

iTrent Other Leave Absence Guide for Managers



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OVERVIEW/PROCESS

This guide covers the Reporting Managers role in the processing of 'other leave' in itrent defined as:

- Special Leave A - Personal and Domestic
- Special Leave B - Other
- Special Leave - Authorised Absence e.g. antenatal, hospital appointments
- Special Leave - Coronavirus
- Volunteer / Reserve Forces
- Volunteering Leave
- Military Reserve Leave
- Study/Exam Leave
- Councillor Duties
- Election Duties
- Foster Care Appointments
- Jury Service
- Public Duties
- Unpaid Bury - Authorised
- Unpaid Teachers - Authorised

All requests made for other leave by the employee will require approval by the manager. An email will inform the manager of the request and a task will display in the To Do List for authorisation. Once actioned by the manager the employee will receive an email notification of the decision. Managers can, if required, enter the above absence types into iTrent directly via the manager access and no approval is required. The employee will receive an email notification of new, amended and deleted requests entered by the manager.

Managers are able to:

- View/enter/ amend and delete other leave absence
- View Absence Entitlement
- View Absence History
- View questionnaires
- Amend hours lost due to absence via pattern override
- Use Out of Office
- View the absence calendar
- Run absence history
- Upload absence related documents into itrent eg MATB1, Foster Carer Evidence, Medical notes etc (replaces process of sending to HR)

There are several other leave requests which the employee and manager are unable to enter/request via the other leave form and must be entered by HR due to payment and service rules that apply, these include:

- Maternity Support / Paternity Leave
- Career Break
- Foster Carer Placement

And only HR/Managers can record unauthorised absence for example absent without leave or industrial action.

The system provides managers with the pro rata entitlement/allowance of other paid leave. The system will only automate a salary deduction for unpaid leave. Any variations to pay because of leave such as Maternity Support/Paternity and Foster Carer Placement will be provided in writing to the employee through HR.

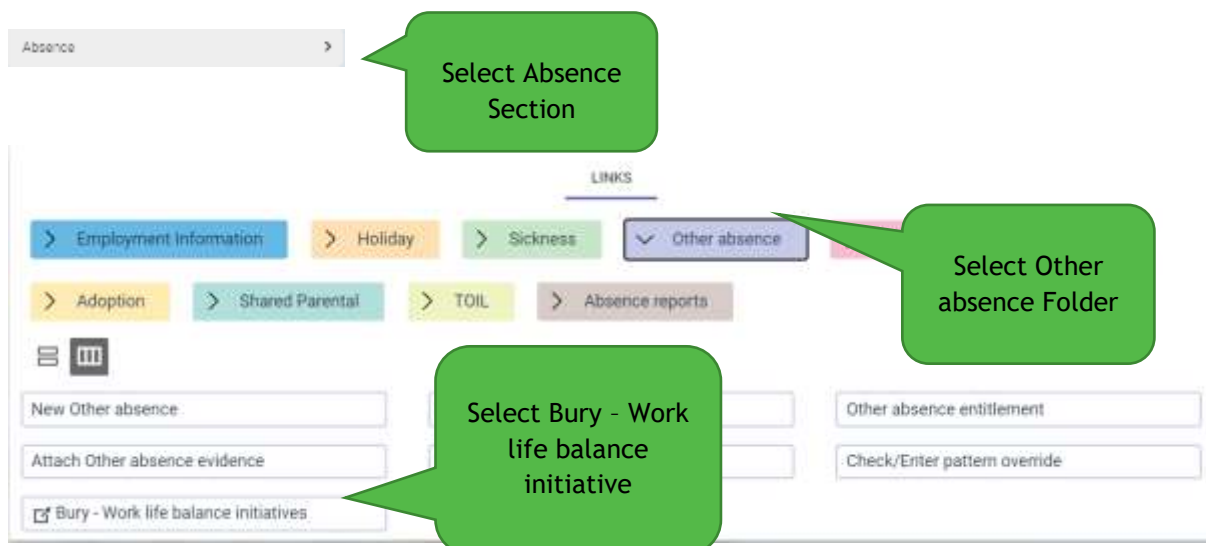
Family Friendly Leave (below) can be requested via the employee self-service functionality via a questionnaire/request within the Employment section or processed off system if appropriate:

- Career Break
- Maternity Support/Paternity
- Maternity
- Paternity
- Adoption
- Shared Parental
- Parental Bereavement

For all paid leave the entitlements details are held on the link [Work life balance initiatives - Bury Council Intranet](#)

HOW TO - ACCESS WORK/LIFE BALANCE POLICIES RELATING TO FAMILY FRIENDLY INITIATIVES

For those logged in via the Bury Network a link has been added to aid the Manager to open the Family friendly initiative folder on the intranet for details of the work/life balance policies.

