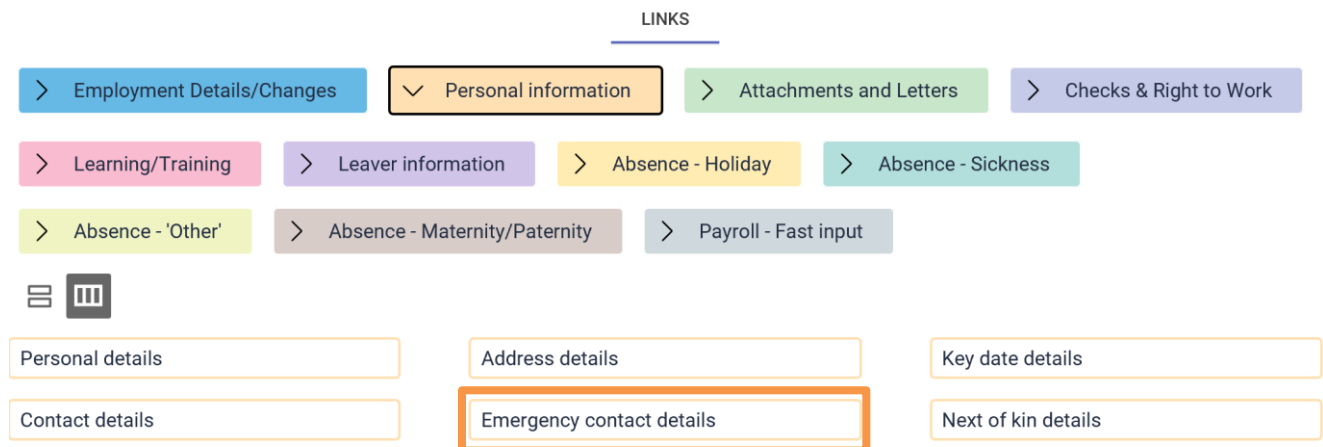
Contact at (required) 07985559633

SAVE

DELETE

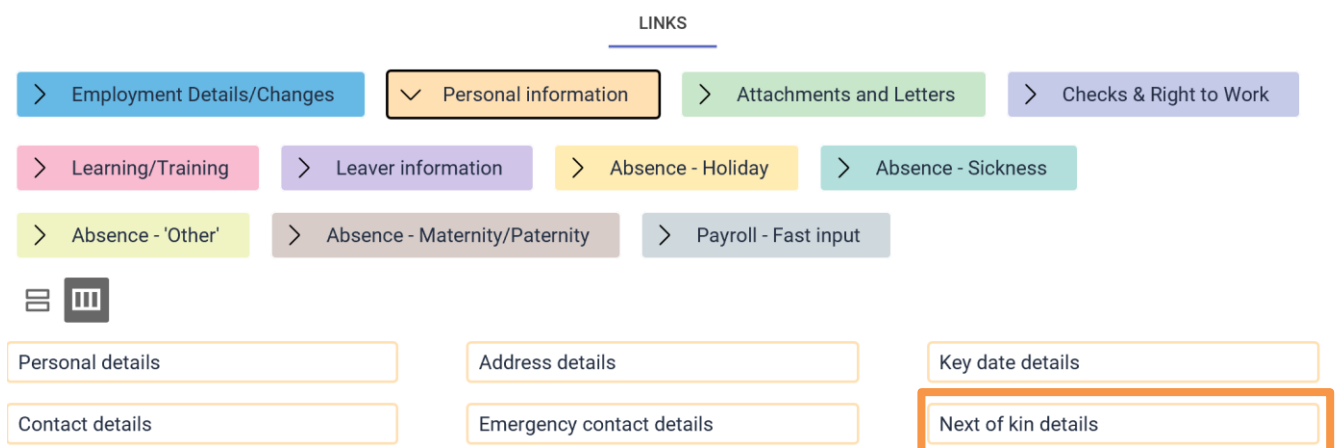
3.5 Emergency contact details

Click the *Emergency contact details* link and select the employee required using the search facility in the object pane. The details open in the display pane and are view only.



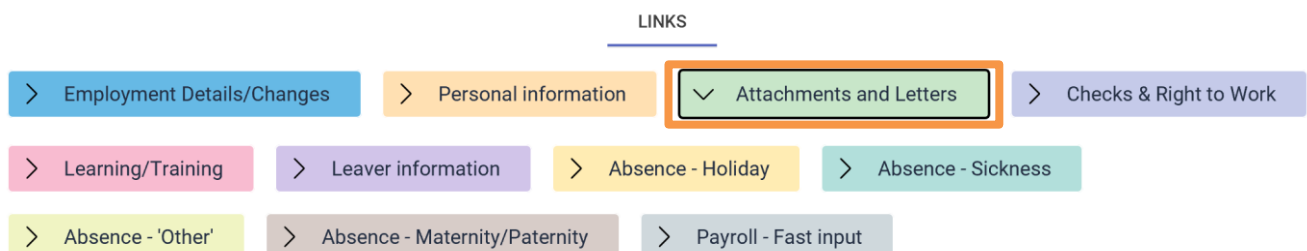
3.6 Next of Kin details

Click the *Next of kin details* link and select the employee required using the search facility in the object pane. The details open in the display pane and are view only.



4. Attachments and Letters

To view or attach any documents to an employee's record select the *Attachments and letters* link.



In this section you can:

- view document attachments
- attach a new document
- run contractual change letter
- print/reprint contractual change letters

4.1 View document attachments

To view a document, it must be downloaded first.



Select the *View document attachments* link and search for the employee.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)


[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)



 

[View document attachment](#) [Document attachment - New](#) [Run contractual change letter](#)

[Print/re-print contractual letters](#)

Select the document to be viewed from the object pane and click the *Download* button highlighted below.

 Ms Tanya Lake

Document attachment details RE change in hours ▼ MENU  

Document (required) RE change in hours

Document type Instructions ▼

Link ☐

Visible in Self Service ☐

Last updated date 07/04/2016

Last updated time 16:52

Filename RE change in hours.msg

Replace by ... [Browse...](#)

[DOWNLOAD](#) [SAVE](#) [DELETE](#) [NEW](#)

4.2 Document attachment - New

Scan and save the document.



You can then select the *Document attachment - New* link and search for the employee.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [▼ Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)


[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

[View document attachment](#) [Document attachment - New](#) [Run contractual change letter](#)

[Print/re-print contractual letters](#)

Enter a document name and select a *Document type* from the drop-down list. Browse the network and select the relevant file, then save.

 Ms Tanya Lake

Document attachment details New ▼ MENU ↺ 🖨

Document (required)

Document type

Link ☐

Visible in Self Service ☐

Last updated date

Last updated time

Filename

Select a file ... (required) [Browse...](#)

[SAVE](#)

4.3 Run contractual change letter

Please refer to [section 2.8](#).

4.4 Print/reprint contractual change letters

Please refer to [section 2.9](#).

5. Checks and Right to Work

In this section you can:

- view checks summary
- view check details
- view personal learning accounts
- view work permit details
- view residency permit details

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [▼ Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)



5.1 Checks summary

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [▼ Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

[Checks summary](#) [Check details](#) [Check details - New](#)

[Personal learning account](#) [Work permit details](#) [Residency permit details](#)

These are read-only fields showing details of all pre-employment checks and verification. Click the + to drill down expand the information.

