



User Guide



Version Control

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0.17	24/03/2022	Amy Dale	Updated wording within document and updated screenshots to reflect new myTeam rollout
0.18	06/02/2024	Nichola Millen	Addition of Sickness History search facility

Version Control History

Document Name: myTeam User Guide

Reviewed & Approved By:

Job Title	Name	Date	Version Approved
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ESC - Helpdesk Team		For staff live on myNL Portal - Please raise a People Helpdesk General Enquiry request form. For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk

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Introduction

myTeam is a restricted level of access within iTrent which provides North Lanarkshire Council employees with line management responsibilities the opportunity to view a range of employment information about employees who directly report to them.

With this application you will have access to the following information and processes for employee's who directly report to you:

- View the organisational start date
- View position details
- View occupancy details
- View hours and basis (contractual working hours and employment status)
- Working patterns
- View and add sickness absence details
- View and run standard management reports
- Approve holiday and other absence requests

Access levels and audit trails will continue to be monitored by the Systems Admin Team on a regular basis.

Data Protection

The data contained in this system and its usage is subject to relevant legislation and North Lanarkshire Council's Data Protection Policy and Procedure.

1. Login

The link to myTeam is: https://ce0076li.webitrent.com/ce0076li_web/

Once you have entered the website, please enter your username and password, then click on the login button.

Your myTeam log in information is the same log in information that you use for mySelf.

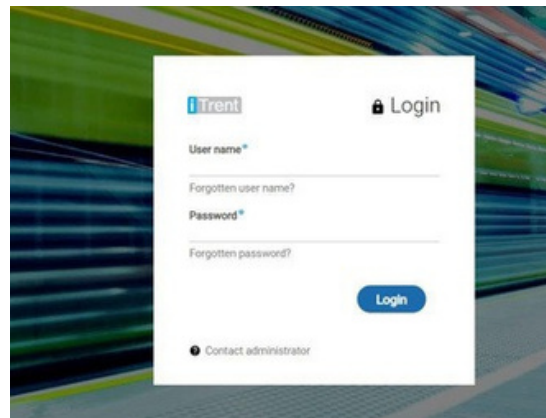
If you have any problems logging in to myTeam, please try the below steps in the first instance.

However, should you experience any further difficulties where you require further support –

For staff live on myNL Portal - Please raise a [People Helpdesk General Enquiry](#) request form.

For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk

The log in screen is shown below:



1.1 Forgotten Your Username

Your username for myTeam is your employee reference number. You'll be able to find this on your staff ID badge,

However, should you require a reminder of your employee reference number, please press the 'Forgotten username?' option within the log in screen, you will be directed to the following screen:

The screenshot shows a login form titled 'iTrent Login'. It contains four input fields: 'Forename', 'Surname', 'Date of birth', and 'Email address'. Below the fields are two buttons: 'OK' and 'Cancel'. At the bottom left, there is a link that says 'Contact administrator' with an information icon.

Enter the information requested, and press 'ok', please ensure that the email address which you enter matches your user email address from your mySelf account. You will then receive your prompt for your memorable information which you would have previously set up when you first logged in to your mySelf account. Please enter your memorable information into the 'Memorable information' field and then press ok.

The screenshot shows a prompt for memorable information. It has a 'Prompt' label above a blacked-out input field. Below that is a 'Memorable information' label with a blue asterisk, followed by an empty input field.

This will then redirect you back to the log in page, and your employee number will be automatically populated in the 'username' section.

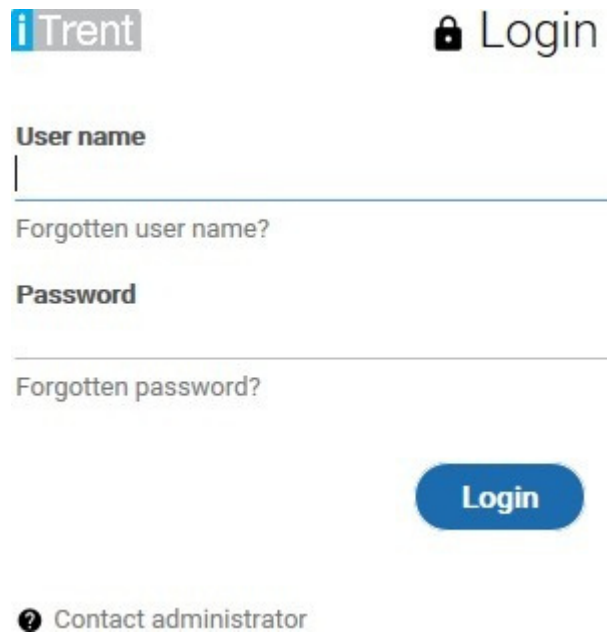
If you have **not** previously set up your Memorable Information in your mySelf account and require further support –


For staff live on myNL Portal - Please raise a [People Helpdesk General Enquiry](#) request form.

For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk

1.2 Resetting your Password

If you have forgot your password, you can reset this via the log in screen by clicking on 'Forgotten password'




iTrent  **Login**

User name
|
Forgotten user name?

Password
|
Forgotten password?

Login

 [Contact administrator](#)

You will then be directed to the following screen. Please enter your username and your email address which is registered as your user email address on your mySelf account. Then click 'Email'

User name

Email address

 [Contact administrator](#)

You will then receive confirmation that your password reset request has been successful and you will receive an email within 15 minutes with a link to reset your password. The confirmation is shown below:

An email containing a link to reset your password has been sent to the address provided, and should be received within the next 15 minutes.

User name

Email address

 [Contact administrator](#)

You should receive an email shown below within a timeframe of 15 minutes, however, please allow longer for this to arrive.

Please also check your 'junk' folder to ensure that the email has not went there. Should you have any issues, please do not hesitate to contact the People Helpdesk Team.

iTrent / mySelf / myTeam

Hi Amy,

You recently requested to reset your password for your iTrent account. Use the button below to reset it.



This password reset is only valid for the next 24 hours.


[Reset your password](#)


If you did not request a password reset or if you have any further questions, please contact the People Help Desk Team by emailing them at ESC-HelpDeskTeam@northlan.gov.uk or by calling 01698 403151.

Once you have received the reset email, please click on the 'Reset your password' box where you will be directed to mySelf and you will be prompted to change your password and confirm your new password.


You must change your password before you can continue.

  Login

New password 

Confirm password 

[Login](#) [Cancel](#)

 Contact administrator

Your password must be a minimum of 8 characters long, consist of upper and lower case letters and at least 1 number or special character.

Once you have entered and confirmed your new password click on Save.

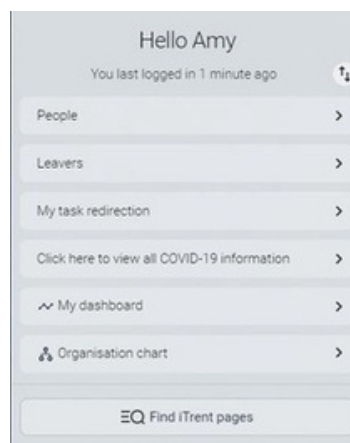
You will then be directed to the login screen where you should enter your username and the password which you have just created, press 'Login' and you will then successfully be logged into myTeam.

2.Home Page

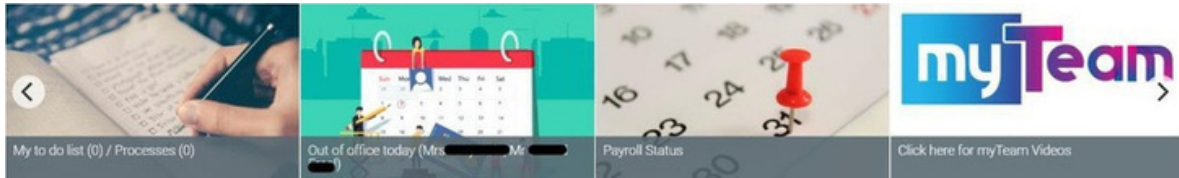
You will now see the home screen:



At the top right-hand side, a menu is available:



At the bottom of the home page, a carousel of items is available, you can view and click on more items on the carousel by using the arrows to see all available options:

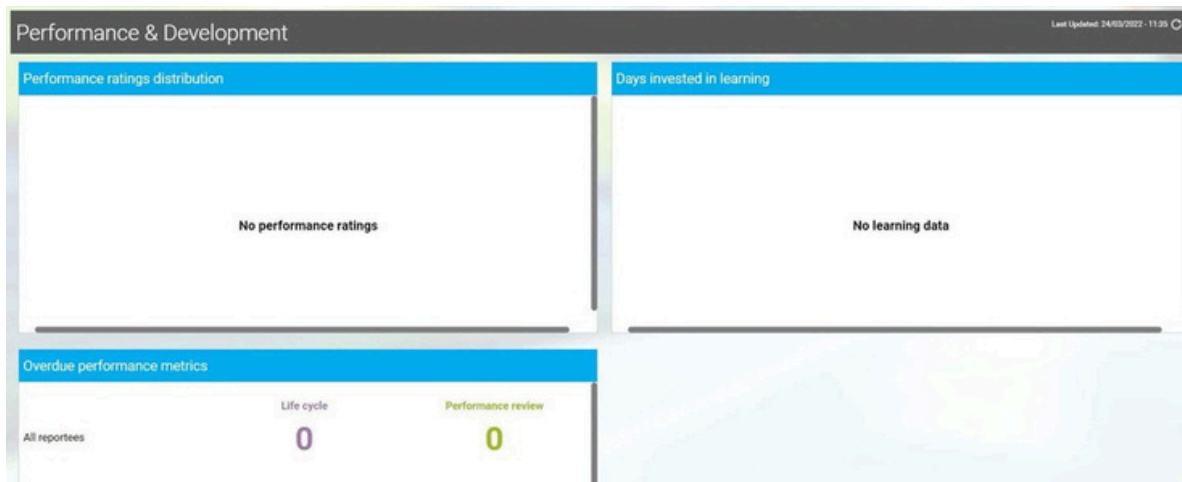


2.1 My Dashboard



My Dashboard provides a summary of “Absence” and “Performance and Development” data relating to your reportees:





2.2 Organisation Chart



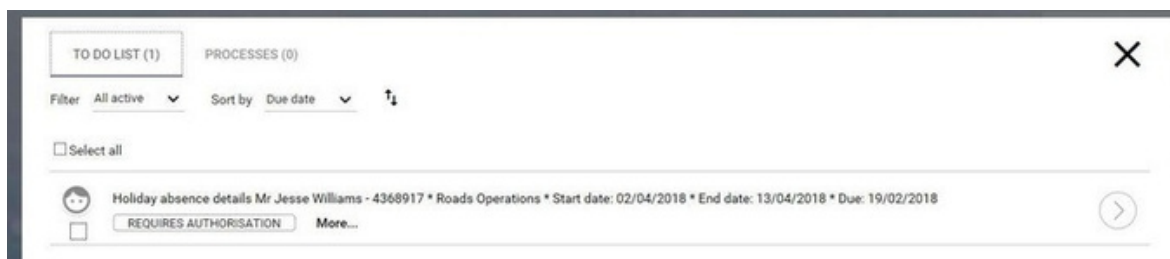
Organisation Chart allows you to view the organisational structure. This allows you to view the employees who currently report to you as a manager and who reports to them if they are also a reporting manager

2.3 Your to do list/Processes



Your 'To Do List' allows you to view any outstanding tasks which you have to action. For example, absence requests and if you are an authorised signatory also, time and expenses and overtime claims.