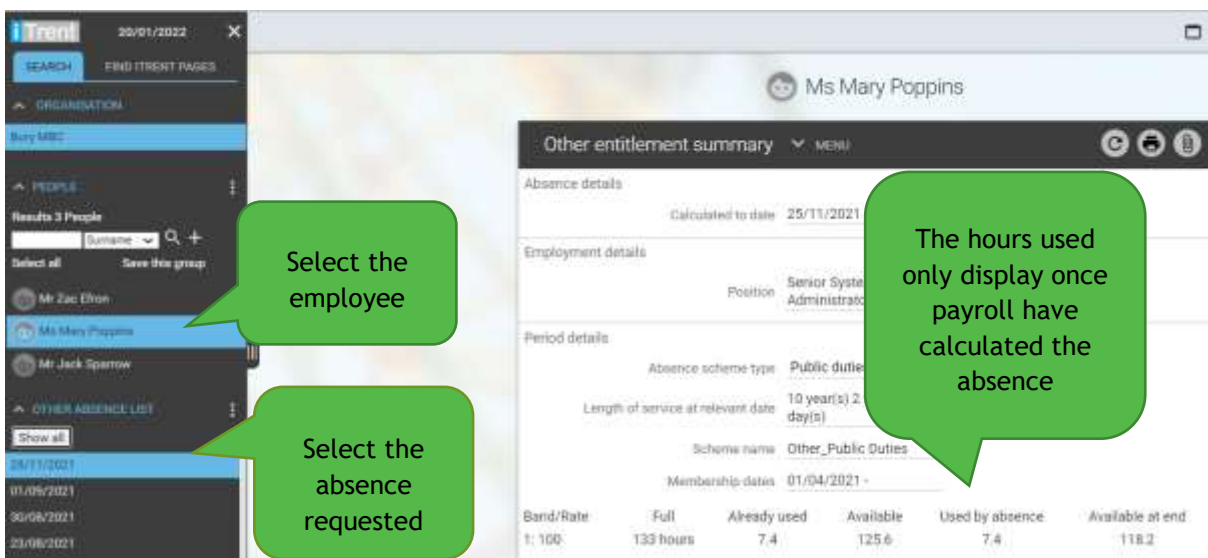
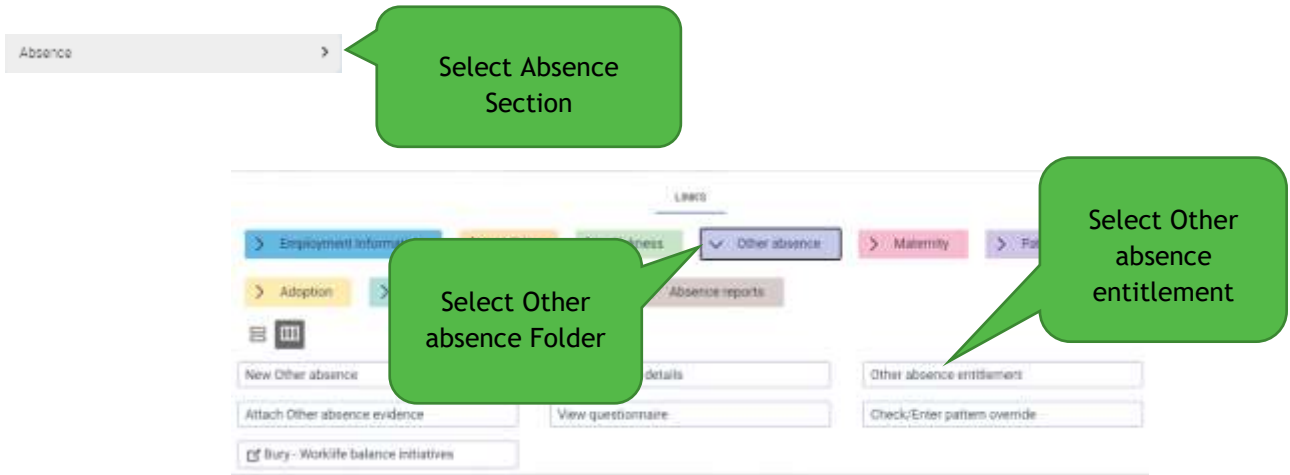


A new tab will open on the browser to the relevant intranet page



HOW TO - CHECK ENTITLEMENTS OF FAMILY FRIENDLY INITIATIVES ON ITRENT

These initiatives have entitlement specified as full time equivalent days. The days have been converted into hours on the system (e.g. 3 days = 22.2 hours) and are pro rata for part time employees. Managers should be aware of these entitlements and whether they have been exhausted when making the decision to approve or reject paid leave requests.



The used entitlement will only calculate based on the work pattern once the absence calculation is run. The Manager may need to check the pattern override for the hours to be taken from the new absence request if the calculated to date is blank.

Select MENU to check pattern

No hours deduct from entitlement of 31 hours

Hover mouse over absence if absence calc pending - need to check pattern

Select Pattern Override for hours in the request

Total hours for request

	Mon	Tue	Wed	Thu	Fri	Total
Week 1	04:30	04:00	04:00	03:00	03:00	18:30

HOW TO - ENTER NEW 'OTHER LEAVE'

When the New Other Absence form is saved an email trigger to the employee to confirm the dates of the booking.

It is critical if Unpaid Leave Authorised or Unauthorised is selected the Absence Type is correct for the position or the hourly rate will be incorrectly calculated.

