

iTrent People Manager (Schools) User Guide

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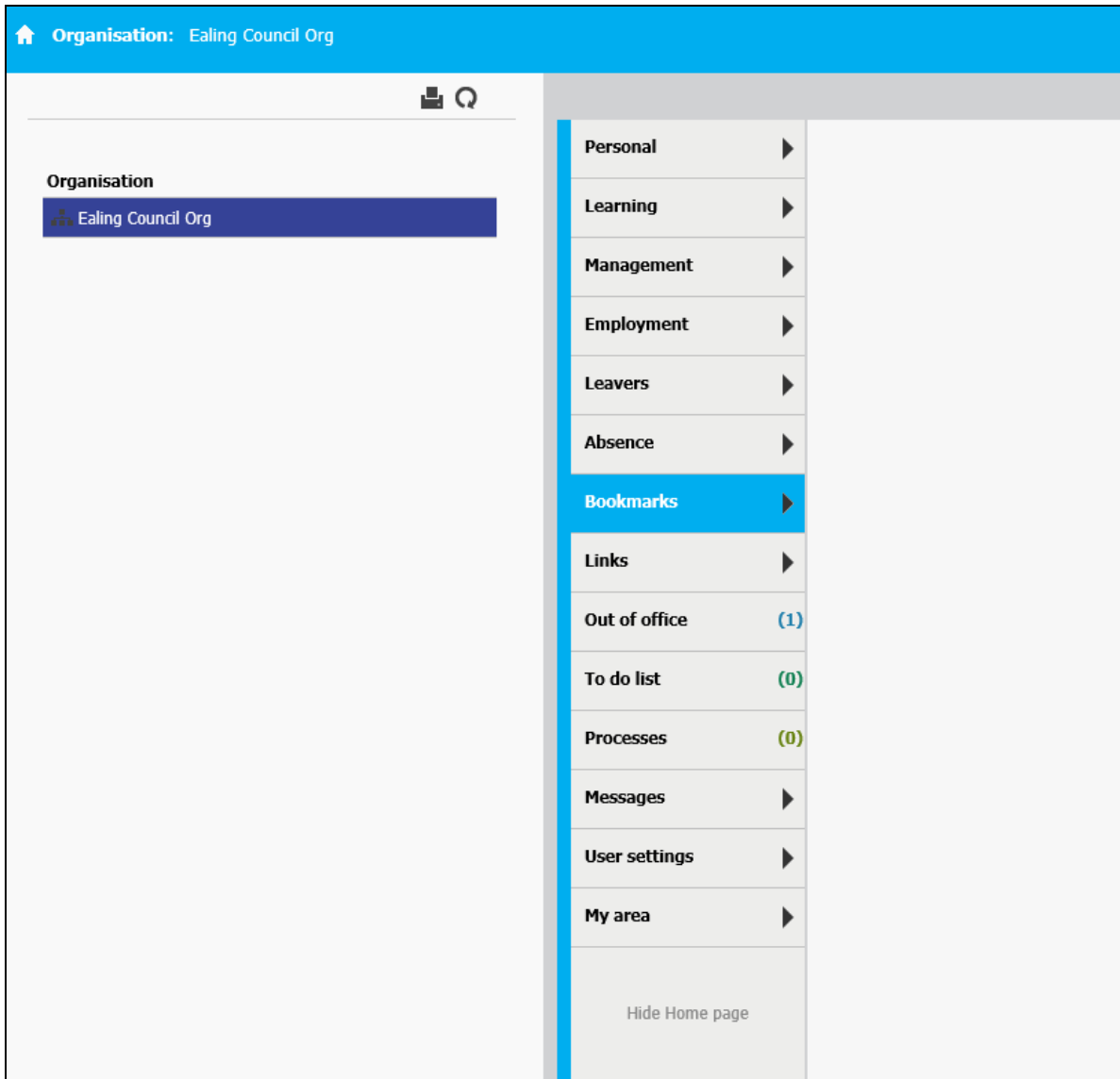
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1.0 Introduction

Log in to the home page which is the starting point for all tasks.



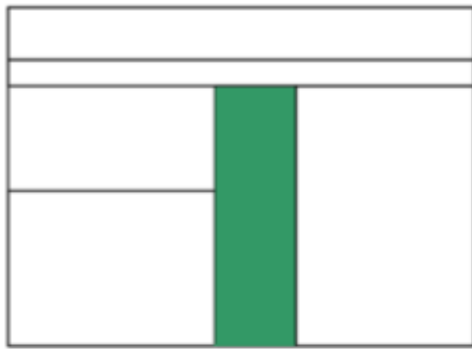
Moving through the different areas of iTrent creates a navigation trail.



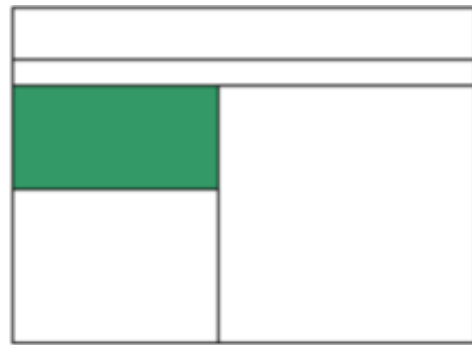
To return to the Home Page, click on the white home icon or the home button at the bottom of each page.



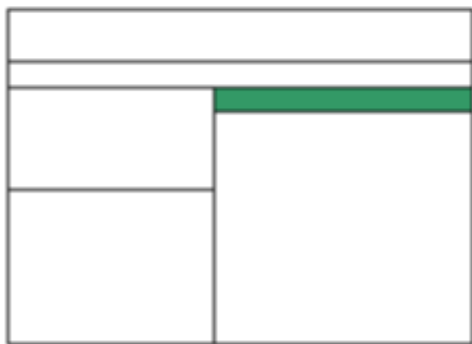
This guide makes reference to different areas of the screen as follows:



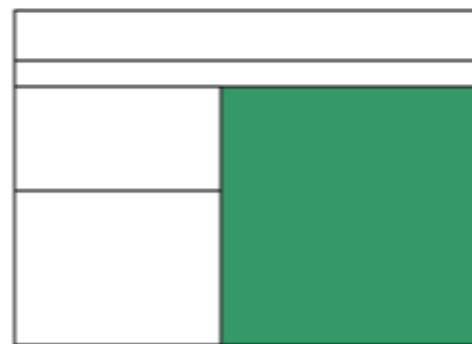
The Home Page Tabs



The Object Pane



The Display Header



The Display Pane

2.0 Personal

To view and amend an employee's personal information, select the Personal tab from the home page.

Personal	<p>Personal Information</p> <ul style="list-style-type: none"> Personal details Key date details Miscellaneous details Checks summary Add a new background check <p>Contact</p> <ul style="list-style-type: none"> Address details New Address Details Contact details Next of kin Emergency contact details <p>Right to Work</p> <ul style="list-style-type: none"> Work permit details Residency permit details
Learning	
Management	
Employment	
Leavers	
Absence	
Bookmarks	
Links	

Certain links within the Personal tab are referential, so the information can be viewed but not changed.

Employees should update their own personal information using the Employee Self Service module.

2.1 Personal details

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

All the fields can be changed except for Personal ref. and Start date.
Enter any changes and Save.

When changing an employee's surname record the surname being replaced 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 name is changed 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 are for attachment.

Personal details: Mrs Jayne L Smith

Surname

Forename

Forename 2

Forename 3

Title

Preferred name

Previous surname

Personal ref. 0047529

Start date 12/10/2015

2.2 Key date details

These are read only fields.

2.3 Miscellaneous details

These are read only fields and include details of Right to work, Passport, Visa etc.

2.4 Checks summary

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

Checks summary: Mrs Jayne L Smith

Name **Mrs Jayne L Smith**

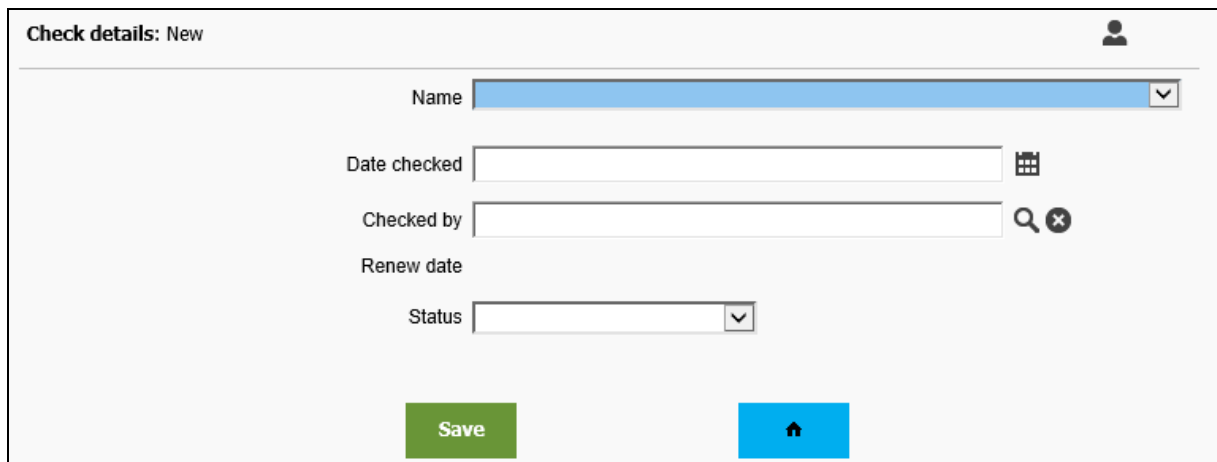
+ Checks

+ Passport details

2.5 Add a new background check

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.



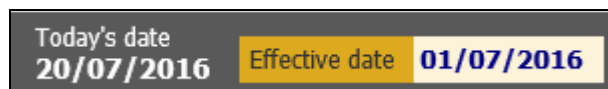
The screenshot shows a form titled "Check details: New". It contains the following fields and controls:

- Name:** A dropdown menu with a blue highlight.
- Date checked:** A text input field with a calendar icon to its right.
- Checked by:** A text input field with a magnifying glass icon and a close icon to its right.
- Renew date:** A text input field.
- Status:** A dropdown menu.
- Buttons:** A green "Save" button and a blue "Home" button with a house icon.

2.6 Address details

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

The cursor moves to the effective date field, 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.



The screenshot shows a date selection interface with two fields:


- Today's date:** 20/07/2016
- Effective date:** 01/07/2016


2.7 New address details

Click the New address details link and select the employee required using the search facility in the object pane. This is used for entering a new address.


The cursor moves to the effective date field, 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 blue fields are populated, then Save.

Address details: New 

Address type **Home** 

Mailing address

Country **United Kingdom** 

Address Line 1


Address Line 2


Local Area

Town

County

Postcode


Start date **27/07/2016** 




End date 



2.8 Contact details

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

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

 **Organisation:** Ealing Council Org **People:** Brown, Clare

Means of contact	Contact at
 Home Telephone number	02087156856
 Mobile Telephone number	07812345698

2.9 Next of Kin

Click the Next of kin 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.

2.10 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.

2.11 Right to work


Both work permit and residency permit details are view only.

3.0 Learning

Qualifications, Memberships and Personal learning events can be view here.

