



# iTrent



## Introduction to iTrent



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## What is iTrent?

iTrent is the Council's new integrated HR and Payroll system which is replacing the current system, Vision from January 2022. It will provide a new modern look and feel with enhanced functionality for both managers (Manager Self Service) and employees (Employee Self Service).

This guide will show you how to create, update and manage sickness absences using iTrent.

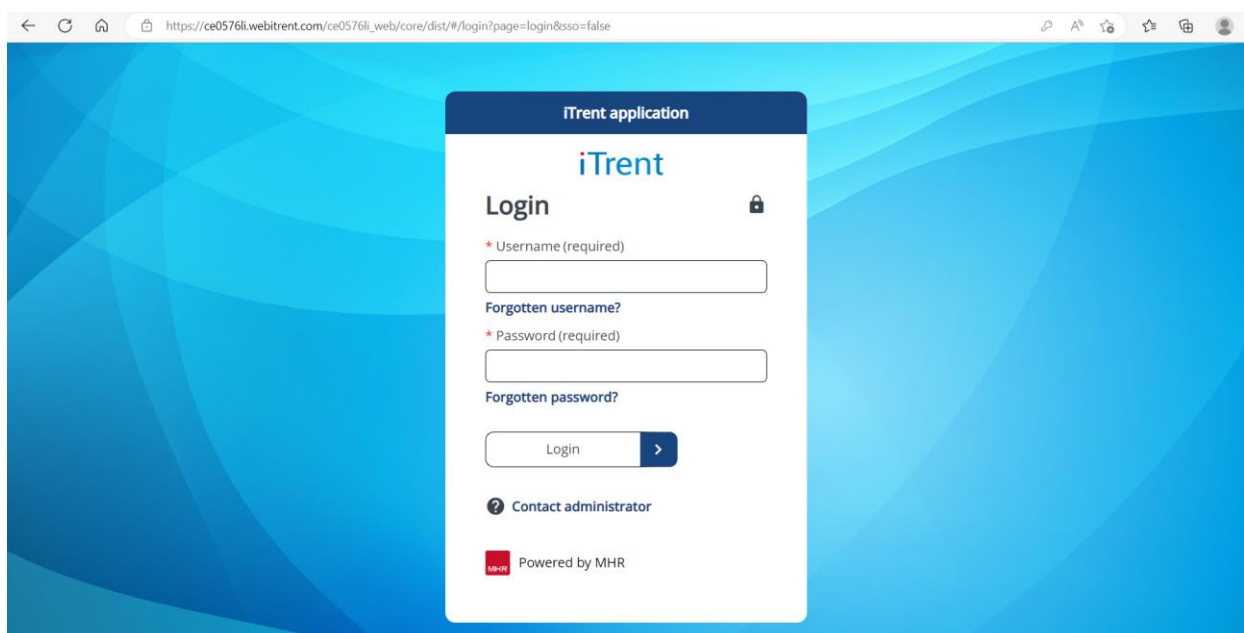
**Video guides and other resources will be available shortly.**

## How to Access iTrent – Manager Self Service (MSS)

A shortcut to iTrent has been remotely installed on your PC or laptop and can be accessed via a shortcut on your desktop or from the list of installed apps you can access by clicking the Windows start button at the bottom left of your desktop.

iTrent MSS is web based and can be accessed only from the Council's network, either from a Council office/site or if working from home when connected to the network via VPN.

If iTrent has not been installed on your PC or laptop then click this [iTrent Homepage Link](#) which will take you to the iTrent login page. iTrent can only be accessed using Microsoft Edge so if clicking the link opens in Internet Explorer, right click the link, select 'copy hyperlink', open Microsoft Edge and in the address bar right click and select 'Paste and Go'. The link will open the iTrent login page:

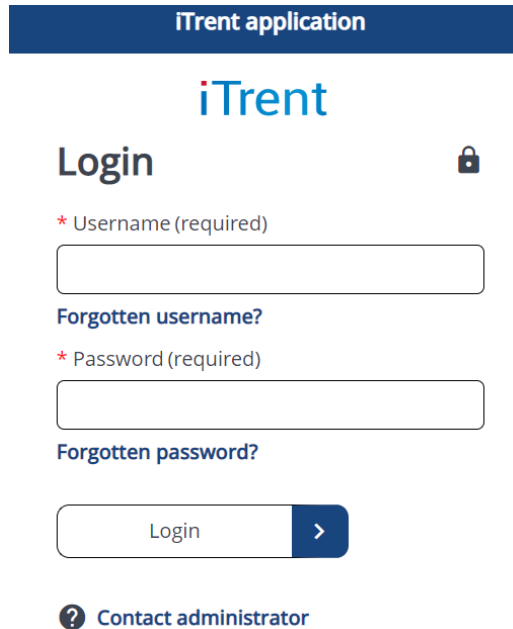


## How to Login to iTrent

You login to iTrent using your network username and your network password.

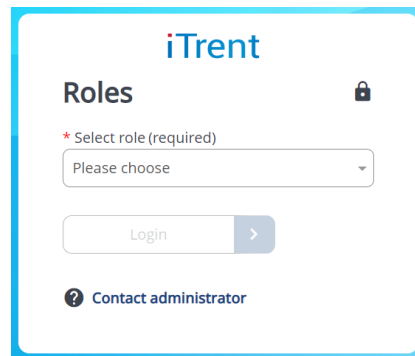
Click here to login to [iTrent](#):

Enter your network username and password and click 'Login' (or press enter on your keyboard).



The screenshot shows the iTrent application login page. At the top, there is a dark blue header with the text "iTrent application". Below the header is the iTrent logo. The main heading is "Login" with a lock icon to its right. There are two input fields: the first is for the username, labeled "\* Username (required)", and the second is for the password, labeled "\* Password (required)". Below each input field is a link: "Forgotten username?" and "Forgotten password?". At the bottom of the form is a "Login" button with a right-pointing arrow. Below the button is a link: "? Contact administrator".

If you have been assigned multiple role in iTrent you will be asked to select from the drop down list.



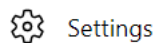
The screenshot shows the iTrent application roles selection page. At the top, there is a light blue header with the text "iTrent". Below the header is the heading "Roles" with a lock icon to its right. There is a dropdown menu labeled "\* Select role (required)" with the text "Please choose" and a downward arrow. Below the dropdown menu is a "Login" button with a right-pointing arrow. Below the button is a link: "? Contact administrator".

## Browser Settings and Maintenance

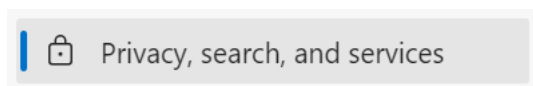
It is recommended that users clear the cache of the Microsoft Edge browser on a regular basis. This can be done via the browser settings menu:



Open the Microsoft Edge menu by clicking the 3 dots in the top right-hand corner of the browser



Click 'settings' in the menu (you may need to scroll to the bottom of the menu to see it)



Click 'Privacy, search and settings' in the left hand menu.

Choose what to clear

Scroll down the page and click 'choose what to clear' under Clear Browsing Data/Clear browsing data now

Last 7 days

- Browsing history**  
228 items. Includes autocompletions in the address bar.
- Download history**  
6 items
- Cookies and other site data**  
From 59 sites. Signs you out of most sites.
- Cached images and files**  
Frees up less than 26.8 MB. Some sites may load more slowly on your next visit.

Ensure the 'Cookies and other site data', and 'Cached images and files' are checked and click 'Clear now'.

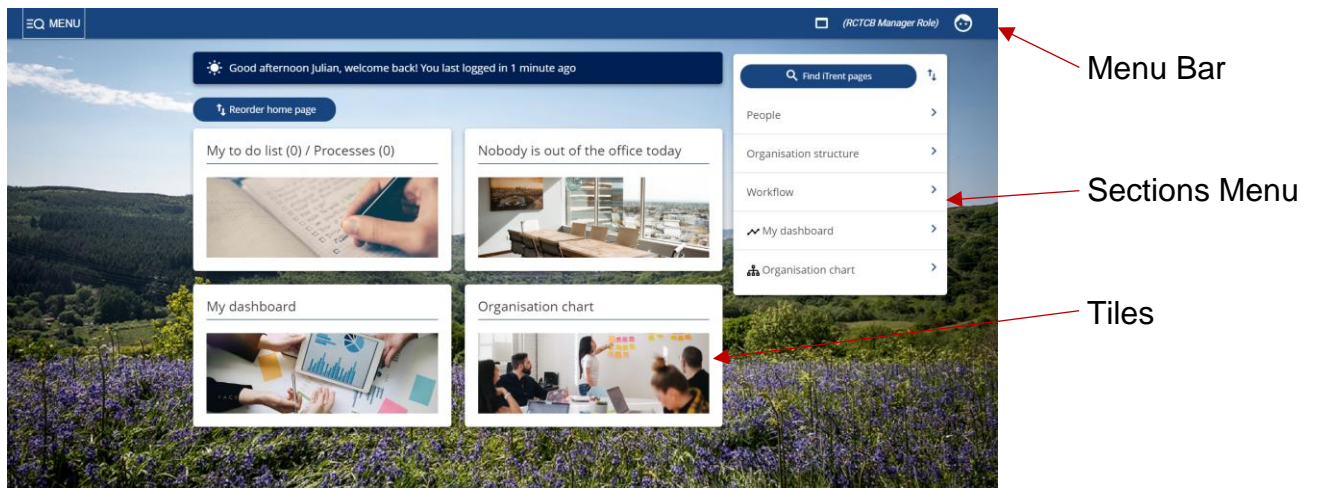
Uncheck the 'Browsing history' and 'Download history' items if you want to retain that information.

## The iTrent Homepage

The iTrent homepage has three main areas:



- The menu bar at the top of the screen
- The sections menu at the top right of the screen
- The Tiles in the centre of the screen




All 3 areas contain links to navigate around iTrent, view details about your employees and carry out actions and tasks.