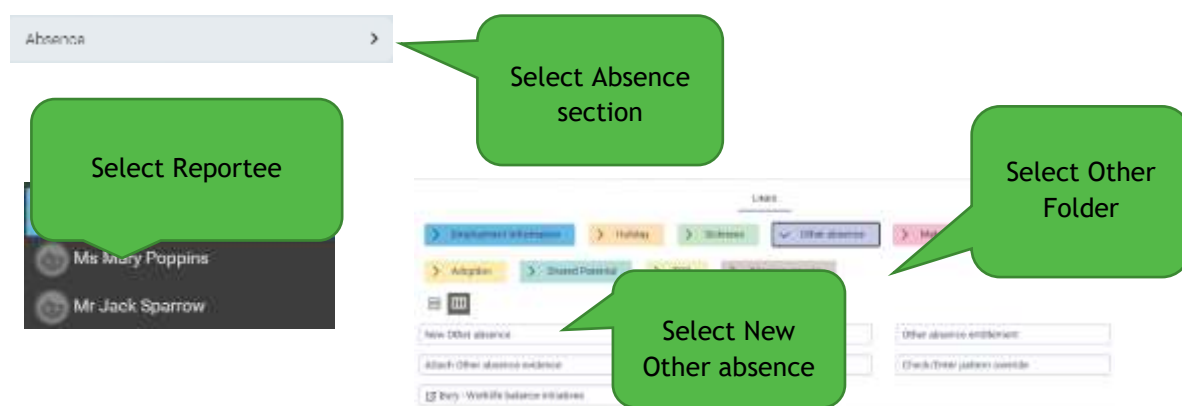
Those on Teachers T&C – Head Teachers, Teachers, Practitioners use the Types:

- Unpaid Teachers - Authorised
- Unpaid Teachers - Unauthorised

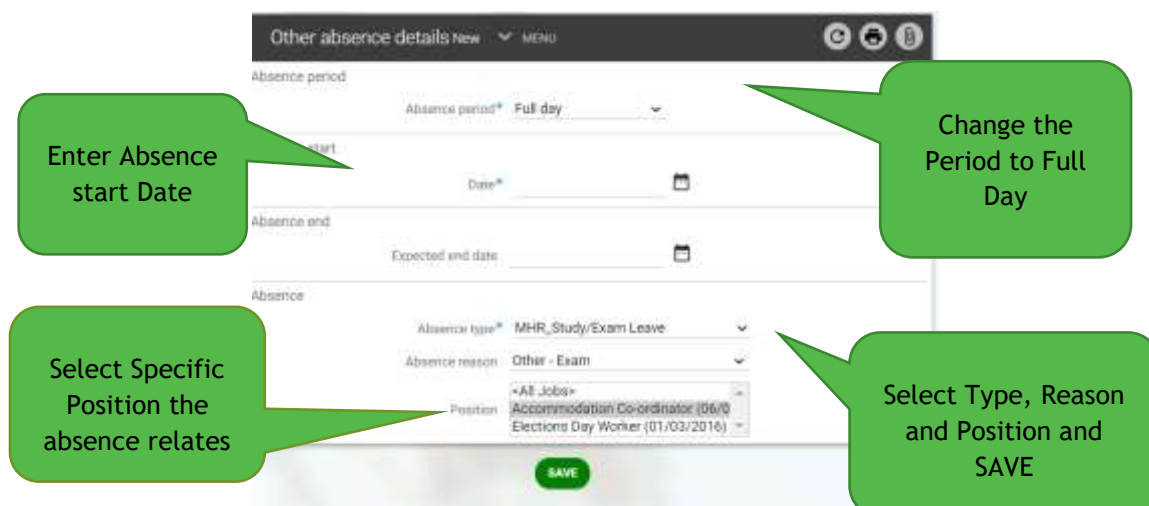
All other categories of staff NJC, NHS, Chief Officer

- Unpaid Bury - Authorised
- Unpaid Bury - Unauthorised

If in doubt, ask Payroll@Bury.gov.uk



FULL DAY



PART DAY

Enter as Half Day AM/PM or specify the exact hours and minutes to deduct from the entitlement or to reduce the pay if the request is for unpaid leave. AM or PM will deduct half the standard work pattern hours for the day. The Start Time, End Time and Expected End Date do not impact the deduction and are for information only. ONLY the Hours absent field for Part Day absences affect the deduction / calc of unpaid leave.

The screenshot shows the 'Other absence details New' form with the following fields and callouts:

- Enter Absence start Date:** Points to the 'Absence start' date field.
- Change the Period to Part Day:** Points to the 'Absence period' dropdown menu, which is set to 'Part day'.
- Select Type:** Points to the 'Type' dropdown menu, which is set to 'Part day'.
- Enter Hours Absent in HH:MM:** Points to the 'Hours absent' input field.
- Select Specific Job the absence relates to:** Points to the 'Position' dropdown menu, which is set to 'Accommodation Co-ordinator (05/0 Elections Day Worker (01/03/2016))'.
- Select Type, Reason and Position and SAVE:** Points to the 'Absence type' (MHR_Study/Exam Leave), 'Absence reason' (Other - Exam), and 'Position' fields.