Processes will allow you to check the status of your processes within the system such as reports which you are waiting to download.



2.4 MyTeam Videos

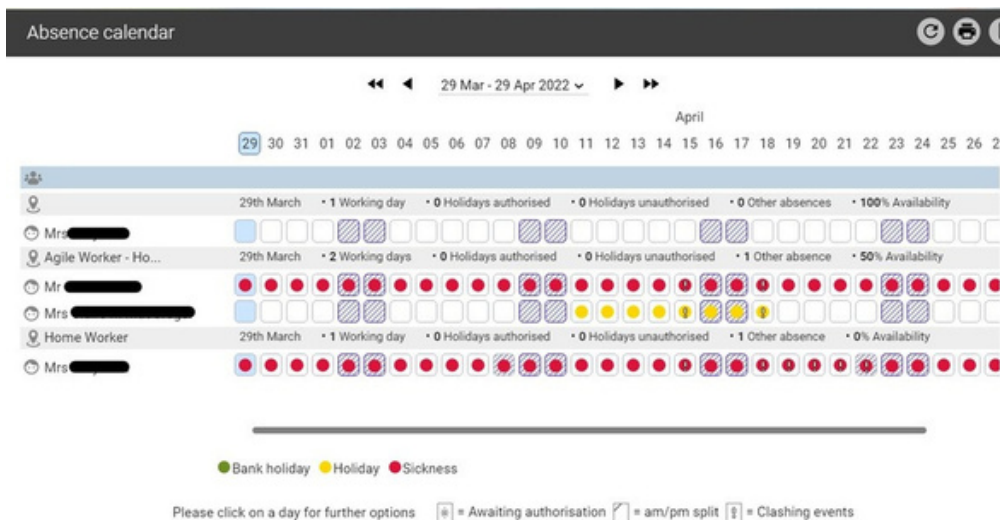


The 'myTeam Videos' carousel option allows you to view helpful videos on myTeam functions.

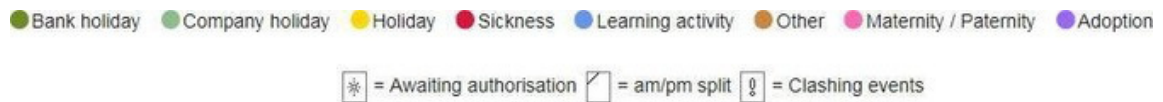
2.5 Out of Office




This shows which reportees are out of the office on the date you are logged into myTeam. If you click on this, it will direct you to the absence calendar where you will see a list of employees and their absence information.



The absence calendar has a coloured coded key to various absence reasons as shown below:



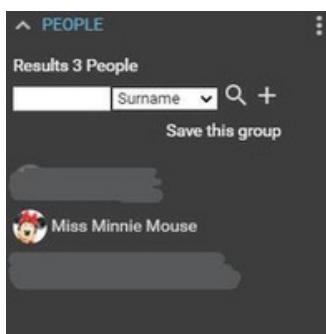
You can click on  at any time to return to the homepage.

3. People

To view your reportees record, first click on the 'People' option on the menu.

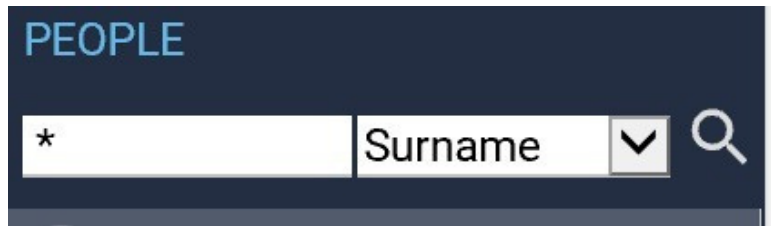


This will then bring up a list of your reportees at the left-hand side of the screen.

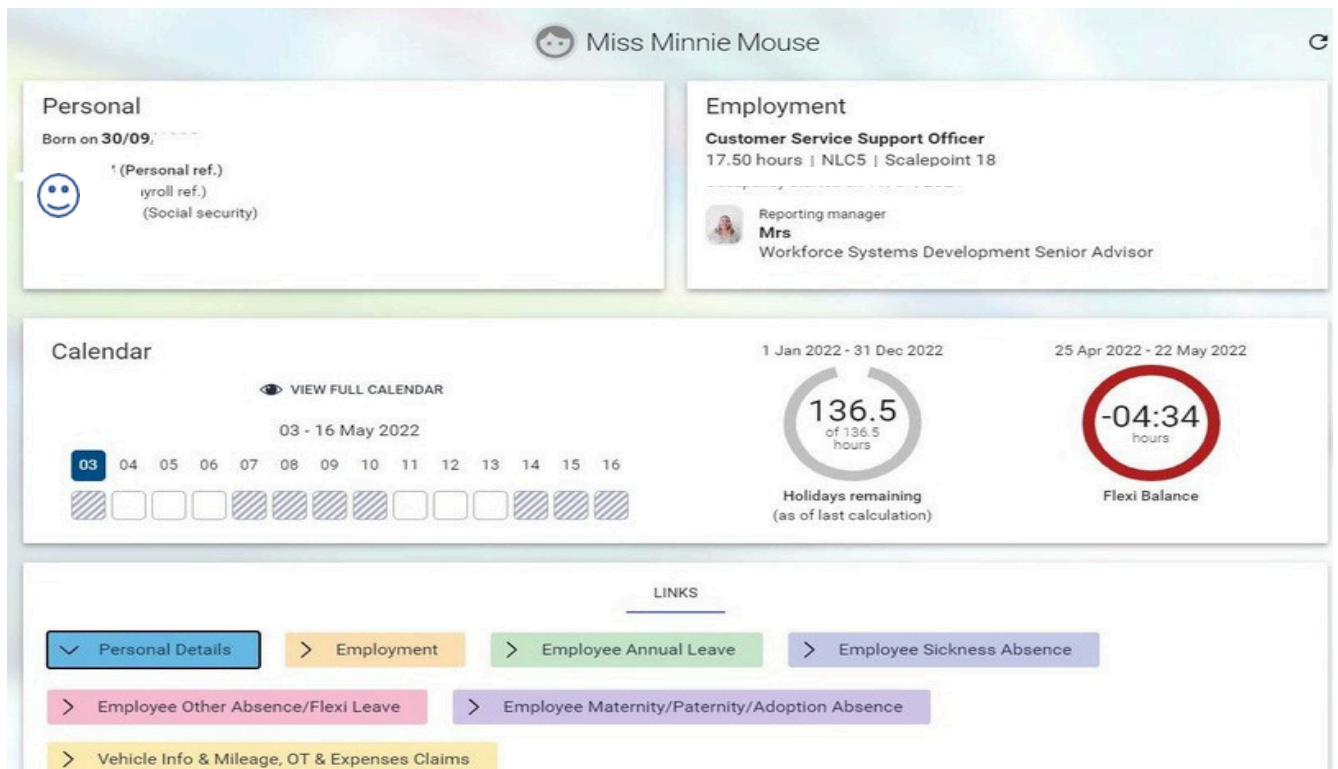


From here you can either select the person whose record you wish to view or scroll down the list of employees and click on their name.

Similarly, you can also type in the surname of the person you wish to search for. You can also do a blank search in which you must first type an asterisk (*) in the search box as shown below:



Click on your reportees name whose record you wish to view; you will then be directed to their record:



3.1 Basic Information

This screen will give you some basic information about the employee such as:

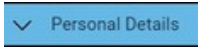

- Start Date
- Personal Reference Number (Employee Number)
- Positions held

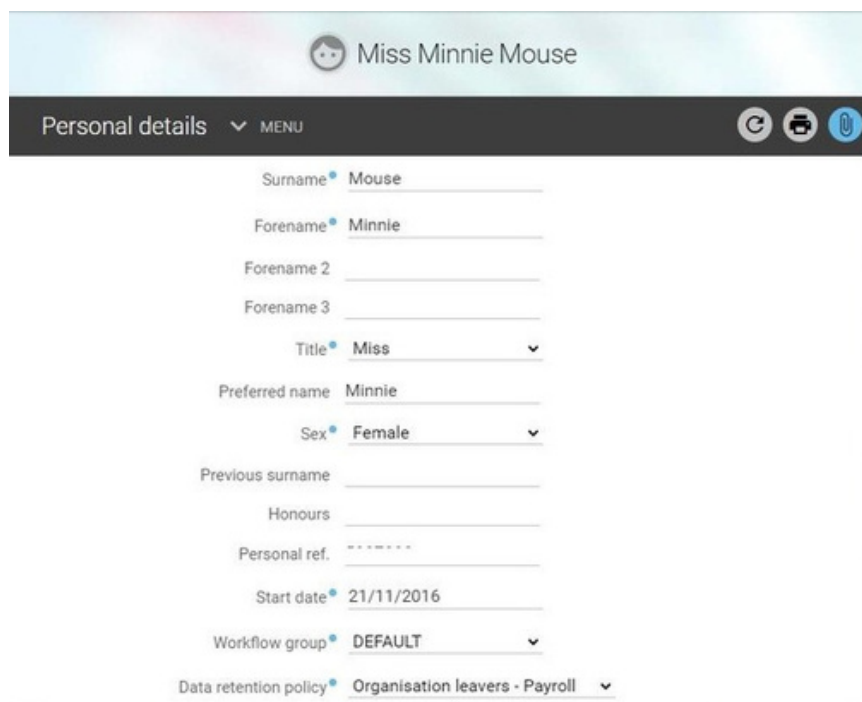
3.2 Links

You will have access to folders which contain quick access links to various screens within the system which will help you to navigate quicker and simpler.