## The Menu Bar

The Menu Bar has several icons that allow you to access areas of iTrent and carry out basic functions:

	<p>The menu icon opens the left-hand pane that allows you to perform searches of iTrent and view recently visited pages. This is described in more detail later in the guide.*</p>
	<p>This icon opens a new iTrent window</p>

	<p>This icon opens a user preferences menu which allows you to view any outstanding tasks and logout of iTrent (see below).</p>
 	<p>You can return to the homepage at any time by clicking the iTrent logo at the top left of the screen. If the iTrent logo isn't visible, click the Menu icon to show the left hand pane.</p>



ROLE

---

RCTCB Manager Role

---

My tasks and processes

---


← Click to view outstanding tasks and processes

About iTrent

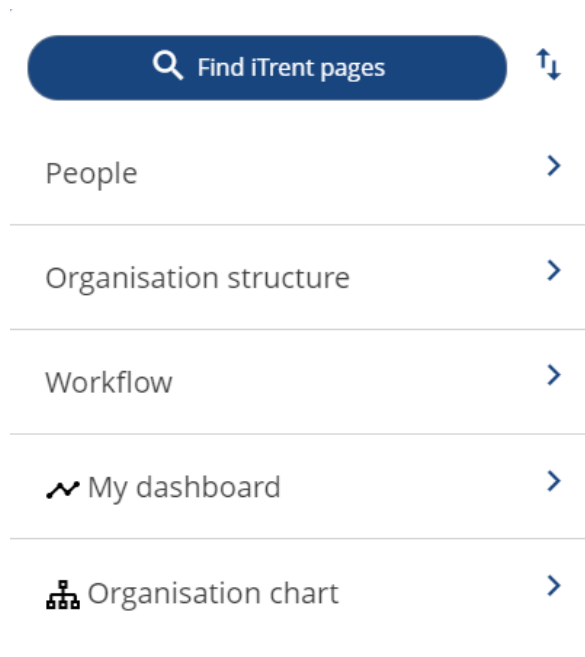
Log off

← Click to logout of iTrent

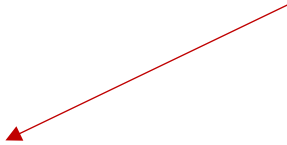
## The Sections Menu

The Sections menu contains links to various sections of iTrent. Clicking on the links will take you to the relevant pages. These are described in more detail later in the guide. You can also reorder the links using by clicking  and using the menu that appears.



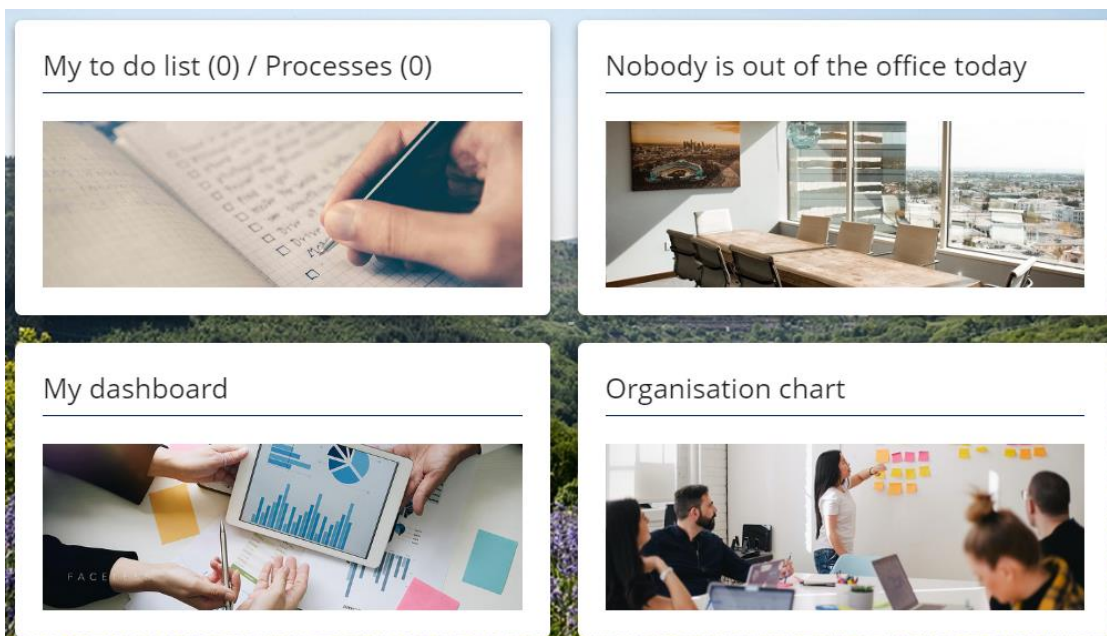


Click the links to access sections of iTrent

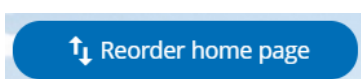


### The Tiles

The Tiles that sit in the centre of the homepage can access various items such as a to do list of outstanding tasks, a dashboard of absence data, details of any staff who are 'out of the office', and an organisation chart. Other information such as Council news will be available in the future. These are described in more detail later in the guide.




You can change the appearance of your homepage by clicking the button as shown below

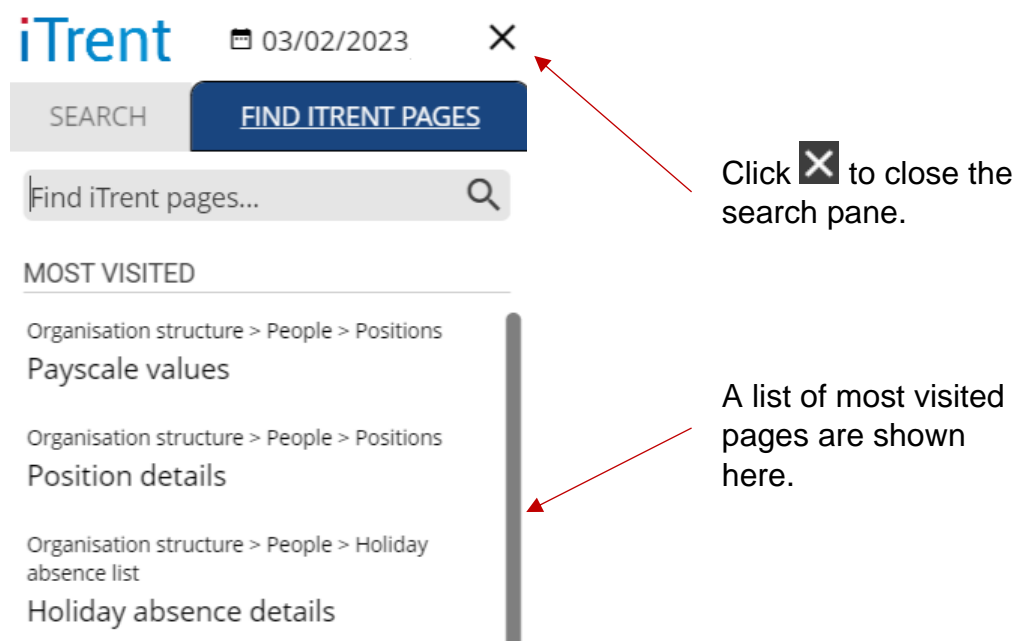



## Viewing Information in iTrent

### The Menu Bar

Clicking the menu icon in the top left of the screen opens the search pane. 'Find iTrent Pages' allows you to search for pages within iTrent. This option is also available from the Sections menu which is described in the next section. As you use and navigate around iTrent you'll also see a list of most visited pages. The items in the list are links that you can click to return to those pages.

You can close the search pane by clicking  or click the iTrent logo to return to the homepage:







Click  to close the search pane.

A list of most visited pages are shown here.

### The Sections Menu

There are several options available in the Sections Menu on the right-hand side of the homepage. You can view details of people, posts and tasks from this area.

People >	This allows you to view details of all employees in your area, including those that report directly to you and others in the wider staff group.
----------	---

 <span style="float: right;">&gt;</span>	This allows you to view details of the post structure in your area.
<span>Workflow</span> <span style="float: right;">&gt;</span>	This allows you to redirect tasks to colleagues (approve leave, expenses etc) if you're unable to complete them.
 My dashboard <span style="float: right;">&gt;</span>	This allows you to view real time absence data for your staff team.
 Organisation chart <span style="float: right;">&gt;</span>	This allows you to view an organisational chart of your staff team.
	This allows you to search for pages in iTrent, as described above.

## People

Clicking the People section will open the search pane on the left-hand side of the screen. A list of employees who directly report to you will be shown, together with a search option if you need to view anyone from your wider staff team. The default search is by surname, but you can choose several options from the menu. If you want to carry out a general search of all the employees in your area leave the search field blank and click the magnifying glass

SEARCH

FIND ITRENT PAGES

Organisation

Rhondda Cynon Taf County Boroug...

People

Search bar with 'Surname' dropdown, search icon, and plus sign

Results 6 People

Save this group



People

Search bar with 'Surname' dropdown

Results 6 People



Include leavers

Advanced search

Smart groups

Reporting view

Export to excel

Use the search function to view employees in your area.

A list of employees who directly report to you is shown under the search area.

Clicking the 3 dots will give the option to include leavers in your employee search

Name :

Unit : Workforce Development

Job title : Job Analyst

Personal ref. : 281306

Leaver : No

Position reference : POS009164002

Position occupancy reference : 281306  
AA

Payroll : 048M - Mid Monthly

Grade : Grade 10

Payment table : 90 - RCT CBC Grading S  
tructure

Hovering the cursor over a name in the search pane will show a pop-up window that contains basic information about the employee.

iTrent 03/02/2023 X

SEARCH FIND ITRENT PAGES

Organisation

Rhondda Cynon Taf County Boroug...

People

Surname Q +

Clicking the **slider button**, will show an expanded view that contains more information about the employees. \*

\*Some information may be hidden depending on your level of access to iTrent.

People

Surname Q +

Results 6 People

Save this group

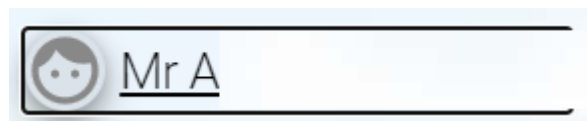
Name	Unit	Job title	Sex
	Workforce Development	Workforce Data & Job Analyst	

Clicking the name of the employee will take you to their individual record. The information on the screen is split into 3 areas that display information about the employee – Personal/Employment Details, a Calendar and Links and Folders:

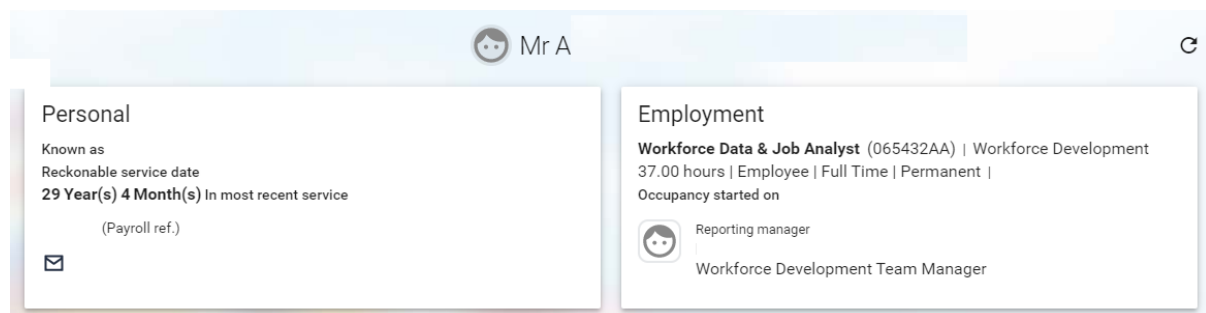
### Personal and Employment Details

The first section contains a summary of personal and employment information about the employee (name, job title etc).