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






Talent profile summary: Miss Jayne L Smith 

[Expand all/collapse all](#)

▼ Qualifications

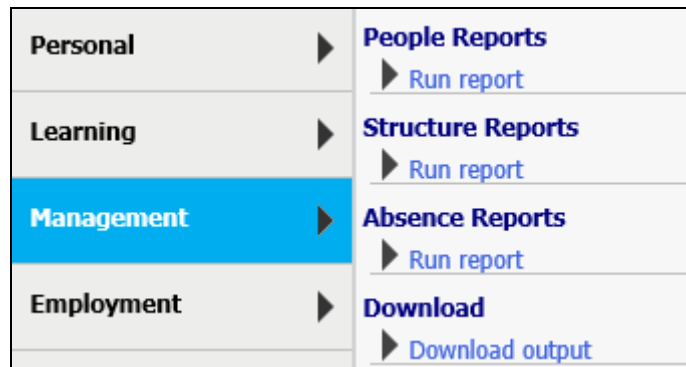
Subject	Level	Achievement/grade	Date obtained	Status
Hotel and Business Management	Bachelors Degree	2.1	01/06/1991	Completed

▼ Memberships

Membership	Number	Level	Start date	Expiry date	
(BPS) British Psychological Society	123456	Fellow	01/04/2016		
(CIM) Marketing	0011234	Associate	01/05/2006		
General Teaching Council for England	0035698	Member	01/06/2015		






4.0 Management Reports

Management reports are generated from here, and are split into 3 report categories:



4.1 People Reports

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

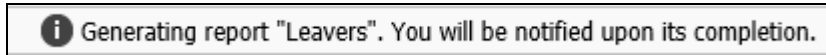
Report name	Status	Last run date	Last run time
 Employee Contact Details			
 Organisation Leavers			
 New Starters			
 People By Organisation Unit			
 Scheduled Reviews			

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

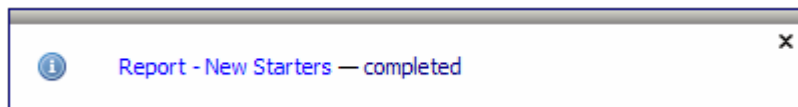
The Organisation start point defaults to Ealing Council, this is correct. Managers can only view employee details of their reports.

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

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



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.

Employee contact details

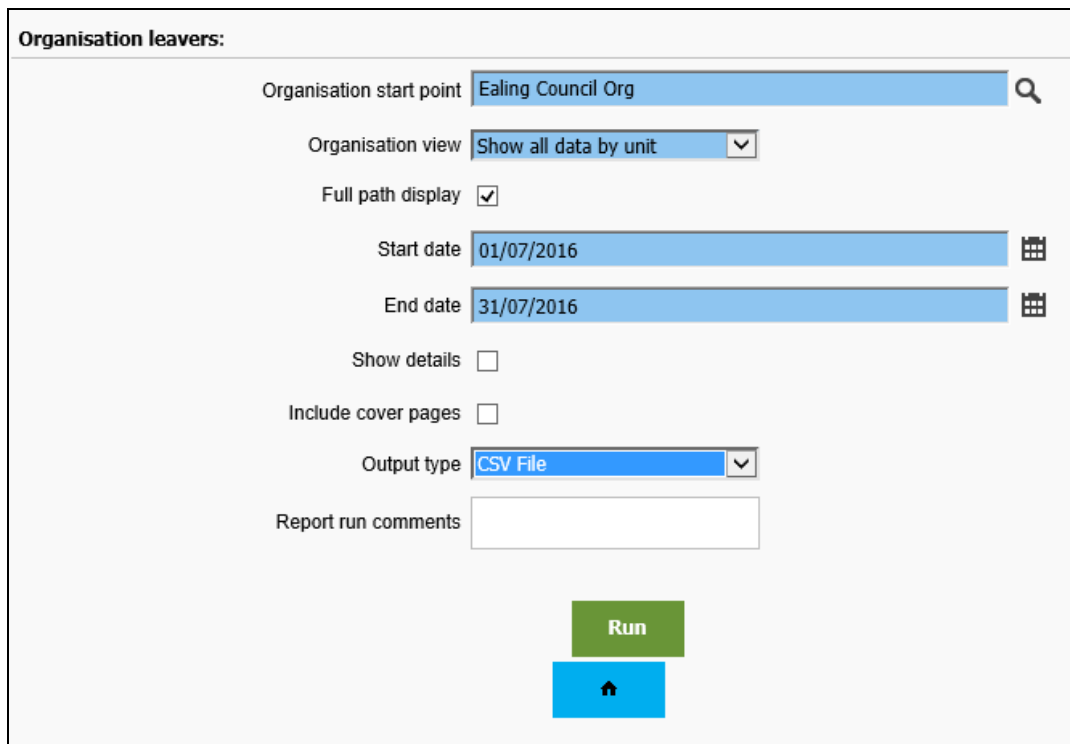
This reports required the date effective field to be populated, this will be the date that the report is to be run at.

Select either address or contact and then the type from the drop down list.

Change the output type to CSV file.

Organisation Leavers and New starters

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

A screenshot of a web application interface for configuring a report. The title is "Organisation leavers:". Below the title are several configuration options: "Organisation start point" with a text box containing "Ealing Council Org" and a search icon; "Organisation view" with a dropdown menu showing "Show all data by unit"; "Full path display" with a checked checkbox; "Start date" with a text box containing "01/07/2016" and a calendar icon; "End date" with a text box containing "31/07/2016" and a calendar icon; "Show details" with an unchecked checkbox; "Include cover pages" with an unchecked checkbox; "Output type" with a dropdown menu showing "CSV File"; and "Report run comments" with an empty text box. At the bottom center, there is a green "Run" button and a blue button with a white home icon.

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 at the date entered in to the Effective date field.

People by organisation unit:

Organisation start point

Organisation view ▾

Show details

Full path display

Include cover pages

Output type ▾

Report run comments

Scheduled reviews

This report shows reviews that are schedules in a time period and those that are overdue.

4.2 Structure reports

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

Report name	Status	Last run date	Last run time
<input type="checkbox"/> Global Patterns			
<input type="checkbox"/> Headcount Analysis			
<input type="checkbox"/> Position And Structure Details			
<input type="checkbox"/> Reporting Managers			

Global patterns

This report shows working patterns that are in use.

Headcount Analysis

This report provides headcount analysis for the date specified and can be run against an individual employment type such as permanent or acting up employees. It shows gender, job, grade and FTE.

Headcount analysis:

Organisation start point

Type

Organisation view

Show details

Full path display

Exclude if under 1 yrs service

Output type

Report run comments

Position and Structure Details

This report outputs 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 needs to be entered but change the output type to CSV file.

Reporting Managers

This report outputs details of reporting managers and their reportees, as at the Effective Date at the top of iTrent. The report includes managers via reporting posts as well as managers via positions.

4.3 Absence reports

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

Report name	Status	Last run date	Last run time
<input type="checkbox"/> Absence Frequency			
<input type="checkbox"/> Absence History			
<input type="checkbox"/> Absence Summary			
<input type="checkbox"/> Absence Tolerances			
<input type="checkbox"/> Authorisation Status			
<input type="checkbox"/> Friday Monday Absences			
<input type="checkbox"/> Holiday Entitlement Breakdown			
<input type="checkbox"/> Outstanding Holiday Entitlement			

Absence is not just sickness but includes the following groups.

- Holiday
- Maternity
- Other
- Sickness
- Paternity
- Adoption


Absence Frequency

This shows the frequency report for an organisation, organisation unit or a specific employee

To search for an employee alter the drop down Unit/Employee to Employee and search for the employee using the magnifying glass icon.


Absence frequency:


Unit/Employee

Organisation start point 

Absence group

Absence type

Absences from 

Absences to 

Reference number

Include leavers

Full path display

Organisation view

New page for each organisation unit

Output type

Report run comments

Absence History

This report will return absences in the report period where the absence position was under the selected start point at the start of the absence. Employees who have left the organisation between the report end date and the current date will only be returned when 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 is 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 1 – 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 provided that they have had at least 4 absences.


Absence tolerances:


Unit/Employee

Organisation start point 

Absence group

Absence type

Absences from 

Absences to 

Reference number

Include leavers

Absence tolerance limits

Combine with

Percentage of working days

Number of absences

Number of days absent

Full path display

Organisation view

New page for each organisation unit

Output type

Report run comments

Friday Monday Absences

This report lists all of 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.

Holiday entitlement breakdown:

Unit/Employee

Organisation start point

Effective date

Holiday Scheme

Reference number

People to include in the report

Those with basic entitlement only.

Those with brought forward entitlement.

Those with manual adjustments/overrides.

Organisation view

Full path display

New page for each organisation unit

Output type

Report run comments

Outstanding Holiday Entitlement

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

Outstanding holiday entitlement:

Unit/Employee

Organisation start point

Effective date

Holiday Scheme

Reference number

Minimum balance to report on

days

hours

Organisation view

Full path display

New page for each organisation unit

Output type

Report run comments

4.4 Download Reports


When a report has completed and its status has changed to Complete, the report output can be downloaded. The report status changes to complete.




Report name	Status	Last run date	Last run time
Headcount Analysis	Complete	03/08/2016	11:30
Payscale Listing	Complete	03/08/2016	11:02

Select the Download reports link.



The Download output page is used to view a list of all of 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  icon and open the document.

Download output: All reports				
View output from				
Today				
Available report outputs				
Report name	Run date & time	Comments	Download	Delete
Vacancy Details	03/08/2016 12:05			Select all <input type="checkbox"/>
Headcount Analysis	03/08/2016 11:30			<input type="checkbox"/>
Payscale Listing	03/08/2016 11:02			

5.0 Employment Information

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

To view and amend employment information, select the Employment tab from the home page.



The display pane shows the available actions.

Personal	▶	Employment Details / Changes
		▶ Hours Changes
Learning	▶	▶ Extension of fixed term contract
		▶ View working pattern
Management	▶	▶ New working pattern
		▶ Allowances - New
		▶ Allowances - Change
Employment	▶	▶ Employee position occupancy history (Read only)
Leavers	▶	▶ Fast input - Temporary input only
		▶ View/Amend Temporary Input
Absence	▶	▶ View expense claims
		▶ View expense receipts
Bookmarks	▶	▶ New expense claim
		▶ Expenses claim submission
Links	▶	▶ Payscale Changes
		Attachments and Letters
Out of office (121)		▶ Attach document to employee
		▶ View document attachments
To do list (0)		▶ Run contractual change letter
		▶ Print / re-print letters

5.1 Hours Changes

Click the Hours Changes link in the display pane.

Search for the employee in the object pane, the search criteria can be change from personal reference to surname using the drop down list.

If the employee has more than one job, click the correct one that needs the change. The cursor will jump to the effective date field, enter the date at which the change will take effect.

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

Today's date 20/07/2016	Effective date 01/07/2016
-----------------------------------	-------------------------------------

Enter the new hours in the Contractual Hours field and change the Basis if necessary, e.g. FT to PT. A change reason can be added from the drop down list, then save the record. Save

Hours and basis: Teacher Villiers High School

Contractual Hours

Basis

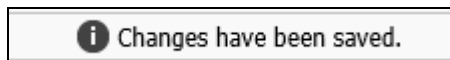
Employment type

Standard sessions

Actual sessions

Change reason

Once saved a notification message will be generated.



.As a result of the hours change a work pattern change may be required, Refer to the Changing working pattern section 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 & 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.

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 Modify the Payscale functionality. A new contract should be arranged through HRSSC Operations

A letter must be generated to the employee for hours changes. Please see **Run Contractual Change Letters** section.