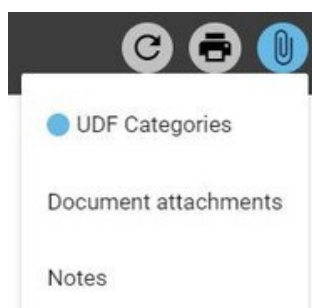


3.3 Personal Details

To view personal details, first select  followed by  and this will then allow you to view personal details for your selected reportee:



The information shown on this screen is read only and you will not be able to update or edit this. By clicking on the attachment button (paper clip icon) on the top right-hand side of the screen, you will see further options that are available; however, you will only be able to access these attachments if your security profile allows it.

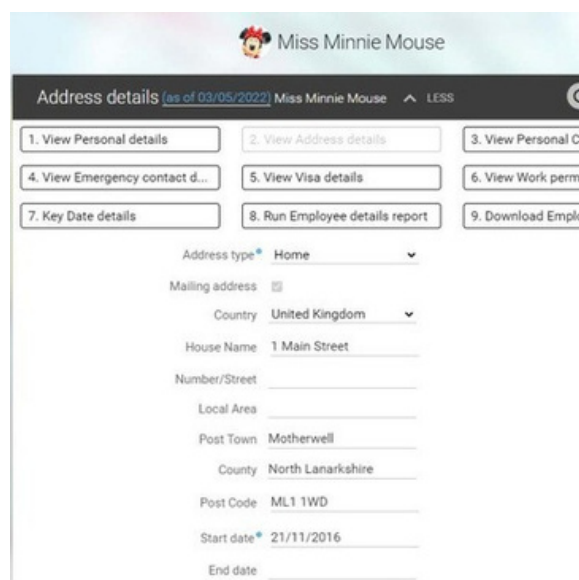


Click on the employee's name at the top of the screen to go back to the summary page. Or alternatively select the menu tab to see the other options that are available to take you directly to one of the other pages:



3.4 Address Details

The following information will be displayed on screen:



The information on this screen is read only and you will not be able to update or edit this.

3.5 Emergency Contacts

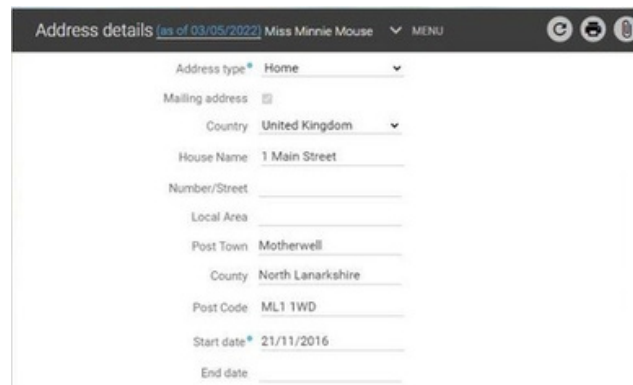
Select “View Emergency contact details” and this will show on the left-hand side of the screen the emergency contacts which the employee has set up.



If there are no emergency contact details held for the employee, you will see the following message:

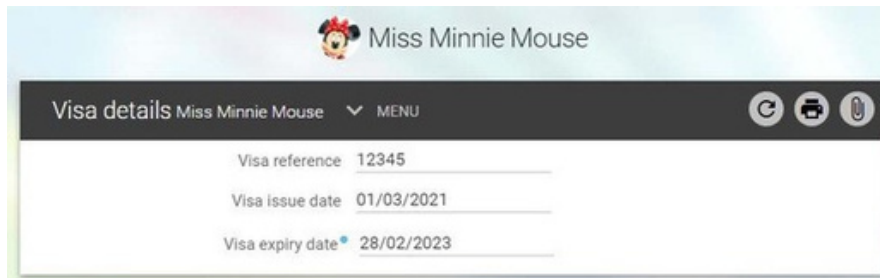


By selecting an emergency contact you will have access to their information however this screen is read only.



3.6 Visa Details

If there are visa details held within the employee record, this will provide information on the visa reference number, the visa issue date and the visa expiry date. This information is read only access.

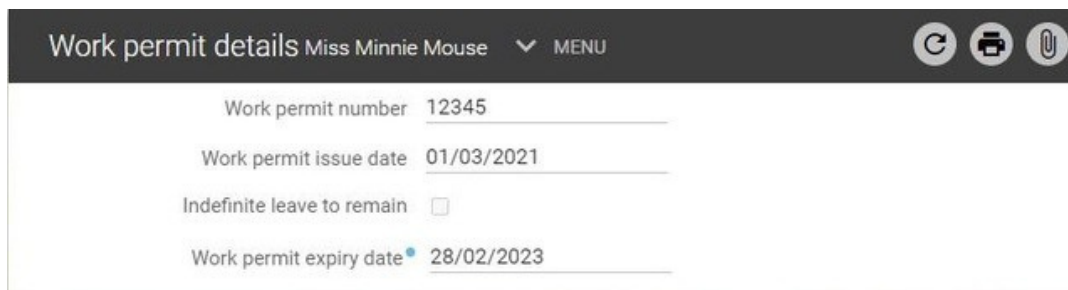


If there are no visa details held on file for the employee, the following message will appear on the left-hand side of the screen:



3.7 Work Permit Details

This will provide you with information on the work permit number, the issue date, if the employee has indefinite leave to remain and the work permit expiry date.



If there are no work permit details within the employees record the follow message will appear on the left-hand side of the screen.



3.8 Key Date Details

This will provide you with information on the employee date of birth, age, organisation start date, length of service and if applicable, reckonable service date.

Key dates ▾ MENU 🔄 🖨 🔍

Personal

Date of birth* 01/07/1996 📅

Age 23 year(s) 7 month(s)

Date verified 📅

Expected retirement date

Rule ▾

Organisation

Start date* 21/11/2010 📅

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

Reckonable service date 📅

Length of reckonable service

4. Employment

From the employee summary screen page, select the “Employment” tab and a list of links within this tab will appear:

LINKS

> Personal Details ▾ Employment > Vehicle Info & Mileage, OT & Expenses Claims

> Employee Sickness Absence > Employee Annual Leave > Employee Other Absence/Flexi Leave

> Employee Maternity/Paternity/Adoption Absence

☰ ☰

Notification of Change Guidance 1. View Key date details 2. View Position details 3. View Occupancy details

4. View Payscale values 5. View Hours and basis 6. View Work Pattern details 7. View Leaver information details

8. View/Amend where employee is working from

4.1 Key Date Details

Select “Key Date details”

LINKS

> Personal Details ▾ Employment > Vehicle Info & Mileage, OT & Expenses Claims

> Employee Sickness Absence > Employee Annual Leave > Employee Other Absence/Flexi Leave

> Employee Maternity/Paternity/Adoption Absence

☰ ☰

Notification of Change Guidance **1. View Key date details** 2. View Position details 3. View Occupancy details

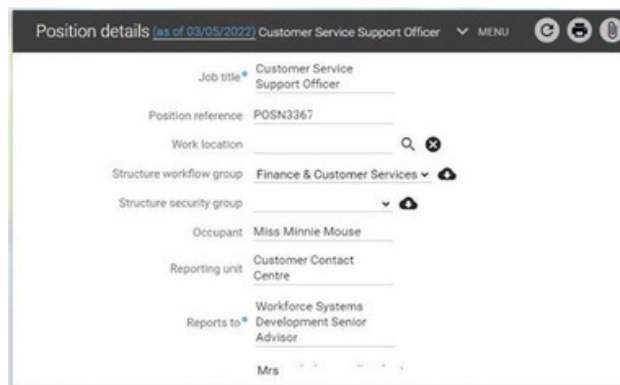
4. View Payscale values 5. View Hours and basis 6. View Work Pattern details 7. View Leaver information details

8. View/Amend where employee is working from

Information relating to the employee's employment can be found under the 'Employment' tab including links to guidance for the [which is a form](#) [Change Guidance](#) required when you make a change to an employee's position.

4.2 Position Details

This will provide you with information on the employees' position within the council. You can view the position reference, work location and reporting manager information within this screen.



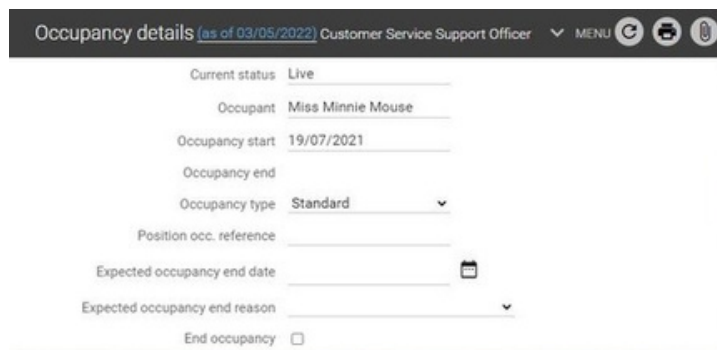
The screenshot shows a web interface titled "Position details (as of 03/05/2022) Customer Service Support Officer". The form contains the following fields:

- Job title: Customer Service Support Officer
- Position reference: POSN3367
- Work location: [Search icon] [Close icon]
- Structure workflow group: Finance & Customer Services
- Structure security group: [Dropdown arrow]
- Occupant: Miss Minnie Mouse
- Reporting unit: Customer Contact Centre
- Reports to: Workforce Systems Development Senior Advisor
- Mrs [Dropdown arrow]

The information on this screen is read only and you will not be able to update or edit this.