Checks summary ▼ MENU

Name **Ms Tanya Lake**

[+ Checks](#)

Checks summary ▼ MENU

Name **Ms Tanya Lake**

— Checks

[+ CRB/DBS](#)

[+ Contract issued \(Schools\)](#)

[+ Qualifications Verified](#)

[+ Appointment checklist received \(Schools\)](#)

[+ Reference 2](#)

[+ Reference 1](#)

[+ Passport](#)

[+ National Insurance No. \(NI\)](#)

[+ Medical Check 1](#)

[+ Contract returned](#)

5.2 Check details



Displays a list of the employee's checks. Select the information required using the links below

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

Checks summary

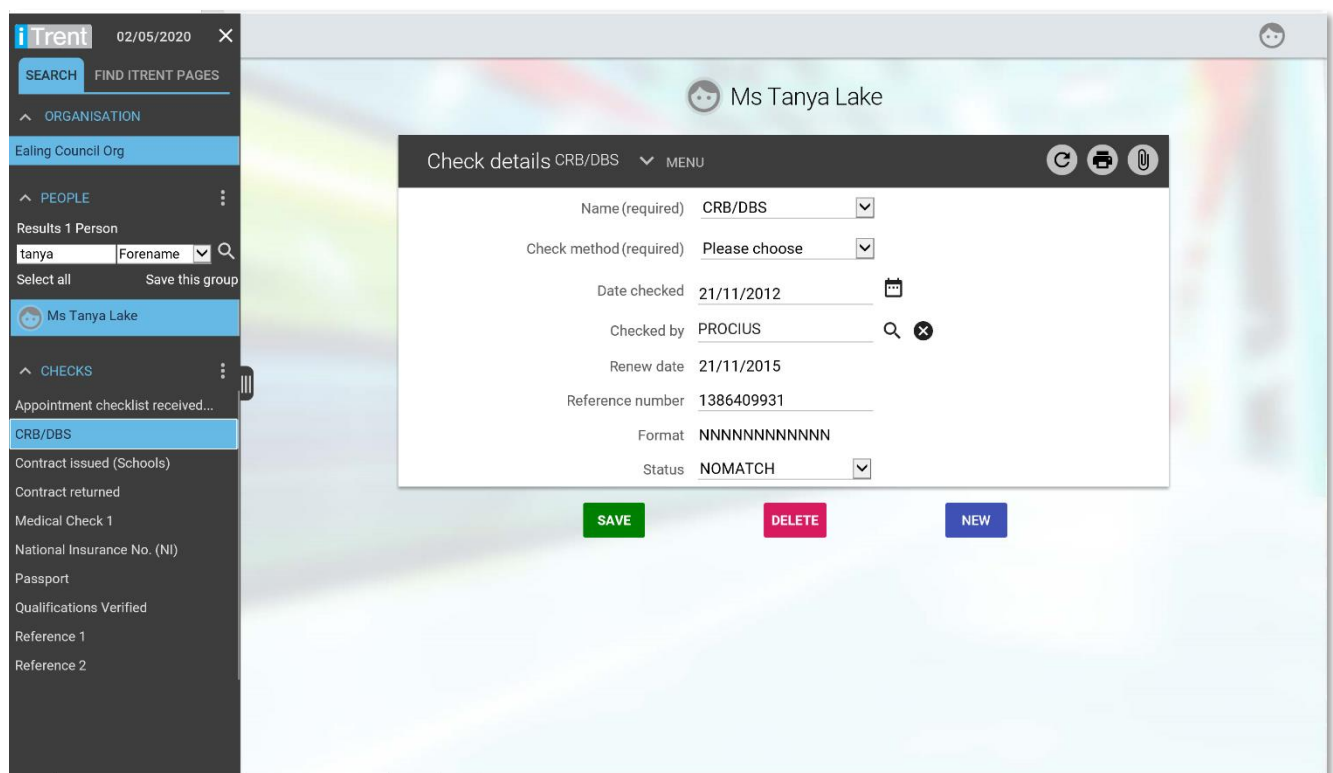
Check details

Check details - New

Personal learning account

Work permit details

Residency permit details



iTrent 02/05/2020 X

SEARCH FIND ITRENT PAGES

ORGANISATION

Ealing Council Org

PEOPLE

Results 1 Person

tanya Forename

Select all Save this group

Ms Tanya Lake

CHECKS

Appointment checklist received...

CRB/DBS

Contract issued (Schools)

Contract returned

Medical Check 1

National Insurance No. (NI)

Passport

Qualifications Verified

Reference 1

Reference 2

Ms Tanya Lake

Check details CRB/DBS MENU

Name (required) CRB/DBS

Check method (required) Please choose

Date checked 21/11/2012

Checked by PROCIOUS

Renew date 21/11/2015

Reference number 1386409931

Format NNNNNNNNNNNN

Status NOMATCH

SAVE DELETE NEW

5.3 Check details - New



By clicking this link, you can enter a new check for the selected person.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

Checks summary

Check details

Check details - New

Personal learning account

Work permit details

Residency permit details

Select a new *check name* from the drop-down list and add the date of the check using the calendar icon.

The *checked by* field is the name of the person verifying the check. Use the magnifying glass icon to search for the person and Save.

5.3 Work permit details

Work permit details are view only and can't be amended.

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

∨ Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

☰

☑

Checks summary

Check details

Check details - New

Personal learning account

Work permit details

Residency permit details

5.4 Residency permit details

Residency permit details are view only and can't be amended.

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

∨ Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

☰

☑

Checks summary

Check details

Check details - New

Personal learning account

Work permit details

Residency permit details

6. Learning/Training

In this section you can view an employee's learning record.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

6.1 Employee Learning record



This link allows you to view qualifications, memberships and personal learning events for staff members. They should enter this information on their self-service account.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)





[> Learning/Training](#) [> Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

[Employee Learning Record](#)

Click the link and when prompted for a date in the effective field, enter 'T'

Talent profile summary [\(as of 03/05/2020\)](#)  MENU   

Expand all/collapse all

►Qualifications (0) Add qualification

►Memberships (0) Add membership

►Personal learning events (0) [Create a new personal learning event](#)

7. Leaver Information

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [▼ Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

In this section you can:

- make an employee a leaver
- make an employee a leaver from a single position
- email HR if employee is transferring schools
- attach a resignation letter

7.1 Make employee a leaver



In this link you can make an employee a leaver by entering their end date. Click the *Make an employee a leaver* link and select the employee using the search facility.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [▼ Leaver information](#) [> Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)


[Make employee a leaver](#) [Make employee a leaver from a single p...](#) [✉ If employee is transferring schools](#)

[Attach Resignation letter](#)

Use this to make an employee a leaver from the school, i.e. employee is leaving all jobs with the school. This will end the record completely and payroll will issue a P45.

If the employee has more than one position at your school and is only leaving one of them, please select *Make employee a leaver from a single position* and follow instructions

You may also receive an error message indicating there are insufficient privileges to use this functionality. This is due to the employee having a different position at another school or with the council. Again, in this case select *Make employee a leaver from a single position* and follow instructions

 You cannot perform this action as you do not have access to one or more positions attached at this date.

Leaver information Ms Tanya Lake
MENU

Leaving details

Leaving date (required)

Last working day

Reason for leaving (required)

Please choose

Last payment date

Re-employable

☐

Exit interview complete

☐

New employer details

Employer name

Country

United Kingdom

Address Line 1

Address Line 2

Local Area

Town

County

Postcode

Forwarding details

Enter the *Leaving date* using the calendar icon.

Enter the *Last working day* if different from the leaving date and select a reason from the drop-down list, then Save.

An email is sent to the initiator of the process confirming the update and another to the employee of actions to be taken before the employment ends.

Please note that details of any additional payments due to be made to the employee e.g. outstanding annual leave, must be sent to the payroll team (genpayroll@ealing.gov.uk)

If an incorrect leaving date is entered, please contact the payroll team immediately as amending a leaving date will affect the employee's final pay.

7.2 Make an employee a leaver from a single position

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

Make employee a leaver

Attach Resignation letter

Make employee a leaver from a single p...

If employee is transferring schools

LBE iTrent People Manager (Schools) v1.1 28/04/2020

Page 34

If an employee has multiple positions but is only leaving one of them, make them a leaver from a single position only.


There is a prompt to confirm the date, but this has no impact on the position end date, so enter 'T' for today and enter.


Enter the leaving date and the reason for leaving from the drop-down list. As the employee is only leaving one position tick the box next to this position, as shown and Save. An email is sent to the initiator of the process confirming the update.