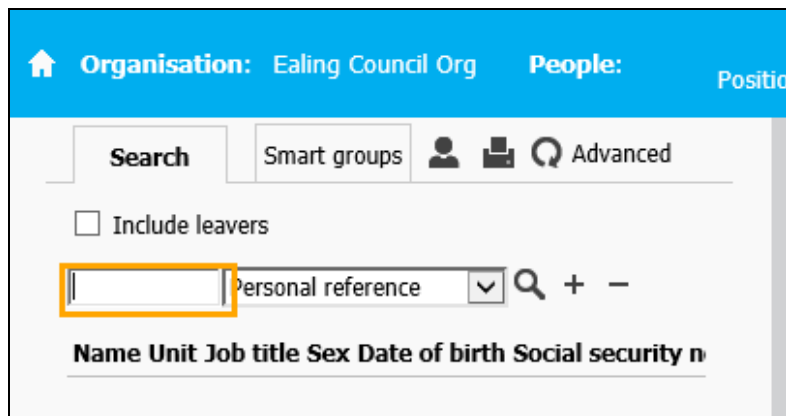
5.2 Extension of fixed term contract

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.



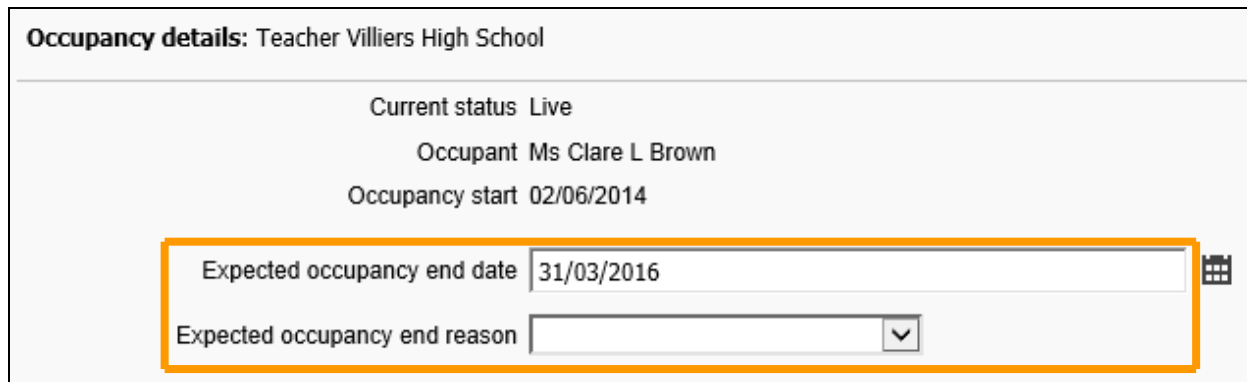
Select the person by reference number or surname, by using the drop down list.



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.

The display pane opens the **Occupancy Details** form.



Overwrite the Expected occupancy end date to the new one and select a new reason and Save.

A letter should be generated to the employee for an extension to a fixed term contract. Please see **Run Contractual Change Letters** section.

5.3 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 take into account rotational patterns, condensed hours, etc.

The default working pattern is 35-hours a week, 7-hours a day, Monday to Friday.

Select the link View working pattern.

Personal	▶ Employment Details / Changes
	▶ Hours Changes
Learning	▶ Extension of fixed term contract
	▶ View working pattern
Management	▶ New working pattern
	▶ Allowances - New

Select the person by reference number or surname, by using the drop down list.

If the person has multiple positions select the position to view the pattern for.

The object pane will display the Working Patterns.

Select all				
Type	Pattern name	Start day	Start date	End date
Working Pattern	27.5 Teacher Full Time M-F	Week 1 / Day 2	01/04/2014	

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

Pattern details: Working Pattern : Working Pattern

Pattern information

Type: Working Pattern

Pattern: 27.5 Teacher Full Time M-F

Start day: Week 1 / Day 2

Start date: 01/04/2014

End date:

Pattern days

Current day: Week 1 / Day 1

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	05:30	05:30	05:30	05:30	05:30	00:00	00:00	27:30

The working pattern time is displayed as hours and minutes, minutes are not displayed as a decimal equivalent.

5.4 New working pattern

Select the New working pattern link.



Enter the pattern information in the following order:

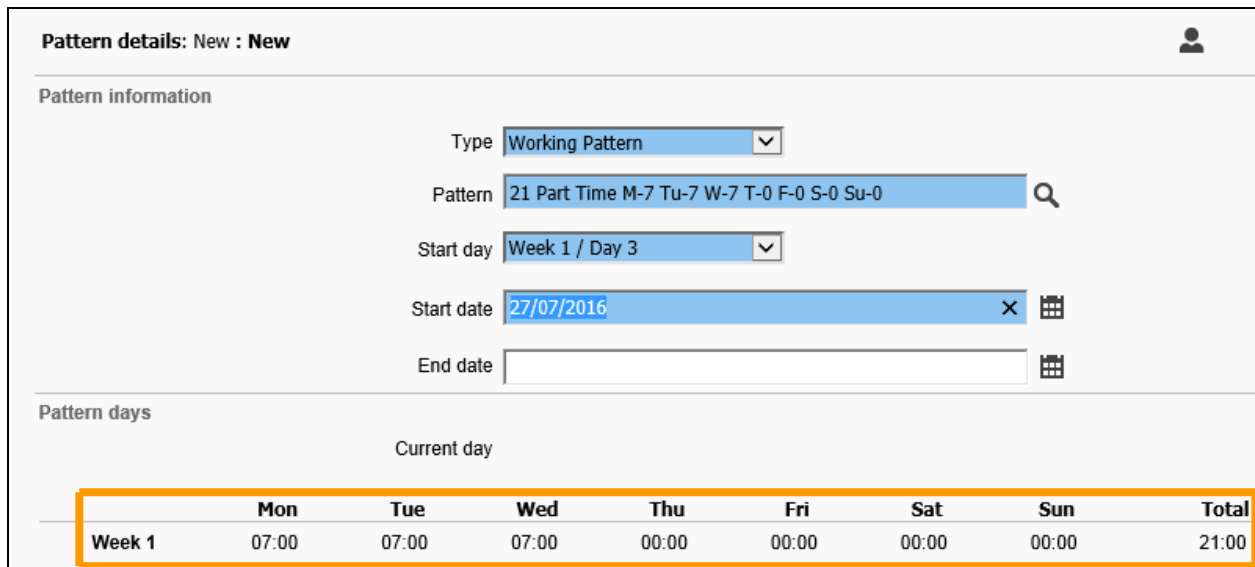
Type: Working Pattern

Pattern: Search by using the magnifying glass icon and entering the weekly hours as the search criteria e.g. 21. The 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 begins on. So if it is a one week pattern and the start day is Wednesday the choose Week 1 / Day 3.

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



The screenshot shows the 'Pattern details: New : New' form. The 'Pattern information' section includes fields for Type (Working Pattern), Pattern (21 Part Time M-7 Tu-7 W-7 T-0 F-0 S-0 Su-0), Start day (Week 1 / Day 3), Start date (27/07/2016), and End date. The 'Pattern days' section shows a table with columns for days of the week and a Total column. The table is highlighted with an orange border.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	07:00	07:00	07:00	00:00	00:00	00:00	00:00	21:00

5.5 Allowances – New

Allowances are permanent elements such as TLRs, SEN and Fire Wardens payments paid to an individual.

Personal	▶	Employment Details / Changes
		▶ Hours Changes
Learning	▶	▶ Extension of fixed term contract
		▶ View working pattern
Management	▶	▶ New working pattern
		▶ Allowances - New
		▶ Allowances - Change
Employment	▶	▶ Employee position occupancy history (Read

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.

Element	Start date	End date	Cash	Units	Time
TLR2	02/06/2014	31/08/2014	4,366.00		
TLR2	01/09/2014	31/08/2015	4,410.00		
TLR2	01/09/2015		4,455.00		

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.

- DISCRETIONARY ALLOWANCE
- FIRE WARDEN ALLOWANCE
- 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 👤

Start date 📅

End date 📅

Element 🔍

Element type

Cash ✕

Payment table / rate code

Membership reference

5.6 Allowances – Change

Click the Allowances - Change 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.

Element	Start date	End date	Cash	Units	Time
TLR2	02/06/2014	31/08/2014	4,366.00		
TLR2	01/09/2014	31/08/2015	4,410.00		
TLR2	01/09/2015		4,455.00		

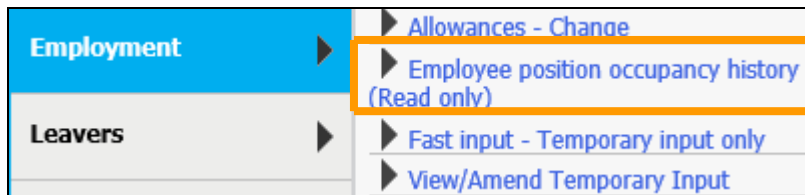
Select the Element to be changed and change the Cash value and Save.



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.

5.7 Employee position occupancy history (Read only)

This gives a view only overview of the history of the position.

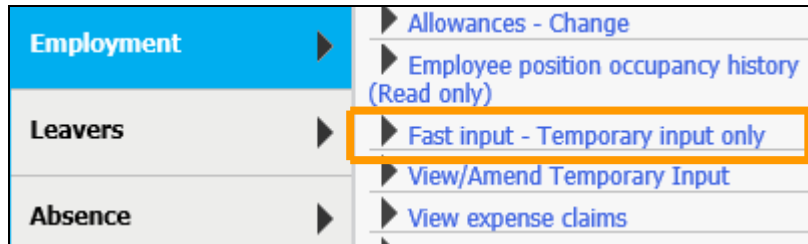


Position occupancy history: iTrent System Officer (15620)									
Position details									
		Position start date 01/03/2013							
		Position end date							
+ Set search criteria									
+ Occupancy start	- Expected occupancy end	- Occupancy end	- Occupant name	- Personal reference	- Occupancy type	- Position occupancy reference	- FTE value	- Grade	-
12/10/2015	31/10/2016		Miss Jayne L Smith	0047529	Standard	0047529A	1.00	GRADE 10	
16/02/2015		11/10/2015	Vacant		Standard		1.00	GRADE 10	

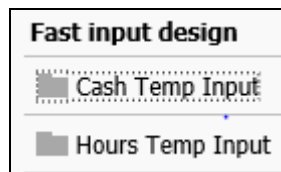
5.8 Fast input – Temporary input only

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.

Fast input screens are templates where multiple employees can have payments made without the need to open individual personal screens.



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



When a template is selected they open to full screen format for easy of data entry.

Template completion

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

A screenshot of the 'Cash Temp Input' form. The 'Payroll' dropdown menu is set to 'MSCH' and is highlighted with an orange box. Other fields include 'Payment date' (26/07/2016 09:00 Main), 'Date earned' (31/07/2016), and 'Smart group'.

Enter the employee payroll number and click the green Validate button or the tick at the end of the row. If an employee only has one job the job field will populate.

A screenshot of a table with columns: 'Employee payroll number', 'Employee name', 'Job', 'Code', 'Element', and 'Cash Amount'. The 'Employee payroll number' field is highlighted with an orange box. The table contains one row for 'Ms Clare L Brown' with a job of 'Teacher Villiers High School (Current)', a code, and a cash amount of 25.0. A green 'Validate' button is highlighted with an orange box. Below the table are buttons for 'Validate', 'Save', and a home icon.

Employee payroll number	Employee name	Job	Code	Element	Cash Amount
0044374	Ms Clare L Brown	Teacher Villiers High School (Current)			25.0

If an employee holds two or more jobs the validation will prompt for a contract or position to be selected. Choose the correct one from the drop down list and re validate.