MORE THAN ONE DAY

The screenshot shows the 'Other absence details New' form with the following fields and callouts:

- Do not leave end date blank unless unauthorised unpaid leave:** Points to the 'Absence end' date field.
- Enter start /end date and type ensure if specify time you enter hours absent:** Points to the 'Absence start' date, 'Absence end' date, and 'Type' dropdown menu (set to 'Full day').
- Select Type and Reason:** Points to the 'Absence type' (MHR_Study/Exam Leave) and 'Absence reason' (Other - Exam) fields.
- Select Specific Position the absence relates to & SAVE:** Points to the 'Position' dropdown menu (set to 'Accommodation Co-ordinator (05/0 Elections Day Worker (01/03/2016))') and the 'SAVE' button.

HOW TO - VIEW / AMEND /DELETE OTHER ABSENCE

The manager can amend the details and attach any documentation associated with the absence, refer to the document attachment section to do this.

Select Absence

Select Reportee

Select Other absence

Select Other absence details

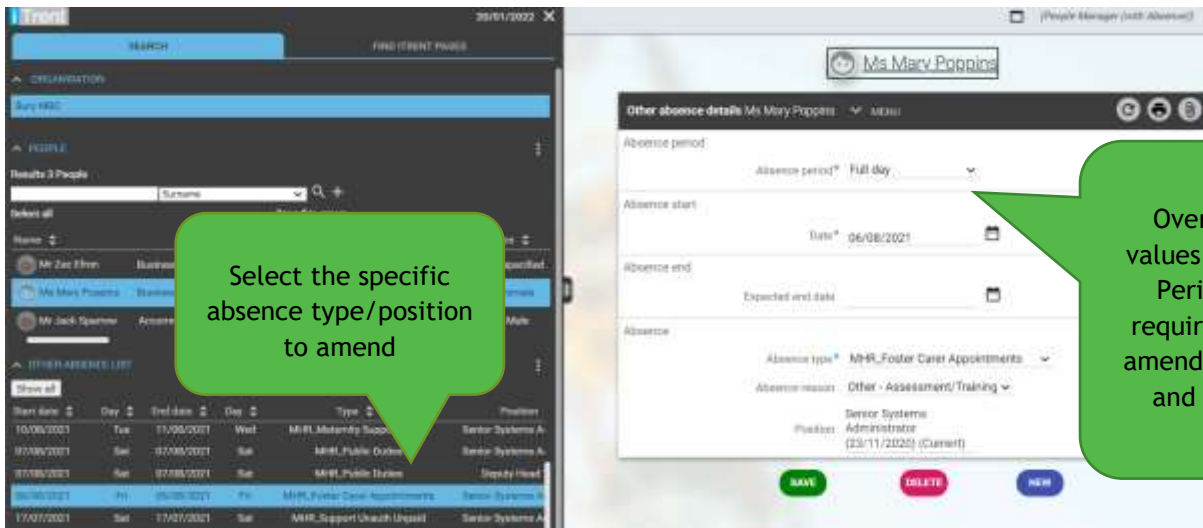
Select the Expand Side pane icon to view absence

Select the specific absence type/position to delete or amend

Select Delete

Select OK to remove the record

The details will be deleted. Continue?



HOW TO - OVERRIDE WORK PATTERN FOR OTHER ABSENCE

Closed Absence:

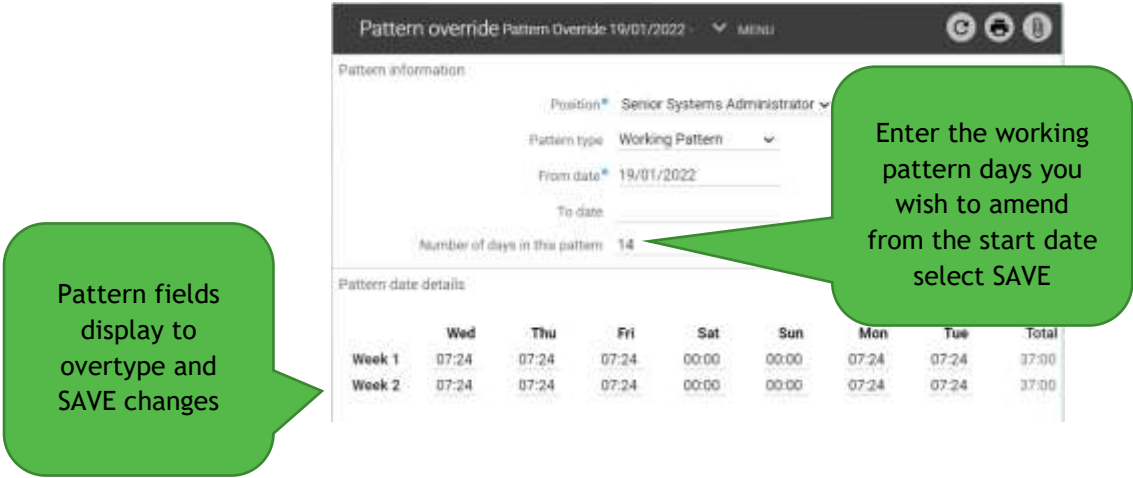
The standard work pattern held against an employee is the default pattern used to calculate the hours lost unless the specify time hours absent field is populated for part day absences.

The Manager can override the hours lost for any absences of more than one or full day.

When the absence reports are run the hours lost due to the absence will be based on the hours and minutes entered in the working pattern – if a pattern override is carried out for a particular absence the hours and minutes within the override will display.