4.3 Occupancy Details

This will provide you with information on the position occupancy, the occupancy start date and if there is an expected occupancy end date for the employee this will be shown within this screen. This is the time that the employee has been in the particular position.



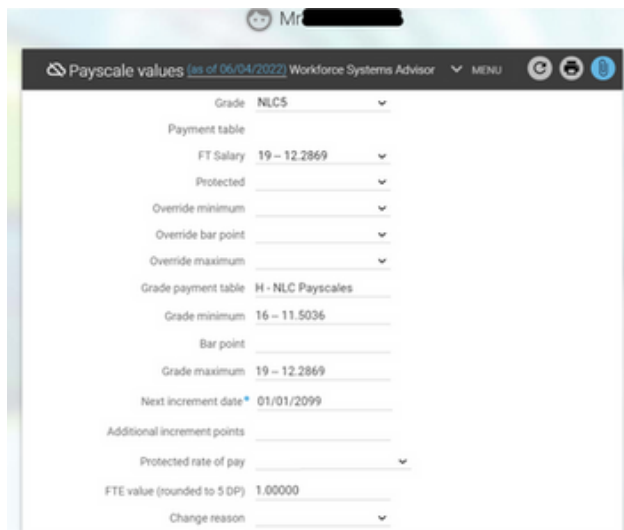
The screenshot shows a web interface titled "Occupancy details (as of 03/05/2022) Customer Service Support Officer". The form contains the following fields:

- Current status: Live
- Occupant: Miss Minnie Mouse
- Occupancy start: 19/07/2021
- Occupancy end: [Empty field]
- Occupancy type: Standard
- Position occ. reference: [Empty field]
- Expected occupancy end date: [Calendar icon]
- Expected occupancy end reason: [Dropdown arrow]
- End occupancy:

The information on this screen is read only and you will not be able to update or edit this.

4.4 Payscale Values

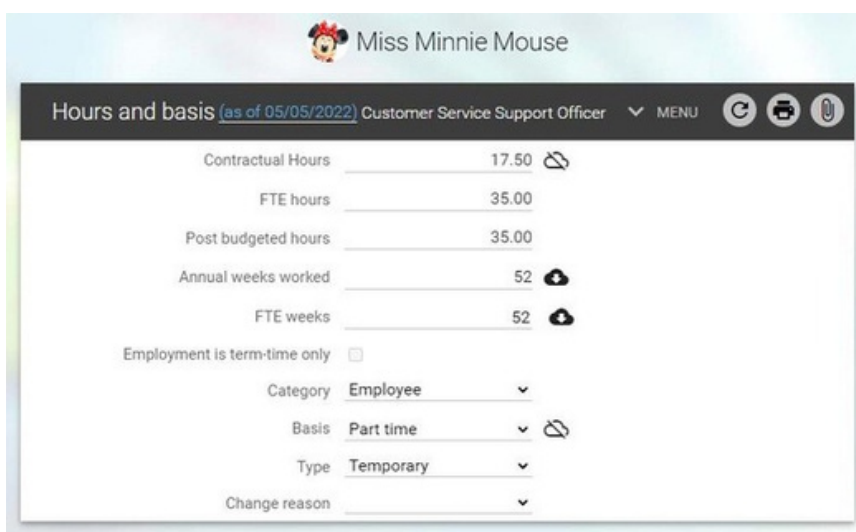
This will provide you with information on the employees' payscale values such as grade, spinal column point and next increment date.



The information on this screen is read only and you will not be able to update or edit this.

4.5 Hours and Basis

This will provide you with information on the employees' contractual hours, full time equivalent (FTE) hours as well as annual weeks worked (if term time). It will show you information on the employees' category, basis and type and will provide information on the post budgeted hours for the POST in which the employees' POSN is sitting underneath. The example below shows that the employee works 17.5 hours and has an FTE of 35 hours.

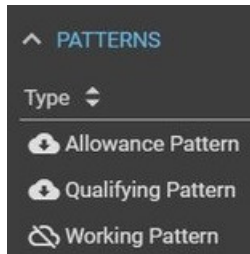


The information on this screen is read only and you will not be able to update or edit this.

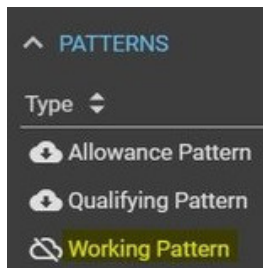
4.6 Pattern Details

This will provide you with information on the work pattern details for the employee.

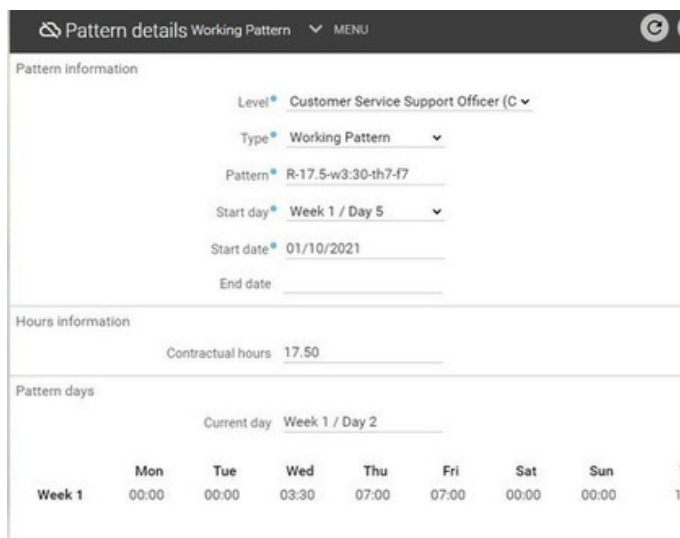
If the employee has more than one pattern type within their position, you will be prompted to select which pattern you wish to view on the left-hand side:



As a reporting manager, the only pattern which will be of relevance to you will be the “Working Pattern”. Click on “Working Pattern”



Working Pattern:



The screenshot shows the 'Pattern details Working Pattern' screen. It has a title bar with a clock icon, the text 'Pattern details Working Pattern', and a 'MENU' button. The main content is divided into three sections: 'Pattern information', 'Hours information', and 'Pattern days'.
- 'Pattern information' includes: Level (Customer Service Support Officer (C)), Type (Working Pattern), Pattern (R-17.5-w3:30-th7-f7), Start day (Week 1 / Day 5), Start date (01/10/2021), and End date.
- 'Hours information' includes: Contractual hours (17.50).
- 'Pattern days' includes: Current day (Week 1 / Day 2) and a table for 'Week 1' showing start and end times for each day of the week.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Ti
Week 1	00:00	00:00	03:30	07:00	07:00	00:00	00:00	17

This example shows an employee who works 17.5 hours per week.

They work 3.5 hours on a Wednesday and 7 hours on a Thursday and Friday.

This is a one week pattern

The information on this screen is read only and you will not be able to update or edit this.

4.7 Leaver Information Details

This will provide you with any leaver information for the employee if they are leaving NLC:

Leaver information Miss Minnie Mouse MENU

Leaving details

Leaving date*

Last working day

Reason for leaving*

STSS leaver reason

Exit interview complete

New employer details

Employer name

The information on this screen is read only and you will not be able to update or edit this.

5. Annual Leave Absence

> Personal Details > Employment **Employee Annual Leave** > Employee Sickiness Absence

> Employee Other Absence/Flexi Leave > Employee Maternity/Paternity/Adoption Absence

> Vehicle Info & Mileage, OT & Expenses Claims

☰

🔗 Manager's Annual Leave Guidance 🔗 myTeam Guide - Annual Leave 1. View Holiday Entitlement Summary

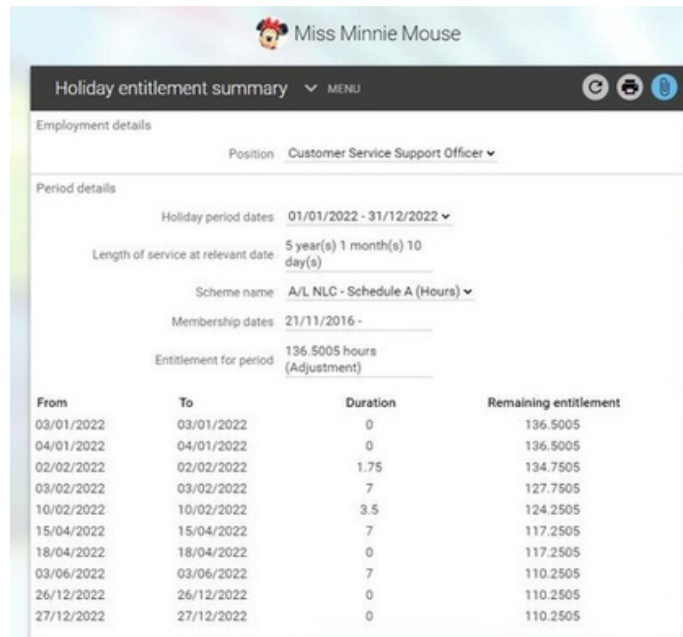
2. View Annual Leave details 3. Run Absence report 4. Download Absence report

Links to guidance relating to annual leave can be found on this screen by clicking on

🔗 Manager's Annual Leave Guidance 🔗 myTeam Guide - Annual Leave

5.1 Holiday Entitlement Summary

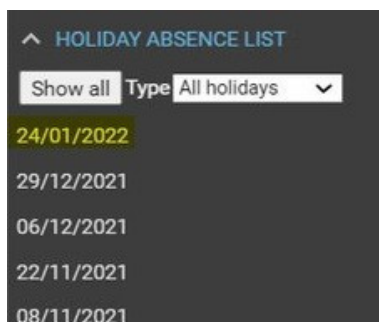
You will be able to view a summary showing the employee's holiday entitlement, and any dates which are deducted from the employee holiday record for annual leave, and if applicable to the POSN, public holiday details.