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


Occupancy maintenance [\(as of 03/05/2020\)](#) ▼ MENU

Leaving details

Leaving date (required) 






Last working day 

Last payment date 

Reason for leaving (required) Please choose 

Exit interview complete ☐

Occupancy details

	Ealing Council Org	<input type="checkbox"/>
		<input type="checkbox"/>
	Play Worker (15738)	<input type="checkbox"/>
	Play Worker (15766)	<input checked="" type="checkbox"/>
	Senior Playworker (41114)	<input type="checkbox"/>

SAVE

7.3 Email link to HR

You should email the HR administration team if an employee is transferring to another school.

LINKS

> Employment Details/Changes > Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday > Absence - Sickness

> Absence - 'Other' > Absence - Maternity/Paternity > Payroll - Fast input

≡

Make employee a leaver Make employee a leaver from a single p... **✉ If employee is transferring schools**

Attach Resignation letter

Clicking this link will take you straight to your email application with the hrsscops@ealing.gov.uk email address entered.

7.4 Attach resignation letter

This will allow you to attach the resignation letter via the document attachments link to the person's record.

LINKS

> Employment Details/Changes > Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday > Absence - Sickness

> Absence - 'Other' > Absence - Maternity/Paternity > Payroll - Fast input

≡

Make employee a leaver Make employee a leaver from a single p... ✉ If employee is transferring schools

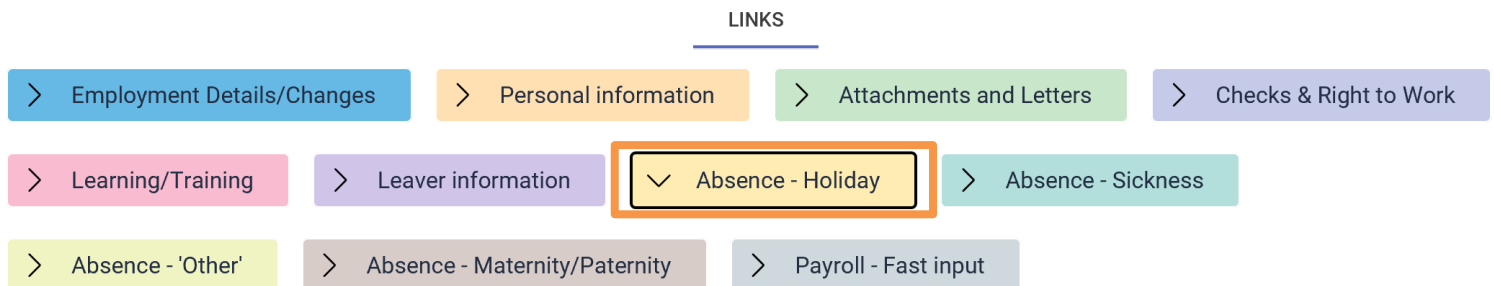
Attach Resignation letter

Scan and save the resignation letter and attach the document to the employee record as described in [section 2.9](#) of this guide.

8. Absence - Holiday

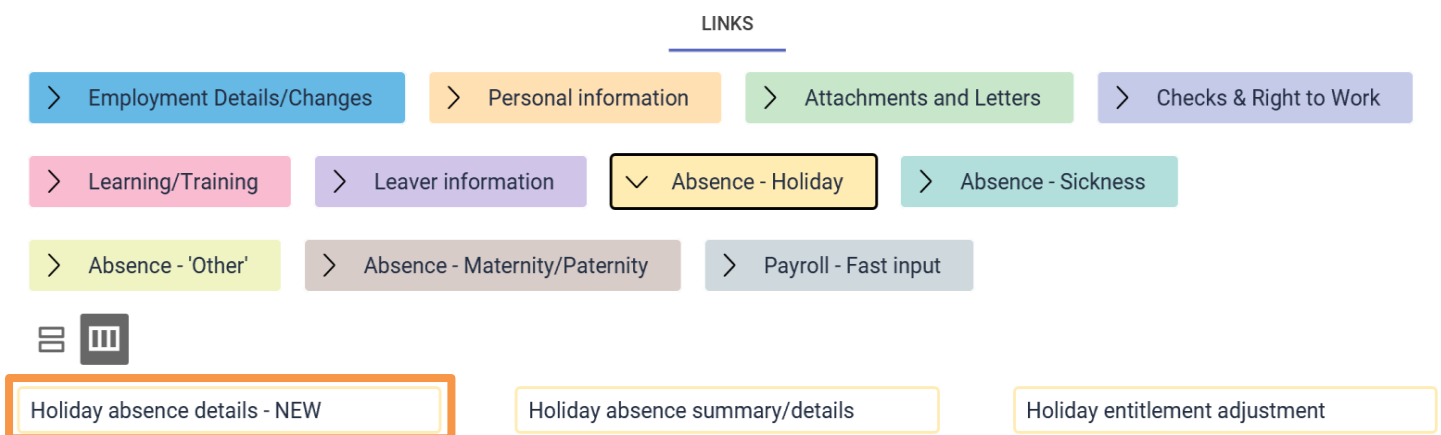
In this section you can:

- add/amend holiday absence details
- view holiday absence summary details
- adjust a holiday entitlement



8.1 Holiday absence details - NEW

Holidays only need to be recorded for employees who work all year round, Term time only staff take holidays in the school holidays.



Employees request holidays via self-service and a task is forwarded to the head to authorise. Occasionally, however, it may be necessary for the school office to add a holiday period.

Select the employee using the search facility in the object pane and click the *Holiday absence details - NEW* link

A new holiday absence details page will open in the display pane.

Enter holiday details for employee and save

Holiday absence applies to staff that work all year round and is calculated in hours.

Holiday absence details
New
MENU

Holiday period

Holiday period (required)
More than one day

Holiday start

Holiday start date (required)

Holiday start type
Full day

Holiday end

Holiday end date (required)

Holiday end type
Full day

Absence

Absence type (required)
Holiday

Authorisation
Not applicable

Position
<All Jobs>
Play Worker
Play Worker

+ Holiday balances

SAVE

Select the *Holiday period* - Full day, Part day or More than one day.

Enter the start date and relevant start type and the end date and end type.

Holiday absence details
New
MENU

Holiday period

Holiday period (required)
Part day

Holiday start

Holiday start date (required)
01/04/2020

Holiday start type
Part day

Holiday start time
15:00

Hours absent
1.30

Holiday end

Holiday end time

Absence

Absence type (required)
Holiday

Authorisation
Not applicable

If a part day is selected the *Holiday start time* and *Hours absent* entered need to be completed in a time format e.g. 1:30 which equates to 1 hour and 30 minutes ([see Appendix 1](#)).

To view the holiday balance, click the + icon by Holiday balances.

— Holiday balances				
Play Worker		- Corp Annual Leave		
Holiday period	Entitlement	Taken	Scheduled	Balance
01/11/2018 - 31/10/2019	183 hours	0 hours	0 hours	183 hours
01/11/2019 - 31/10/2020	183 hours	0 hours	0 hours	183 hours
01/11/2020 - 31/10/2021	183 hours	0 hours	0 hours	183 hours
Play Worker		AWR - Corp Annual Leave		
Holiday period	Entitlement	Taken	Scheduled	Balance
01/11/2018 - 31/10/2019	0 hours	0 hours	0 hours	0 hours
01/11/2019 - 31/10/2020	0 hours	0 hours	0 hours	0 hours
01/11/2020 - 31/10/2021	0 hours	0 hours	0 hours	0 hours
Senior Playworker		- Corp Annual Leave		
Holiday period	Entitlement	Taken	Scheduled	Balance
01/11/2018 - 31/10/2019	43 hours	0 hours	0 hours	43 hours
01/11/2019 - 31/10/2020	40 hours	0 hours	0 hours	40 hours
01/11/2020 - 31/10/2021	40 hours	0 hours	0 hours	40 hours

You can also select a holiday period from the list in the object and view the details in the display pane. Details can be amended and saved or deleted using the relevant buttons.