Employee payroll number	Employee name	Job	Code	Element	Cash Amount
⚠ A contract or position value must be specified.					
0028388	Miss Jenny Tested	(Contract)			✓

Validate
Save
Home

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

Populate the relevant element code in the Code field (refer to Appendix 1). If this code is incorrectly entered or left blank a warning message will appear.

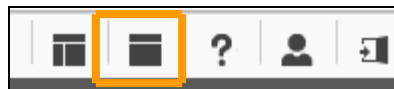
Enter the cash amount, do not use the £ sign or the hours depending on the form used.

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, the data will go for payment and the screen will be returned blank.

To return to a split screen and view the fast input design list click the Normal view button



5.9 View/Amend Temporary input

Once temporary input has been entered it cannot be viewed on the fast input screens as it disappears after saving.

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

Employment	▶ Allowances - Change
	▶ Employee position occupancy history (Read only)
Leavers	▶ Fast input - Temporary input only
	▶ View/Amend Temporary Input
	▶ View expense claims

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 there error is on the element code or the position then the details must be deleted and input again.

Temporary element details: BOOSTER CLASSES

Element details

Level **Teacher Villiers High School (Current)** ▼

Element 1675 **BOOSTER CLASSES** ▼

Value 25.00


Type **Cash** ▼

Override

Date earned 31/07/2016

Payment period **26/07/2016 09:00 Main** ▼

Payroll **MSCH** ▼

Save **Delete** **New** 




5.10 View expense claim

Select the View expense claim link and an individual's Time & Expense claims are displayed in the object pane.

Employment	▶ Allowances - Change
	▶ Employee position occupancy history (Read only)
Leavers	▶ Fast input - Temporary input only
	▶ View/Amend Temporary Input
Absence	▶ View expense claims
	▶ View expense receipts
	▶ New expense claim

Click on any claim to view the summary in the display pane.

Organisation: Ealing Council Org People: Smith, Jayne Time & Expenses claims Time & Expenses claim summary

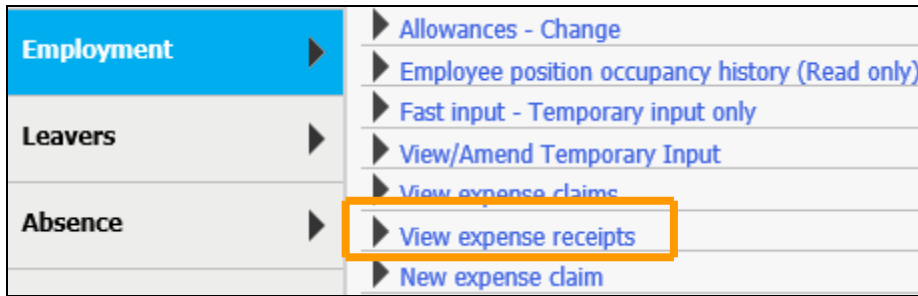
  

Select all

Claim	Reference	Payroll Job title	Start date	Submitted date	Authorised date	Cut off date	Authorisation status
<input type="checkbox"/> Ealing Exp & Mileage	EEXP0000005648	MGEN iTrent System Officer	01/06/2016	19/07/2016	19/07/2016	12/07/2016	Authorised
<input type="checkbox"/> Ealing Exp & Mileage	EEXP0000005649	MGEN iTrent System Officer	01/06/2016			12/07/2016	Provisional
<input type="checkbox"/> Ealing Exp & Mileage	EEXP0000005647	MGEN iTrent System Officer	01/01/2016	12/07/2016	12/07/2016	12/07/2016	Authorised
<input type="checkbox"/> Ealing Exp & Mileage	EEXP0000002021	MGEN iTrent System Officer	01/11/2015	23/11/2015	23/11/2015	06/11/2015	Authorised

5.11 View expense receipts

All claims should have receipts attached when they are submitted to payroll.

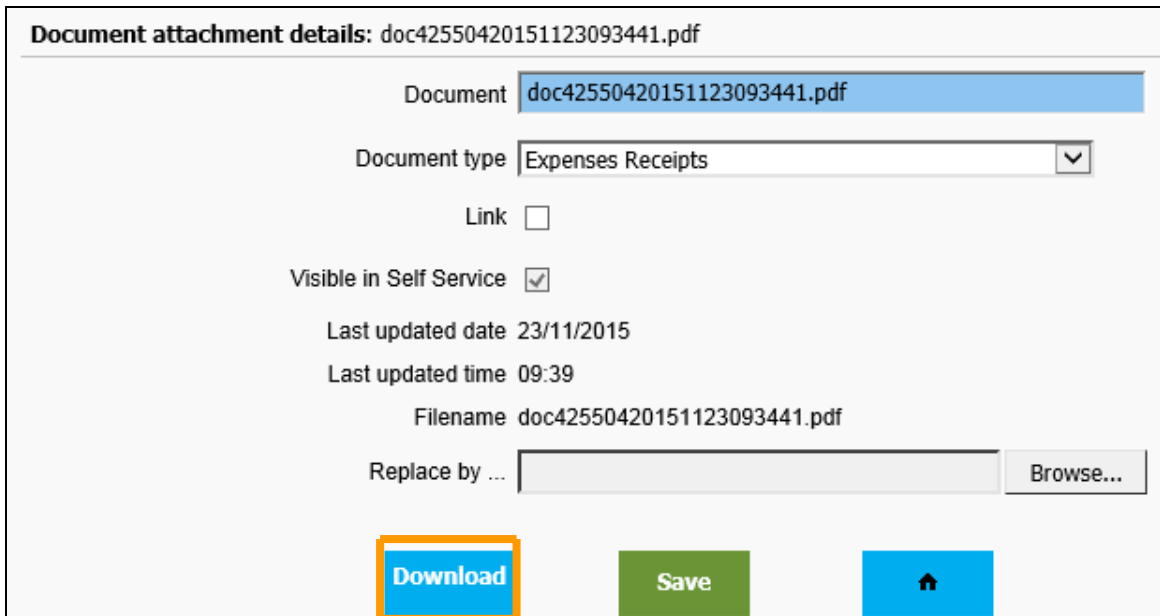


If a person's expense list is already open select the claim for which the receipt needs to be viewed and click the View expense receipts link.

If a person has not yet been selected the link will prompt a person search and then the claim in question needs to be highlighted.

Both these prompts will appear as a red to orange flashing outlined box.

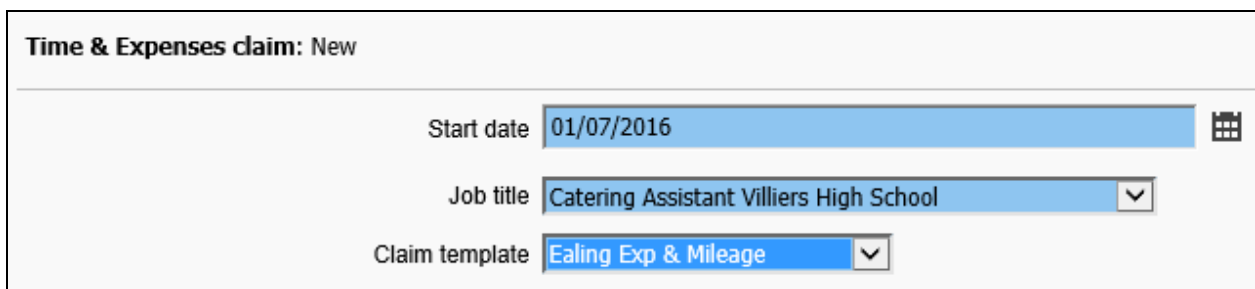
The document can be downloaded and viewed by clicking the Download button.




5.12 New expense claim

Most employees have access to submit their own claims through self service, however there may be occasions where these need to be added by a third party.

Click the New expense claim link and select the employee required using the search facility in the object pane.

A screenshot of the 'Time & Expenses claim: New' form. The form has three fields: 'Start date' with the value '01/07/2016' and a calendar icon; 'Job title' with the value 'Catering Assistant Villiers High School' and a dropdown arrow; and 'Claim template' with the value 'Ealing Exp & Mileage' and a dropdown arrow.

Enter the start date of the claim, this should be the first date a claim is being made for and select the correct position. There is only one available template for selection, then click .

The template has 3 pages:
 Page 1 Expense claim form
 Page 2 Mileage claim form
 Page 3 Standard journey mileage claim form

Page 1 – Expenses

Select the type of expense from the first drop down list.
 Enter the date of the expense using the calendar and a receipt number which is just a reference so payroll can check the attachments easily.
 Detail the expense in a free text field and enter the amount to be claimed.

Please note that if the amount filed is not completed a payment will not be made.

Cost codes default to that of the person making the claim, only complete this field if payment is coming from a different department/service.

Add additional lines by clicking the + at the end of the row.

Page 2 – Mileage (non-standard journeys)

Select the vehicle registration number and the scheme type.

Scheme types: Bicycle
 Casual in borough
 Motorcycle
 Out of borough

Mileage Claim Form

[Page 1 - Expenses](#)
[Page 2 - Mileage \(non Standard Journeys\)](#)
[Page 3 - Mileage Standard Journeys](#)
[Click for Mileage Guidelines](#)

I confirm that my car is insured, roadworthy, fit for it's purpose and has a current MOT certificate (if applicable).
I further confirm that I hold a valid driving license which permits me to legally drive this vehicle.

If you are claiming for more than one scheme eg. out of borough and casual in borough, you will need to complete an additional claim form.

Vehicle		Scheme		Cost Code	
LM55 TZP		CASUAL IN BOROUGH			
Journey Date	Miles claimed	Journey From	Journey To	Reason for Journey	Fuel Receipt Number

The reason for journey field can be double clicked to expand it to allow for 255 characters, once completed, select Update to close.

255

Update Clear Close

Page 3 – Mileage standard journeys

Select the vehicle registration number and the scheme type.

- Scheme types:
- Bicycle
 - Casual in borough
 - Motorcycle
 - Out of borough

Select the journey from the drop down list and enter the date.
The other fields will be automatically populated except for the Reason which needs to be entered.

Vehicle		Scheme		Cost Code		
LM55 TZP		CASUAL IN BOROUGH				
Journey	Journey Date	Miles claimed	Journey From	Journey To	Reason for Journey	Fuel Receipt Number
Acton House		20	Perceval House	Acton House		

Add additional lines by clicking the + at the end of the row.

Once completed click the green Save button. The claim is now available in the object pane.

Claim	Reference	Payroll	Job title	Start date	Submitted date	Authorised date	Cut off date
Ealing Exp & Mileage	EEXP0000005651	MSCH	Cleaner Villiers High School	01/07/2016			14/08/2016

5.13 Expenses claim submission

Once the claim has been saved it is good practice to submit the claim immediately.

From the homepage click the expenses claim submission link. Enter the password used to log in and click the Approve button.

Time & Expenses claim submission:

Claim template Ealing Exp & Mileage

Job title Cleaner Villiers High School

Time & Expenses claim reference EEXP0000005651


Payroll MSCH

Start date 01/07/2016

Cut off date 12/07/2016 - This claim will not now be paid until 26/08/2016.

Password

Approve



The timesheet status changes to Authorised.

Job title	Start date	Submitted date	Authorised date	Cut off date	Authorisation
Cleaner Villiers High School	01/07/2016	17/08/2016	17/08/2016	14/08/2016	Authorised

5.13 Payscale changes

Click the Payscale changes link and select the employee required using the search facility in the object pane.