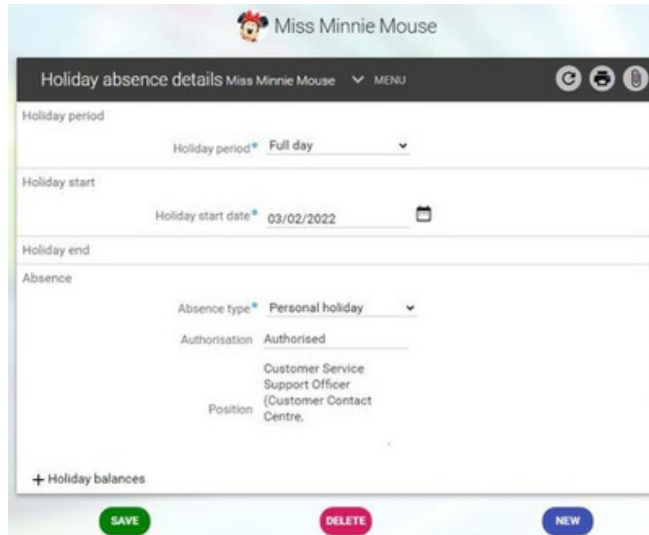
The information on this screen is read only and you will not be able to update or edit this.

5.2 Holiday Absence Details

Select “View Annual Leave details” This will provide you with a holiday absence list which shows the employee annual leave. To view further information about a particular absence, click on the absence date in which you wish to view:



This will provide you with information on the holiday period, holiday start date, holiday end date and the absence type:

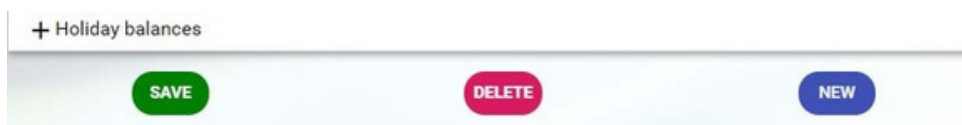


You can view the employee holiday balance at the bottom of the holiday absence details screen:

Customer Service Support Officer - A/L NLC - Schedule A (Hours)				
Holiday period	Entitlement	Taken	Scheduled	Balance
01/01/2021 - 31/12/2021	195.03 H	170.9965 H	0 H	24.0335 H
01/01/2022 - 31/12/2022	136.5005 H	19.25 H	7 H	110.2505 H
01/01/2023 - 31/12/2023	133 H	0 H	0 H	133 H

5.3 Deleting Annual Leave

There may be occasions where you are required to delete annual leave from an employee record, to do this, press the “delete” button within the holiday you wish to delete within the “holiday absence details” screen mentioned in the point above, the delete button is shown at the bottom of the screen:



The following screen will then appear:

ce0076tr.webitrent.com says

The details will be deleted. Continue?



Press “OK” and the holiday absence will then be deleted from the employee record.

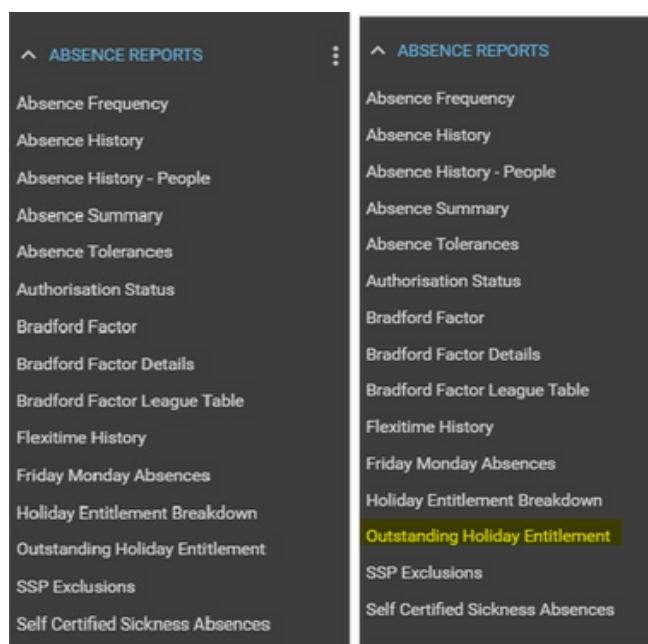
In a situation where an employee has annual leave booked within the system and the employee reports unfit for work, if the employee has submitted a medical GP sick note dated on or before the annual leave was due to commence, then the sickness absence will supersede the prearranged annual leave.

In this instance, only if a medical GP sick note has been submitted, then as the reporting manager you should delete the annual leave dates from the system to ensure that the hours are not deducted from the employee annual leave balance.

5.4 Absence Reports

Select “Run Absence report”

On the left-hand side of the screen, you will then be able to see a list of the absence reports which are available for you to download. Select the absence report which you wish to run.



This will then bring up the report screen which you have selected, you should then set the parameters of the report which you wish to be ran, as shown in the example below, the “Outstanding Holiday Entitlement” report can be ran per UNIT or by employee.

For this example, we will change this to be ran on an individual employee:

Outstanding Holiday Entitlement

Outstanding holiday entitlement MENU

Unit/Employee* Unit

Organisation start point* North Lanarkshire Council

Effective date* 13/04/2022

Holiday Scheme <All Holiday Schemes>

Reference number Personal reference

Minimum balance to report on

days

hours

Organisation view Show all data by unit

Full path display

New page for each organisation unit

Output type PDF File

Report run comments

RUN

Changed to Employee and searched for employee using magnifying glass:

Outstanding holiday entitlement MENU

Unit/Employee* Employee

Employee name* Miss Minnie Mouse

Effective date* 05/05/2022

Holiday Scheme <All Holiday Schemes>

Reference number Personal reference

Minimum balance to report on

days

hours

Organisation view Show all data by unit

Full path display

New page for each organisation unit

Output type CSV File

Report run comments

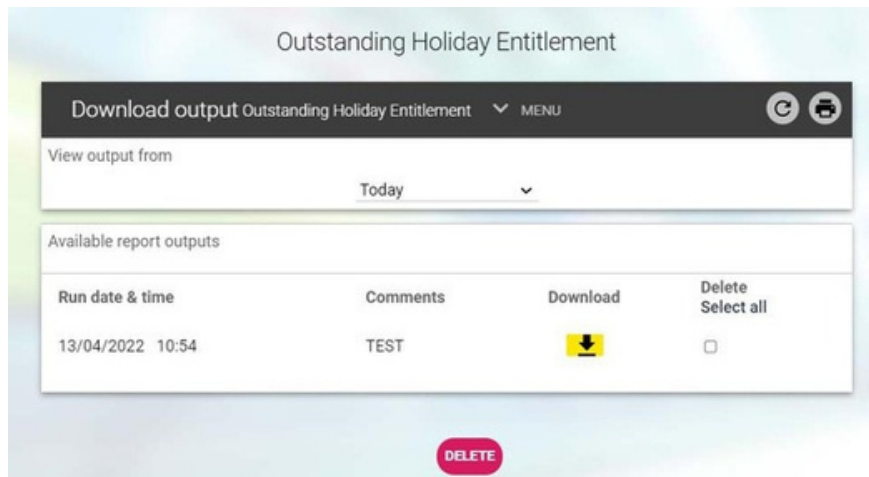
RUN

Now press "Run".

This will run as a background process; you will then be notified on screen once this has run successfully.

Once you have received confirmation that the report has ran successfully, you should then select “Download Absence Report”

The download output screen will appear, you should press the download button as shown below and this will download your absence report:



The report will then open in PDF format for you to view.

6.Sickness Absence

It is now the responsibility of the reporting manager to create a new sickness record for an employee if an employee reports themselves as unfit for work. The reporting manager will also be expected to add in the details of any sickness certification details when an employee submits a fit note.

It will be the responsibility of the employee to end their sickness absence upon return to work, however, the manager has a responsibility to ensure the information provided is correct.

6.1 Add Sickness Absence

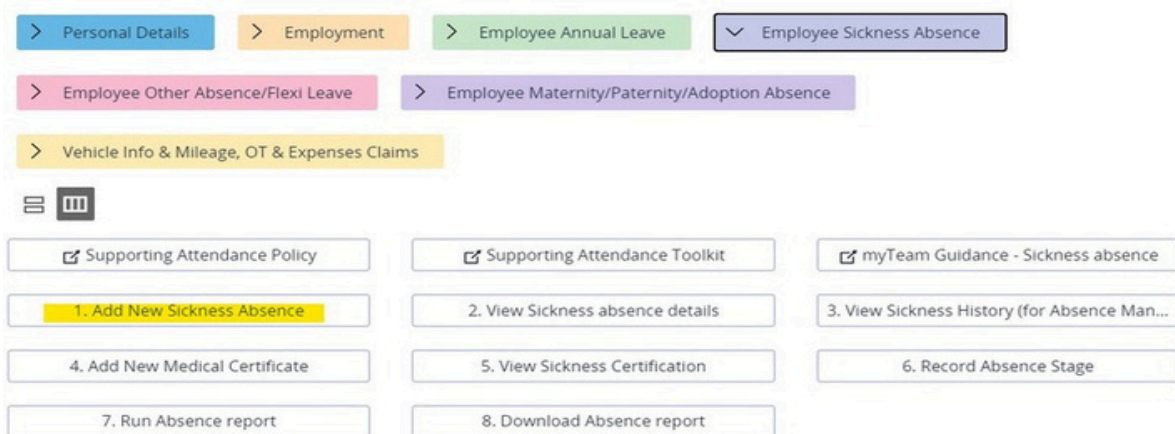
Sickness absence should be recorded in whole days only. Where an employee has went home ill, this should be recorded via “Home Ill” via Other Absence details in line with the Supporting Attendance Policy which can be found on www.mynl.co.uk or by clicking on the

Supporting Attendance Po...

link on the menu in myTeam .

If the employee is still unwell the following day, this is the first date of their sickness absence, you should then follow the process below to add a new sickness absence.

To add a new sickness absence, click on the “Employee Sickness Absence” link from the employee record:



Insert the absence start date, the expected end date (if known), the absence type and then select the absence reason from the drop-down list.

It is important that you select the correct absence reason in the drop-down list as this information is used for management reporting purposes.