Open Absence:

In the case of an absence which is still open the pattern override will not display the field to enter the hours and minutes HH:MM until the number of days are populated



HOW TO - VIEW/AMEND EMPLOYEE'S STANDARD WORK PATTERN

All hours/days lost due to any absence refer to the Standard Work Pattern attached to an employee record. iTrent does not allow for flexible patterns it uses a fixed pattern. The manager can use Pattern Override to amend any hours lost due to the absence.

The screenshot shows the iTrent interface with several callouts:

- Select Employment Information Folder:** Points to the 'Employment Information' dropdown menu.
- Select View Standard Work Pattern:** Points to the 'View Standard Work Pattern' button.
- Select the position:** Points to the 'Ms Mary Poppins' entry in the 'PERSONS' list.
- Select the Work Pattern:** Points to the '37-Standard Mon-Fri 7:24 Per day' entry in the 'WORKING PATTERNS' list.
- Hours and minutes of pattern display:** Points to the 'Hours information' section showing 'Contractual hours: 37:00' and the 'Pattern days' table.

Week 1	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
	07:24	07:24	07:24	07:24	07:24	00:00	00:00	37:00

Managers will need to ensure all employees standard working patterns are correct. An error message will display if the pattern hours do not match the contractual hours. If the Standard Pattern is incorrect select the link to report data/entitlement errors:

The screenshot shows the 'LINKS' section of the iTrent interface with a callout:

- Select link to open email:** Points to the 'Report data/entitlement errors' button.

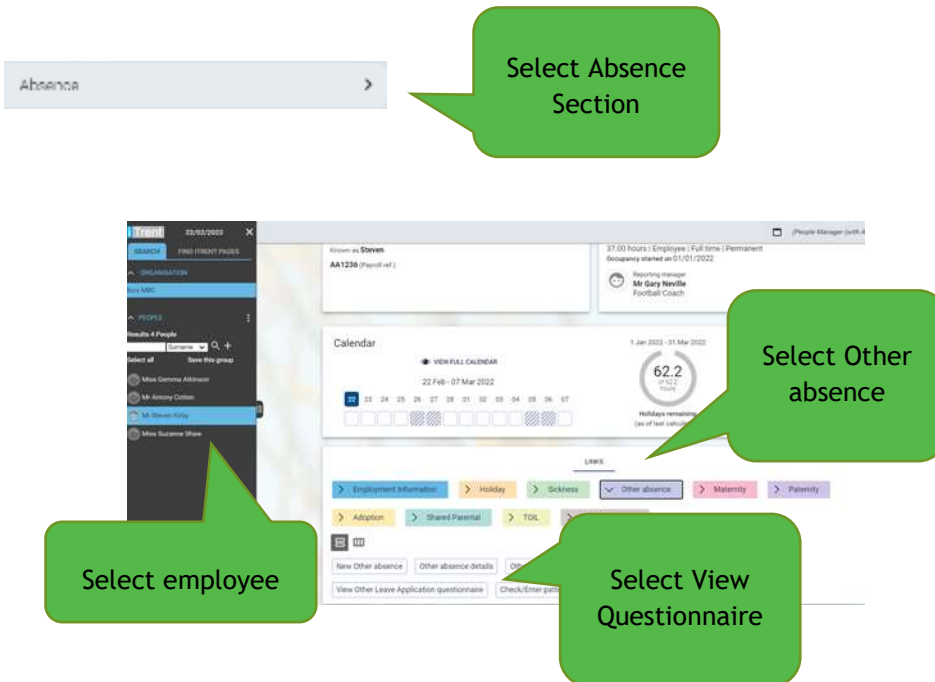
Please submit changes to work pattern with an effective date in the format of total hours and minutes and breakdown of hours and minutes worked each day

Total Hours 00:00hrs | M00:00 Tu00:00 W00:00 Th00:00 F00:00

Once the new pattern is attached by TransactionalHR they will recalculate all absences from the date of the change to cover all future absences.

HOW TO – VIEW QUESTIONNAIRES

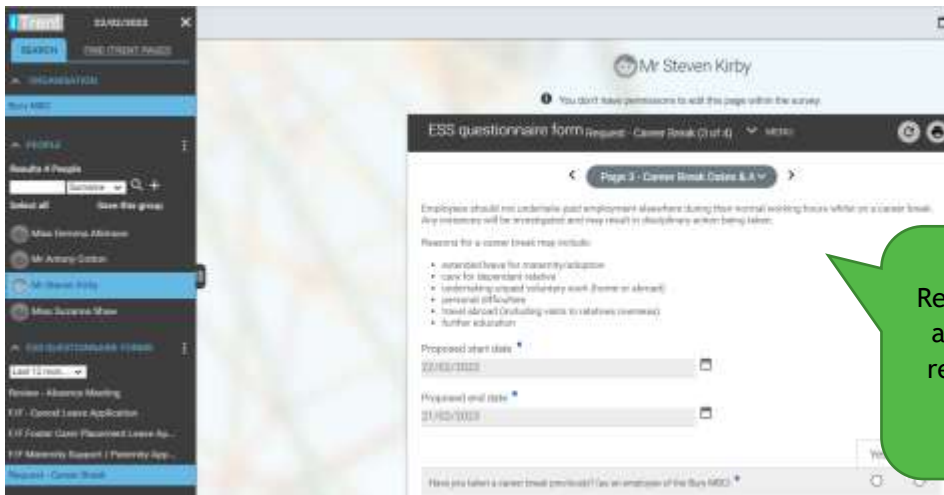
The manager can view the details of any questionnaire.