Employment	▶ Allowances - Change
	▶ Employee position occupancy history (Read only)
Leavers	▶ Fast input - Temporary input only
	▶ View/Amend Temporary Input
Absence	▶ View expense claims
	▶ View expense receipts
Bookmarks	▶ New expense claim
	▶ Expenses claim submission
	▶ Payscale Changes

If the employee has more than one job, click the correct one that needs to change. The cursor will jump to the effective date field, enter the date at which the change will take effect.

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

Change the grade, if applicable, and the FT Salary. Enter a reason for the change from the drop down list and Save.

Payscale values : Teacher Villiers High School

Grade POST THRESHOLD 03

FT Salary 03 -- 46,365.00

Grade payment table TEACHER POST THRESHOLD

Grade minimum 03 -- 46,365.00

Grade maximum 03 -- 46,365.00

FTE value 0.73

Pro-rated rate of pay 33,720.00

Change reason

5.14 Attach document to employee

Documents can be attached once scanned and saved to a network drive. Select the Attach document to employee link and search for the employee.

Attachments and Letters

- ▶ Attach document to employee
- ▶ View document attachments
- ▶ Run contractual change letter
- ▶ Print / re-print 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.

Document attachment details: New

Document

Document type

Link

Visible in Self Service

Last updated date

Last updated time

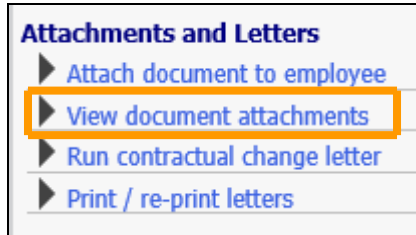
Filename

Select a file ... Browse...

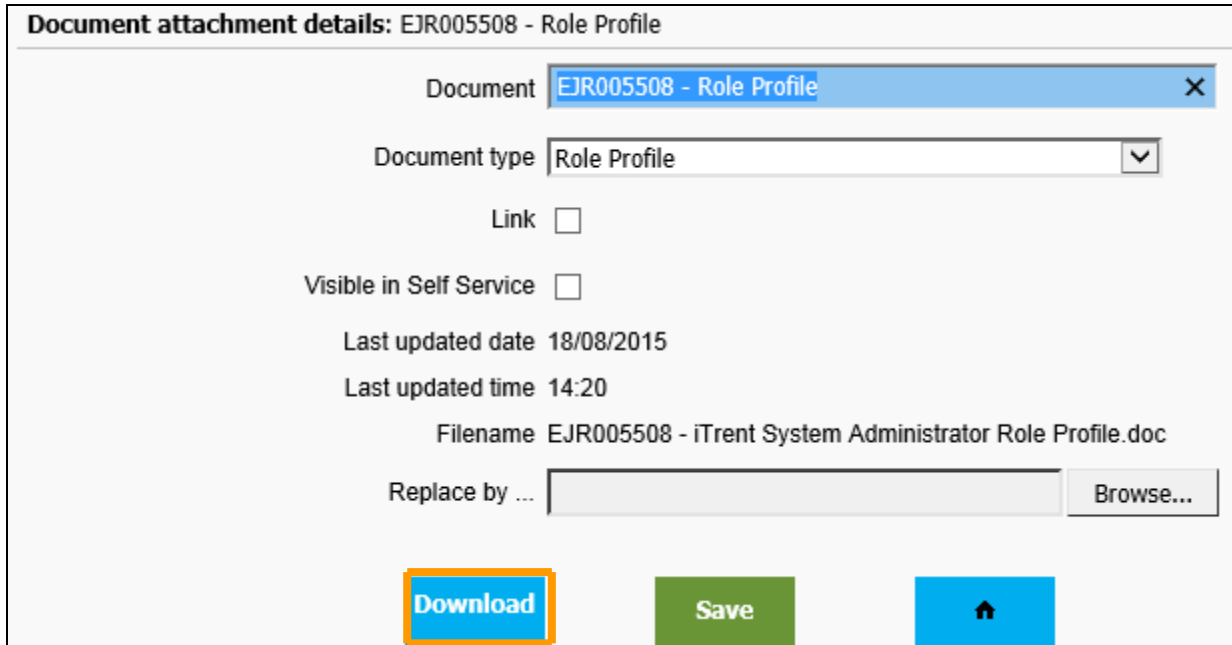
Save

5.15 View document attachments

To view a document it must be downloaded first.
Select the View document attachments link and search for the employee.

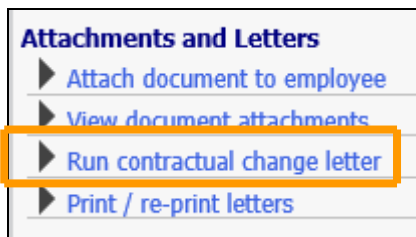


Select the document to be viewed from the object pane and click the Download button.



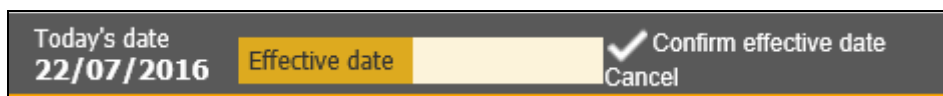
5.16 Run contractual change letter

When a contractual change has been made and notification has been received confirming authorisation, run and print a contractual change letter.



Select the Run a 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.




It is essential that the effective date represents the date when the change comes into effect from otherwise the letter will not populate the correct information.

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

Run document merge:

Template description 

If the employee only has one position then this does not have to be selected. However, if there is more than one position click on the one that has the contractual change.

Template description 

Position selection

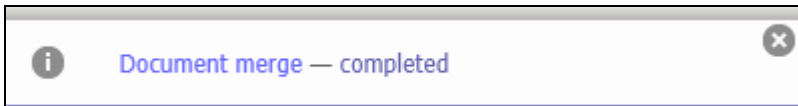
Job Title	Position Reference
Senior Clerk	22412
Business Support Officer	P013785

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 Promotion
SCHOOLS - Performance Pay Progression Leadership (Heads)
SCHOOLS - Performance Pay Progression Leadership
SCHOOLS - Performance Threshold Move to next point
SCHOOLS - Performance Threshold for Teachers move up to UPS
SCHOOLS - Teacher Pay Increase following performance review

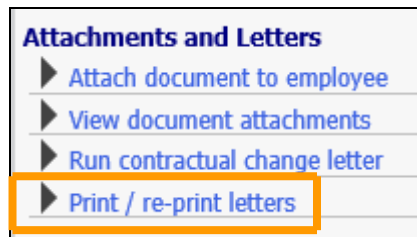
Select the relevant letter and click .

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

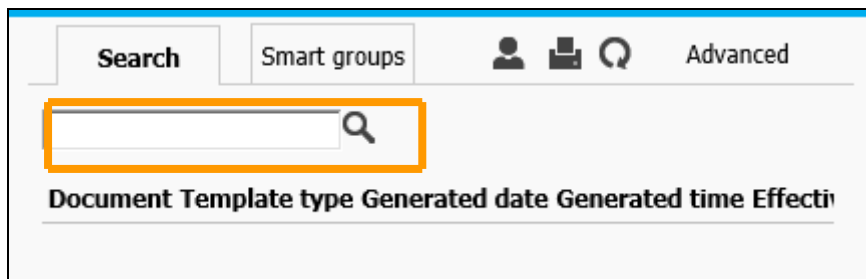


5.17 Print and re-print letters

Select this link to print the generated document.



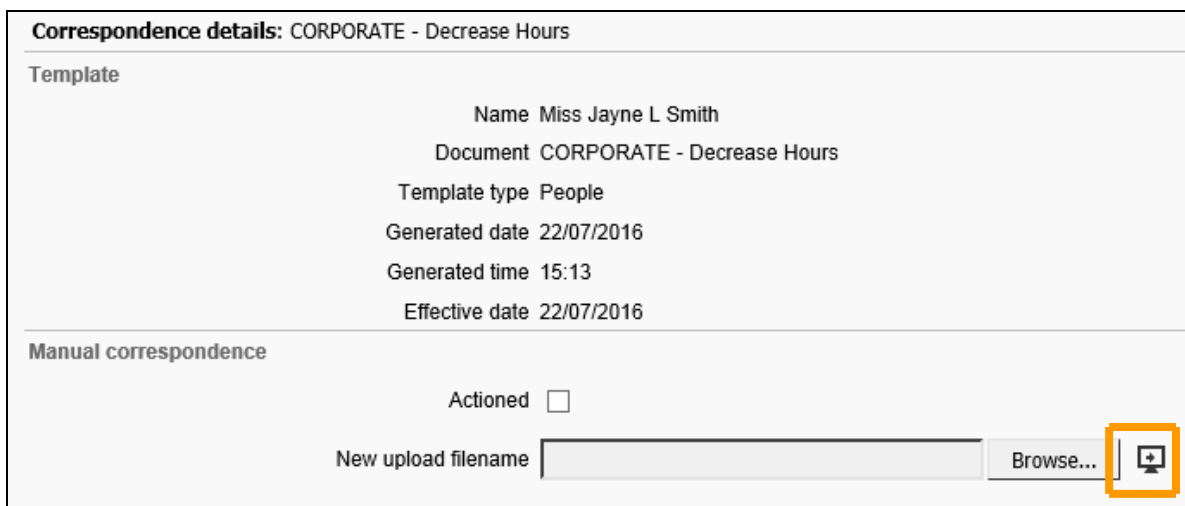
Search for the document, enter SCHOOLS and click the magnifying glass icon.



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

Document	Template type	Generated date	Generated time	Effective date
SCHOOLS - Pay Change to Grade - Re-graded	People	12/02/2014	11:08	12/02/2014
SCHOOLS - Increase Hours	People	25/10/2011	18:10	26/09/2011

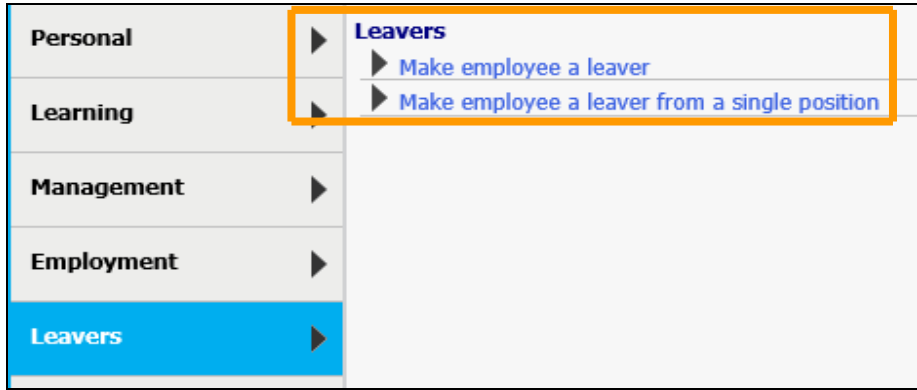
Click the Download icon to the right of Browse and open the document.



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.

6.0 Leavers

To make an employee a leaver from any position or the school, click on the link and search for the person.