Holiday absence details

Holiday period

Holiday period (required)

Full day

▼

Holiday start

Holiday start date (required)

04/11/2019

📅

Holiday end

Absence

Absence type (required)

Holiday

▼

Authorisation

Not applicable

Position

Nursery Manager Fielding

+ Holiday balances

SAVE

DELETE

NEW



8.2 Holiday absence summary/details

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [▼ Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)

[Holiday absence details - NEW](#) [Holiday absence summary/details](#) [Holiday entitlement adjustment](#)

Select the employee using the search facility in the object pane and click the *Holiday absence summary/details* link.




The holiday entitlement summary combines annual leave, public/bank holidays, three Ealing days between Christmas and New Year, and any adjustments, where applicable.

The annual leave year can be changed by selecting the relevant year from the holiday period dates field.

If the previous years are not available change the effective date to a date prior to the beginning of the current leave year and refresh the screen.

Holiday entitlement summary

MENU

Employment details

Position Nursery Manager

Period details

Holiday period dates 01/10/2019 - 30/09/2020

Length of service at relevant date 11 year(s) 11 month(s) 24

Scheme name Corp Annual Leave

Membership dates 01/10/2015 -

Entitlement for period 308 hours (Adjustment)

From	To	Duration	Remaining entitlement
09/10/2019	09/10/2019	7	301
14/10/2019	14/10/2019	7	294
28/10/2019	28/10/2019	7	287
31/10/2019	31/10/2019	7	280
04/11/2019	04/11/2019	7	273
25/12/2019	25/12/2019	7	266
26/12/2019	26/12/2019	7	259
27/12/2019	27/12/2019	7	252
30/12/2019	30/12/2019	7	245
31/12/2019	31/12/2019	7	238
01/01/2020	01/01/2020	7	231
10/04/2020	10/04/2020	7	224
13/04/2020	13/04/2020	7	217
08/05/2020	08/05/2020	7	210

8.3 Holiday entitlement adjustment

There will be instances where an employee's leave allowance will require adjustment. This could be for leave carried over from the previous year, banking leave to be used at a future time or borrowing leave from a future year.



Click the *Adjust a holiday entitlement* link and select the employee required using the search facility in the object pane.

LINKS

[> Employment Details/Changes](#) [> Personal information](#) [> Attachments and Letters](#) [> Checks & Right to Work](#)

[> Learning/Training](#) [> Leaver information](#) [▼ Absence - Holiday](#) [> Absence - Sickness](#)

[> Absence - 'Other'](#) [> Absence - Maternity/Paternity](#) [> Payroll - Fast input](#)




[Holiday absence details - NEW](#) [Holiday absence summary/details](#) [Holiday entitlement adjustment](#)

If an employee has more than one position, select the correct position from the drop-down list in the *Employment details* section.

Select the correct holiday period dates. If there was a balance at the end of the previous leave year then this needs to be added as an adjustment to the current annual leave year.

Holiday entitlement adjustment

▼ MENU

Employment details

Position Nursery Manager ▼

Period details

Holiday period dates 01/10/2019 - 30/09/2020 ▼

Scheme name Corp Annual Leave ▼



Entitlement for period 287 hours (287 hours Pr

Brought forward

Brought forward not used (lost)

Adjustment details

Adjustment type Adjust ▼

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
07/10/2019		21.000	Days carried over from la:	30/09/2020	 308 hours	+	-
				30/09/2020		+	-

SAVE

The default adjustment type is *Standard*, change this to *Adjust*.

Adjustment details

Adjustment type Adjust ▼

The display will change and then enter the *Value*, *Reason* and *End Date* fields. To add additional lines for further adjustments, click on the + button, and to remove lines click on the - button. Save

If the time value includes part hours should be entered as a decimal value.

The adjustment will show on the *Holiday entitlement summary* screen.

Period details

Holiday period dates 01/10/2019 - 30/09/2020 ▼

Length of service at relevant date 11 year(s) 11 month(s) 24

Scheme name Corp Annual Leave ▼

Membership dates 01/10/2015 -

Entitlement for period 308 hours (Adjustment)

9. Absence - Sickness

In this section you can:

- view sickness absence details
- add sickness absence details
- view sickness absence entitlement

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

▼ Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

9.1 Sickness absence details



Select the employee using the search facility and click the *Sickness absence details* link. Sickness absence periods for the last two years will be listed. To see all periods, click the *Show all* button.

LINKS

[> Employment Details/Changes](#)
[> Personal information](#)
[> Attachments and Letters](#)
[> Checks & Right to Work](#)

[> Learning/Training](#)
[> Leaver information](#)
[> Absence - Holiday](#)
[▼ Absence - Sickness](#)

[> Absence - 'Other'](#)
[> Absence - Maternity/Paternity](#)
[> Payroll - Fast input](#)

[Sickness absence details](#)
[Sickness absence details - NEW](#)
[Sickness absence entitlement](#)

^ SICKNESS ABSENCE LIST

Show all

9.2 Sickness absence details - NEW

Sickness is calculated monthly, just prior to the payroll run, and calculates sickness from the previous month



Select the employee using the search facility and click *Sickness absence details - NEW*

LINKS

[> Employment Details/Changes](#)
[> Personal information](#)
[> Attachments and Letters](#)
[> Checks & Right to Work](#)

[> Learning/Training](#)
[> Leaver information](#)
[> Absence - Holiday](#)
[▼ Absence - Sickness](#)

[> Absence - 'Other'](#)
[> Absence - Maternity/Paternity](#)
[> Payroll - Fast input](#)

[Sickness absence details](#)
[Sickness absence details - NEW](#)
[Sickness absence entitlement](#)

Sickness absence details New
MENU

Sickness period

Sickness period (required)
More than one day

Absence start

Absence start date (required)
Absence start type
Full day

Absence end

Absence end date
Absence end type
Full day
Expected end date

Absence

Absence type (required)
Please choose
Set as default
Absence reason
<None>

SAVE

Enter the absence period from the drop down, if *Full day* is selected no end date is required.

9.3 Sickness absence entitlement

Select the employee using the search facility and click the *Sickness absence entitlement* link. The display pane will change to show the *Sickness entitlement summary* form.

LINKS

> Employment Details/Changes
> Personal information
> Attachments and Letters
> Checks & Right to Work

> Learning/Training
> Leaver information
> Absence - Holiday
Absence - Sickness

> Absence - 'Other'
> Absence - Maternity/Paternity
> Payroll - Fast input

Sickness absence details
Sickness absence details - NEW
Sickness absence entitlement

Sickness entitlement summary ▼ MENU 🔄 🖨️ 📎

Absence details

Calculated to date

Employment details

Position Nursery Manager ▼

Period details

Absence scheme type OSP - Sickness ▼

Length of service at relevant date 11 year(s) 6 month(s) 28

Scheme name OSP Officers

Membership dates 06/10/2008 -

Band/Rate	Full	Already used	Available
1: 100	156 days	0	156
2: 50	156 days	0	156

The entitlement appears in days for both full and half pay bands, and the number of days already used by sickness absence is also shown.

10. Absence - 'Other'

In this section you can:

- enter/amend a new 'other' absence
- view 'other' absence details

LINKS

> Employment Details/Changes
> Personal information
> Attachments and Letters
> Checks & Right to Work

> Learning/Training
> Leaver information
> Absence - Holiday
> Absence - Sickness

▼ Absence - 'Other'
> Absence - Maternity/Paternity
> Payroll - Fast input

10.1 New- Other absence details

Click the *New - Other absence details* link and select the employee using the search facility.

LINKS

> Employment Details/Changes
> Personal information
> Attachments and Letters
> Checks & Right to Work

> Learning/Training
> Leaver information
> Absence - Holiday
> Absence - Sickness

▼ Absence - 'Other'
> Absence - Maternity/Paternity
> Payroll - Fast input


☰ 🏠

New - Other absence details
Other absence details

Absence period

Absence period (required) More than one day 

Absence start

Date (required) Type Full day 

Absence end

Date Type Full day Expected end date 

Absence

Absence type (required) Please choose  ☐ Set as defaultAbsence reason <None> Hide absence reason ☐



SAVE

CALCULATE

Select the absence period from the drop down, if **Full day** is selected no end date will need to be entered.