CAREER BREAK QUESTIONNAIRE:

For career break requests via a questionnaire the manager should view the content and approve the task in their To Do List.





AUTOMATED EMAIL ALERTS

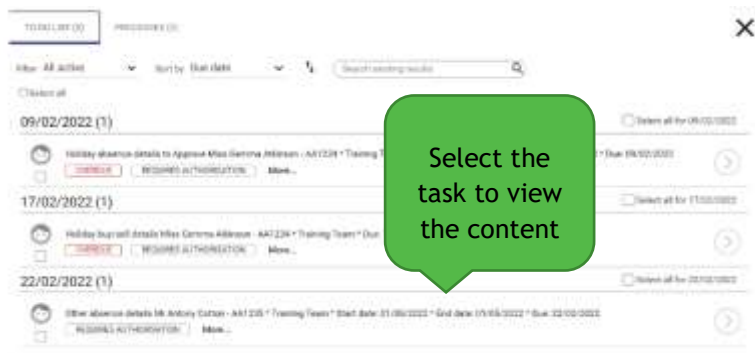
Emails will trigger to the manager and employee when any form is saved or submitted. If an employee’s request requires authorisation then the manager will receive an email and a task in their to do list.



HOW TO - APPROVE / REJECT TASK TO DO LIST:

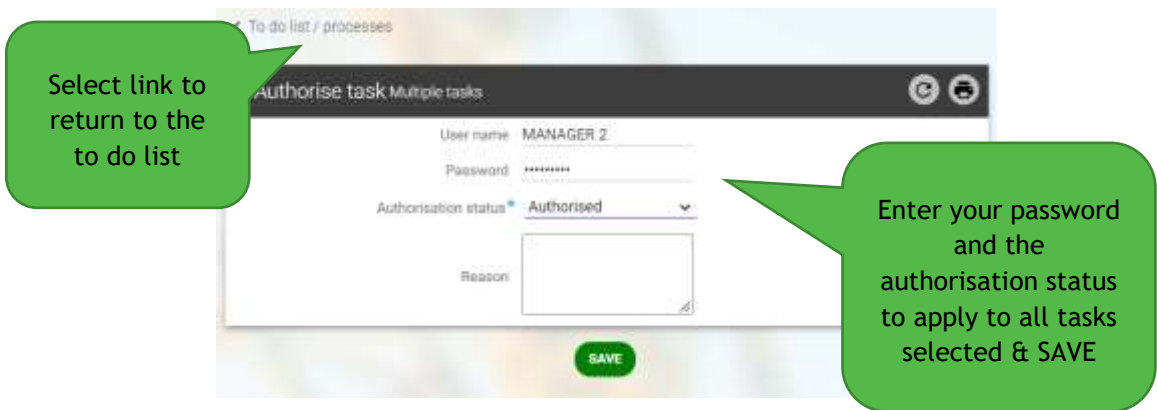
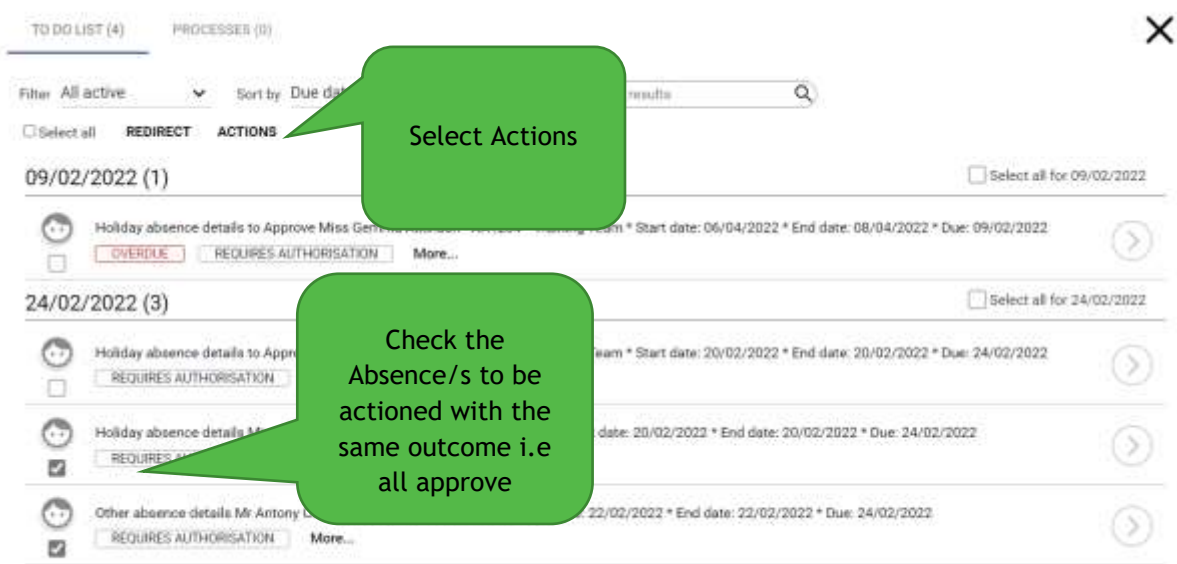


Select To open the to do list





If the Manager wishes to approve the request without checking the calendar as the email reason and dates are all acceptable the manager can authorise / reject from the To Do List directly



The employee will receive a confirmation email



The Absence will display on the absence calendar as a brown dot.



