Advanced Flexi Manager Information & Guidance – iTrent Leave Module

This document provides Advanced Flexi Managers with information and guidance on using the Leave module within the core iTrent system:

Version	Notes	Author	Date
1.0		Product Owner (HRP)	12.02.24
1.1	Update to special leave slide Refresh after amendments	Project Manager (HRP)	02.04.24

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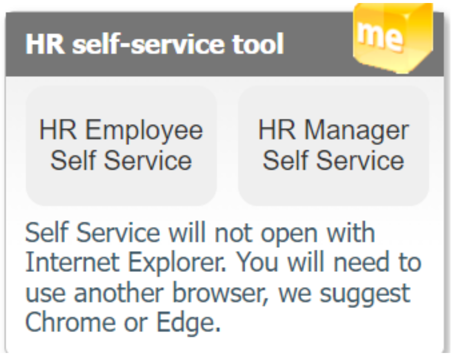
AFMs – Overview

Advanced Flexi Managers – iTrent

All advanced flexi managers will be given a dedicated role profile on the Core iTrent System to allow access to their department's flexi, annual and special leave. Additional employee details will be made available to assist with any checking or amendments required.

The role name will be "**ERC Advanced Flexi Manager – (Dept Name)**"

This will be accessed through the HR Manager Self Service link on the intranet page shown below:



If you have never used Manager Self Service, the login details are the same as your employee self service

AFM Tasks for Leave in iTrent

Go live tasks:

- Support Managers with the one-off tasks they are required to do at go live of iTrent leave module (Adjustment of leave balances for carried forward or borrowed days out with current year and transferring flexi balance onto iTrent, if applicable)

Ongoing tasks:

- Carry out manual adjustments for staff who have to work public holidays
- Highlight potential issues/errors to Managers (e.g. via Conflicts report)
- Deal with employee enquiries that are forwarded from the leave mailbox by HR Systems
- Provide general support and guidance to Managers (familiarise yourselves with the Manager tasks and guidance so you are able to support enquiries)
- Action any manual adjustments that may be required for employees if the Manager is off work and their iTrent tasks have been redirected
- Support Managers to carry out manual adjustments to employee's annual leave balances if they have approved additional carry over/borrow of leave for that employee (standard carry over should happen automatically)

AFMs – (For info only) Tasks that are no longer required

Tasks that are <u>no longer</u> required due to automation within the system:

Advanced Flexi Manager	Central Business Support
Manually updating in department transfers	Manually adding new starts
Manually updating entitlement when there is a change to work pattern	Calculating new start entitlement
Manually actioning the annual increase to AL balances	Manually updating cross departmental transfers
Manually actioning all the additional carry over or borrow requests for your department	Removing leavers from a Leave perspective (process for door entry will remain unless reviewed by that project)
Manually actioning the purchased annual leave requests	
Making manual adjustments to public holiday entitlement for people who are pro-rata	
Notifying central business support of leavers	

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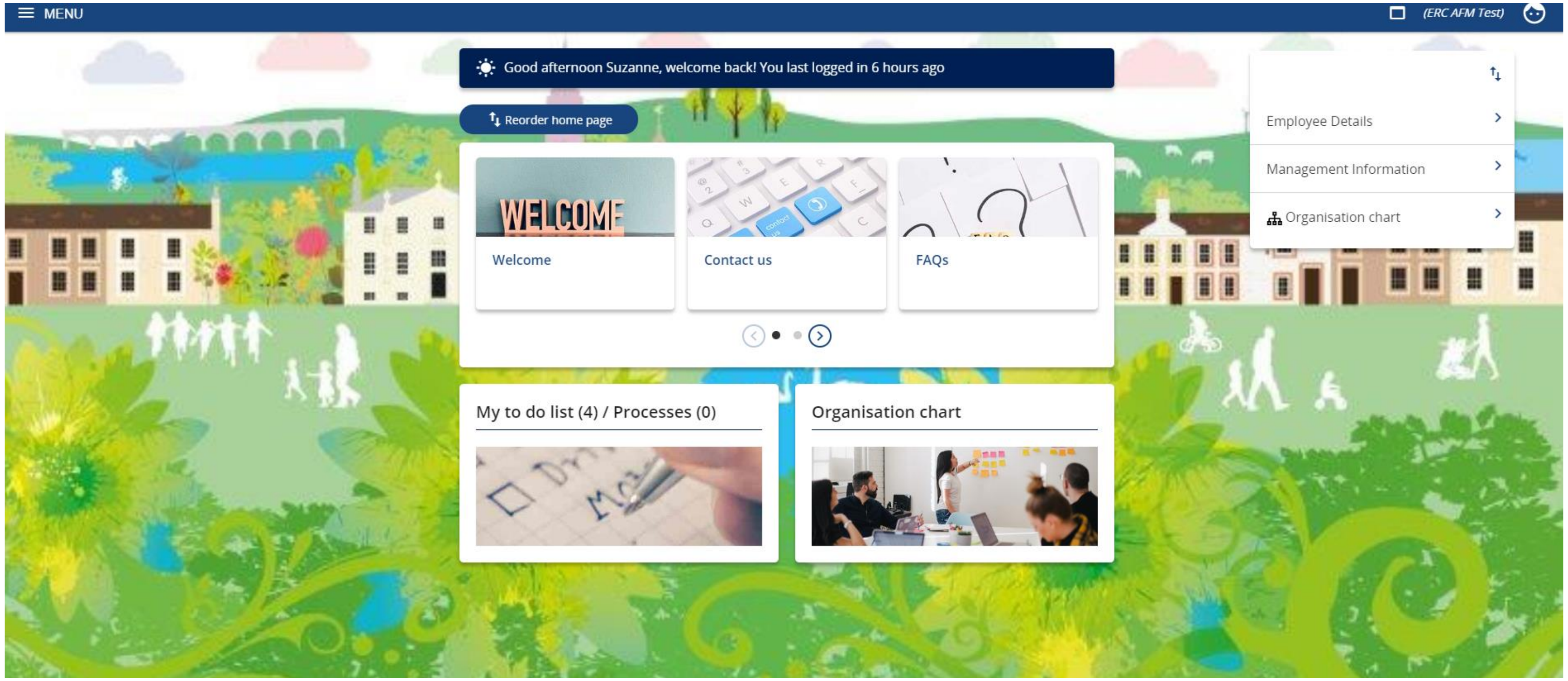
Navigating iTrent