If **Part day** is selected enter the number of hours absence in the hours absent field.

Absence start

Date (required) Type Half Day - PM Time Hours absent 

If **Half day - PM** or **Half day - AM** is selected no hours need to be entered as the system will calculate this as half a day based on the employees working pattern

Enter the start date.

Enter the end date (or leave blank if not known) and select the type: Full day, Part Day, Half day.

<None>
 Addiction
 Adoption - pre-placement discussions
 Adoption - trial placement period
 Adoption/Maternity/Parenting - Support Leave
 Allergy
 Anaemia
 Anxiety
 Arthritis
 Asthma
 Back / Neck
 Back and Spinal Disorders
 Bereavement Leave
 Blood Disorder

Select the absence type from the drop-down list, then Save.

10.2 Other absence details

Select the employee using the search facility and click the other absence details link.

LINKS

> Employment Details/Changes > Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday > Absence - Sickness

▼ Absence - 'Other' > Absence - Maternity/Paternity > Payroll - Fast input

≡

New - Other absence details Other absence details

Select an absence period from the list in the object and view the details in the display pane.

Other absence details MENU

Absence period

Absence period (required) Part day

Absence start

Date (required) 20/06/2019

Type Part day

Time 10:30

Hours absent 02:05

Absence end

Time 13:00

Expected end date 20/06/2019

Absence

Absence type (required) Medical appointment (paid)

Absence reason Medical Appointment

Hide absence reason ☐

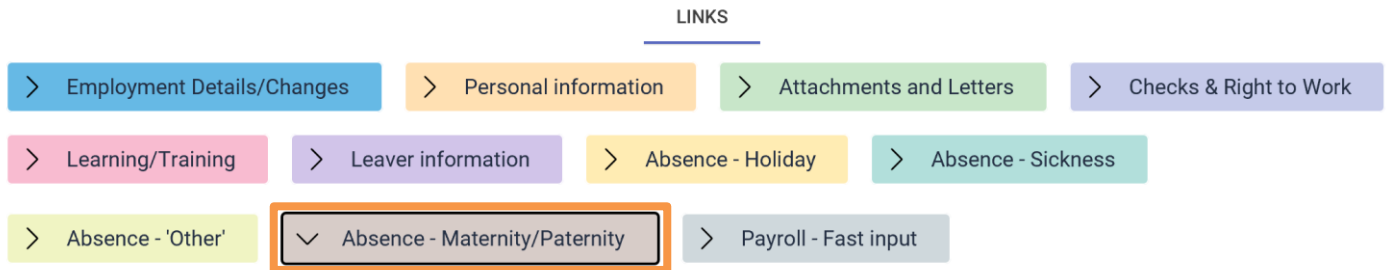
Position Nursery Manager

SAVE CALCULATE DELETE NEW

11. Absence – Maternity/Paternity

In this section you can:

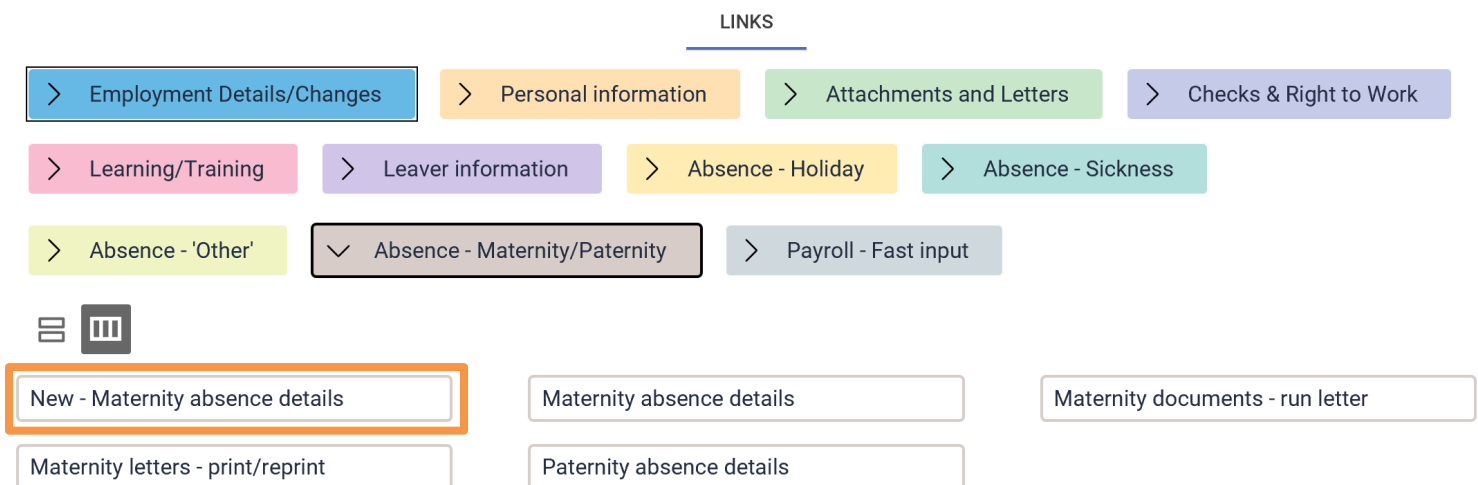
- enter/update maternity absence details
- view maternity absence details
- print/reprint maternity letters
- view paternity absence details



11.1 New - maternity absence details

Once an employee has provided MATB1 and MAT2 forms record the details.

Select the employee using the search facility and click the *New - maternity absence details* link.



If there are previous occurrences of maternity, these will be listed in the object pane.

Enter the *Expected Birth Date*, the *Maternity Absence Start Date* field and the *Issue date of MATB1* and then Save

Maternity absence details New
MENU

Absence dates

Absence type Maternity

Expected birth date (required)

Issue date of MATB1 (required)

Calculated maintenance details

Expected week of childbirth

Earliest MPP start

Qualifying week commences

Earliest allowed MATB1 date

Key maternity dates

Maternity absence start date (required)

Maternity absence end date

Expected end date

MPP start date

MPP end date

A notification confirming the change will appear in the display header

The MPP start date will be set to the Absence start date.

Changes have been saved.

11.2 Maternity absence details

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information

> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

> Payroll - Fast input

New - Maternity absence details

Maternity absence details

Maternity documents - run letter

Maternity letters - print/reprint

Paternity absence details

Select the employee using the search facility and click the Maternity absence details link.

Select the correct maternity record if there is more than one and the details will open in the display pane.

If the maternity start date is changed due to the employee going on maternity leave early or late, update the details using this link. HR will then send out a letter with the revised date.

Once the child is born the *Actual Date of Childbirth* field can be completed. The child's birth certificate should also be attached.

When the employee returns to work, the *Maternity Absence End Date* must be entered. If the date is not entered, their pay will not revert to normal as payroll will not be aware of this information.

If the employee returns to work on reduced hours this should be updated via the hours change links.