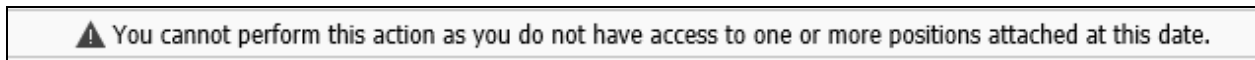


Make employee a leaver

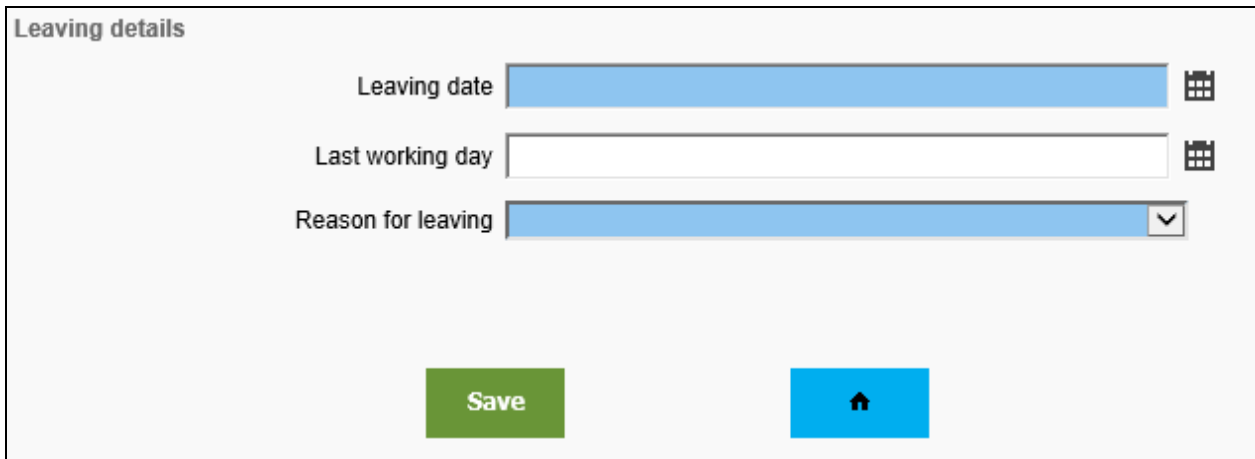
Use this to make an employee a leaver from the school, i.e. employee is leaving all jobs with the school. This will end the record completely and payroll will issue a P45.

If the employee has more than one position at your school and is only leaving one of them please do not use this leaving form. In this case 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



Click the Make an employee a leaver link and select the employee using the search facility.

A screenshot of the 'Leaving details' form. It contains three input fields: 'Leaving date' with a calendar icon, 'Last working day' with a calendar icon, and 'Reason for leaving' with a dropdown arrow. Below the fields are two buttons: a green 'Save' button and a blue button with a home icon.

Enter the Leaving date using the calendar icon, there is a system error where the save button disappears if the date is entered manually.

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

Make an employee a leaver from a single position

When an employee has multiple positions but is only leaving one of them, make them a leaver from a single position but not from the school as a whole.

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 ending one position tick the box next to the ending position, as shown and Save. An email is sent to the initiator of the process confirming the update

Occupancy maintenance: Mrs A K Smith

Leaving details

Leaving date

Last working day

Reason for leaving

Exit interview complete

Occupancy details

	Ealing Council Org	<input type="checkbox"/>
	0001275	<input type="checkbox"/>
	School Meals Supervisory Assistant (12097)	<input checked="" type="checkbox"/>
	Teaching Assistant (P004619011)	<input type="checkbox"/>

Save

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

Enter the last day of service and the last working day, as they may be different. Select the reason for leaving from the drop down list and enter the job titles of the positions leaving.

Add a value for any outstanding leave if it needs to be paid.

7.0 Absence

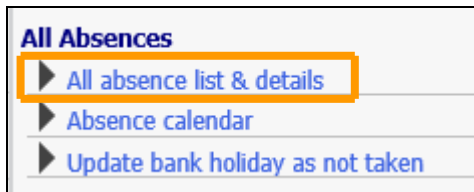
Absence relates to annual leave, sickness and other forms of absence.

To add and review absence from the homepage click the Absence tab, the absence links are grouped by absence type.

Absence is recorded against position, so if an employee has more than one position, by default absence is recorded against them all.

7.1 All absence list & details

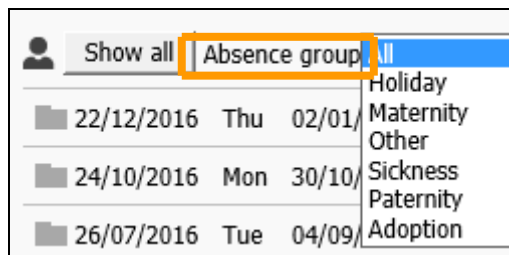
Select the All absence list & details link and search for the employee.



All types of absences are listed, showing the start and end dates and days .

Show all		Absence group		All	
22/12/2016	Thu	02/01/2017	Mon	Non-working periods	Teacher Villiers High School
24/10/2016	Mon	30/10/2016	Sun	Non-working periods	Teacher Villiers High School
26/07/2016	Tue	04/09/2016	Sun	Non-working periods	Teacher Villiers High School
04/07/2016	Mon	04/07/2016	Mon	Sickness	Teacher Villiers High School Back / Neck
13/06/2016	Mon	13/06/2016	Mon	Sickness	Teacher Villiers High School Eye
30/05/2016	Mon	05/06/2016	Sun	Non-working periods	Teacher Villiers High School
02/05/2016	Mon	02/05/2016	Mon	Non-working periods	Teacher Villiers High School
21/04/2016	Thu	21/04/2016	Thu	Training and INSET (paid)	Teacher Villiers High School
18/04/2016	Mon	19/04/2016	Tue	Sickness	Teacher Villiers High School Chest / Respiratory
25/03/2016	Fri	10/04/2016	Sun	Non-working periods	Teacher Villiers High School

To select to view only a specific absence group, choose from the drop down list.



To view the details of the absence in the display pane, click on the specific occurrence.

7.2 Absence Calendar

Click the Absence calendar link and select the employee required using the search facility in the object pane.

- All Absences**
- ▶ All absence list & details
- ▶ **Absence calendar**
- ▶ Update bank holiday as not taken

Absence calendar: Mrs Jayne L Smith

Calendar selection options

Display period: **This quarter**

Period from: 01/07/2016
Period to: 30/09/2016

Position: iTrent System Officer (12/10/2015 -)

Position reference: 15620
Position occupancy reference: 0047529A
Reporting unit: iTrent Support Team
Reports to: Service Manager

Calendar colour options

Please click on a day for further options

July

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Jayne Smith				■	■													■				■			■	■						

☼ = Awaiting authorisation □ = am/pm split ▲ = Clashing events
 ■ = AM absence □ = PM absence □ = Working pattern

Change the Display period in the Calendar selection options to alter the date range.

- Month - centred on effective date
- Month from today
- Quarter from today
- Specific date range
- This month
- This quarter**
- This week
- Yearly view (dates)
- Yearly view (days)

With a long date range use the scroll bar under the dates to move along.

Alternatively use the navigation buttons to move back and forth between months.

Please click on a day for further options

July

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22
				■	■													■				■

Expand the + Calendar colour options to view the key to the colour scheme.

– Calendar colour options

Bank holiday <input checked="" type="checkbox"/>	Company holiday <input checked="" type="checkbox"/>	Holiday <input checked="" type="checkbox"/>
Sickness <input checked="" type="checkbox"/>	Learning activity <input checked="" type="checkbox"/>	Other <input checked="" type="checkbox"/>
Maternity / Paternity <input checked="" type="checkbox"/>	Adoption <input checked="" type="checkbox"/>	Working pattern <input checked="" type="checkbox"/>

Choose not to display certain types of absence within the calendar by clearing the tick box for the relevant absence type.

Click on a specific date on the calendar to access a floating menu which allows an absence to be created against that date.

Create sickness absence
Create holiday absence
Create 'other' absence
Create maternity absence
Create ordinary paternity absence
Create additional paternity absence
Create adoption absence
Check holiday entitlement
Check sickness entitlement
Check 'other' entitlement
Check patterns

7.3 Update a bank holiday as not taken

This is only relevant for all employees who work all weeks of the year.

Bank holidays dates are added to an individual's record automatically so If an employee works on a Bank Holiday these hours need to be added back on to the entitlement.


All Absences
▶ All absence list & details
▶ Absence calendar
▶ Update bank holiday as not taken

Select the Update bank holiday as not taken link and search for the person.

The holiday periods are then listed on the left, click the bank holiday that was worked and tick the box 'Not taken' and save.

Bank holiday details: Miss Jayne L Smith

Start


Date 

Type

Time

Hours absent

End

Date 

Type

Time

Hours absent

Absence

Absence type Bank Holiday & Ealing Days

Position iTrent System Officer

The hours taken for this period will change to zero.

7.4 New holiday absence

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



In most circumstances employees request holidays through self service and these present as a task for their manager to authorise.

Occasionally however, it may be necessary to add a holiday period.

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

Click the Add a holiday link and select the employee using the search facility in the object pane.

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

Holiday absence details: New

Holiday period

Holiday period

Holiday start

Holiday start date

Holiday start type

Holiday end

Holiday end date

Holiday end type

Absence

Absence type

Authorisation Not applicable

+ Holiday balances

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.

If a part day is selected the Holiday start time and Hours entered need to be completed in a time format i.e. 1:30 which equates to 1 hour and 30 minutes, then Save.

Holiday absence details: Mrs Jayne L Smith

Holiday period

Holiday period

Holiday start

Holiday start date

Holiday start type

Holiday start time

Hours absent

Holiday end

Holiday end time

Absence

Absence type

Authorisation Not applicable

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

- Holiday balances				
iTrent System Officer - Corp Annual Leave				
Holiday period	Entitlement	Taken	Scheduled	Balance
12/10/2015 - 30/09/2016 (Part)	283 hours	210 hours	21 hours	52 hours
01/10/2016 - 30/09/2017	173 hours	0 hours	77 hours	96 hours

7.5 Holiday absence details



Click the Holiday details link and select the employee using the search facility in the object pane.

Select a holiday period from the list in the object and view the details in the display pane. Details can be amended then save or entire records can be deleted using the relevant buttons.

Holiday absence details: Mrs Jayne L Smith

Holiday period

Holiday period

Holiday start

Holiday start date

Holiday start type

Holiday end

Holiday end date

Holiday end type

Absence

Absence type

Authorisation Not applicable

Position iTrent System Officer (Current)

+ Holiday balances

7.6 Holiday entitlement summary

Click the View an employee's holiday entitlement link and select the employee using the search facility in the object pane.

Holidays
▶ New holiday absence
▶ Holiday absence details
▶ Holiday entitlement summary
▶ Holiday entitlement adjustment

The holiday entitlement summary combines annual leave, public/bank holidays, the 3 Ealing days between Christmas & 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.

Position iTrent System Officer ▼

Period details

Holiday period dates 12/10/2015 - 30/09/2016 (Part) ▼

Length of service at relevant date 14 year(s) 10 month(s) 11 day(s)

Holiday period dates Corp Annual Leave ▼

Membership dates 12/10/2015 -

Entitlement for period 283 hours (Adjustment)

From	To	Duration	Remaining entitlement
19/10/2015	22/10/2015	28	255
30/10/2015	30/10/2015	7	248
17/12/2015	17/12/2015	3.5	244.5
25/12/2015	25/12/2015	7	237.5
28/12/2015	28/12/2015	7	230.5
29/12/2015	29/12/2015	7	223.5
30/12/2015	30/12/2015	7	216.5
31/12/2015	31/12/2015	7	209.5
01/01/2016	01/01/2016	7	202.5
25/03/2016	25/03/2016	7	195.5
28/03/2016	28/03/2016	7	188.5
02/05/2016	02/05/2016	0	188.5
18/05/2016	18/05/2016	3.5	185
30/05/2016	30/05/2016	7	178
01/06/2016	09/06/2016	49	129
18/07/2016	18/07/2016	7	122
22/07/2016	22/07/2016	3.5	118.5
25/07/2016	26/07/2016	14	104.5
29/08/2016	29/08/2016	7	97.5

↑

7.7 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, the banking of leave to be used at a future time, and the borrowing of 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.