Clicking the employees name will take you back to the summary screen:



As with the search function above many of the items contain hyperlinks that will take you to further details:



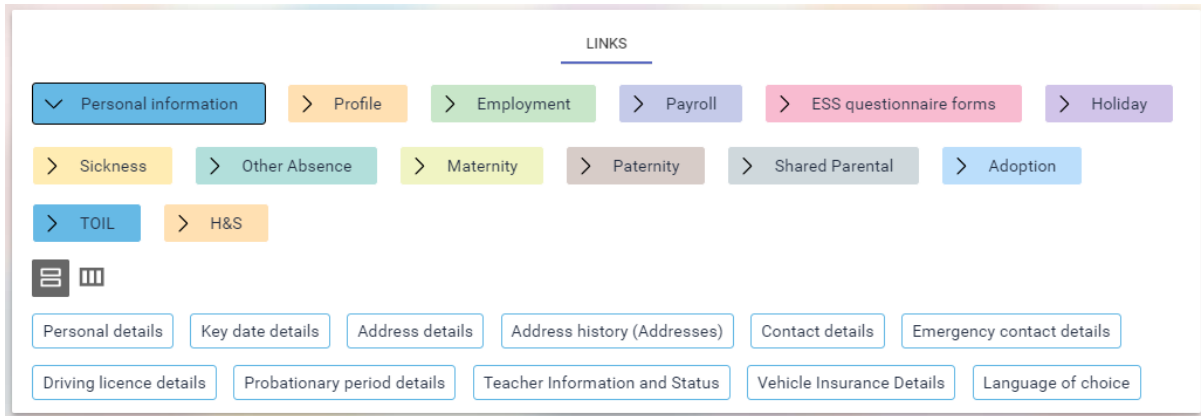
### Calendar

The Calendar shows the employees work pattern, annual leave balance and sickness absence details. (Viewing and creating absence details is explained in a further guide):

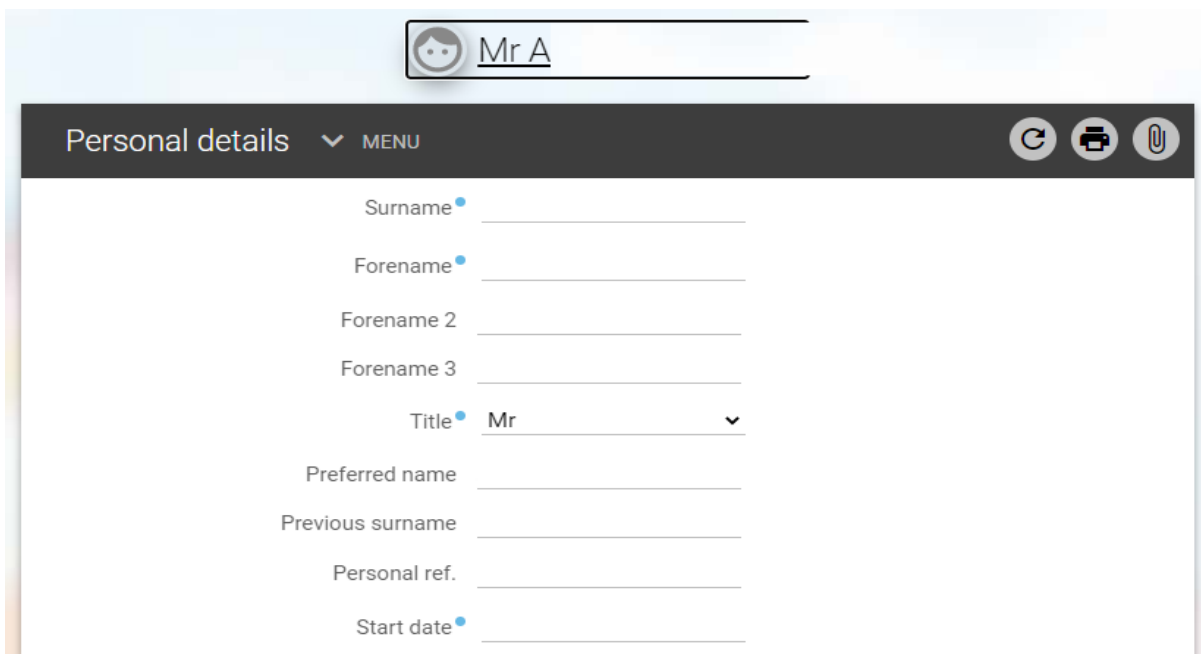


### Links and Folders

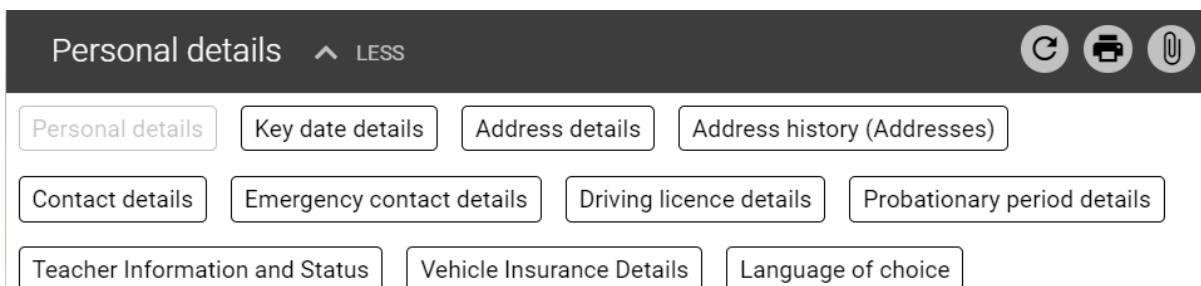
This section contains links to further iTrent pages containing details about the employee. \*



Clicking on a Folder (coloured tiles) will display the links (white tiles) contained in that folder. The active folder is identified by the directional arrow (the Personal Information folder is active in the above example). Clicking the relevant link will display further information about the employee:



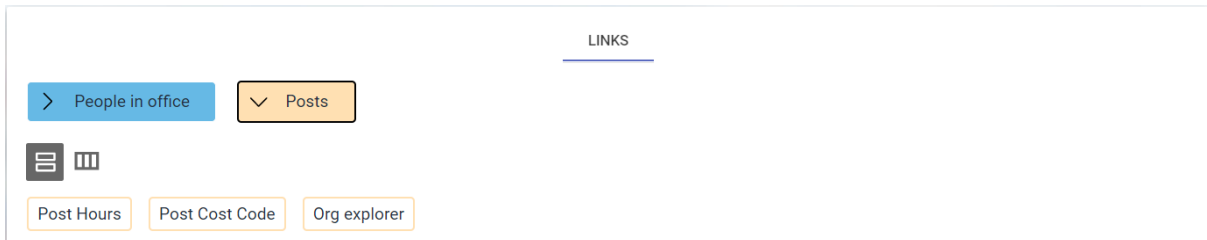
Clicking the menu button **▼ MENU** will show an expanded view containing all the links from the folder your currently viewing, meaning you don't have to go back to the previous screen to view other details (the link your currently viewing is greyed out):



\*Some information may be hidden depending on your level of access to iTrent.

## Organisation Structure

Clicking this link will allow you to use the Organisation Explorer to view posts in your area. Although you will see the whole Council structure when using this tool, you will only be able to view posts from your area. To start click Organisation Structure, select the Posts folder and Org Explorer:





You will see a pop-up window asking for the effective date you wish to view. It will default to today's date so click 'ok'.






Click 'ok' to view the organisation explorer

Click the '+' symbol to expand the relevant area of the structure to find the post(s) you want to view:

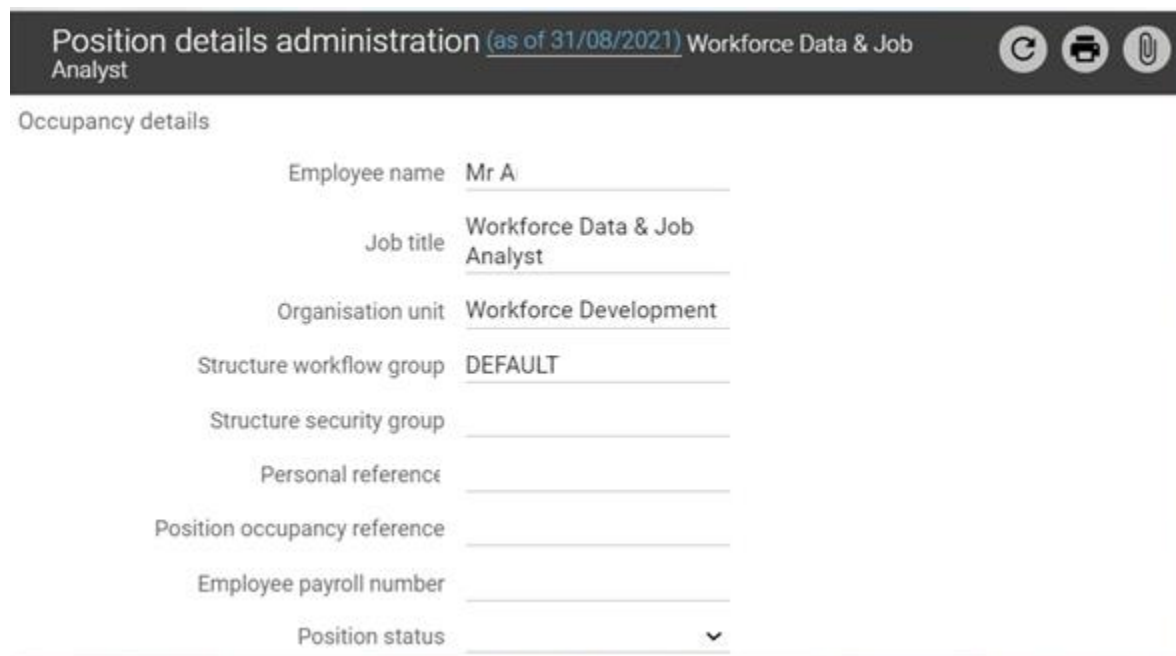




In iTrent, posts are identified with a table symbol (  ). Expanding the post view will show how many positions are filled/unfilled. These are identified with a chair symbol (  ). If a position is filled, you'll see the employee's name against it:

-  Workforce Development
- +  Job Analyst If a post is filled, the employee's name will appear here
- +  Senior Workforce Development Officer
-  Workforce Data & Job Analyst
- +  Workforce Data & Job Analyst

Clicking the post title will take you to an additional screen where you can view more details about the post, (or clicking the employee's name will take you to the employee's summary screen):



Position details administration (as of 31/08/2021) Workforce Data & Job Analyst

Occupancy details

Employee name	Mr A
Job title	Workforce Data & Job Analyst
Organisation unit	Workforce Development
Structure workflow group	DEFAULT
Structure security group	
Personal reference	
Position occupancy reference	
Employee payroll number	
Position status	

There are further links at the bottom of the screen that contain further information (managers name, post history etc).