Home Page

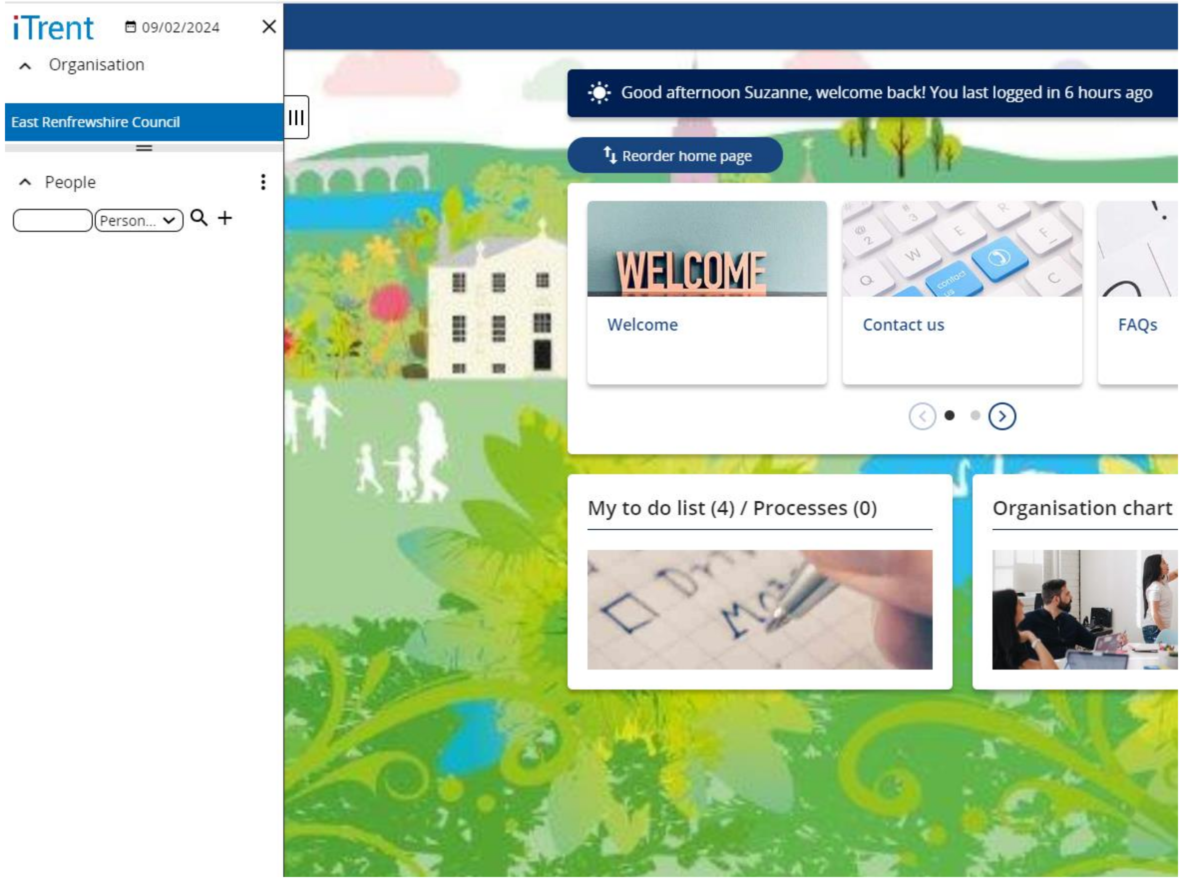


- Click Employee Details to bring up the search criteria box (see next slide)
- Management Information will allow you to access standard reports for Leave

Navigating iTrent

Searching for employees

- You can leave the search box blank and click the magnifying glass and it will return all employees you have access to
- You can also search on various criteria changing the search option by clicking the drop-down box
- Examples of criteria are employee no, forename, surname etc
- Click the magnifying glass once criteria is entered to return results



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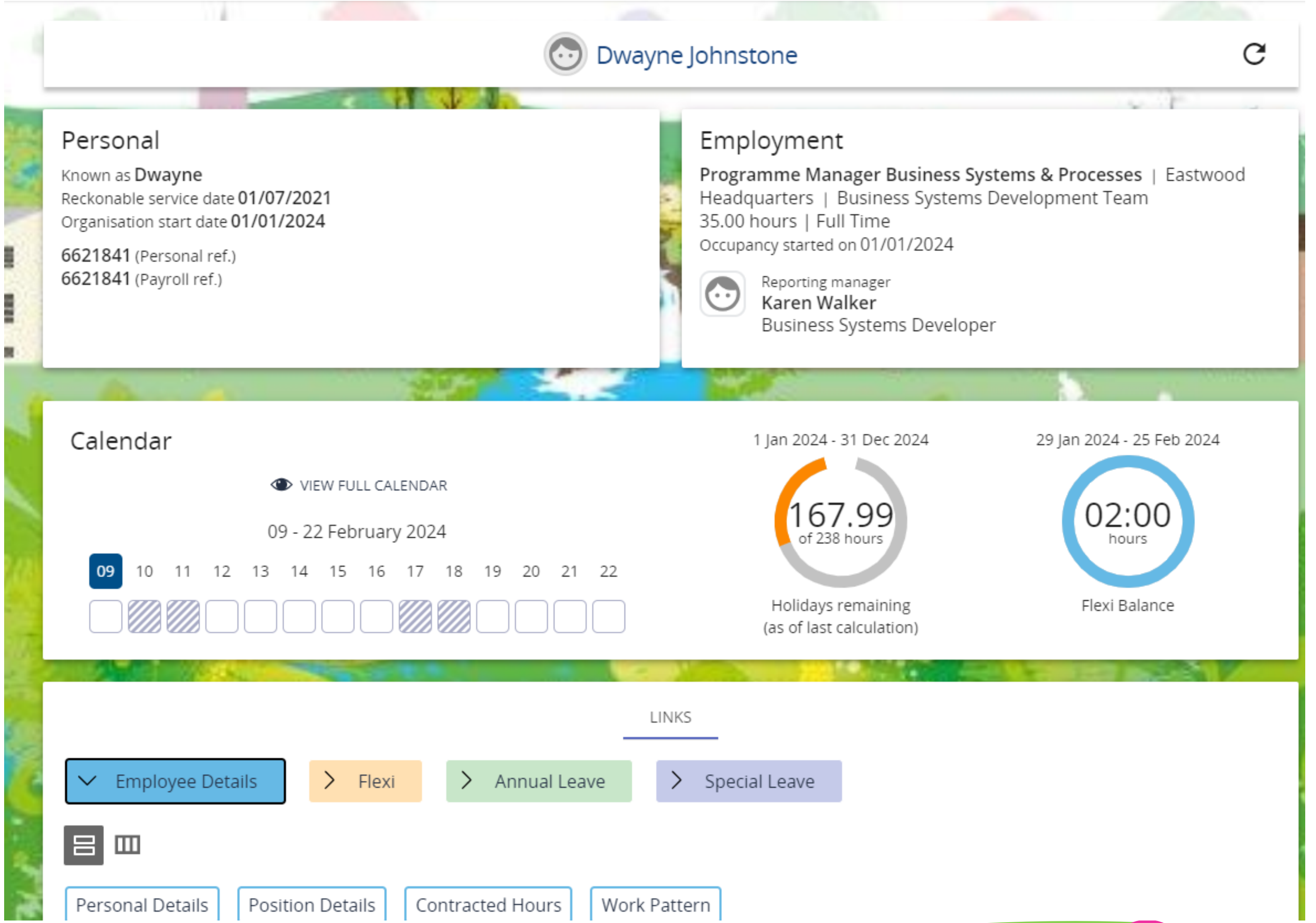
Employee Screen