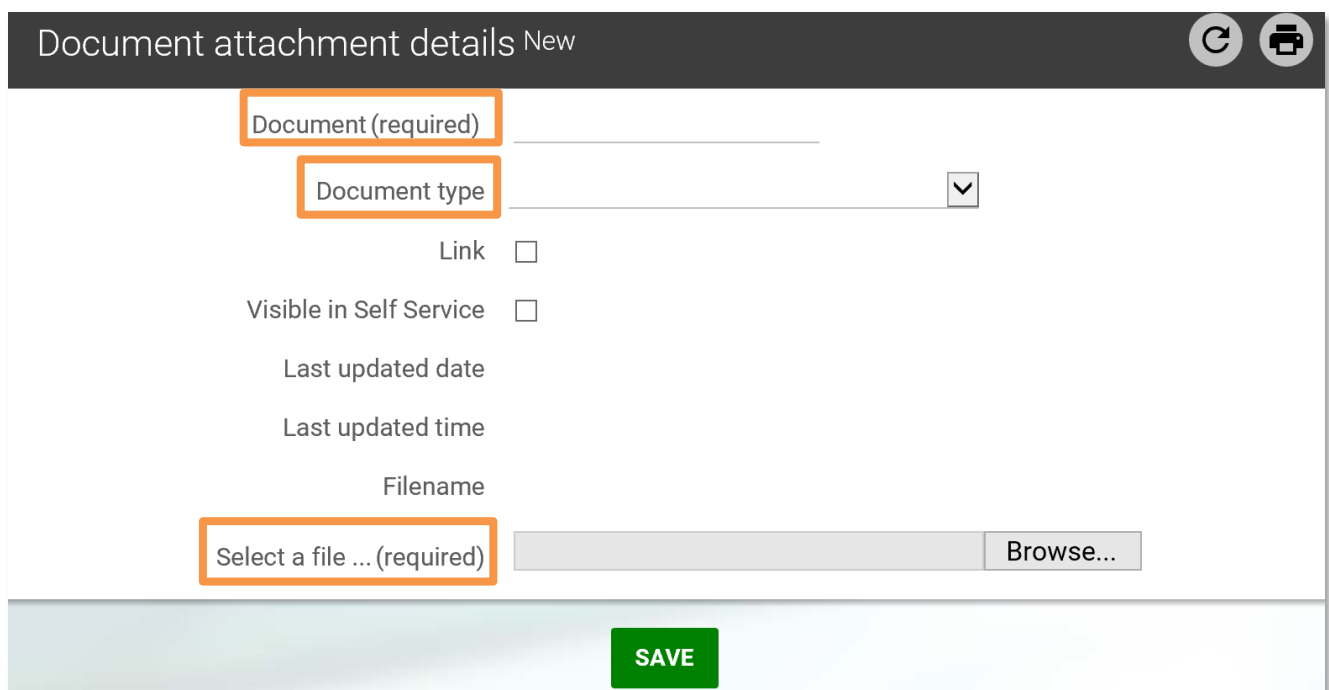
If another form of absence is to be applied against the employee at the end of their maternity leave, e.g. annual leave, their maternity absence must be ended so that the new absence can be applied.

Scan and attach both the MATB1 and MAT1 (intention form) via the attachment link; see paper clip icon below.



Enter a document name into the *Document* field and select a *Document type* from the drop-down list.

Click the Browse button and search the network for the document and Save.



Entering a new maternity triggers a confirmation email to the HR administration team and payroll.

11.3 Maternity documents and letters

Maternity letters are generated by HR, when leave is entered, changed and on the birth. You can print existing letters – refer to [section 2.9](#).

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information



> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

▼ Absence - Maternity/Paternity

> Payroll - Fast input

New - Maternity absence details

Maternity absence details

Maternity documents - run letter

Maternity letters - print/reprint

Paternity absence details

11.4 Paternity absence details

Information relating to an employee's intention to take paternity leave must be entered.

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information



> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

▼ Absence - Maternity/Paternity

> Payroll - Fast input

New - Maternity absence details

Maternity absence details

Maternity documents - run letter

Paternity absence details

Select the employee using the search facility and click the *Paternity absence details* link.

Ordinary paternity absence details New ▼ MENU ↺ 🖨 📎

Absence type (required) Paternity Leave ▼

Adoption ☐

Expected birth date (required) 📅

Qualifying week commences

Paternity absence start date (required) 📅

Paternity absence end date 📅

Expected end date 📅

Actual date of childbirth 📅

Stillbirth ☐

SAVE

Enter the Expected birth date, Paternity absence start date and Paternity absence end date, then Save.

12. Payroll- fast input

In this section you can;

- enter fast input - temporary input only
- view/amend temporary input
- enter new temporary element details

Refer to [Appendix 2](#) for a list of the element codes to be used

LINKS

> Employment Details/Changes > Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday > Absence - Sickness

> Absence - 'Other' > Absence - Maternity/Paternity ▼ Payroll - Fast input

12.1 Fast input - Temporary input only

The fast input functionality is to facilitate individual payments outside of the normal salary. This can be cash payments, additional hours worked or one-off payments such as honoraria, or fees payments.

LINKS

- > Employment Details/Changes
- > Personal information
- > Attachments and Letters
- > Checks & Right to Work
- > Learning/Training
- > Leaver information
- > Absence - Holiday
- > Absence - Sickness
- > Absence - 'Other'
- > Absence - Maternity/Paternity
- ▼ Payroll - Fast input

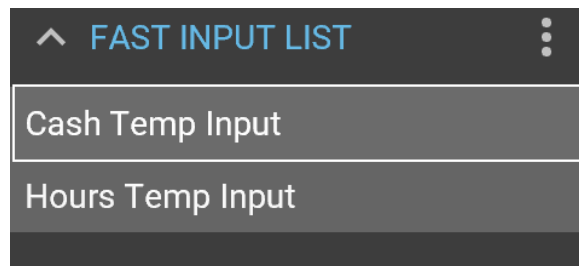


Fast input - Temporary input only

View/Amend Temporary Input

Temporary element details - New

Click the *Fast input - Temporary input only* link, the object pane changes and the options below become available.



Select timesheet template above

Template completion

Select MSCH in the payroll field, the payment date and date earned fields will automatically populate.

Fast input details Cash Temp Input ▼ MENU

Payroll MSCH ▼

Payment date (required) 23/12/2019 09:00 Main ▼

Date earned 31/12/2019 📅


Smart group 🔍 ✕

Enter the employee payroll number and click the green *Validate* button or the tick at the end of the row. The employee name and position will auto-populate

Employee payroll number	Employee name	Job	Code	Element	Cash Amount
	Ms Tanya Lake	Play Worker	▼		✓

VALIDATE SAVE




If the employee has more than one job the validation will highlight and prompt for a contract or position to be selected. Choose the correct position from the drop-down list and re-validate. The employee name and position will auto populate.

 A contract or position value must be specified.

Please ensure that the selected job always ends with (Current). If left as (Contract) the fast input entry will not be paid.

Populate the relevant element code in the *Code* field (refer to [Appendix 2](#)). If this code is incorrectly entered or left blank a warning message will appear.

Enter the cash amount – do not use the £ sign or the hours depending on the form used. To add or remove a line, click the plus or minus buttons at the end of the row.

Code	Element	Cash Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>   

When all the data has been entered click the save button. All entries will be saved and will be paid in the next available payroll. Once saved the fast input template will return blank. You can then check view/or amend the input via the *View/amend temporary input*

12.2 View/amend temporary input

Click the *View/Amend Temporary Input* link and select the employee required using the search facility in the object pane.

LINKS

> Employment Details/Changes

> Personal information

> Attachments and Letters

> Checks & Right to Work

> Learning/Training

> Leaver information



> Absence - Holiday

> Absence - Sickness

> Absence - 'Other'

> Absence - Maternity/Paternity

Payroll - Fast input

Fast input - Temporary input only

View/Amend Temporary Input

Temporary element details - New

The ability to amend/view fast input is only available up until the payroll closure date. Once payroll is closed the fast input values are cleared down for payment.

Only the *Value* field can be amended then saved. If the error is on the element code or the position, then the details must be deleted and input again.



Element details

Level (required) Breakfast Club Playworker ▼

Element (required) 2005 ADDITIONAL HOURS (Officers) ▼

Value 2.00

Type (required) Units ▼

Override ☐

Date earned 31/12/2019

Rate details

Payment period (required) 23/12/2019 09:00 Main ▼

Rate type Rate value ▼

Rate

Payroll (required) MSCH ▼

Costing details

Credit/Debit Debit ▼

Rule name ▼

12.3 Temporary element details- New

You can input the temporary elements via the link *Temporary element details - New* after selecting the person.

LINKS


[> Employment Details/Changes](#)
[> Personal information](#)
[> Attachments and Letters](#)
[> Checks & Right to Work](#)
[> Learning/Training](#)
[> Leaver information](#)
[> Absence - Holiday](#)
[> Absence - Sickness](#)
[> Absence - 'Other'](#)
[> Absence - Maternity/Paternity](#)
[▼ Payroll - Fast input](#)


Fast input - Temporary input only

View/Amend Temporary Input

Temporary element details - New

Element details

Level (required) (Contract) (Current) ▼Element (required) Please choose ▼ Value Type (required) Please choose ▼Override ☐Date earned Payment period (required) Please choose ▼Payroll (required) MSCH ▼

Costing details

Credit/Debit Debit ▼Rule name ▼Cost code Percent / value **SAVE**

Complete fields in the form and save.