### Workflow

Workflow allows you to redirect tasks (approving leave, expenses etc) to other officers should you be out of the office, on annual leave etc. You will be able to redirect the tasks to other suitable officers in your Council area, such as your line manager.

My task redirections

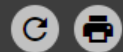


My task redirection details

Click 'My task redirection details' to redirect your tasks to another user.

My task redirection details New

MENU



Start date



End date



Process type Task processes



Process

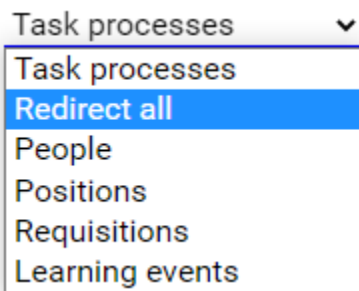


Redirect to



Password

Select the dates you want the redirection of your tasks to start and end by using the calendar icons . You can next choose what tasks to redirect, to redirect all tasks select 'Redirect all' from the drop-down menu:



Select 'Redirect all' from the drop-down menu


This function will be described in more detail in further user guides.

## My Dashboard

The dashboard displays real time, up to date absence data about the employees in your area. The dashboard currently displays the top absence reasons, a 2-year comparison of absence rates and most frequent absentees. After clicking the My Dashboard link, click the arrow symbol at the top right of the screen to view the dashboard .

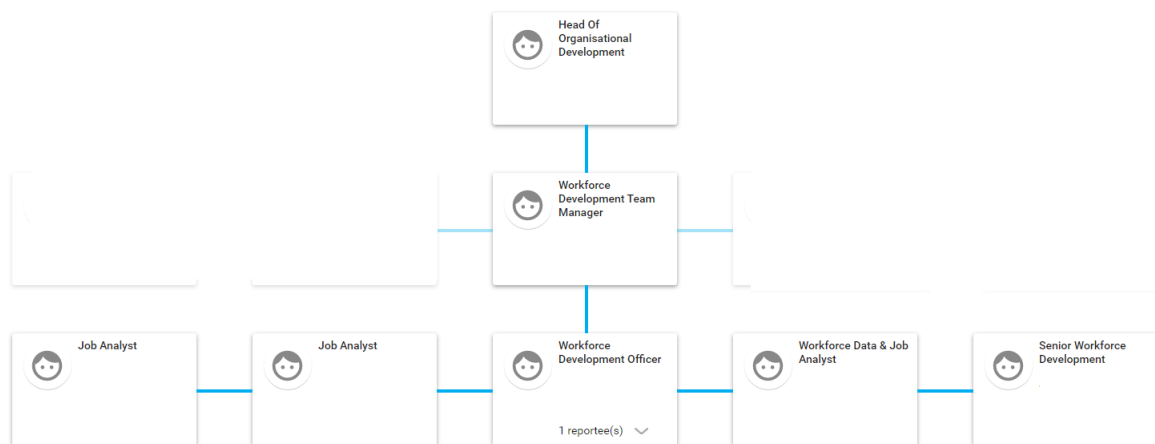


Names of employees will appear here.

Some of the content is interactive, for example clicking the absence reasons will take you to a list of employees who make up those absences. You can also download the data as a CSV file by clicking the download icon .

## Organisation Chart

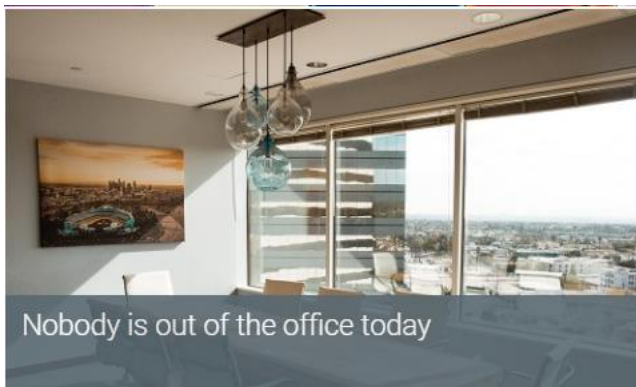
This shows the structure of your area of iTrent in chart form, complete with reporting lines. You can click any areas in bold text to see further detail:



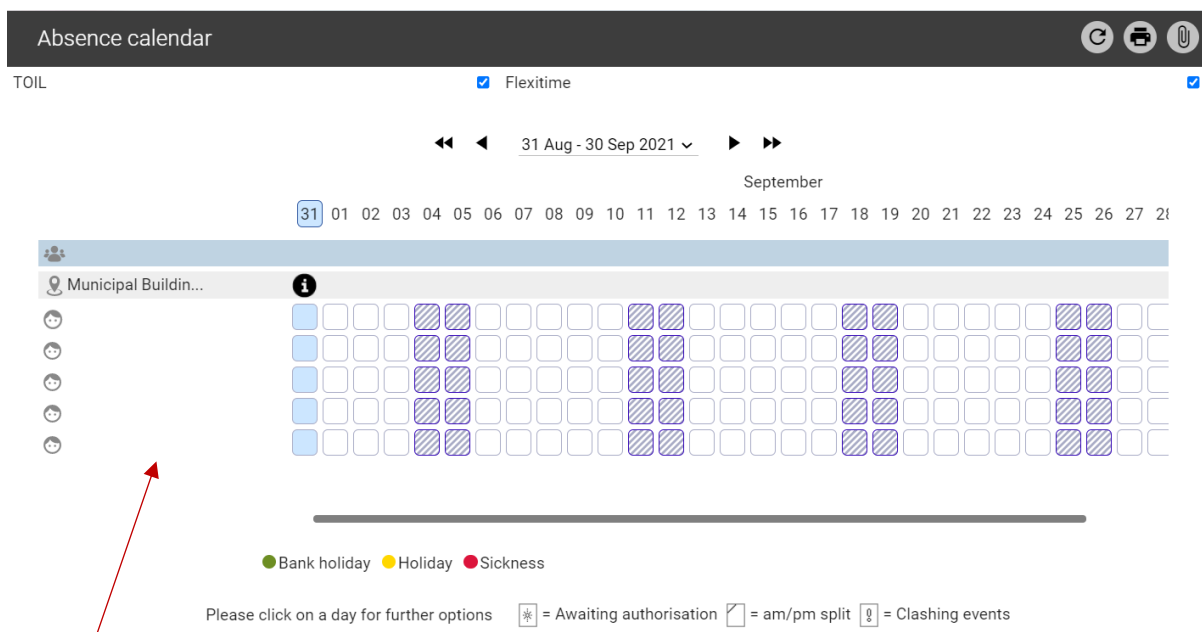
## The Tiles

The Tiles are a series of live tiles that sit in the centre of the screen. As well as Council news (coming soon) other tiles are shortcuts to viewing information and outstanding tasks, for example authorising annual leave or expenses. 2 tiles (My Dashboard and Organisation Chart) are shortcuts to the same functions described in the previous section.

## Out of Office



The out of office tile will show details of employees that may be absent today. Clicking the tile will take you to the absence calendar:



Names of employees will appear here

Absence categories are colour coded and hovering the cursor over an individual day in the calendar will display further details (work pattern etc) in a pop-up window.

## To Do List



The To Do List tile contains tasks that require your attention, which will be submitted by employees that directly report to you via employee self-service. This will include annual leave requests, expenses etc.

Clicking on the tile will take you to a list of outstanding tasks which can be authorised, rejected or redirected. This function will be explained fully in a further guide.

## Creating a New Sickness Absence

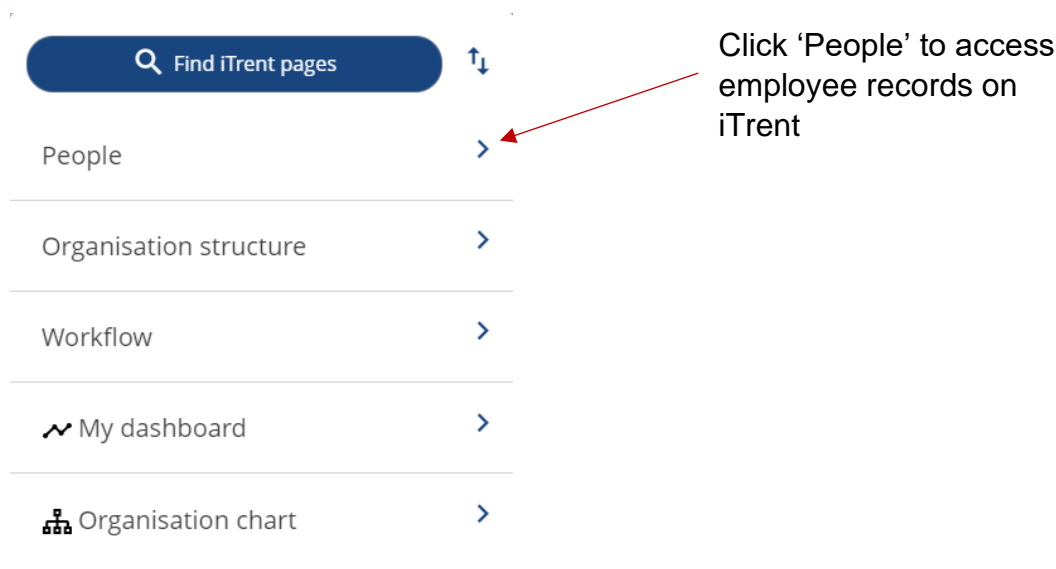
Absences must be created and updated in accordance with the Council's sickness absence policy. The information that needs to be entered in iTrent is largely the same as the Council's previous system (Vision). When an employee is absent from work because of sickness a manager will be expected to:


- Create the new absence record (start date, expected end date, absence reason etc)
- Record relevant details from the conversation with the employee
- Record details of any medical certificates (fit note)
- Record relevant details from further conversations with the employee as the absence progresses
- Enter the absence end date when the employee returns to work

Absence details should be recorded and updated as soon as possible following contact with the employee.

## Viewing Employee Records

You can view employee records from the People section of the Sections Menu on the right hand side of the screen:



Clicking the People section will open the search pane on the left-hand side of the screen. A list of employees who directly report to you will be shown, together with a search option if you need to view anyone from your wider staff team. The default search is by surname, but you can choose several options from the menu. If you want to carry out a general search of all the employees in your area leave the search field blank and click  :

SEARCH

FIND ITRENT PAGES

Organisation

Rhondda Cynon Taf County Boroug...

People

 Surname Q +

Results 6 People

Save this group



Use the search function to view employees in your area.

A list of employees who directly report to you is shown under the search area.