AFMs can view/access: -

- Limited employee personal details including employee no, continuous service date
- Employment details including post details, line manager, contract hours and work patterns
- Annual and Flexi balances shown on the calendar view on the right *(n.b. these are updated in real time)*
- The links section is another way you can navigate to the screen you require



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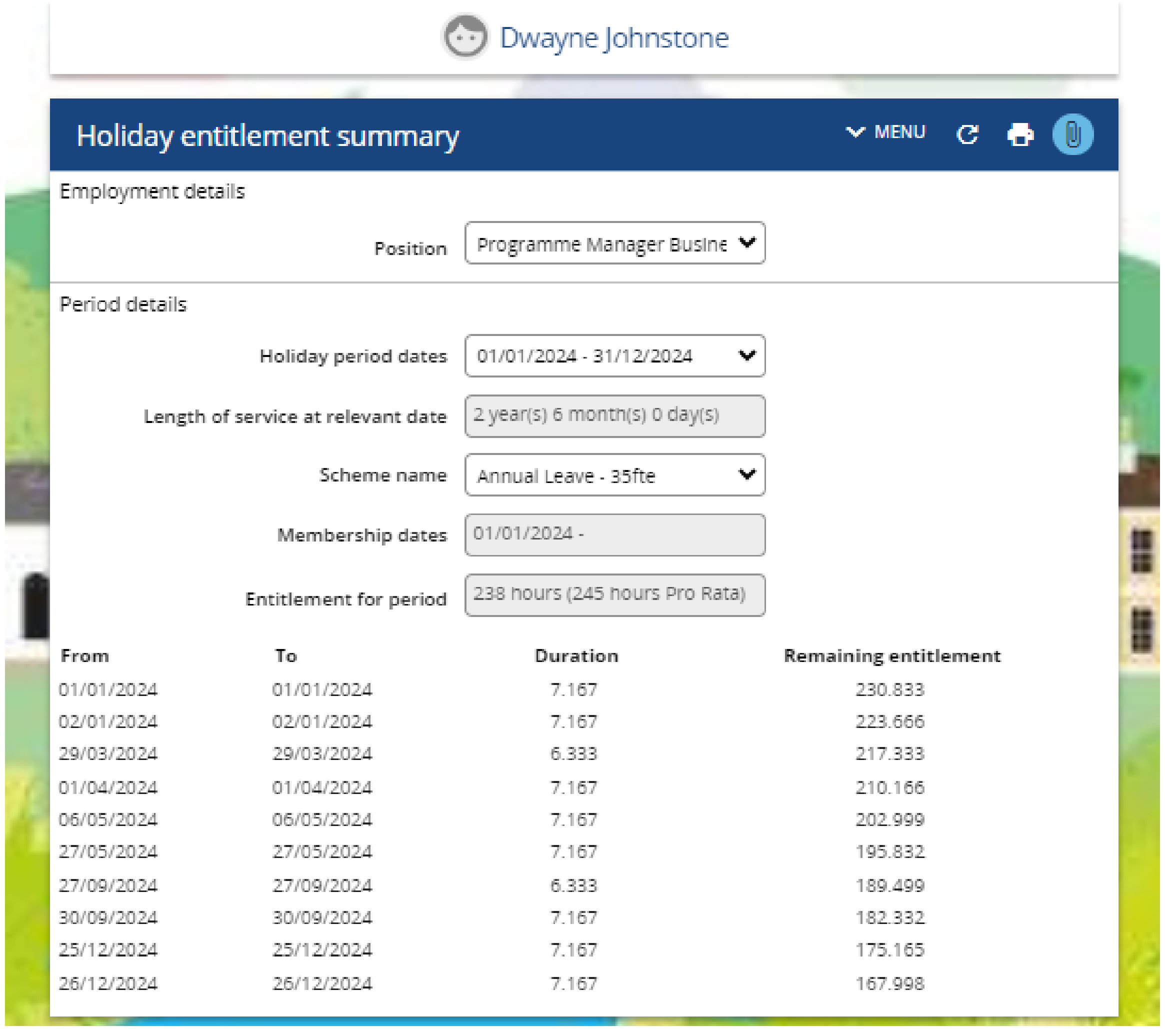
Annual Leave