A screenshot of a form titled "Sickness absence details New" for "Miss Minnie Mouse". The form has a dark header with a "MENU" button and icons for refresh, print, and help. The form is divided into sections: "Sickness period" with a dropdown set to "More than one day"; "Absence start" with fields for "Absence start date" (27/04/2022), "Absence start type" (Full day), and "Absence end" with fields for "Absence end date", "Absence end type" (Full day), and "Expected end date"; and "Absence" with fields for "Absence type" (Sickness), "Absence reason" (Back pain - lower - 06), and a "Hide absence reason" checkbox. A green "SAVE" button is at the bottom.

Select . This will create the new sickness absence.

6.2 Viewing Sickness Absence

Select “View Sickness absence details”

This will allow you to view the sickness absence details:

The screenshot shows a web form titled "Sickness absence details" for "Miss Minnie Mouse". The form is organized into several sections: "Sickness period" with a dropdown set to "More than one day"; "Absence start" with "Absence start date" set to "27/04/2022" and "Absence start type" set to "Full day"; "Absence end" with "Absence end date", "Absence end type" set to "Full day", and "Expected end date" fields; and "Absence" with "Absence type" set to "Sickness" and "Absence reason" set to "Back pain - lower - 06". There is a "Hide absence reason" checkbox and a list of "Customer Service Support Officer (Customer Contact Centre)" positions. At the bottom, there are "SAVE" and "NEW" buttons.

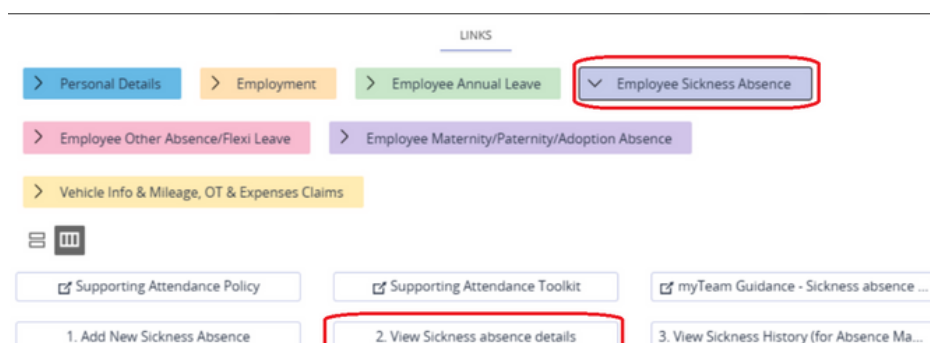
6.2.1 Changing a Sickness Absence Reason

There may be situations where an employee may report absence from work for one reason but during the course of absence, the reason for the absence changes i.e. from mental health to back pain.

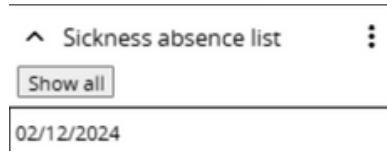
If you need to change the reason for absence, open the employee sickness record and update the absence reason and press save. This will then override the previous reason.

To ensure accurate recording of sickness absence history, you will also need to record the original reason for the absence. You will record this via the UDF Categories > Absence Reason Change. Enter the absence reason into the available field and record the period that this was the reason for absence.

In the employee info area in myTeam, select ‘Employee Sickness Absence’ and then choose ‘View Sickness absence details’ as shown below.



Select the relevant date for the absence requiring the reason change.

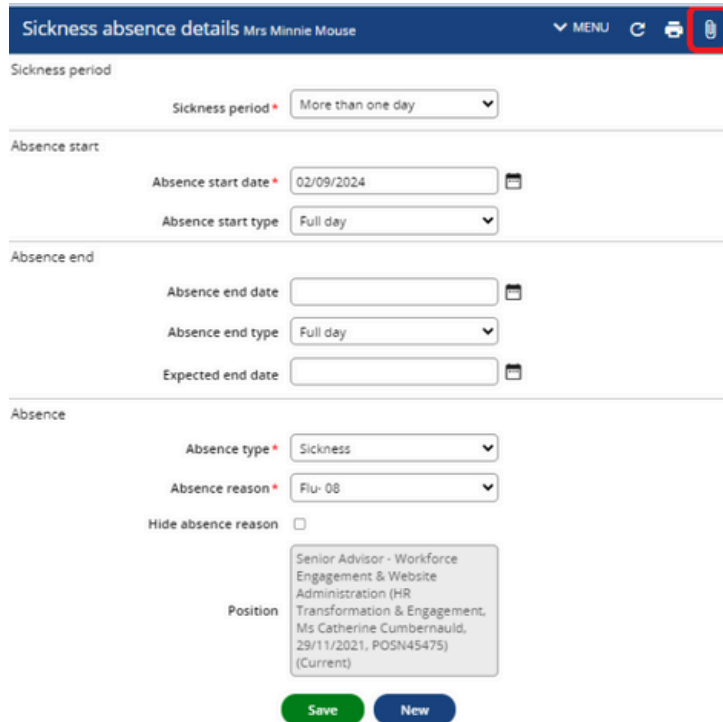


^ Sickness absence list

Show all

02/12/2024

Click on the attachment symbol as highlighted below.



Sickness absence details Mrs Minnie Mouse

Sickness period

Sickness period* More than one day

Absence start

Absence start date* 02/09/2024

Absence start type Full day

Absence end

Absence end date

Absence end type Full day

Expected end date

Absence

Absence type* Sickness

Absence reason* Flu- 08

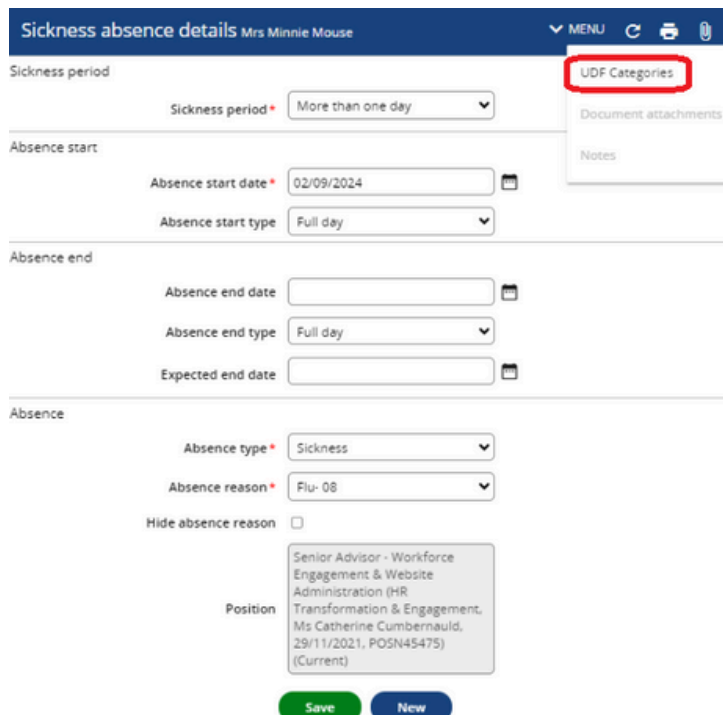
Hide absence reason

Position

Senior Advisor - Workforce Engagement & Website Administration (HR Transformation & Engagement, Ms Catherine Cumbernauld, 29/11/2021, POSN45475) (Current)

Save New

Select UDF Categories from the drop-down options



Sickness absence details Mrs Minnie Mouse

UDF Categories

Document attachments

Notes

Sickness period

Sickness period* More than one day

Absence start

Absence start date* 02/09/2024

Absence start type Full day

Absence end

Absence end date

Absence end type Full day

Expected end date

Absence

Absence type* Sickness

Absence reason* Flu- 08

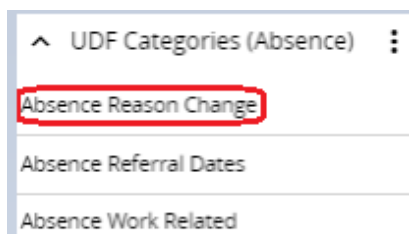
Hide absence reason

Position

Senior Advisor - Workforce Engagement & Website Administration (HR Transformation & Engagement, Ms Catherine Cumbernauld, 29/11/2021, POSN45475) (Current)

Save New

Select UDF Categories from the drop-down options



Then enter the original absence reason and the date the original absence reason commenced and the date it ended. Then select save and the absence will now be accurately recorded .



You would follow this process for each time the absence reason for an employee changes during an open period of sickness absence.

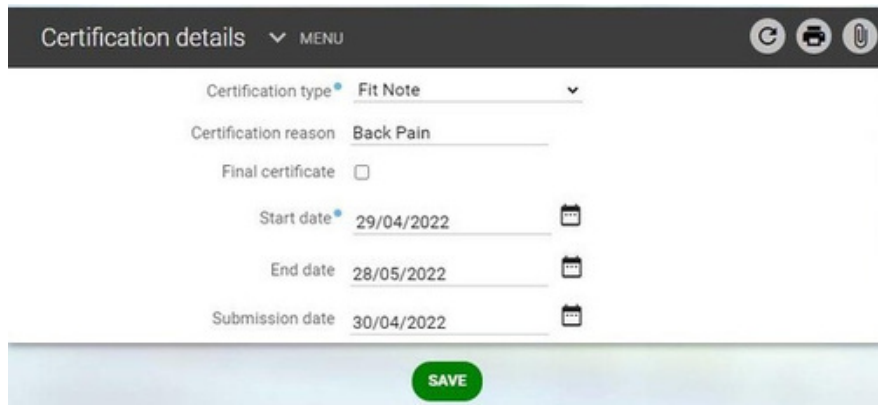
Should you require any further assistance, you can raise a case on the myNL Portal using the [People Helpdesk General Enquiry Form](#).

Where you are not yet live on the Portal ,you can still email the People Helpdesk using [this link](#).