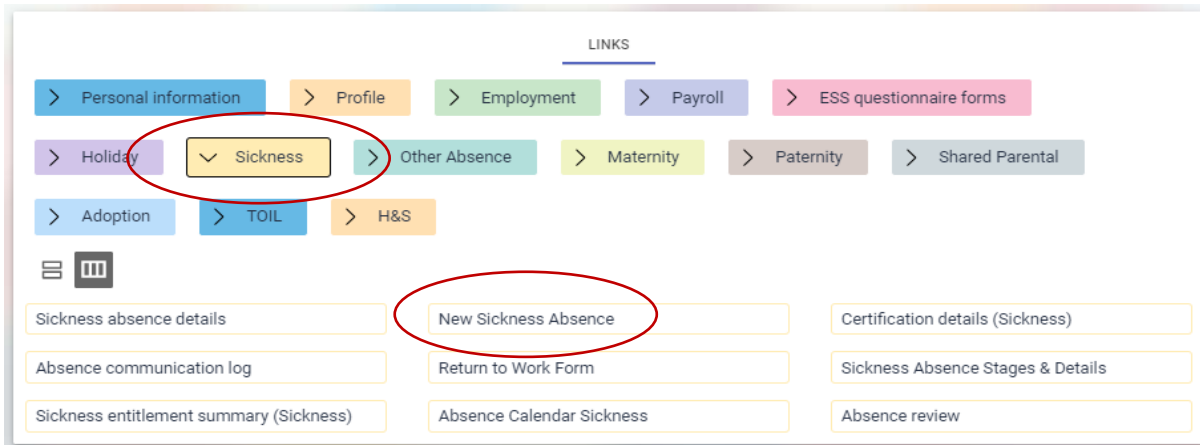
If you can't view the record of the employee you need, please contact your Human Resources representative.

## Entering Absence Details

### Initial Absence Details

Clicking the name of the employee will take you to their individual record from which you will be able to enter the absence details. If you are unable to see the employee record you need, please contact your Human Resources representative.


Click the 'Sickness' folder at the bottom of the screen then 'New Sickness Absence' link:



The following details are required at this stage to create a sickness absence:


- Absence start date (including if this date is a full or part day)
- Expected end date (the date you're expecting to be the last day the employee will be absent)
- Absence type
- Absence reason


If the absence is being created after an employee has returned to work you can also enter the absence end date, which is the last day the employee was sick not the date they returned to work).

You can use the calendar icon against the relevant fields  to select the date, or as a shortcut type 't' in the field and press 'Enter' for today's date. All other values are available from drop down menus.

The first visible field (sickness period) is a system default value and can be ignored. The first field to complete is the absence start date:


Absence start

Absence start date  

Absence start type  

Enter date value as described above. Select full or part day from the drop-down menu.

If the first date of the absence was a part day, you'll be asked to enter the number of hours the employee was absent on that day:

Absence start type  


Hours absent


Enter the number of hours the employee was absent on the first day.




Next enter the expected end date. If the employee is unsure of the date their absence may end, enter what would be their fourth day which is the next day they should contact you in accordance with the Council's sickness absence policy:

Absence end

Absence end date  

Absence end type  

Expected end date  

Enter the expected end date as described above.

Finally, enter the absence type and absence reason from the drop-down menus (the example below is sickness with an absence reason of Flu):

Absence

Absence type  

Absence reason  

If the employee has multiple positions, the positions you are responsible for will be shown in the 'Position' menu. In these circumstances, choose 'All jobs' from the menu:

Absence type

Absence reason

Position


Choose 'All Jobs' from the menu to update all records.





The 'All Jobs' option should also be selected even when the employee holds casual positions that do not attract sick pay.

If the absence is the result of an accident at work, you'll have further items to complete (date of the incident, and, if known the date it was reported and who by):

Incident details

Date of incident  

Date reported  

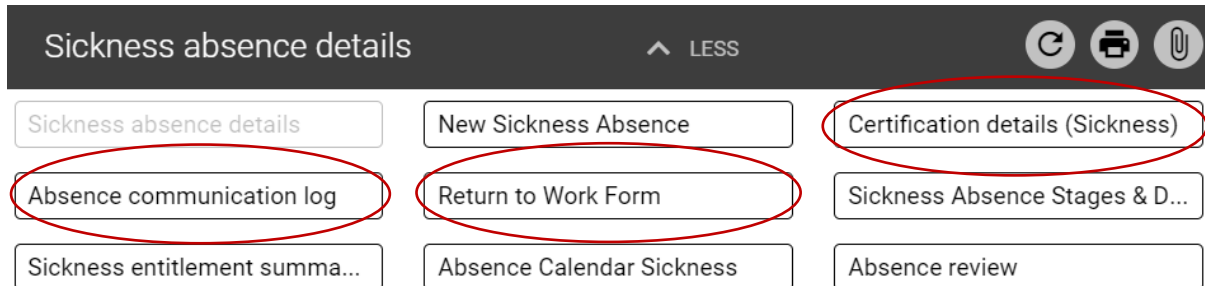
Reported by  

Enter accident/incident details as described above

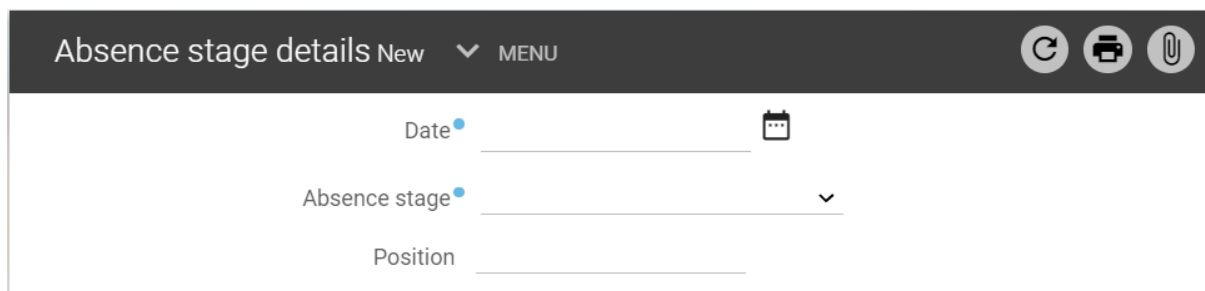
When all items have been completed click the 'Save' button at the bottom of the screen to save the absence.

## Absence Notification Details

When you've saved the absence, you'll notice a series of links at the top of the screen. These can be used to enter further details about the absence including details of your conversations with the employee during the absence ([absence communication log](#)), medical certificates ([certification details](#)) and the [return-to-work interview form](#):



To enter details of the conversation you've had with the employee, click the 'Absence Communication Log' link:

A screenshot of a web application interface titled "Absence stage details New". The page has a dark header bar with the title, a "MENU" button, and icons for refresh, print, and upload. Below the header is a form with three input fields: "Date" with a calendar icon, "Absence stage" with a dropdown arrow, and "Position".

First enter the date the contact with the employee took place. Then from the Absence Stage drop-down menu, select the type of contact the entry relates to. There are a number of options to choose from:

- Initial and days 4,7 and 14 telephone calls - Select one these options to record details of conversation you've had with the employee as required by the Council's sickness absence policy
- Ad hoc telephone call - Select this option to record any contact with the employee outside of the dates above.
- Letter sent and Email sent - Select one of these options \*
- Home visit and site visit - Select one of these options to record a meeting with the employee during their absence from work.

Click 'Save' to confirm your choice, then click the paperclip icon in the menu bar and click 'Notes' from the pop-up window to enter details of the contact with the employee. Enter details of the contact with the employee on the Notes field. The input date will default as today's date:

Click 'Save' to save the details. Once saved, entries will show as 'Stages' in the left hand menu when you click the 'Absence Communication Log' link. Clicking on the relevant date will take you to the note you created:



Clicking the date from the left-hand menu will take you to the note. Hovering over the date will display basic details.

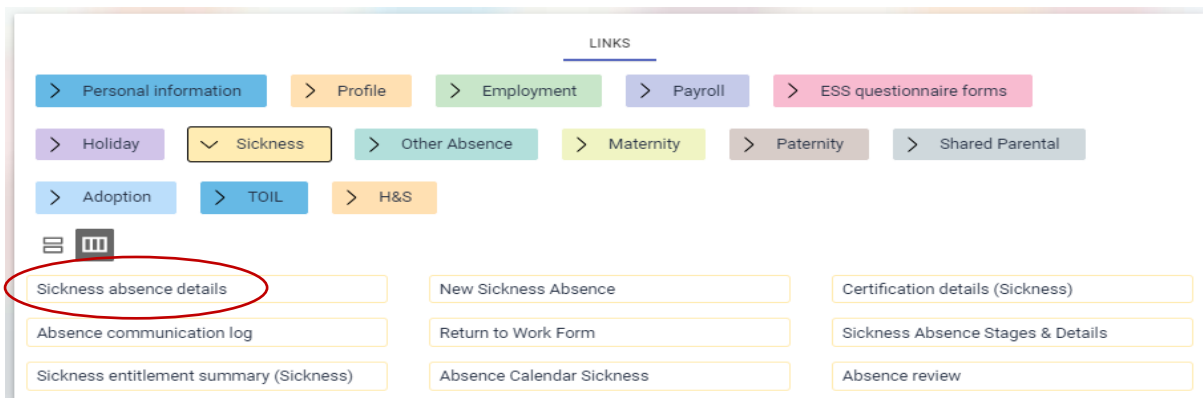
Date: 22/09/2021

Absence stage:

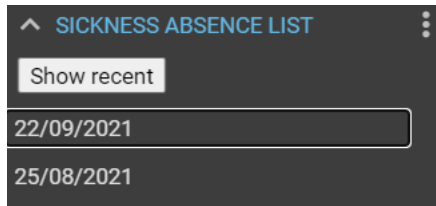
Initial telephone call received

### Viewing Sickness Details

Once saved, you can view the absence by going to the employee record as described above. The employee will also be shown in the 'Out of Office' tile in the Carousel at the bottom of the iTrent homepage. To view the current absence, click the 'Sickness' folder, then the 'Sickness Absence Details' link:

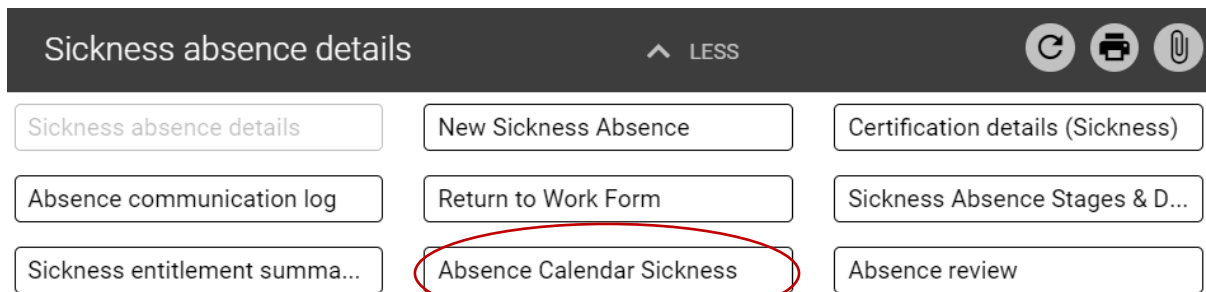


Absences will be listed (most recent first) in the left-hand menu. Open the absence by clicking on the relevant date (if the employee holds more than one position, you will see multiple entries in the menu. Hover the cursor over each date to see details of each position:

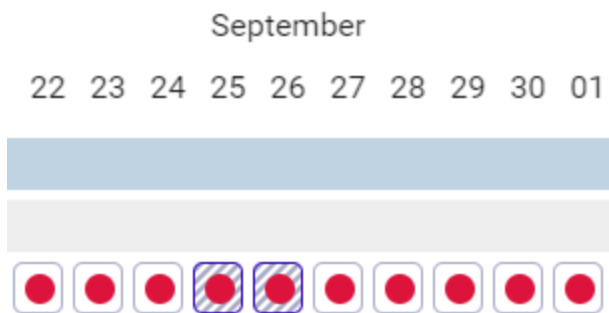


Click the date to view the absence details.

iTrent holds working patterns for all staff which calculates the time lost by an employee during an absence. To view the work pattern for the absence, click the '[Absence Calendar Sickness](#)' link in the Sickness Absence Details menu:



The calendar will show the days absent in red, hovering the cursor over a day will show you the work pattern held for the employee:



Hover the cursor over a day in the calendar to see the work pattern.