- **Overview of Annual Leave Screens**

- Select the **Annual Leave link**
- You have access to the four following screens:
  - **Holiday Entitlement Summary –** Allows you to view employee's rolled holiday entitlement (annual & PH)
  - **Holiday Entitlement Adjustment –** Allows you to make adjustments to employees' annual leave balance
  - **Holiday Absence Details –** Allows you to view holiday bookings made
  - **Holiday Absence Details – New Booking –** Allows you to book annual leave on employee's behalf

Holiday Entitlement Summary

- Shows the full entitlement for the period
- Shows all personal & public holidays scheduled/booked
- Shows length of service
- Name of scheme attached to the employee
- Public Holidays are loaded from the start of a leave year and subsequently deducted straight away
- Time is only deducted if the day input is a scheduled workday



Dwayne Johnstone

Holiday entitlement summary

MENU

Employment details

Position: Programme Manager Busine

Period details

Holiday period dates: 01/01/2024 - 31/12/2024

Length of service at relevant date: 2 year(s) 6 month(s) 0 day(s)

Scheme name: Annual Leave - 35fte

Membership dates: 01/01/2024 -

Entitlement for period: 238 hours (245 hours Pro Rata)

From	To	Duration	Remaining entitlement
01/01/2024	01/01/2024	7.167	230.833
02/01/2024	02/01/2024	7.167	223.666
29/03/2024	29/03/2024	6.333	217.333
01/04/2024	01/04/2024	7.167	210.166
06/05/2024	06/05/2024	7.167	202.999
27/05/2024	27/05/2024	7.167	195.832
27/09/2024	27/09/2024	6.333	189.499
30/09/2024	30/09/2024	7.167	182.332
25/12/2024	25/12/2024	7.167	175.165
26/12/2024	26/12/2024	7.167	167.998

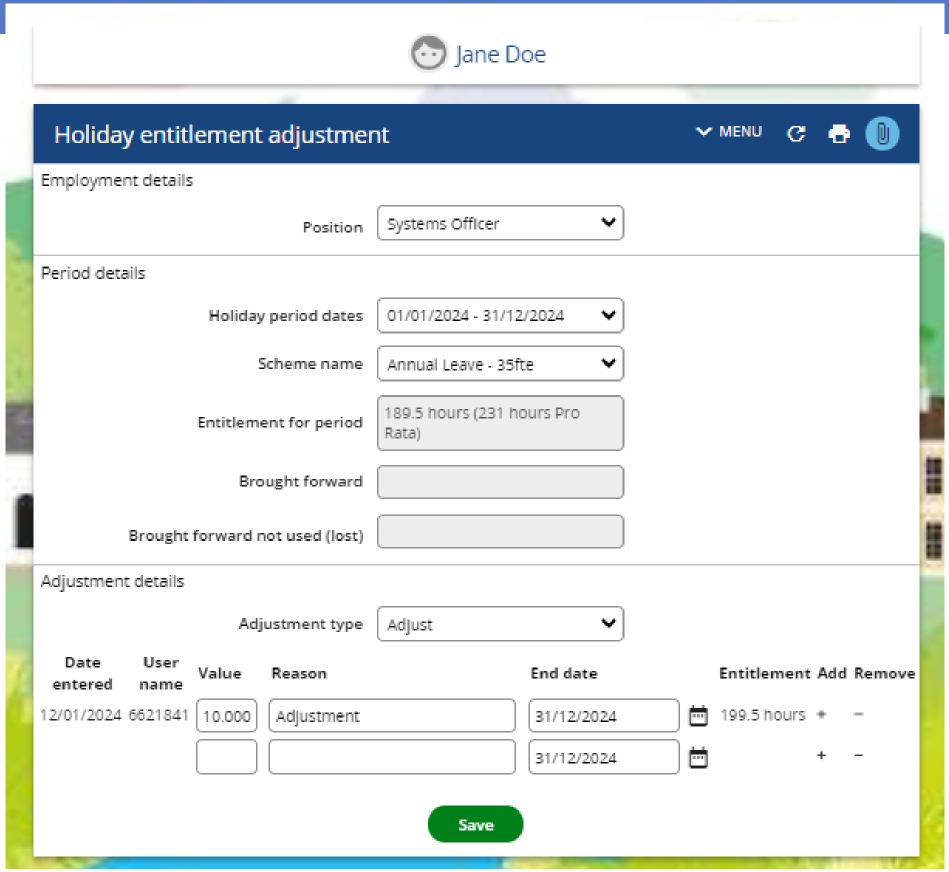
Annual Leave

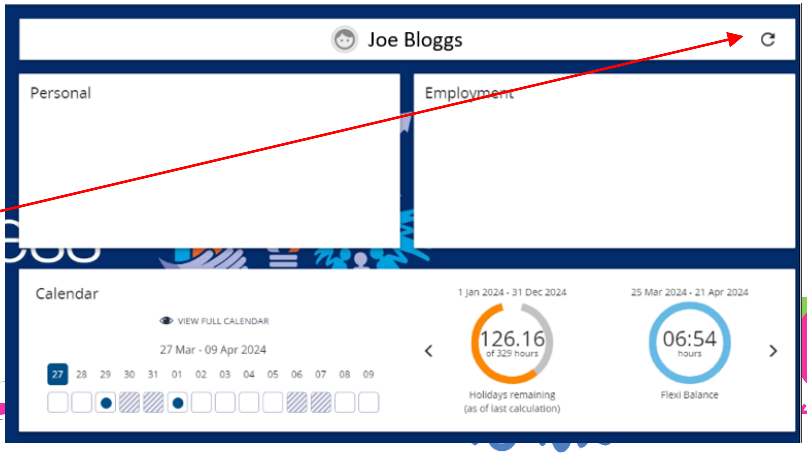
Holiday Entitlement Adjustment

- Allows adjustments to be made to entitlements
- This can be used for carry forward or borrowed days leave from a previous year
- Crediting hours if an employee has worked a public holiday and they were not due to

- Adjustment must be made in hours and minutes (minutes to 3 decimal places)
- A reason should be added for the adjustment for audit purposes
- End date is entered as the last calendar day of the holiday period the adjustment is entered for