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 AL year 2014/2015 then this needs to be added as an adjustment to AL year 2015/2016.

Holiday entitlement adjustment:

Employment details
Position: iTrent System Officer

Period details
Holiday period dates: 12/10/2015 - 30/09/2016 (Part)
Scheme name: Corp Annual Leave
Entitlement for period: 269 hours (287 hours Pro Rata)
Brought forward
Brought forward not used (lost)

Adjustment details
Adjustment type: Adjust

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
14/07/2016	CPTEST	14,000	Carry over from 14/15	30/09/2016	283 hours	+	-
				30/09/2016		+	-

Save

The default adjustment type is Standard, change this to adjust.

Adjustment details
Adjustment type: Standard

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.

Holiday entitlement summary:

Employment details

Position iTrent System Officer

Period details

Holiday period dates 12/10/2015 - 30/09/2016 (Part)

Length of service at relevant date 14 year(s) 10 month(s) 11 day(s)

Holiday period dates Corp Annual Leave

Membership dates 12/10/2015 -

Entitlement for period 283 hours (Adjustment)

7.8 New – Other absence details

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

Other

- ▶ New - Other absence details
- ▶ Other absence details

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

Other absence details: New

Absence period

Absence period More than one day

Absence start

Date

Type Full day

Absence end

Date

Type Full day

Expected end date

Absence

Absence type

Set as default


Absence reason <None>


Save

Enter the start date and select the type: Full day, Part Day, Half day – PM.

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

Absence start

Date 

Type 

Time

Hours absent

If **Half day – PM** is selected no hours need to be entered as the system will calculate this as half the working hours on the working pattern.

Enter the end date and select the type: Full day, Part Day, Half day – AM.

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

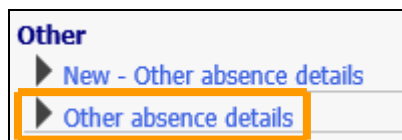
If **Half day – AM** is selected no hours need to be entered as the system will calculate this as half the working hours on the working pattern.

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

- Bereavement leave (paid)
- Career break (unpaid)
- Dependants' Leave (schools only)
- Election duties (paid)
- Flexi leave (paid)
- Industrial action (unpaid)
- Jury service (paid)
- Medical appointment (paid)
- Other Unpaid 30 Days
- Other unpaid
- Public duties (paid)
- Reserve forces (paid)
- Shared Parental Leave
- Special leave (paid)
- Study leave (paid)
- Toil
- Trade union duties (paid)
- Training and INSET (paid)
- Trips and Visits (paid)

7.9 Other absence details

Click the other absence details link and select the employee using the search facility.




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

7.10 New – Sickness absence details

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

Click the other absence details link and select the employee using the search facility.


- Sickness**
- ▶ **New - Sickness absence details**
 - ▶ Certification details
 - ▶ Sickness entitlement summary
 - ▶ New - certification details
 - ▶ Sickness absence details

Sickness absence details: New 

Sickness period


Sickness period

Absence start


Absence start date 

Absence start type

Absence end

Absence end date 

Absence end type

Expected end date 

Absence

Absence type Set as default

Absence reason

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

Other absence details: New 👤

Absence period

Absence period More than one day ▼

Absence start

Date 📅

Type Full day ▼

Absence end

Date 📅

Type Full day ▼

Expected end date 📅

Absence

Absence type ▼ Set as default

Absence reason <None> ▼

Save
🏠

Enter the start date and select the type: Full day, Part Day, Half day – PM.

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

Absence start

Date 📅

Type Half Day - PM ▼

Time

Hours absent

If **Half day – PM** is selected no hours need to be entered as the system will calculate this as half the working hours on the working pattern.

Enter the end date and select the type: Full day, Part Day, Half day – AM.

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

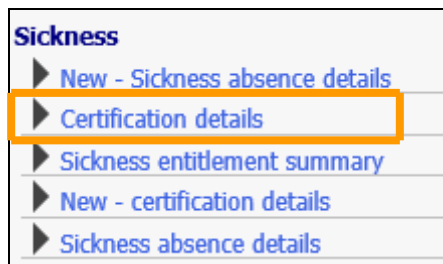
If **Half day – AM** is selected no hours need to be entered as the system will calculate this as half the working hours on the working pattern.

Select the absence type as sickness from the list, then enter the absence reason and Save.

Allergy
Anxiety
Asthma
Back / Neck
Blood Disorder
Burns / Poisoning / Frostbite / Hypothermia
Cancer / Tumour
Chest / Respiratory
Consent Withheld
Depression / Mental Health
Ear / Nose / Throat
Epidemic / Pandemic Infection
Eye
Fracture / Broken Bone
Gastroenteritis
Glandular
Gynaecological
Head Injury
Headache / Migraine
Heart / Cardiovascular
Infections including Cold and Flu
Kidney / Urinary
Liver
Mouth / Dental
Musculo-Skeletal
Nervous Illness
Neurological
Other
Pregnancy Related
Reported to Occ. Health

7.11 Certification details

Certification details should be loaded against sickness absence periods greater than seven calendar days.



Click the certification details link and select the employee using the search facility and select the absence period. The details will open in the display pane.

7.12 Sickness entitlement summary

Click the sickness entitlement summary link and select the employee using the search facility.

The display pane will change to show the Sickness Entitlement Summary form.

Sickness entitlement summary:

Absence details
Calculated to date

Employment details
Position iTrent System Officer

Period details
Absence scheme type OSP - Sickness
Length of service at relevant date 14 year(s) 8 month(s) 10 day(s)
Scheme name OSP Officers
Membership dates 12/10/2015 -

Band/Rate	Full	Already used	Available
1: 100	156 days	1	155
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.

7.13 New - certification details

Click the New - certification details link and select the employee using the search facility and select the absence period. The details will open in the display pane.

Sickness

- ▶ [New - Sickness absence details](#)
- ▶ [Certification details](#)
- ▶ [Sickness entitlement summary](#)
- ▶ [New - certification details](#)
- ▶ [Sickness absence details](#)


Enter Certification type from the drop down list and the start and end dates.


Certification details:


Certification type

Certification reason

Final certificate

Start date 

End date 

Submission date 

7.14 Sickness absence details

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





 Show all	Type	All			
Start date	Day	End date	Day	Type	Position
04/07/2016	Mon	04/07/2016	Mon	Sickness	Teacher Villiers High School
13/06/2016	Mon	13/06/2016	Mon	Sickness	Teacher Villiers High School

7.15 New – Maternity Absence Details


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

Click the Add a maternity absence link and select the employee using the search facility.

Maternity

-  [New - Maternity Absence Details](#)
-  [Maternity Absence Details](#)
-  [Maternity Request Letters](#)
-  [Maternity- Print and Reprint Letters](#)

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. 

Maternity absence details: New

Absence dates

Expected birth date

Issue date of MATB1

Calculated maintenance details

Expected week of childbirth

Earliest MPP start

Qualifying week commences

Earliest allowed MATB1 date

Key maternity dates

Maternity absence start date

Maternity absence end date

MPP start date

MPP end date

OML end date

AML end date

Additional information

Actual date of childbirth

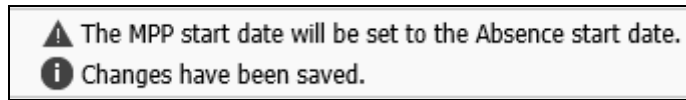
Stillbirth

Absence type

Reason for early absence




A notification confirming the change will appear in the display header.



7.16 Maternity absence details

Click the Maternity absence details link and select the employee using the search facility

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 letters 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.

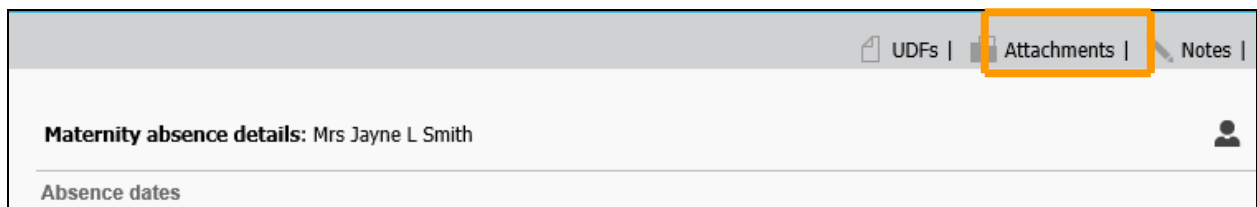
When the employee returns to work, if the Maternity Absence End Date is not completed, their pay will not revert back to normal as HRSSC Payroll will not be aware of this information.

If the employee's hours are changing when they return to work, this should be done through the Hours and/or payscale change link.

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

Both certificates must be attached to the new maternity record. Scan both certificates and save on a network.

Click the attachments icon.



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.

Document attachment details: New

Document

Document type

Link

Visible in Self Service

Last updated date

Last updated time

Filename

Select a file ... Browse...

[Save](#) [Home](#)

Entering a new maternity triggers a confirmation email to the HR Ops Team and Payroll.

7.17 Maternity Request Letters

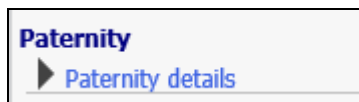
Maternity letters are now generated by HR, when leave is entered, changed and on the birth.

7.18 Maternity – Print and Reprint letters

Maternity letters are now generated by HR.

7.19 Paternity details


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




Click the Paternity absence details link and select the employee using the search facility.


Ordinary paternity absence details: New


Adoption


Expected birth date 


Absence type Paternity Leave 

Qualifying week commences


Paternity absence start date 

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.

8.0 Out of Office

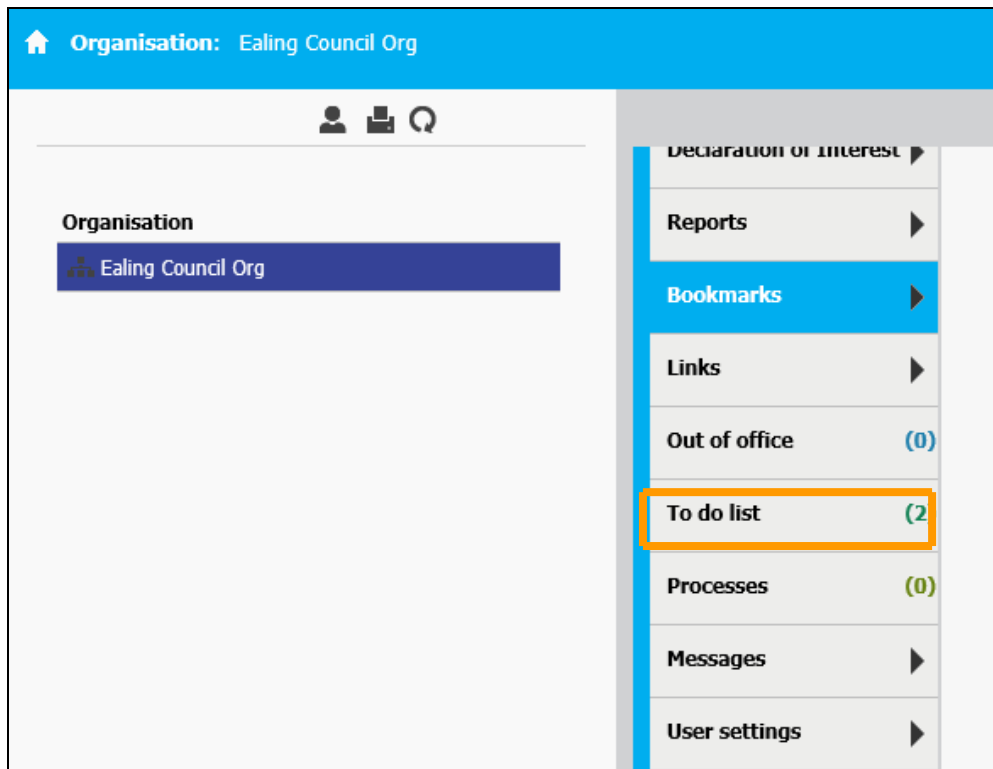
Click the Out of office tab and absence details show in the display pane, by person and type of absence.