Working pattern: 37.00 M7:24 T7:24  
W7:24 Th7:24 F7:24 Sa0:00 Su0:00 (7  
Hrs 24 Mins)  
Working Pattern Start Date:

Details of the work pattern will be displayed in a pop-up window.

If you think the work pattern held for the employee is incorrect, please contact your Human Resources representative.

## Updating Absence Details

To update an absence, go to the absence you want to update as described above. If the employee has not returned to work, select a new expected end date by using the calendar button:

Expected end date



September 2021							
Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
35			1	2	3	4	5
36	6	7	8	9	10	11	12
37	13	14	15	16	17	18	19
38	20	21	22	23	24	25	26
39	27	28	29	30			

Amend the expected end date using the calendar button.

Click the 'Save' button to save the changes. Add details of further communications with the employee using the 'Absence Communication Log' as described above. Repeat this process as the absence progresses.

\*Should the reason for absence change during the absence amend the absence reason and save the current record, do not close the absence and create a new absence.\*

The date of the change can be recorded when completing the appropriate entry on the Absence Communication Log i.e. "absence reason changed from xxxx to xxxx".

## Recording a Medical Certificate

To record details of a self certificate (SA3) or a medical certificate submitted by the employee, click the 'Certification details (sickness)' link from the menu:

Sickness absence details ^ LESS ↻ 🖨 📎

Sickness absence details	New Sickness Absence	<b>Certification details (Sickness)</b>
Absence communication log	Return to Work Form	Sickness Absence Stages & D...
Sickness entitlement summa...	Absence Calendar Sickness	Absence review

There are 3 types of certificate to choose from, self certificate, hospital certificate and doctor's certificate. Complete the information and click 'save' to save your changes:

Certification details ▼ MENU ↻ 🖨️ 📎

Certification type • Doctor's certificate ▼

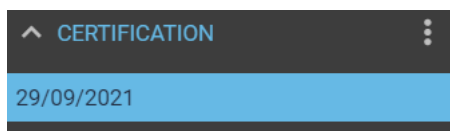
Certification reason • Influenza

Start date • 29/09/2021 📅

End date • 06/10/2021 📅

Submission date 30/09/2021 📅

Repeat this process as the absence progresses. You'll see links to the saved entries in the left hand menu:



Links to the certificate details will appear in the left hand menu.

All employees are required to complete a self-certificate (SA3) for every absence due to sickness even if the absence is for a half day. The only instance when the requirement can be waived is if a Statement of Fitness for Work has been provided from day 1.

As soon as the record has been updated, completed forms should be forwarded by the manager to the appropriate generic payroll mailbox

Education: [EducationPayrollTeam@rctcbc.gov.uk](mailto:EducationPayrollTeam@rctcbc.gov.uk)

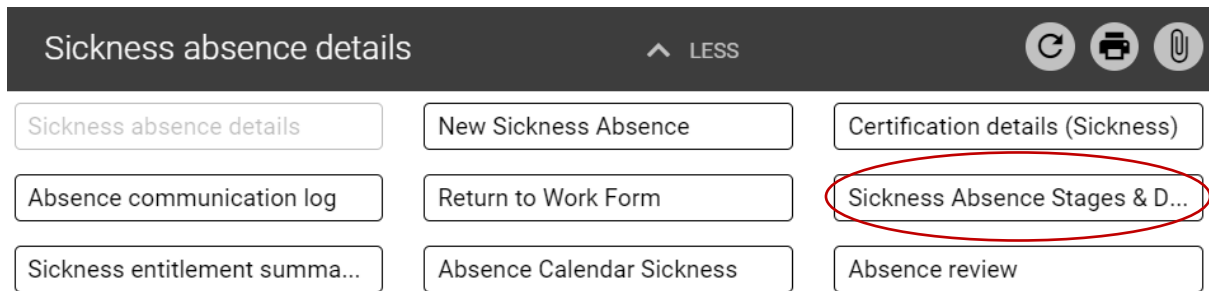
Salaries – [SalariesPayrollTeam@rctcbc.gov.uk](mailto:SalariesPayrollTeam@rctcbc.gov.uk)

### **Sickness Absence Stages and Details**

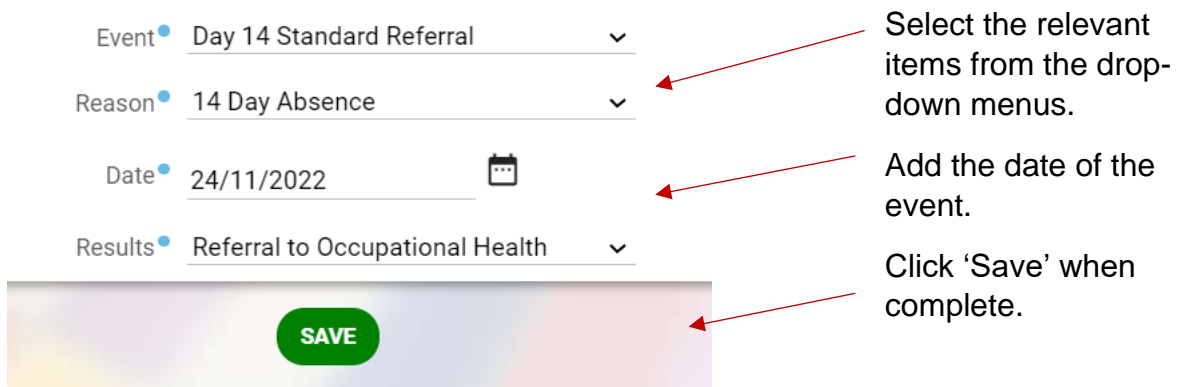
This area is used to record details of all relevant events that take place during an absence. These include:

- Day 1/Day 14 referrals to occupational health
- Referral for and the outcome of second and third stage absence interviews and reviews
- Confirmation of a completed return to work interview

To record these details, click the 'Sickness Stages & Details' link from the menu:



You will then be asked to select the event, reason, date and results. The example below is for a 14-day referral to occupational health:



Once the event is saved, additional notes can be added e.g. the date a second stage interview was requested, by clicking the paperclip icon in the menu bar:





Complete and save your note as necessary.


## Closing an Absence

To close an absence when the employee has returned to work, go to the absence you want to update as described above. Enter the absence end date and update the expected end date using the calendar buttons:

Absence end

Absence end date 06/10/2021 


Absence end type Full day 


Expected end date 06/10/2021 

Enter absence end date as described above.

If the last date of the absence was a part day, you'll be asked to enter the number of hours the employee was absent on that day:

Absence end

Absence end date 06/10/2021 

Absence end type Part day 

Hours absent \_\_\_\_\_




Enter the number of hours the employee was absent on the last day.

Click 'Save' to save your changes.

If there is an ongoing sickness and the employee has a leaving date in the system, iTrent will end the sickness absence using the leaving date. Therefore you will need to review and amend the absence end date if the employee returns to duty prior to the leaving date.

### Return to Work Interview

To record details of the return to work interview with the employee, click the 'Return to Work Form' link from the menu:

Sickness absence details    ^ LESS

Sickness absence details	New Sickness Absence	Certification details (Sickness)
Absence communication log	<b>Return to Work Form</b>	Sickness Absence Stages & D...
Sickness entitlement summa...	Absence Calendar Sickness	Absence review

Complete all relevant fields of the form, starting with the basic absence details:





First date of absence

Last date of absence

Absence reason

Date of Return to Work Interview

Was this absence related to a previous absence?

Select the appropriate outcome from the drop-down menu (if 'Other' is selected enter a further explanation in the field below):

Outcome / Conclusion

"Other" - Further details:

1. No Further Action
2. Managerial Support
3. Referral to Occupational Health
4. Referral to Counselling Services
5. Referral to Designated Officer for Review
6. Referral for Designated Officer for Disciplinary Action
7. Other - please complete the box below

Click 'Save' when the form is completed. Then add the relevant details under 'Sickness Absence Stages and Details' as described [above](#):

Event

Reason

Date

Results

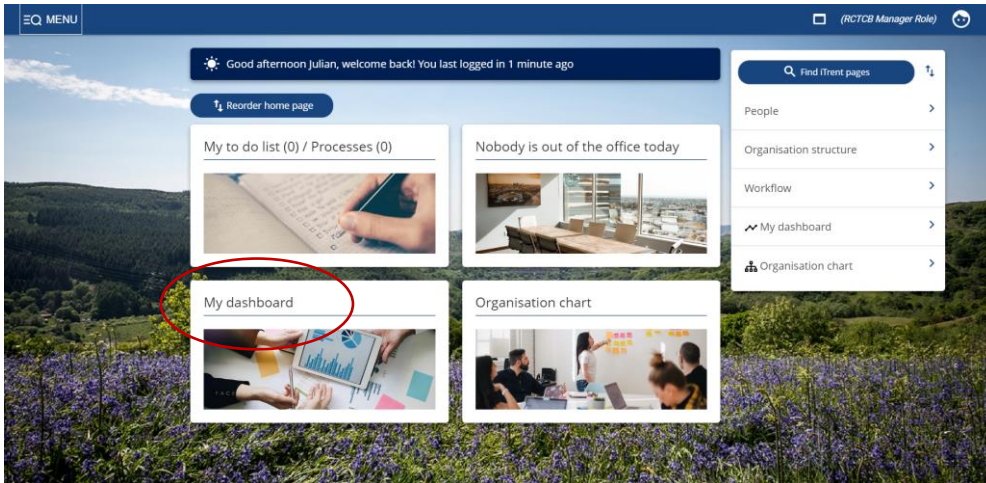
Select the relevant items from the drop-down menus.