- Multiples entries can be made by clicking on the + icon
- Entries can be deleted by clicking on – icon
- If you make an adjustment but it isn't showing on the hours remaining, hit the refresh button on iTrent

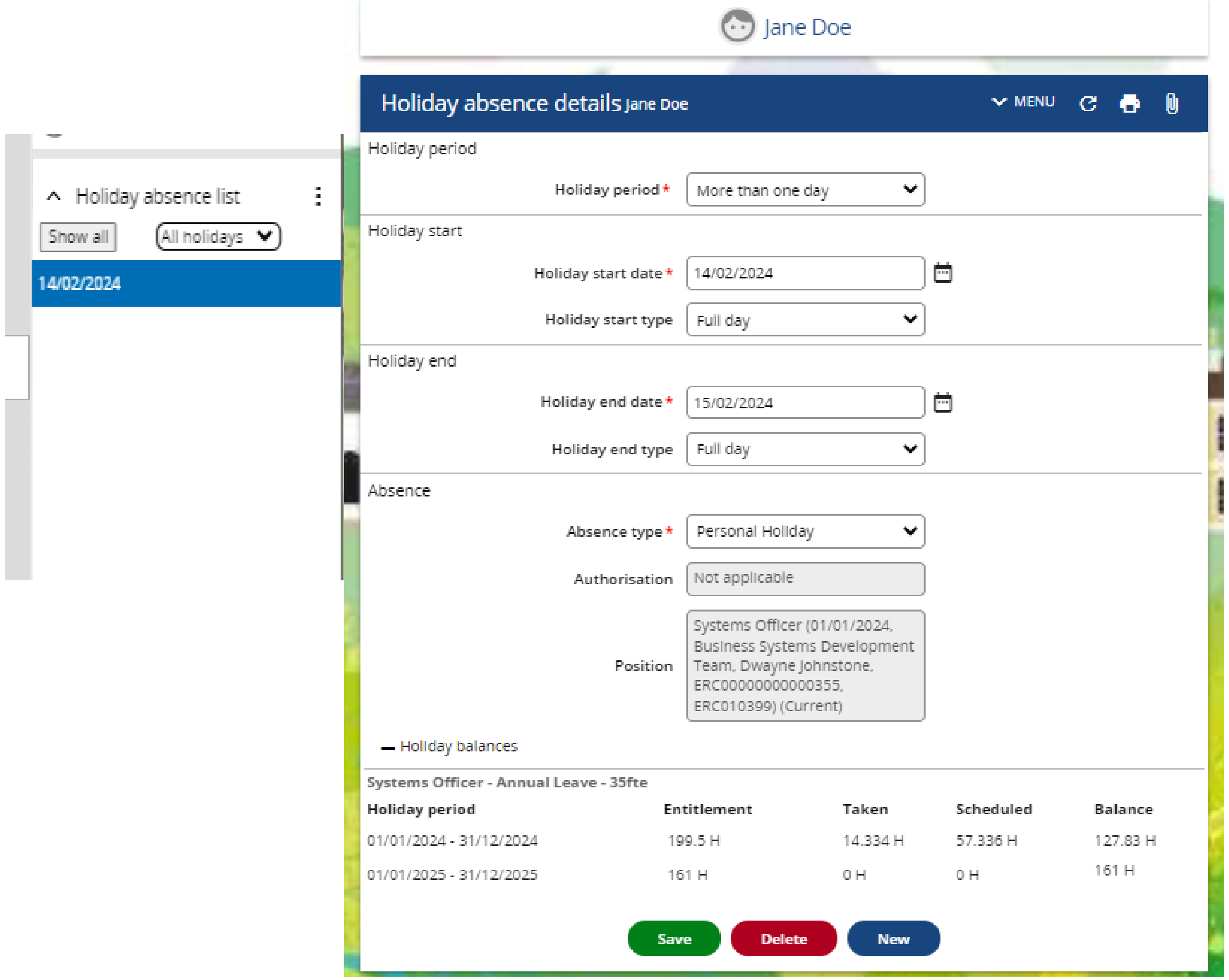




Annual Leave

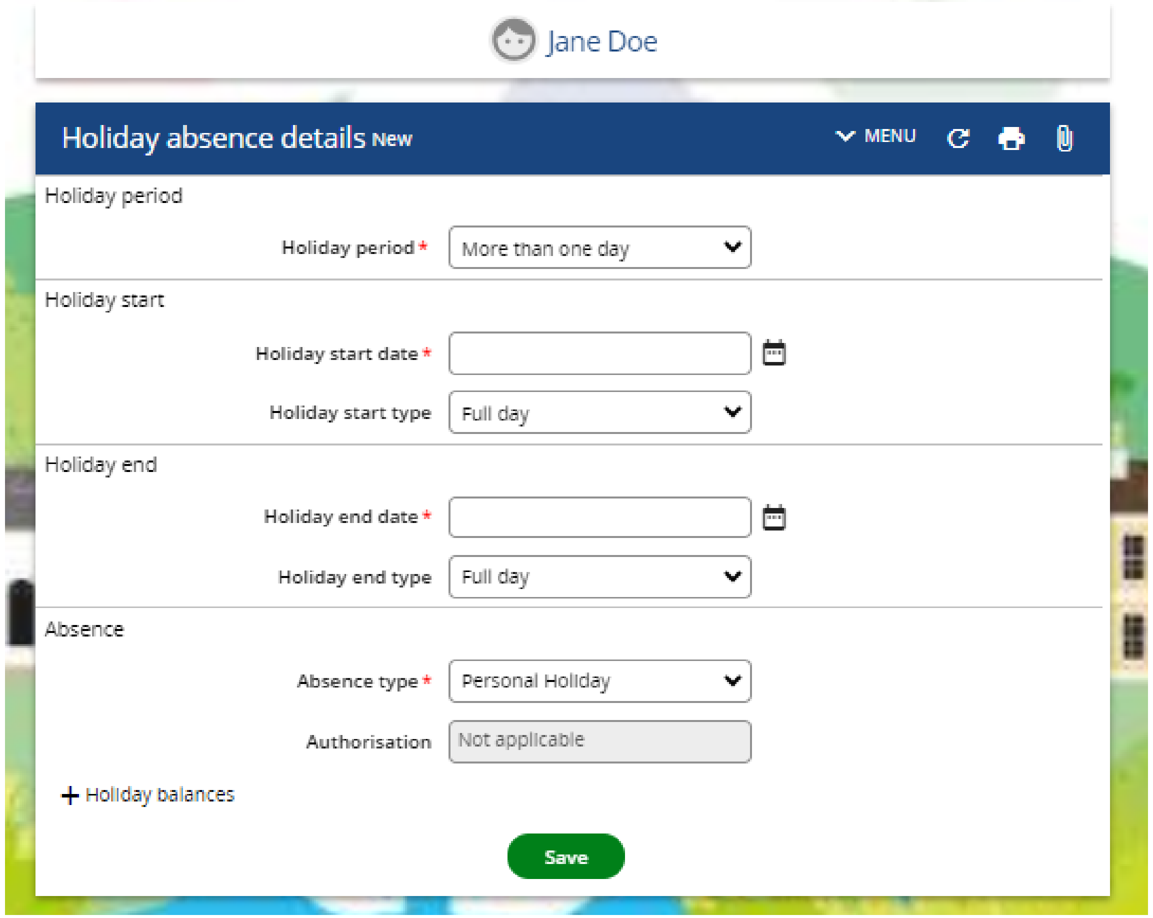
Holiday Absence Details

- Click on the left-hand side the relevant holiday booking from the holiday absence list you wish to view
- Brings up the form and the details of the holiday
- View only screen
- Can also check the balances at the bottom of the screen
- Authorisation not applicable is shown as will have been keyed by support staff with specific profile – so no authorisation required
- If a day has been booked in error, it can be deleted from this screen
- New booking can also be generated from this screen by clicking “New”



Holiday Absence Details – New Booking

- Creates a blank form to record new booking
- Input relevant dates for the holiday/absence
- Click Save
- Once saved you can enter a new booking from this page by clicking "New"



Flexi Leave

- Core working hours are 8am – 6pm
- No flexi terminals – all recordings must be made via Employee Self Service
- One time flexi recording per day – start & finish time and length of break(s)
- Recordings can be made in retrospect if employee forgets to record on the day, provided still in current flexi period