13. Management information (reports)

Select the type of report i.e. *People*, *Absence* or *Structure*

People reports

Absence reports

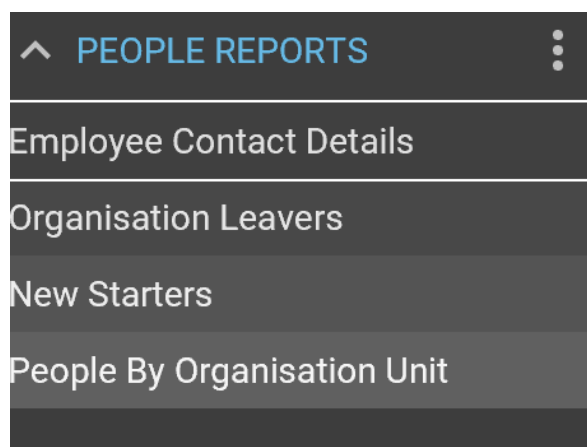
Structure reports

Run report

Download output

13.1 People Reports

Click on the *Run report* link under *People Reports* to open the list of report in the object pane.




To run a report, select the report type and complete the criteria in the display pane.

Set the *Organisation start point* as Ealing Council. This will ensure both teachers and non-teaching staff are included in the one report.

Select the start date and end date using the calendar icon and change the output type to CSV file if required.

Enter a name and date into *Report run comments* in order to locate the report for future reference.

 Generating report "Employee contact details". You will be notified upon its completion.

Employee contact details

This report requires the date effective field to be populated. Select "T" for today or amend the date.

Select either address or contact and then the type from the drop-down list. Change the output type to CSV file.



The report will run in the background and once complete there will be a pop-up notification in the bottom right of the screen.

Click on the pop-up notification to navigate to the specific Report Output screen.

Organisation Leavers and New starters

These reports list leavers and starters in a selected time period.

Organisation leavers [\(as of 04/05/2020\)](#)



Organisation start point (required)

Organisation view (required)

Full path display ☒

Start date (required)

End date (required)

Show details ☐

Include cover pages ☐

Output type



Report run comments

RUN

People by organisation unit

This report shows a breakdown of employees by unit including gender, birth date and organisation start date. The data is returned as at the date entered the Effective date field.

People by organisation unit [\(as of 04/05/2020\)](#)



Organisation start point (required)

Organisation view (required)

Show details ☒

Full path display ☒

Include cover pages ☐

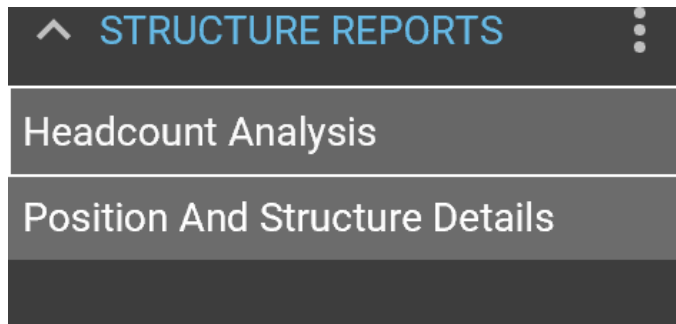
Output type

Report run comments

RUN

13.2 Structure reports

All structure reports need the effective date entered in the first instance.



Headcount Analysis

This report provides a headcount analysis for the school.

A screenshot of a web application form titled 'Headcount analysis (as of 04/05/2020)'. The form includes several input fields and checkboxes: 'Organisation start point (required)' with the value 'Ealing Council' and a search icon; 'Type' with a dropdown arrow; 'Organisation view (required)' with the value 'Show all data by unit' and a dropdown arrow; 'Show details' with a checked checkbox; 'Full path display' with an unchecked checkbox; 'Exclude if under 1 yrs service' with an unchecked checkbox; 'Output type' with a dropdown menu showing 'CSV File'; and 'Report run comments' with a text area. At the bottom right, there is a green 'RUN' button. The top right of the form has a refresh icon and a print icon.

Position and Structure Details

This report shows position data including occupied positions (with employee details including FTE together with Actual, Protected and Pro-rated salary values) and vacant positions.

No search criteria need to be entered but the output type can be changed to CSV file if required.

13.3 Absence reports

^ ABSENCE REPORTS				
Report name	Status	Last run date	Last run time	
Absence Frequency				
Absence History				
Absence History - People	Complete	08/01/2020	20:48:36	
Absence Summary				
Absence Tolerances				
Authorisation Status				
Friday Monday Absences				
Holiday Entitlement Breakdown				
Outstanding Holiday Entitlement				

Click on the required report and the relevant report parameter screen will open.

To search for an employee, select the drop-down *Unit/Employee* to *Employee* and search for the employee using the magnifying glass icon.

To run the report for the whole school, select *Unit* from the *Unit/Employee* dropdown and then search for Ealing Council.

Absence frequency

MENU

Unit/Employee (required)

Unit

Organisation start point (required)

Ealing Council

Absence group

Sickness

Absence type

Sickness

Absences from (required)

04/05/2019

Absences to (required)

04/05/2020

Reference number

Personal reference

Include leavers

☐

Full path display

☐

Organisation view (required)

Show all data by unit

New page for each organisation unit

☐

Output type

CSV File

Report run comments

RUN

Holiday

Maternity

Other

Sickness

Paternity

Adoption

Choose CSV File as the output type if you want to be able to edit the output

Some useful absence reports:

Absence History

This report will return absences in the period selected. Employees who have left the organisation between the report end date and the current date will only be returned if the 'include leavers' option is selected.

Absence Summary

This report calculates the total days lost in a period and shows the number of single days, the longest period and a daily breakdown.

Absence Tolerances

This report records all absences between specified dates which fall within the criteria you set for percentage number of days, number of absences and number of days absent.

If no criteria are specified, the report will include all absences within the specified period. Multiple criteria can be entered to produce the information. The individual entries are combined using a logical AND operation.

Example: Using 'Combine with' AND

% Working days =0

Number of absences =4

Number of days absent =6

This would list all people who have been absent for a total of 6 days or more if they have had at least 4 absences.

Friday Monday Absences

This report lists all the absences within the selected period where the period of absence starts no earlier than Friday and ends no later than the following Monday.

Holiday Entitlement Breakdown

This report shows how each employee's holiday entitlement for the year is made up, taking account of any brought forward from the previous year and manual adjustments made

Outstanding Holiday Entitlement

This report produces a report for the selected Holiday scheme outstanding entitlements. Leave the *Minimum balance to report on* fields empty.

13.4 Download Reports

When a report has completed and the status has changed to *Complete*, the report output can be downloaded.

^ PEOPLE REPORTS				⋮
Report name	Status	Last run date	Last run time	
Employee Contact Details	Complete	04/05/2020	06:20	
Organisation Leavers	Queued	04/05/2020	18:54	
New Starters	Complete	15/01/2020	16:12	
People By Organisation Unit	Complete	29/09/2017	11:53	

Select the *Download output* link.

LINKS

People reports

Absence reports

Structure reports

Run report

Download output

The *Download output* screen is used to view a list of all the report outputs that have been created, either today or in the past. Select from the drop-down list to determine the time period.


Click the *Download* icon and open the document.