HOW TO - USE ABSENCE CALENDAR

The absence calendar displays the absences and work patterns of employees in the Managers reporting line. Absences can be displayed for:

- Month from today
- Specific date range
- Go back or go forward one month
- Go back or go forward three months

A Manager can display the absences for:

- All – Select all
- An individual – Search and highlight
- Selected individuals – Ctrl and highlight

A Manager can navigate from the calendar to absence forms to:

- Add a new absence
- Update/delete an absence
- Add Certificate
- View Entitlement

USE CALENDAR OUT OF OFFICE

The 'Out of Office' on the home page lists names of all employees with an absence as of today's date.

Out of office today (Ms Diane Edwards, Ms Mary Poppins, Mr Zac Efron)

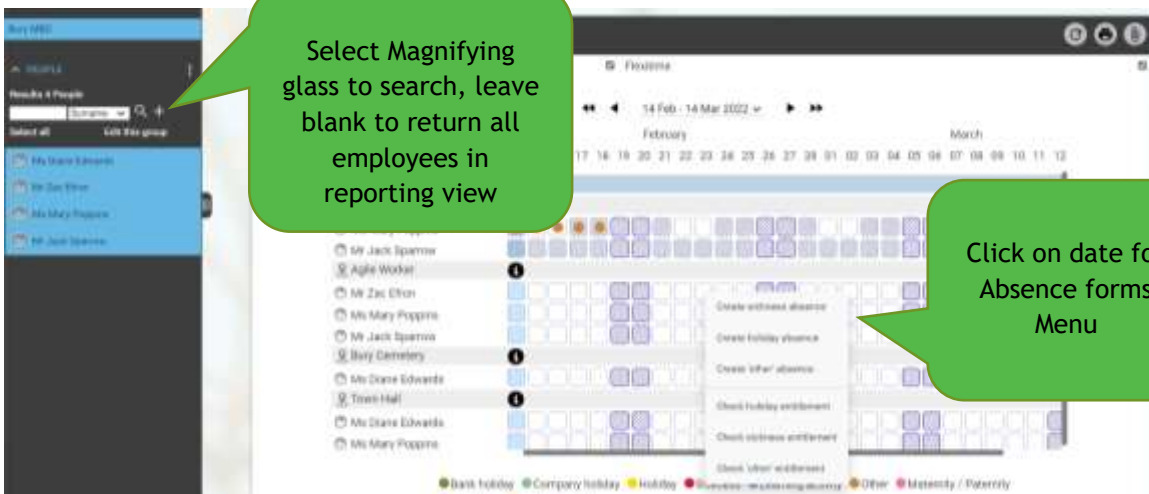
Nobody is out of the office today

To open the absence calendar select the Out of Office tile



Select the Out of Office to open the Absence Calendar

The calendar will open for the manager and direct reportees. Other employees in the reporting line can be obtained through a blank People Search or search by surname / forename or pay reference.



CREATE A NEW 'OTHER' ABSENCE THROUGH CALENDAR

Click on the start date of the Other Absence and select Create Other Absence from the pop menu.



For other forms to open select Menu and see below

Form opens with 'More than one day' period and the start date populated

Record Expected End Date

Once form is saved click paperclip to attach any documentation in relation to the absence

Select position you are the manager for and SAVE

Enter Absence Type of Other unless absence partly or wholly due to work and use Work Related Absence

Select LESS to hide the menu

VIEW / AMEND ABSENCES THROUGH CALENDAR

Click on 'Other' absence indicated with a red dot for the menu to Update/Delete.

You can open the Certification form to log the GP Certificate or Return to Work date.

Select date for option to specify date range

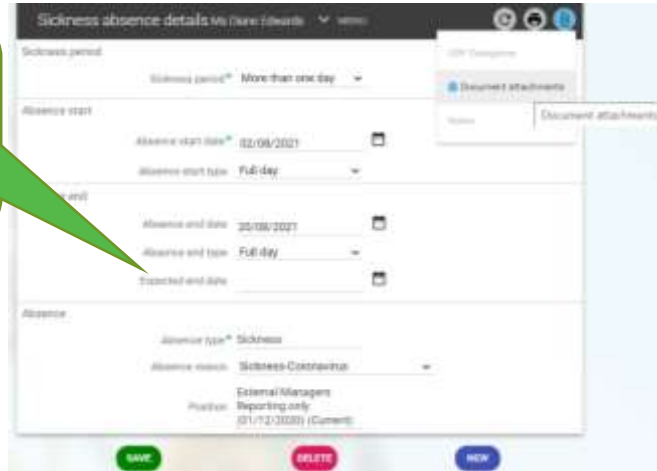
Select Update/Delete to open this Other Details form