- Recordings cannot be made out with the current flexi period
- Adjustments can be made for any time therefore, if a recording cannot be made as have moved to a new flexi period, then an admin or manager will need to make an adjustment on behalf of employee
- Employees can carry forward 15 hours (pro-rata) at the end of each flexi period (automatically processed)
- Negative adjustments have an upper limit that can be done in one transaction this is -999 minutes.
- If a further negative adjustment needs to be done as employee carries a higher negative balance, then admin/manager will need to make a second negative adjustment
- There is no limit on a negative an employee can go into
- Time will not be deducted from the employee however, if a time recording is not made (different from Etarmis)

Flexi Leave

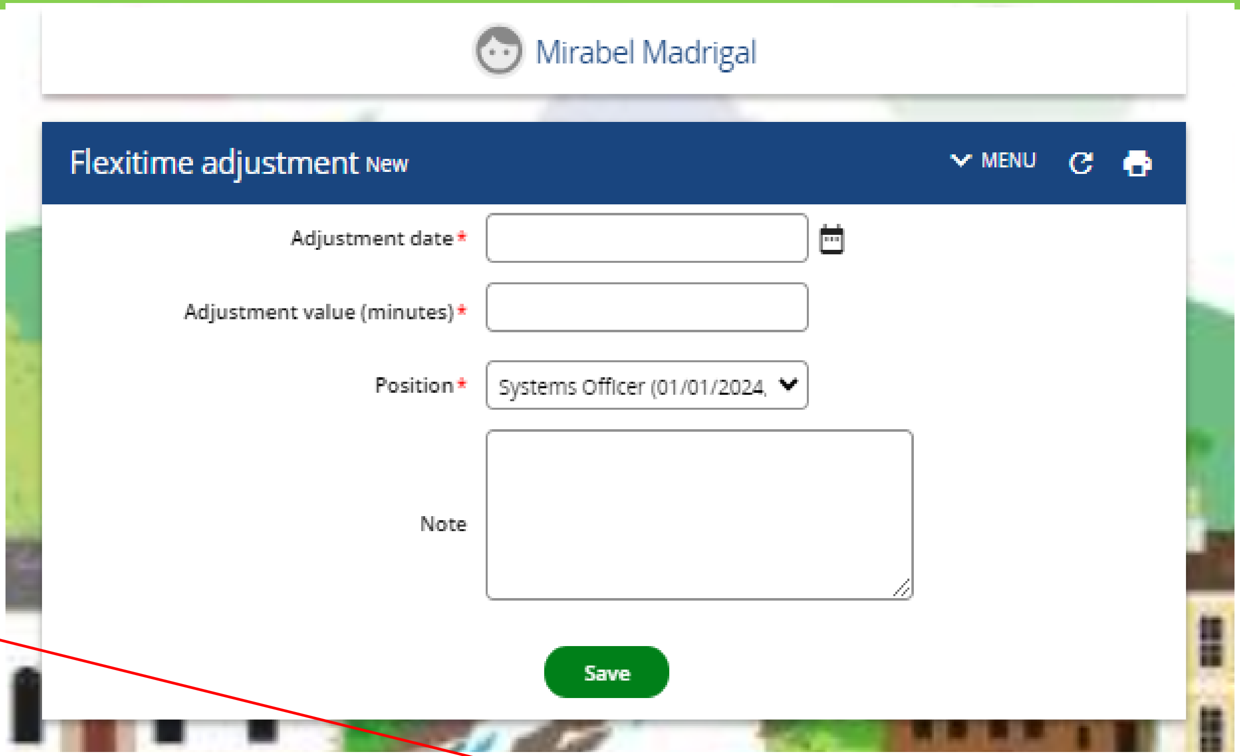
Overview of Flexi Screens

- **Flexi Balance Adjustment:** Allows you to view any adjustments that have been made for the employee
- **Flexi Balance Adjustment - New:** Enter new adjustment for the employee
- **Flexi Record Details:** Show historic flexi bookings made by employee or relevant personnel
- **Flexi Record Details – New Time Recording:** Allows admin to record time or process booking on behalf of employee