6.3 Adding a Medical Certificate

Select “Add New Medical Certificate”

Select the sickness absence which you wish to add medical certificate details for from the left-hand side and the following screen will appear:



The screenshot shows a web form titled "Certification details" with a "MENU" dropdown and icons for refresh, print, and upload. The form contains the following fields:

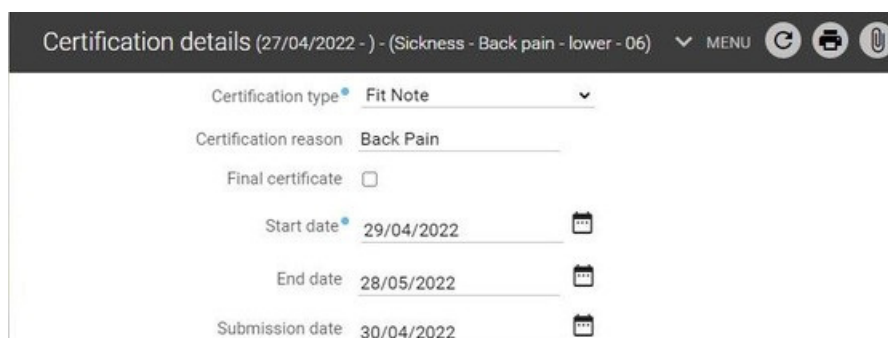
- Certification type: Fit Note (dropdown menu)
- Certification reason: Back Pain (text input)
- Final certificate:
- Start date: 29/04/2022 (calendar icon)
- End date: 28/05/2022 (calendar icon)
- Submission date: 30/04/2022 (calendar icon)

A green "SAVE" button is located at the bottom center of the form.

From the drop-down list, select the appropriate certification type and complete the other fields based on the information provided on the fit note. Select Save. There is no requirement to upload the certificate.

6.4 View Certification Details

If you wish to view certification details, select “View sickness certification”
This will show you certification details which you have entered:



The screenshot shows the same "Certification details" form, but the title bar now includes the date "27/04/2022" and a description "(Sickness - Back pain - lower - 06)". The form fields are identical to the previous screenshot:

- Certification type: Fit Note (dropdown menu)
- Certification reason: Back Pain (text input)
- Final certificate:
- Start date: 29/04/2022 (calendar icon)
- End date: 28/05/2022 (calendar icon)
- Submission date: 30/04/2022 (calendar icon)

6.5 Absence History

You can view your employee's sickness history to a previous date which will be required for Absence meetings with the employee. To do this, click on Option 3 View Absence History (for Absence Management):



Select the date you want to search from similar to the example below and click 'Search':

The screenshot shows the 'Absence history' search form. The search period is defined by a start date of 21/12/2021 and an empty end date. The absence group is set to 'Sickness' and the absence type is also set to 'Sickness'. A green 'Search' button is located at the bottom of the form.

The details for the employee's sickness absences within the date range selected will then be shown:

Personal ref.	Payroll no.	Person	Start date	End date	Type	Reason	Auth status	Unit	Job title	Working days lost
5018670		Miss Lucy Sweetie	29/08/2022	29/08/2022	Sickness	Bone/Muscle/Joint .06	Not applicable	Casual Staff	Casual Sports Coach (NLC)	0
5018670		Miss Lucy Sweetie	01/12/2022	16/12/2022	Sickness	Abdominal pain .01	Not applicable	Casual Staff	Casual Sports Coach (NLC)	0
5018670		Miss Lucy Sweetie	10/04/2023	07/06/2023	Sickness	Eye Injury .21	Not applicable	Casual Staff	Casual Sports Coach (NLC)	0

6.6 Absence Stages

Absence stages are required to be input into the employee sickness record within myTeam. It is the responsibility of the reporting manager to input all absence stages, including:

- Absence Review Meeting (Teaching Only)
- Attendance Support Meeting
- Capability Meeting - Level 1 (Teaching only)
- Capability Meeting - Level 2 (teaching only)
- Early Support Discussion
- Management Discretion Approved
- Return to Work (Formal) interview (Teachers Only)
- Return to Work Discussion
- Stage 1 - Formal Attendance Review Meeting
- Stage 2 - Formal Attendance Review Meeting
- Stage 3 - Capability Meeting

By recording this information, this allows the council to demonstrate that managers deal with sickness absence in accordance with the councils Supporting Attendance policy.

Select “Record Absence Stage”. This will allow you to record stages within the employee absence, such as early support discussion and return to work discussion.

Input the date of the absence stage which you wish to enter, select the absence stage from the drop-down list and press Save. This will record the absence stage detail.

Absence stage details New ▾ MENU

Date 01/05/2022

Absence stage Early Support Discussion ▾

Position Customer Service Support Officer

SAVE

6.7 Absence Reports

The process for sickness absence reports is the same process as annual leave absence reports. For guidance on this, please see point [5.4](#) in this guide.

7. Other (Special) Leave/Flexi Leave

7.1 Add Other Leave

Employees should request Special Leave via mySelf, however, there may be occasions where as the employees reporting manager you are required to enter this on myTeam, for example if an employee goes home ill.

From the employee record, select the “Employee Other Absence/Flexi Leave” link and select “Add Other (Special) Leave”



Select the absence period, the absence start date and the absence type and press “Save”.

The image shows the 'Other absence details' form. The form has a dark header with the title 'Other absence details New' and a 'MENU' button. The form fields are:

- Absence period: Absence period* Full day (dropdown menu)
- Absence start: Date* 04/02/2022 (calendar icon)
- Absence end: Expected end date 04/02/2022 (calendar icon)
- Absence: Absence type* Home ill (dropdown menu), Absence reason <None> (dropdown menu), Hide absence reason

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

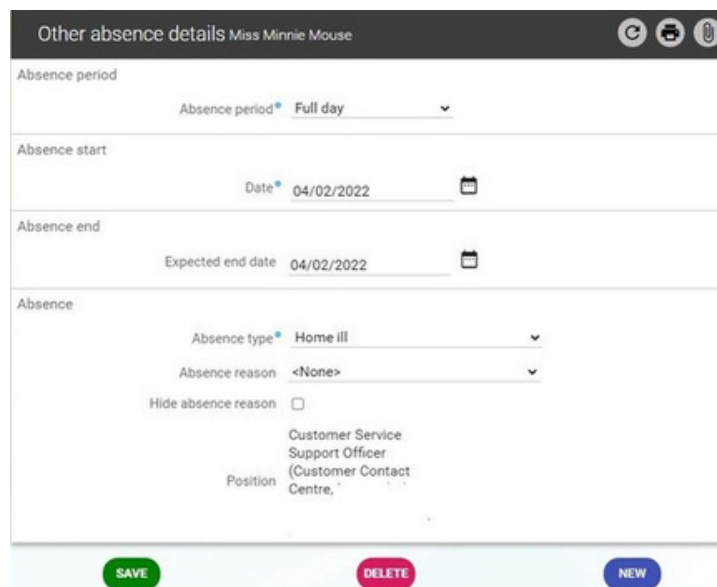
7.2 View Other Absence Details

Select “View/Edit Other (Special) absence details.

Select the relevant absence date from the left-hand side:



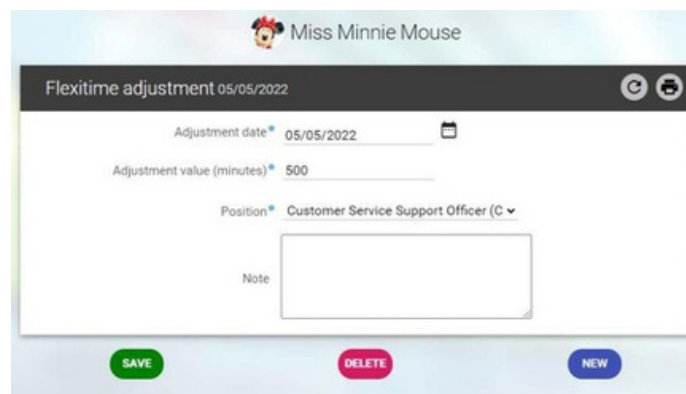
This will show you the absence details, and you will be able to view and edit this.

A screenshot of a mobile application form titled 'Other absence details Miss Minnie Mouse'. The form has several sections: 'Absence period' with a dropdown menu set to 'Full day'; 'Absence start' with a 'Date' field set to '04/02/2022' and a calendar icon; 'Absence end' with an 'Expected end date' field set to '04/02/2022' and a calendar icon; 'Absence' section with 'Absence type' set to 'Home ill', 'Absence reason' set to '<None>', a 'Hide absence reason' checkbox, and a 'Position' field containing 'Customer Service Support Officer (Customer Contact Centre,'. At the bottom of the form are three buttons: 'SAVE' (green), 'DELETE' (red), and 'NEW' (blue).

7.3 Making a Flexi Adjustment

Select “Make a Flexi Adjustments”

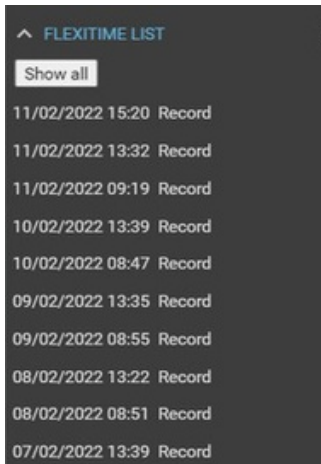
Input the adjustment date, adjustment value (minutes) and any notes which relate to this action. Press Save.

A screenshot of a mobile application form titled 'Flexitime adjustment 05/05/2022' for 'Miss Minnie Mouse'. The form has the following fields: 'Adjustment date' set to '05/05/2022' with a calendar icon; 'Adjustment value (minutes)' set to '500'; 'Position' set to 'Customer Service Support Officer (C)'; and a 'Note' field with a text input area. At the bottom of the form are three buttons: 'SAVE' (green), 'DELETE' (red), and 'NEW' (blue).

7.4 View/Amend Flexi Details

Select “View/Amend Employee Flexi Details”

From the left-hand side of the screen, select which flexi entry you wish to view:



You will then see the following information where you can amend/delete if required.