Add the date of the event.

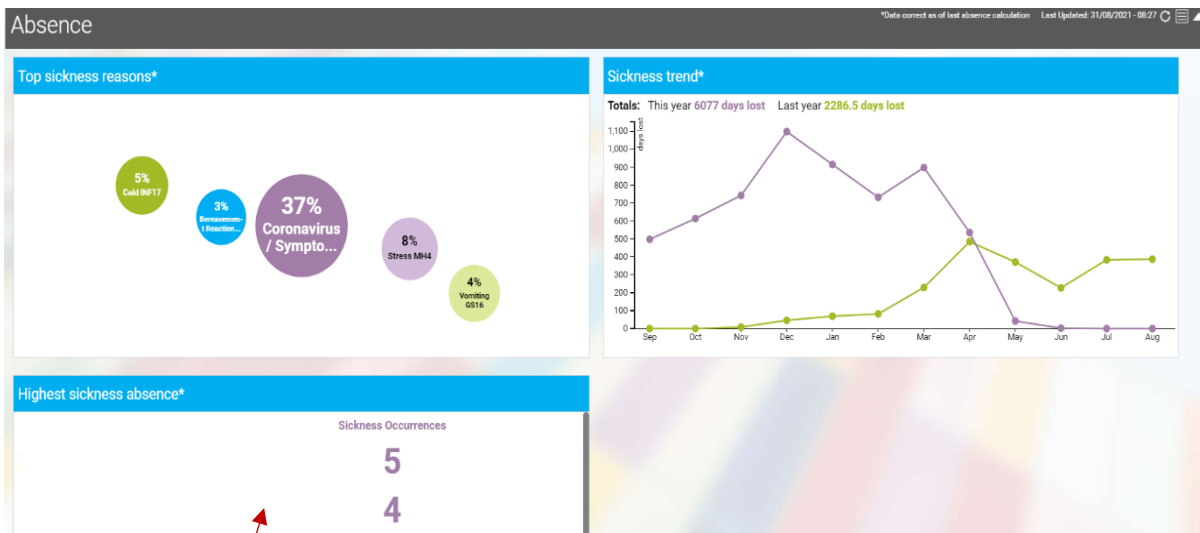
Click 'Save' when complete.

## Sickness Absence Dashboards

You can view a number of dashboards containing up to date sickness absence data about your employees via the 'My Dashboards' tile on the home page.



After clicking the My Dashboard link, click the arrow symbol at the top right of the screen to view the dashboard :



Names of employees will appear here

Some of the content is interactive, for example clicking on an absence reason or a point on the sickness trend graph will take you to a list of employees who make up those absences.

← Sickness: This year January					↓
Unit	Start date	End date	Time lost	Reason	
People Development	04/01/2022	11/01/2022	6 days	Ankle Injury MS57	
Workforce Development	05/01/2022	11/01/2022	5 days	Anaemia CS22	
Workforce Development	04/01/2022	07/01/2022	4 days	Appendicitis GS2	
Workforce Development	12/01/2022	12/01/2022	1 day	Ankle Injury MS57	
Workforce Development	10/01/2022	10/01/2022	1 day	Ankle Injury MS57	

Names of employees will appear here

You can also download the data as a CSV file by clicking the download icon .

## Annual Leave

As with sickness absence, annual leave must be recorded on a timely basis in accordance with Council policy. Using iTrent, managers will be able to:

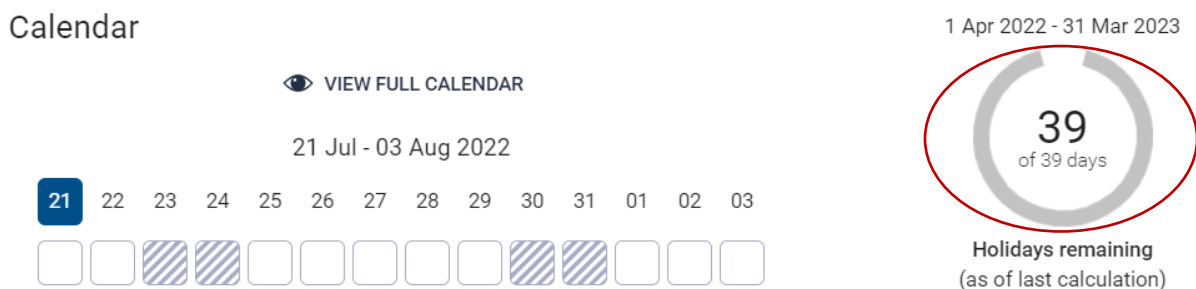
- View the leave entitlement and work patterns of their employees
- Record annual leave taken by their employees
- Add additional leave days to an employee's entitlement because of carry over or purchase of additional annual leave.

Leave details should be recorded and updated as soon as possible following contact with the employee.

### Viewing Annual Leave Entitlement

Search for the details of the employee you want to view as described [above](#).

You will see the current annual leave balance on the right side of the Calendar. The number of days includes annual leave and bank holidays. The example **below** shows a full time employee who works Monday to Friday and has over 5 years service\*:

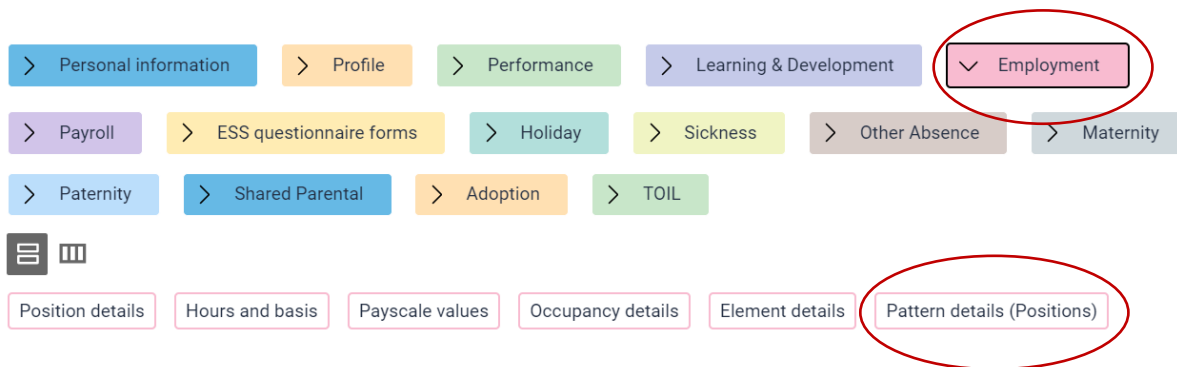


\*This example shows 39 days rather than 38 because of the additional bank holiday for the Queen's jubilee.

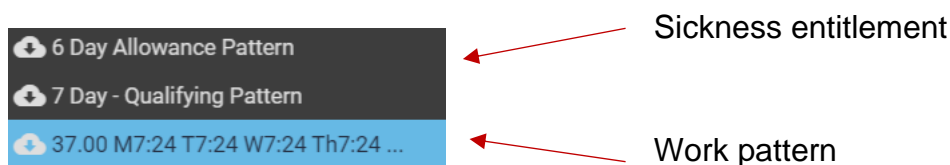
The annual leave entitlement and bank holidays are calculated from the employee's work pattern held in iTrent, so this must be up to date for the entitlement to be calculated correctly.

### Reviewing an Employee's Work Pattern

You can view an employee's work pattern by clicking the '[Pattern Details \(positions\)](#)' link in the '[Employment](#)' folder:



The work pattern can be seen in the left-hand pane. The first two entries refer to sickness entitlement, the work pattern is identified by the employee's contract hours followed by the work pattern:



If you click on the work pattern you can view more details:

Pattern days

Current day Week 1 / Day 4

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
<b>Week 1</b>	07:24	07:24	07:24	07:24	07:24	00:00	00:00	37:00

If there are any queries regarding the work patterns in iTrent, contact Human Resources.

## Recording Annual Leave

You can record annual leave from the Calendar by clicking the '[view full calendar](#)' link and clicking the day you want the leave to start or by clicking the 'Holiday absence details' link from the 'Holiday' folder.

If you're using the calendar option, when you click the day the leave starts, choose 'Create holiday absence' from the pop-up menu:

 VIEW FULL CALENDAR

Click view full calendar

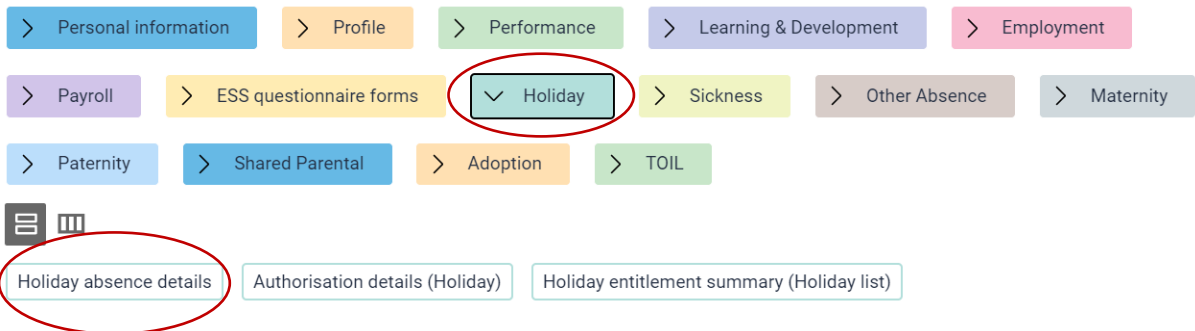
Create sickness absence

Create holiday absence

Create 'other' absence

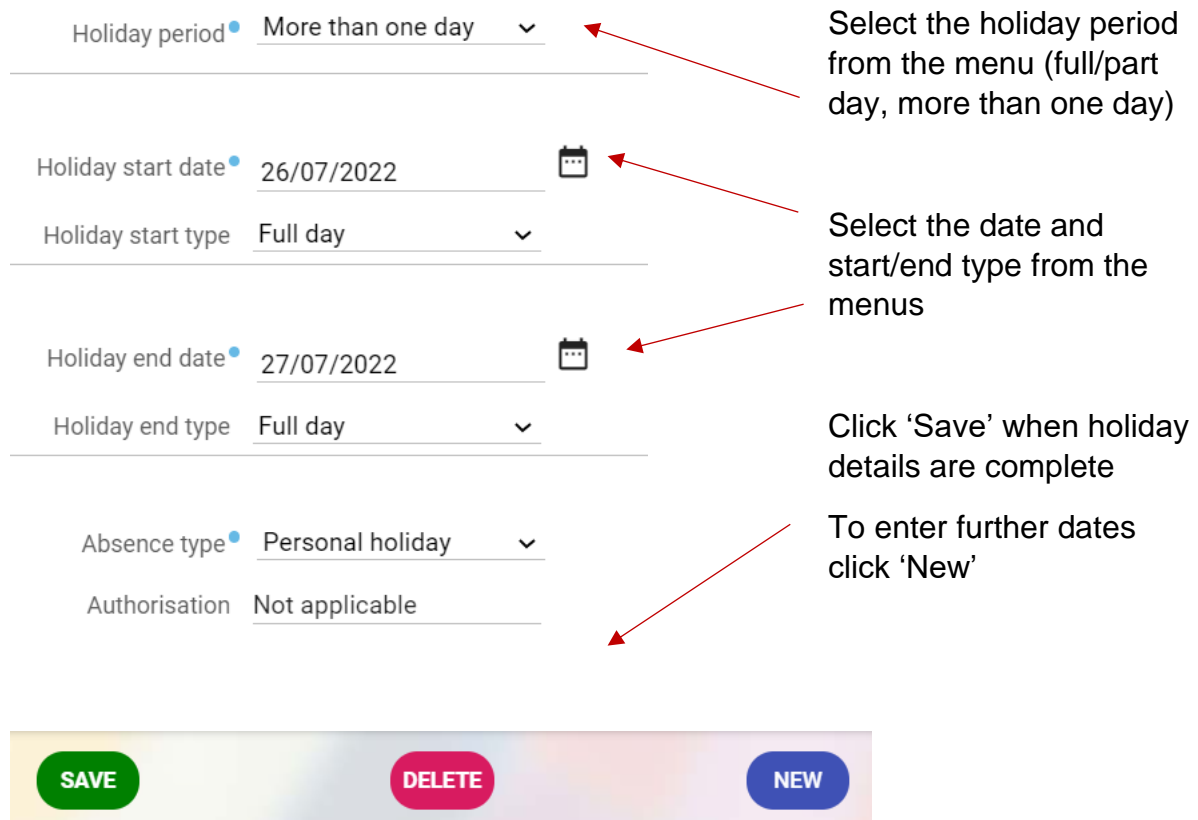
Click 'create holiday absence from the menu

Or click the 'holiday absence details' link from the 'Holiday' folder. If you use this method you will have to input the holiday start date:



The screenshot shows a navigation menu with several categories: Personal information, Profile, Performance, Learning & Development, Employment, Payroll, ESS questionnaire forms, Holiday (circled in red), Sickness, Other Absence, Maternity, Paternity, Shared Parental, Adoption, and TOIL. Below the menu, there are three tabs: 'Holiday absence details' (circled in red), 'Authorisation details (Holiday)', and 'Holiday entitlement summary (Holiday list)'.

Enter the leave details as required (the example below is for two full days):



The form contains the following fields and annotations:

- Holiday period:** More than one day (dropdown menu). Annotation: Select the holiday period from the menu (full/part day, more than one day)
- Holiday start date:** 26/07/2022 (calendar icon). Annotation: Select the date and start/end type from the menus
- Holiday start type:** Full day (dropdown menu)
- Holiday end date:** 27/07/2022 (calendar icon). Annotation: Select the date and start/end type from the menus
- Holiday end type:** Full day (dropdown menu)
- Absence type:** Personal holiday (dropdown menu)
- Authorisation:** Not applicable

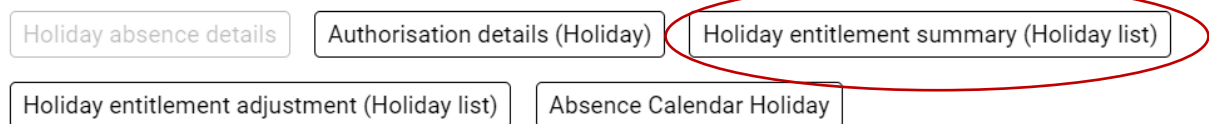
Click 'Save' when holiday details are complete

To enter further dates click 'New'

Buttons: SAVE, DELETE, NEW

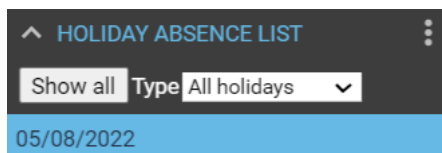
When recording more than one day	Enter the holiday start and end dates and the holiday start and end types (full day, half day am or pm)
When recording a full day	Enter the holiday start date
When recording a part day	Enter the holiday start type (half day am or half day pm)

You can view the full leave record for the employee by clicking the ‘**holiday entitlement summary**’ link at the top of the page (click ‘menu if the links aren’t visible’)



Dates of leave and bank holidays will be listed:

From	To	Duration	Remaining entitlement
15/04/2022	15/04/2022	0	39
18/04/2022	18/04/2022	0	39
02/05/2022	02/05/2022	1	38
02/06/2022	02/06/2022	1	37
03/06/2022	03/06/2022	1	36
05/08/2022	05/08/2022	0.5	35.5
29/08/2022	29/08/2022	1	34.5
19/09/2022	19/09/2022	1	33.5
26/12/2022	26/12/2022	1	32.5
27/12/2022	27/12/2022	1	31.5
02/01/2023	02/01/2023	1	30.5

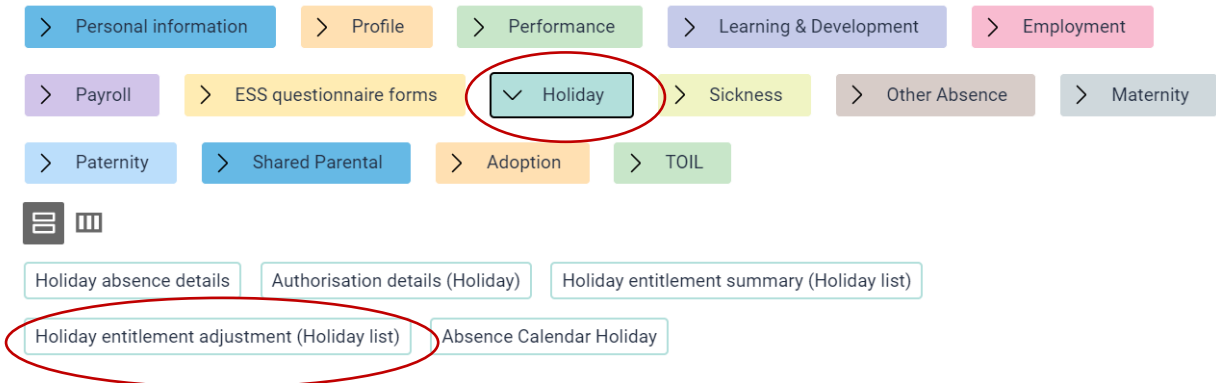


You will also see a list of holidays taken in the left-hand pane.

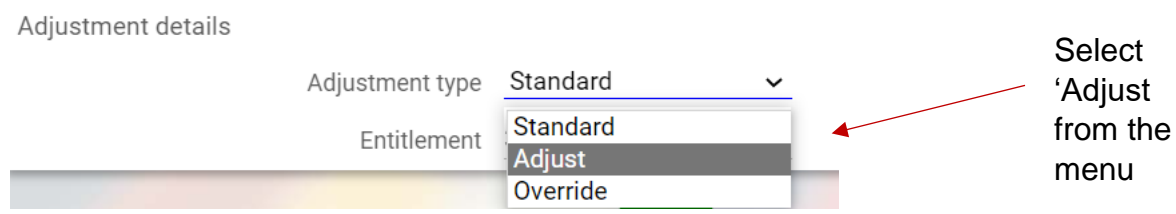
### Amending/Adjusting an Annual Leave Entitlement

If the carry over of leave has been agreed for an employee, or they have purchased additional leave via the Council’s Additional Annual Leave scheme the employee’s leave can be adjusted in iTrent.

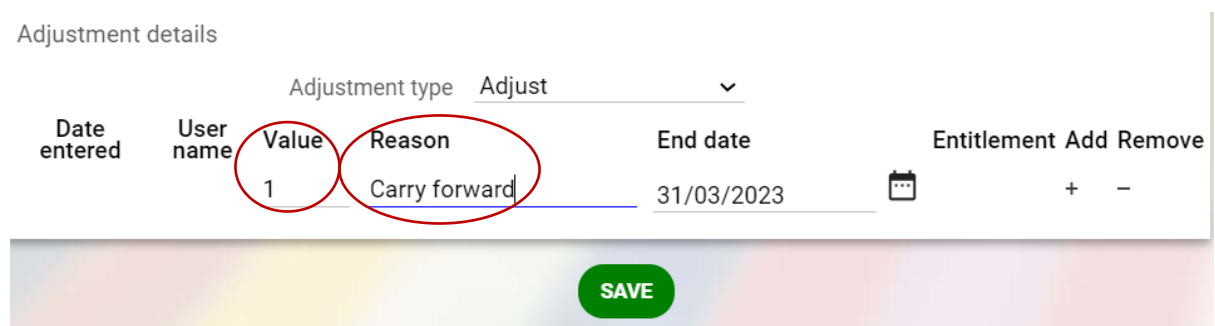
To do so, click the 'Holiday entitlement adjustment' link in the 'Holiday' folder:



At the bottom of the next page, choose 'Adjust' from the drop-down menu:



Enter the days being carried forward in the Value field (1 day is entered as 1), record the reason, either carry forward or purchase of additional leave and click 'Save':



An overnight payroll calculation takes place for all absences, including annual leave and you will not see the correct balance until this takes place.

The Holiday entitlement summary will change once the carry forward is added and will show in the field Entitlement for period.

**The annual leave and bank holidays will be calculated correctly for the majority of staff without any need for adjustment. For staff with more complex work patterns adjustments may be needed and this can be discussed with your HR representative in conjunction with the iTrent admin team.**



## **Useful Contacts**

### **iTrent**

For queries on the iTrent system including system navigation and recording absence, please contact the iTrent admin team:

Email: [itrentadmin@rctcbc.gov.uk](mailto:itrentadmin@rctcbc.gov.uk)

Telephone: 01443 680616, 01443 680760 or 01443 680763

### **Payroll**

For any Payroll queries please contact the relevant Payroll team:

#### **Salaries:**

Email: [Salariespayrollteam@rctcbc.gov.uk](mailto:Salariespayrollteam@rctcbc.gov.uk)

Telephone: 01443 680397

#### **Education:**

Email: [EducationPayrollTeam@rctcbc.gov.uk](mailto:EducationPayrollTeam@rctcbc.gov.uk)

Telephone: 01443 680398

#### **Control (expenses):**

Email: [payrollsection@rctcbc.gov.uk](mailto:payrollsection@rctcbc.gov.uk)

Telephone: 01443 680399

### **Human Resources**

For any policy issues including sickness and leave, please contact your HR representative.