Flexi Leave

Flexi Balance Adjustment/New

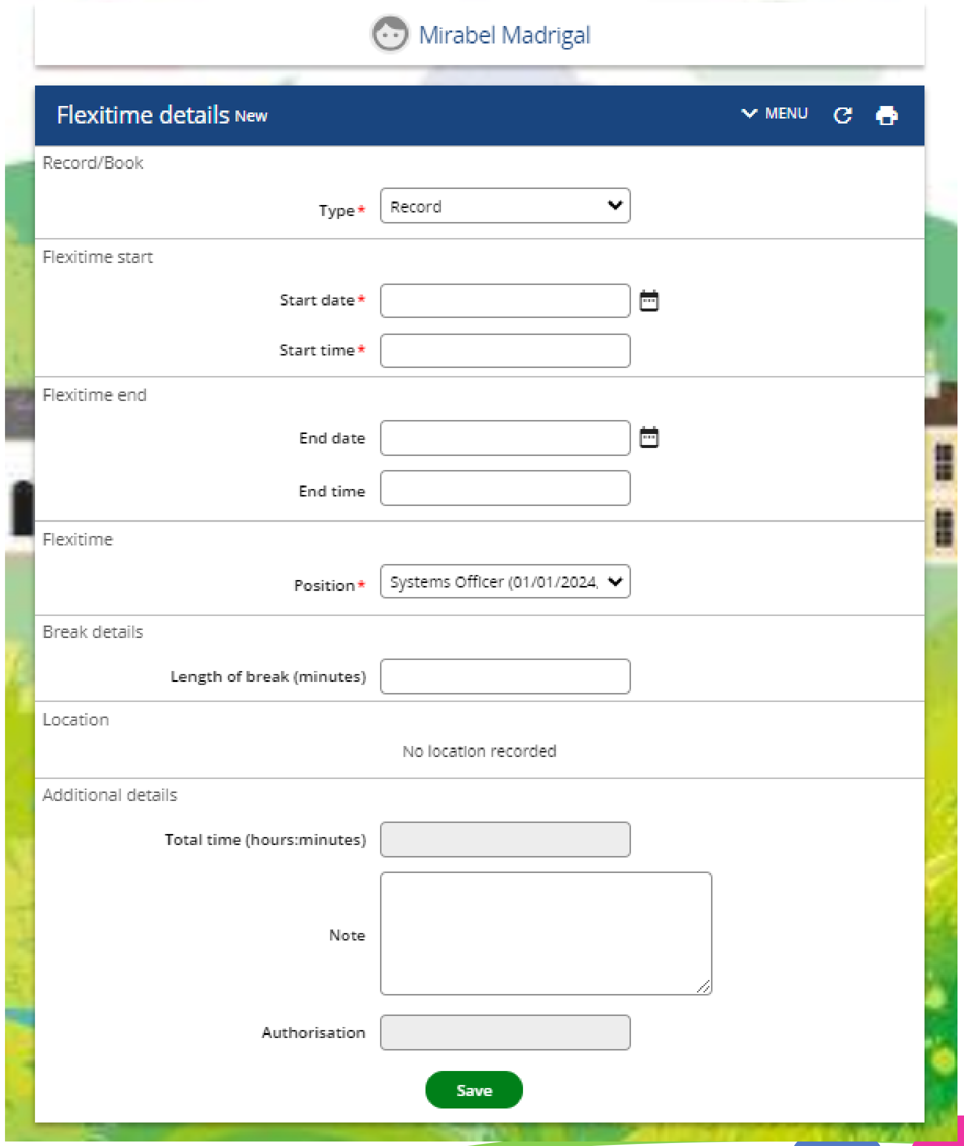
- Adjustment Date should be entered as date adjustment being made
- All adjustments must be made in minutes
- If an employee were to have 8 hour 15 minutes to be credited this should be entered as 495 minutes. Once record is saved this will show in hours and minutes on the clock on the employee's record (if the adjustment isn't showing, click refresh on iTrent)
- To deduct time just put a **"-"** in front of the minutes to be deducted
- If employee has more than one position, ensure correct position is selected from drop down
- Record relevant details of why adjustment being made i.e. date and reason for it – helpful to put name or initials of person making adjustment in notes
- Click Save



Flexi Leave

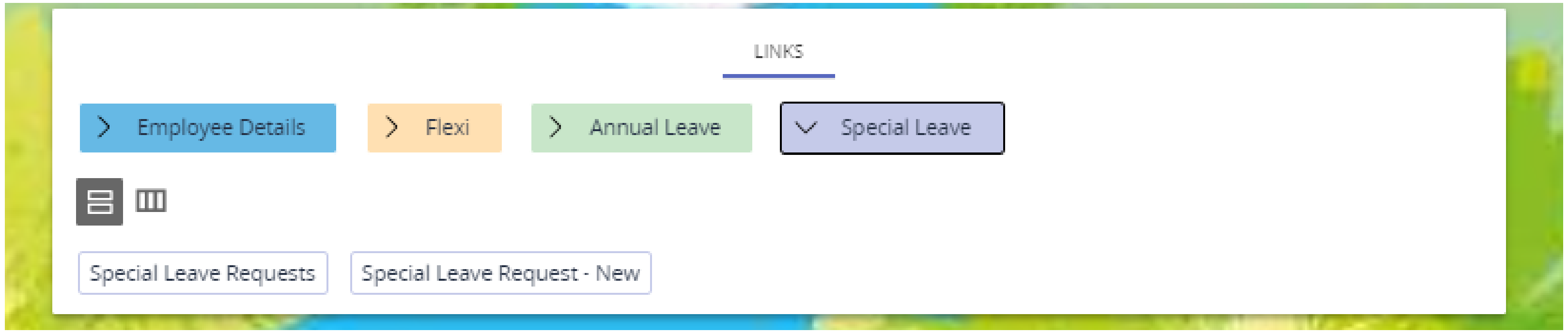
Flexi Record Bookings/New

- Can view previous flexi recording bookings made
- Can enter recording & bookings on behalf of the employee
- Complete form shown on the right-hand side of the screen
- If completing this for any reason on behalf of employee, please detail this within notes section including name or your initials.
- Click Save
- Balance updated on the front screen