Download output Organisation Leavers MENU

View output from

Today

Available report outputs

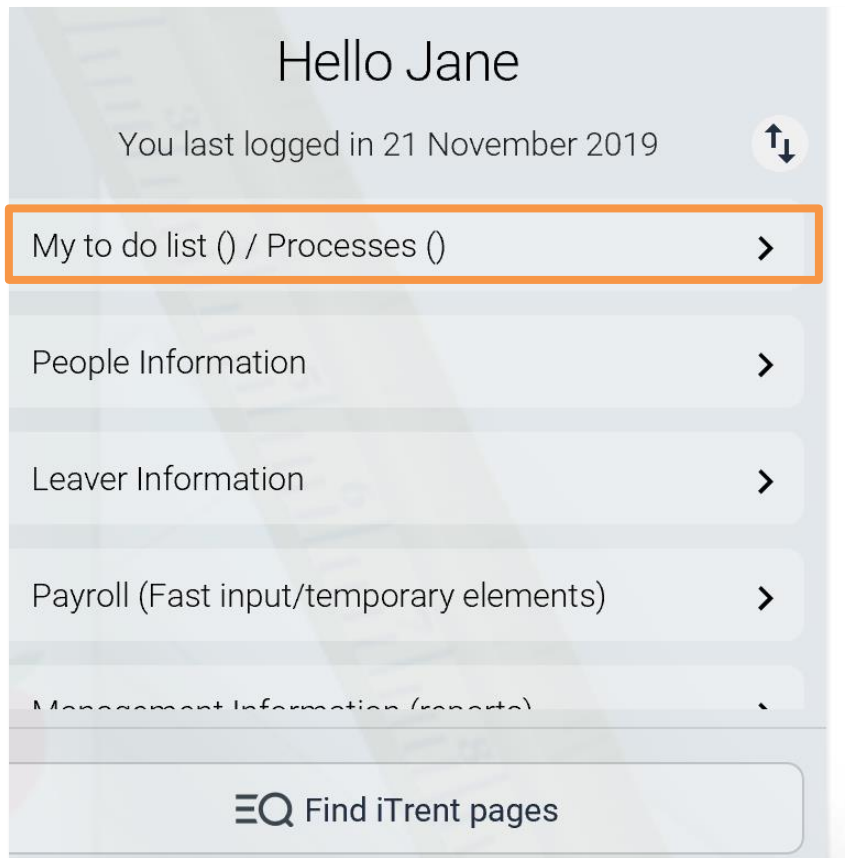
Run date & time	Comments	Download	Delete Select all
04/05/2020 18:54			<input type="checkbox"/>

DELETE

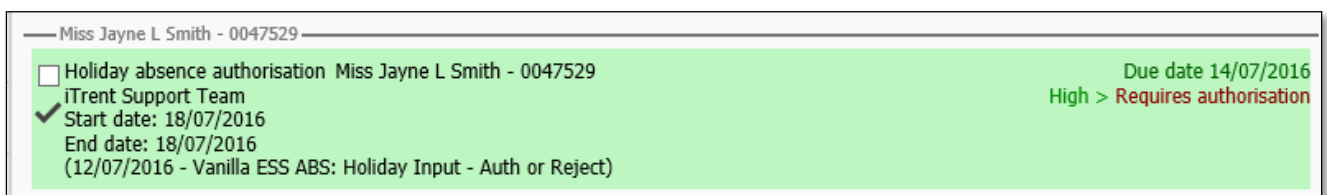
14. Authorising absence requests - where applicable

Notifications of requested absences are received by email.

Requests appear as tasks in the *To do list* on the homepage. The following guide relates to both holidays and other absences.



Click the to do list to view all pending tasks



Click anywhere in the coloured section to view the absence details.

If the details are correct click the blue home button to return to the homepage.

To action the request, ensure the check box is ticked and select the required action from the blue action button, either authorised or not authorised.

If there are several claims they can be checked and ticked, then authorised together.

Miss Jayne L Smith - 0047529

☒ Holiday absence authorisation Miss Jayne L Smith - 0047529
Trent Support Team
✓ Start date: 18/07/2016
End date: 18/07/2016
(12/07/2016 - Vanilla ESS ABS: Holiday Input - Auth or Reject)

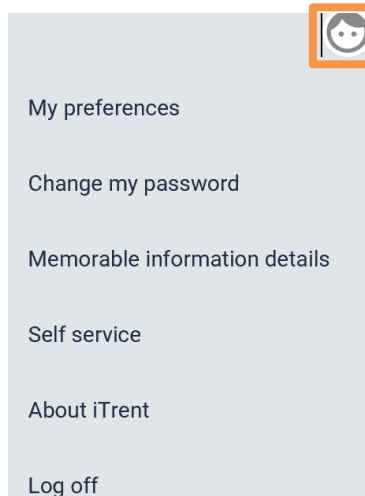
Once authorised, the task will disappear from the to do list and the requester will receive a confirmation email. The holiday balance and absence calendar will be updated.

15. Out of Office

Click the *Out of office* tab and absence details show in the display pane, by person and type of absence.



16. End the session



To leave iTrent People Manager click on the person icon in the top, right hand corner of the screen and then *Log off*.

17. Support

For technical queries please email iTrentSupportTeam@ealing.gov.uk

Appendix 1 - Minutes to decimal – conversion table

Minutes	Decimal
5	0.08
10	0.16
15	0.25
20	0.33
25	0.41
30	0.5
35	0.58
40	0.66
45	0.75
50	0.83
55	0.92

Appendix 2 - Element codes for temporary input

Additional Hours (Officer) – Code 2005

Where a part time employee worked extra hours.

This should only be used up to 35 hours per week including their contracted hours. Hours worked over and above 35 should be paid @ 1.5 or planned overtime, depending on the grade.

Additional Hours (Teachers) – Code 1023

Where a part time teacher worked extra hours.

After School Club (Officers) – Code 2095

Enter the cash value for Non-Teaching staff.

After School Club (Teachers) – Code 1680

Enter the cash value for Teachers only.

Annual Leave – Code 2010

Use only for making payment of outstanding holiday to a member of staff who is leaving.

Basic Hourly Rate – Code 1010

Used for casual/AWR staff who have zero contracted hours.

Booster Class – Code 1675

Enter the full cash value to be paid.

Breakfast Club Payment – Code 1689

Enter the full cash value to be paid.

Caretaker's Dinner Duty – Code 2080

Enter the hours to be paid.

Casual Letts (Monday to Saturday) – Code 2060

If a caretaker works a letting during the week (Monday to Saturday) this is classed as a casual letting. The pay received is calculated the same as Regular (Monday – Saturday) lettings.

Casual Letts (Sunday) – Code 2070

If a caretaker works a letting during the week (Sunday) this is classed as a casual letting. The pay received is calculated the same as Regular (Sunday) lettings.

Casual Letts (Unsocial Hours) – Code 2170

Payable as a 'top up payment' in addition to lettings after 8pm.

Chartered London Teachers Payment – Code 2025

Pay the full cash value.

Extended Schools Payment – Code 1676

Pay the full cash value.

Fees (Cash Only) – Code 1710

Pay the full cash value.

Honorarium – Code 1570

Paid as a one-off cash value.

Lunchtime Duty Payment – Code1585

Pay the full cash value.

One to One Tuition Payment – Code 1685

Enter the full cash value.

This should be used for one to one tuition payments where the duties are NOT carried out at the school at which they are employed.

Overtime @ 1.5 – Code 2150

Overtime rate for staff on Grade 6 or less and that have worked more than 35 hours per week (Monday to Saturday).

Overtime @ 2.0 – Code 2160

Overtime rate for staff on Grade 6 or less and that have worked more than 35 hours per week (Sunday only).

Planned Overtime – Code 2190

Overtime rate for staff on Grade 7 (contracted to work 35 hours) or higher.

Regular Letts (Monday to Saturday) – Code 1400

If a caretaker works the same letting each week (Monday to Saturday only) this is classed as a Regular letting. The pay received is calculated the same as casual lets.

Regular Letts (Sunday) – Code 1410

If a caretaker works, the same letting each week (Sunday only) this is classed as a Regular letting. The pay received is calculated the same as casual lets – Sunday rate.

Regular Letts (Unsocial Hours) – Code1420

Payable as a top up payment in addition to lettings after 8pm.

Weekend Enhancement – Code 1365

Enter the number of hours worked on the day(s).

Where an employee's normal working week includes a Saturday or a Sunday