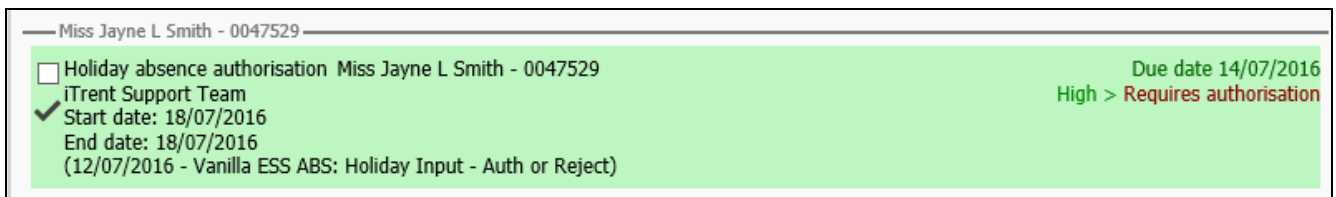
9.0 Authorising absence requests – where applicable

Notifications of requested absences is received by email from no-reply@ealing.webitrent.com.

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, they open on the right if the screen.



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

Holiday absence details: Miss Jayne L Smith

Holiday period
 Holiday period Full day

Holiday start
 Holiday start date 18/07/2016

Holiday end

Absence
 Absence type Holiday
 Authorisation Awaiting authorisation
 Position iTrent System Officer (Current)

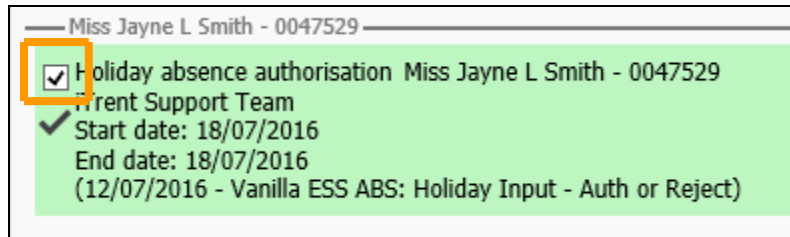
Authorisation
 User name CPTTEST
 Authorisation status
 Reason

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 a number of claims they can be checked and ticked then authorised together.

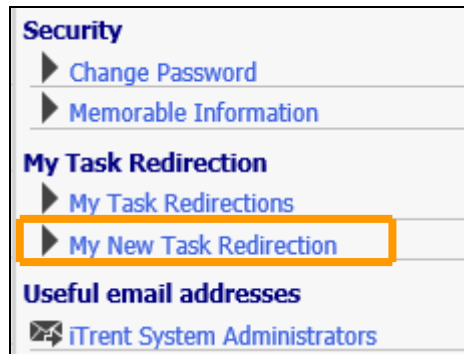


The task will disappear from the to do list and the requestor will receive a confirmation email.

The Holiday balance and absence calendar will be updated.

10.0 Redirecting tasks

To redirect future tasks, i.e. tasks that do not currently in the 'to do' list, click on the My Area tab.



Click My New Task Redirection link and enter the start and end date of the redirection. Use this for periods of AL for example.

The process type is Redirect all.

To search for the Redirect to person, click the magnifying glass icon and search by surname. Select the person and save. The username/employment number of this person will populate the field as users are set up with these reference numbers.

My task redirection details: New

Start date	<input type="text" value="01/08/2016"/>	
End date	<input type="text" value="17/08/2016"/>	
Process type	<input type="text" value="Redirect all"/>	
Redirect to	<input type="text" value="p046219"/>	
Password	<input type="text"/>	

Tasks must only be redirected to people with People Manager/People Manager Admin access.

If tasks are redirected to a sub-ordinate staff member, they must not authorise their own expense requests. These should be redirected back to their manager once the re-direction has elapsed, or to their manager's manager.

11.0 Amending or removing an authorised absence request

Select the Absence button on the homepage to access the links and select the one required.

Management	▶ Holidays
	▶ New holiday absence
	▶ Holiday absence details
Employment	▶ Holiday entitlement summary
	▶ Holiday entitlement adjustment
Leavers	
	Other
	▶ New - Other absence details
Absence	▶ Other absence details
	Sickness
Bookmarks	▶ New - Sickness absence details
	▶ Certification details
Links	▶ Sickness entitlement summary
	▶ New - certification details
Out of office (118)	▶ Sickness absence details

Search for the person the absence relates to using the search facility. Personal reference can be altered to surname using the drop down list.

🏠 **Organisation:** Ealing Council Org **People:**

Search Smart groups **Advanced**

Include leavers

Personal reference ▼ 🔍 + -

Name Unit Job title Sex Date of birth Social secu

Highlight the period to be changed and the details page will open on the right side.

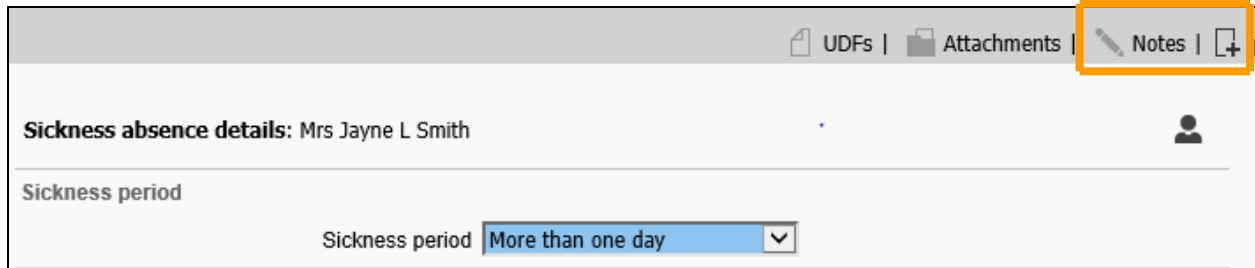
	Show all	Type	All holidays	▼		
Start date	Day	End date	Day	Type	Position	Reason
27/09/2016	Tue	28/09/2016	Wed	Holiday	iTrent System Officer	
25/07/2016	Mon	26/07/2016	Tue	Holiday	iTrent System Officer	
18/07/2016	Mon	18/07/2016	Mon	Holiday	iTrent System Officer	
13/06/2016	Mon	14/06/2016	Tue	Holiday	iTrent System Officer	
01/06/2016	Wed	09/06/2016	Thu	Holiday	iTrent System Officer	
18/05/2016	Wed	18/05/2016	Wed	Holiday	iTrent System Officer	
25/02/2016	Thu	26/02/2016	Fri	Holiday	iTrent System Officer	

Changes the dates and save to amend the record or delete to remove it.

12.0 Creating notes

Relevant notes can be created against an individual's record.

Specific notes should be created against the specific part of the employee's record. For example to create a note against an employee's sickness absence record, while in the specific sickness absence details form click on the notes icon.



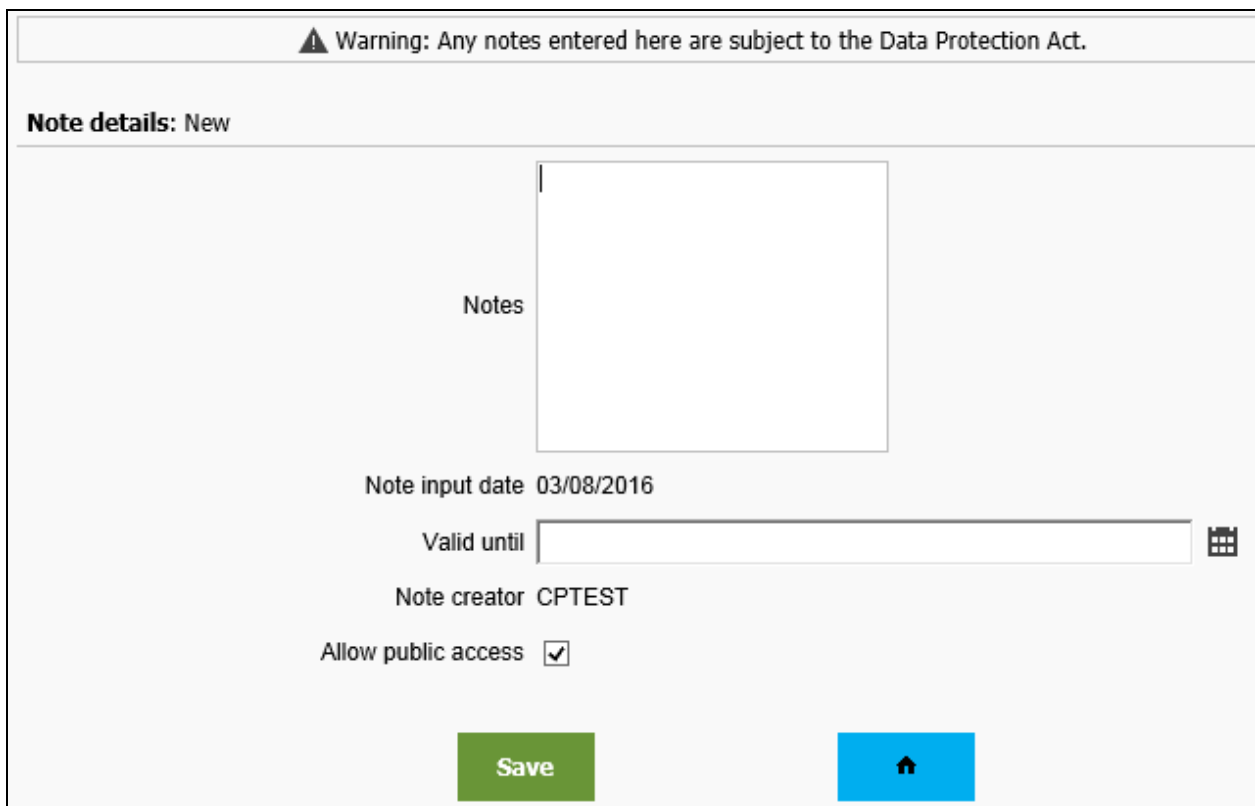
UDFs | Attachments | Notes | +

Sickness absence details: Mrs Jayne L Smith

Sickness period

Sickness period **More than one day** ▾

Notes are subject to the Data Protection Act and are date and time stamped with the details of the creator.



⚠ Warning: Any notes entered here are subject to the Data Protection Act.

Note details: New

Notes

Note input date 03/08/2016

Valid until 📅

Note creator CPTTEST

Allow public access

Save Home

If a valid until date is entered the note will no longer be visible after that date. Allow public access means all users who have access to this part of the system and person can read this note.

13.0 End the session

To leave iTrent People Manager click on the door icon in the top, right hand corner of the screen.



14.0 Support

For any queries please email itrentsupportteam@ealing.gov.uk

15.0 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

16.0 Element Codes

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 – Code 1585

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.