Special Leave

Overview of Special Leave Screens

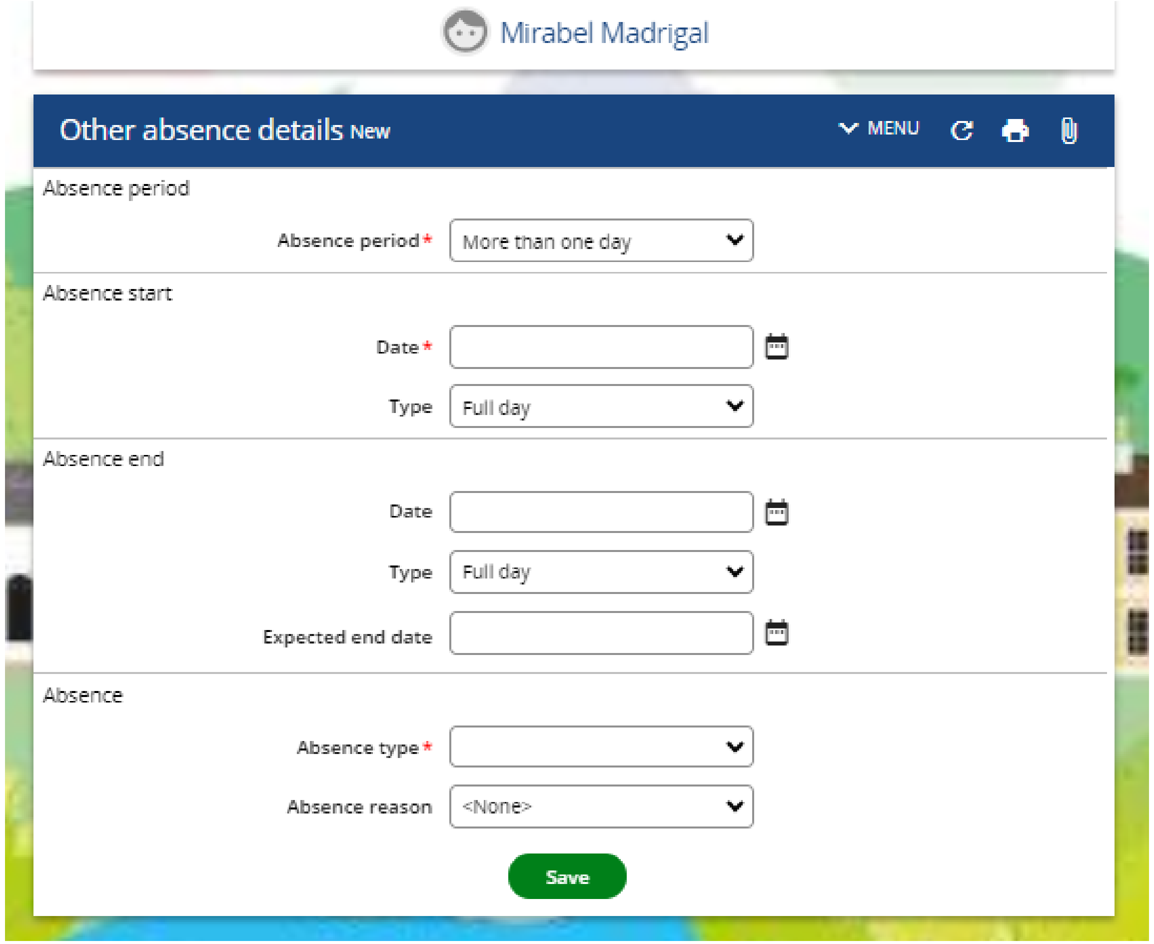


- **Special Leave Requests:** View any special requests submitted/ recorded on the system
- **Special Leave Request – New:** Record/key special leave request on behalf of the employee

Special Leave

Special Leave Requests/ New

- Can record special leave paid
- Employees/Managers should contact HR Direct if they need to request period of unpaid special leave
- Select reason from Absence Type
- A list of relevant reasons will then be shown in the drop-down field of "Absence Reason"
- Dates and length of period should be completed
- Full Day should only be selected when it is one day's absence
- More than one day you must select "More than one day"
- For Part Day absences you can then stipulate am or pm
- Alternatively, you key the times absent or a total amount of hours



Conflicts report

- A Boxi report has been set up for Conflicts, to show where double bookings may have occurred in the previous period (e.g. someone clock ins on flexi when they already have a days annual leave booked and is created double time)
- This is scheduled to be sent to you by email every month
- Ideally this will be a blank report as double bookings should not be occurring (a warning will show to the employee that another absence exists), however, this will highlight if it does occur and allow you to report this to Managers

Key Points to Remember!

- This profile does not allow you access to approve or reject requests – this will only allow you to view employee records and adjust where appropriate
- There should always be a note included when adjusting and the name of the employee (or initials) who has made the adjustment along with the date
- TOIL is not currently defined in the flexi policy or any other guidance/ rules therefore, without a defined process we cannot build a module to reflect the parameters. For this reason, this will not be recorded in iTrent
- Employees cannot make bookings or recordings for previous flexi periods – therefore if adjustments are required, these must be made by a manager or admin
- No time will be deducted from a flexi balance if a booking is not made
- Employees can now carry over 15 hours (pro-rata) per flexi period
- No change to policy in terms of 1 flexi day (pro-rata) per period
- Adjustments for public holidays will only be required if an employee requires time credited for this day where the system has not processed it
- As annual leave and public holiday balances are rolled together if a PH falls on a non-working day for an employee and they are entitled to it then these hours will remain within their entitlement balance to take when they wish i.e. this may apply in the case of a full-time worker who works condensed hours
- For Adjustments (conversion calculators are available to assist):
    - **Annual Leave: Hours and minutes (minutes to 3 decimal places)**
    - **Flexi: Minutes only**

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