Click on Existing Absence for pop up menu

UPDATE / DELETE 'OTHER' LEAVE THROUGH CALENDAR

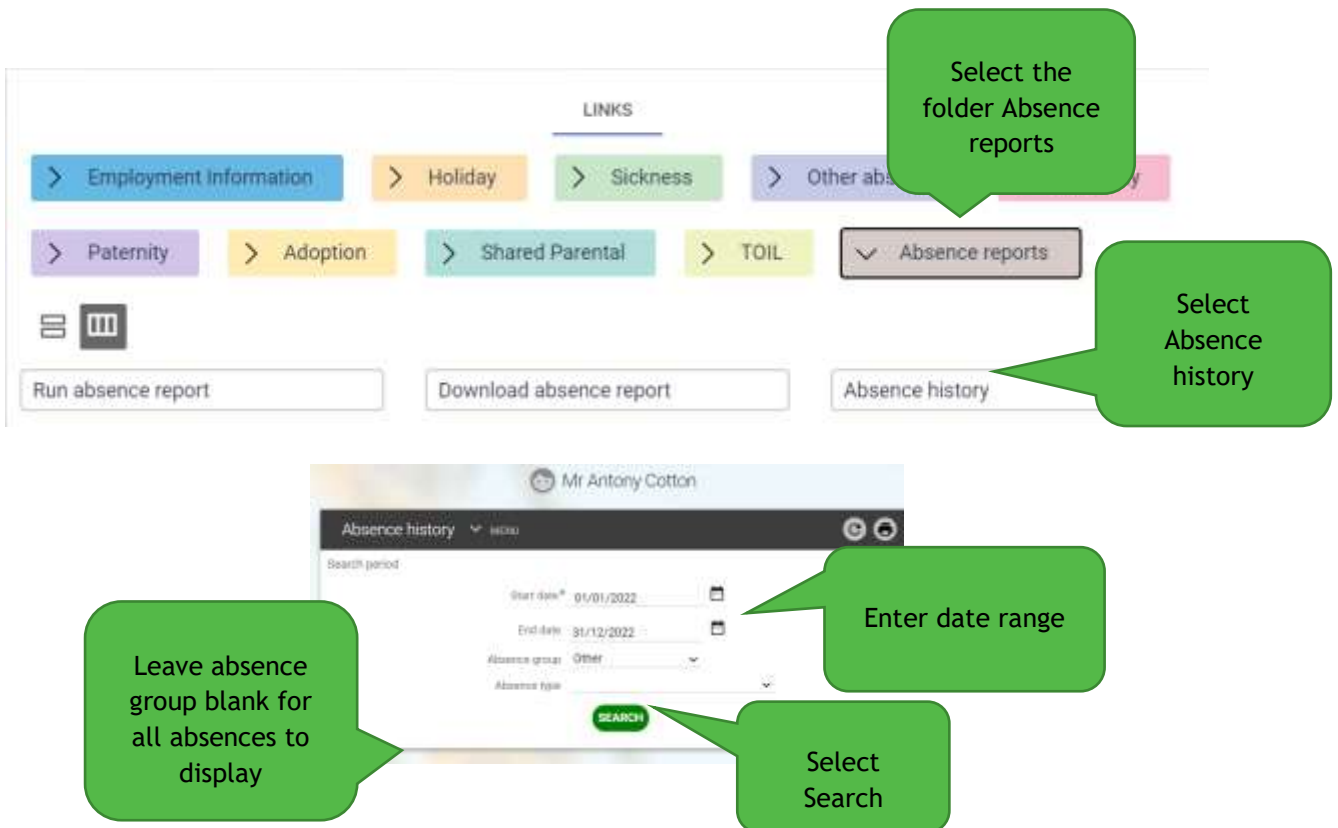
To end an absence an end date must be entered by the employee (or the manager can do this for them). The expected end date does **not** close the absence. The Reporting Manager **must monitor the absences of all employees in their reporting line** as pay will be affected if absences are not ended.

Other Details form opens to edit details and SAVE changes



HOW TO - VIEW ABSENCE HISTORY

To view the 'Other' absence history of reportees over a period managers can use the Absence History link.



Select the folder Absence reports

Select Absence history

Enter date range

Select Search

Leave absence group blank for all absences to display

Absence history ▼ MENU

Q

Personal ref.	Payroll no.	Person	Start date	End date	Type	Reason	Authorised	Team	Actor	Days
AA1235		Mr Antony Cotton	03/01/2022	03/01/2022	MHR_Authorised Absence	Other- Hospital Appointment				
AA1235		Antony Cotton	21/02/2022	21/02/2022	MHR_Support Special Leave_Other	Other- Funeral Close Relative				
		Cotton	22/02/2022	22/02/2022	MHR_Adoption Scheme Appointments	Other - Adoption Appointment	Authorised	Training Team	Actor	0
		Cotton	01/05/2022	01/05/2022	MHR_Election Duties	N/A	Authorised	Training Team	Actor	0

Absence history for all positions displays

All absences display. Select Print to save as PDF

Save as PDF

Print
Total: 3 pages

Printer

Save as PDF

Layout

Portrait