The screenshot shows a form for viewing and editing flexi record details. The form is divided into several sections:

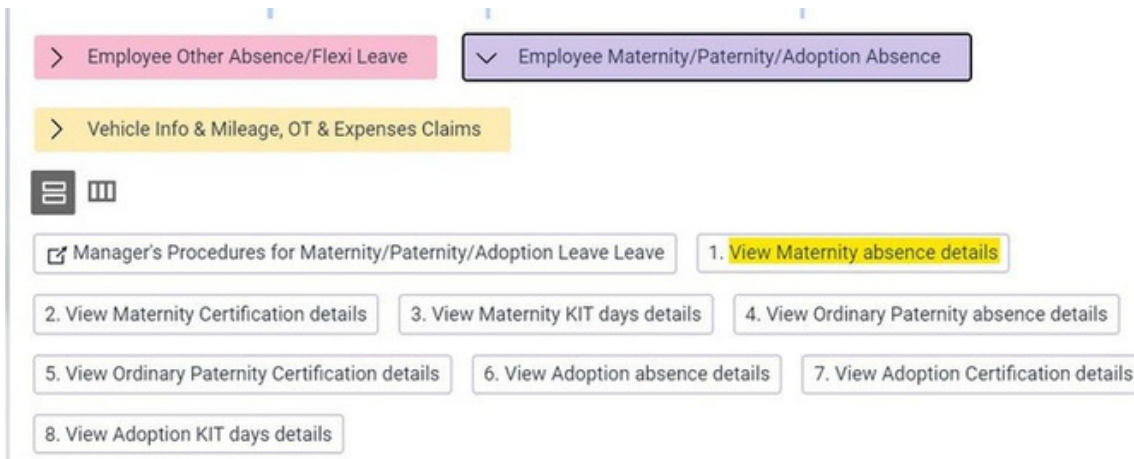
- Record/Book:** Type: Record (dropdown menu)
- Flexitime start:** Start date: 11/02/2022 (calendar icon), Start time: 15:20
- Flexitime end:** End date: 11/02/2022 (calendar icon), End time: 16:34
- Flexitime:** Position: Payroll & Pensions Analyst (Payroll) (dropdown menu)
- Location:** No location recorded
- Additional details:** Total time (hours:minutes): 01:14, Note: (text area), Authorisation: Not applicable

At the bottom of the form, there are three buttons: "SAVE" (green), "DELETE" (red), and "NEW" (blue).

8. Maternity/Paternity/Adoption Absence

8.1 Maternity Absence Details

From the employee record, select the “Employee Maternity/Paternity/Adoption Absence” link and select “View Maternity absence details”



Select the maternity absence details you wish to view at the left-hand side of the screen and you will then be able to view the maternity absence details:

Absence dates	
Absence type	Maternity
Expected birth date*	14/03/2020
Issue date of MATB1	18/11/2019

Calculated maintenance details	
Expected week of childbirth	08/03/2020
Earliest MPP start	22/12/2019
Qualifying week commences	24/11/2019
Earliest allowed MATB1 date	20/10/2019

Key maternity dates	
Maternity absence start date*	01/03/2020
Maternity absence end date	29/11/2020
Expected end date	13/03/2021
MPP start date	01/03/2020
MPP end date	28/11/2020
OML end date	29/08/2020
AML end date	27/02/2021

Additional information	
Actual date of childbirth	
Stillbirth	<input type="checkbox"/>

The information on this screen is read only and you will not be able to update or edit this.

8.2 Maternity Certification

Select “View Maternity Certification details”

This will show you maternity certification details which are held within the system:

Certification details (01/03/2020 - 29/11/2020) - (Maternity) ▼ MENU ↺ 🖨️ 📎

Certification type **Hospital certificate** ▼

Certification reason **MATB1**

Final certificate

Start date **14/03/2020** 📅

End date 📅

Submission date 📅

SAVE

8.3 Maternity KIT Details

Select “View Maternity KIT day details”

Certification details (01/03/2020 - 29/11/2020) - (Maternity) ^ LESS ↺ 🖨️ 📎

[🔗 Manager's Procedures for Maternity/Paternity/Adoption Leave Leave](#)

1. View Maternity absence details 2. View Maternity Certification details

3. View Maternity KIT days details 4. View Ordinary Paternity absence details

5. View Ordinary Paternity Certification details 6. View Adoption absence details

7. View Adoption Certification details 8. View Adoption KIT days details

You will then be able to view the KIT day details for the employee:

KIT days details 01/09/2020 ▼ MENU ↺ 🖨️

Absence dates

Expected week of childbirth **08/03/2020**

Qualifying week commences **24/11/2019**

MPP start date **01/03/2020**

MPP end date **28/11/2020**

KIT values

Date **01/09/2020**

SMP offset value

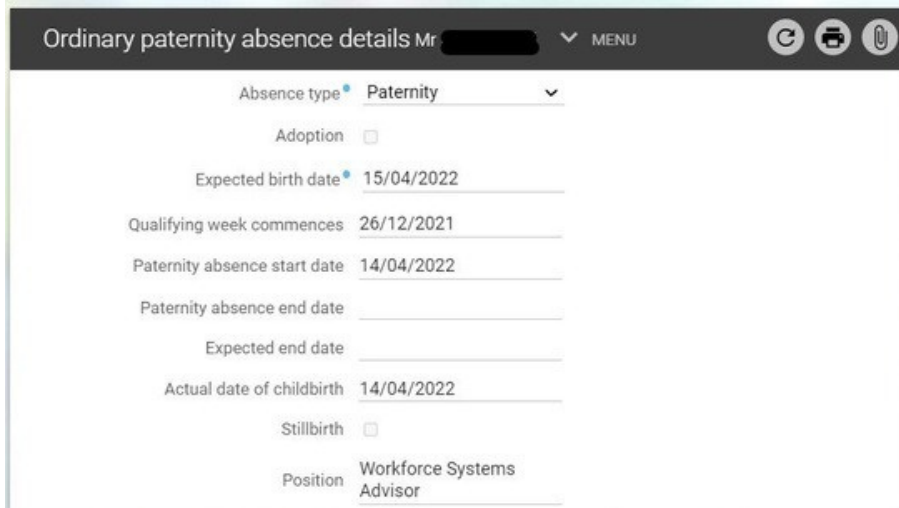
SMP pay value

Higher rate

8.4 Ordinary Paternity Absence Details

Select “View Ordinary Paternity absence details”

This will allow you to view the ordinary paternity absence details:



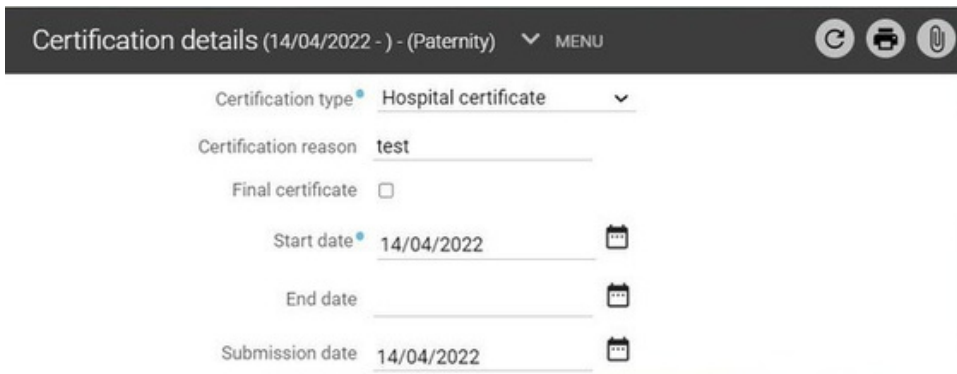
The screenshot shows a web interface for viewing ordinary paternity absence details. The title bar reads "Ordinary paternity absence details Mr [redacted] MENU". The form contains the following fields:

- Absence type: Paternity (dropdown menu)
- Adoption:
- Expected birth date: 15/04/2022
- Qualifying week commences: 26/12/2021
- Paternity absence start date: 14/04/2022
- Paternity absence end date: (empty field)
- Expected end date: (empty field)
- Actual date of childbirth: 14/04/2022
- Stillbirth:
- Position: Workforce Systems Advisor

8.5 Ordinary Paternity Certification Details

Select “View Ordinary Paternity Certification details”

This will allow you to view the certification details:



The screenshot shows a web interface for viewing ordinary paternity certification details. The title bar reads "Certification details (14/04/2022 -) - (Paternity) MENU". The form contains the following fields:

- Certification type: Hospital certificate (dropdown menu)
- Certification reason: test
- Final certificate:
- Start date: 14/04/2022 (with calendar icon)
- End date: (empty field) (with calendar icon)
- Submission date: 14/04/2022 (with calendar icon)

8.7 Adoption Absence Details

From the employee record, select the “Employee Maternity/Paternity/Adoption Absence” link and select “View Adoption absence details”

This will allow you to view the adoption leave absence details:

The screenshot shows a web form titled "Adoption absence details". It is divided into three sections:

- Key adoption dates:**
 - Absence type: Adoption
 - Matching date: 20/04/2022
 - Date notified by employee: 20/04/2022
 - Expected placement date: 22/04/2022
 - Actual placement date: 22/04/2022
- Calculated dates:**
 - Sunday of matching week: 17/04/2022
 - Ordinary adoption absence end date: 20/10/2022
 - Additional adoption absence end date: 20/04/2023
 - Earliest APP start date: 08/04/2022
 - Latest APP start date: 23/04/2022
- Absence dates:**
 - Adoption absence start date: 22/04/2022
 - Adoption absence end date: (empty)
 - Expected end date: (empty)
 - APP end date: 19/01/2023

The information on this screen is read only and you will not be able to update or edit this.

8.8 Adoption Certification Details

Select "View Adoption Certification details"

This will allow you to view the certification details:

The screenshot shows a web form titled "Certification details (22/04/2022 -) - (Adoption)". It contains the following fields:

- Certification type: Other
- Certification reason: Adoption Certification
- Final certificate:
- Start date: 22/04/2022
- End date: (empty)
- Submission date: 25/04/2022

The information on this screen is read only and you will not be able to update or edit this.

8.9 Adoption KIT Day Details

Select "View Adoption KIT day details"

This will allow you to view the KIT Day details:

Adoption KIT days details 25/04/2022 ▼ MENU 🔄 🖨️

Absence dates

Matching date 20/04/2022

Sunday of matching week 17/04/2022

Adoption pay period start date 22/04/2022

APP end date 19/01/2023

KIT values

Date* 25/04/2022

SAP offset value

SAP pay value

If there are no KIT Days recorded for the employee, the following message will appear on the left-hand side:

There were no records found for this query

9. Vehicle Info & Mileage, OT & Expense Claims

9.1 Mileage, OT & Expense claim details

From the employee record, select the “Vehicle Info & Mileage, OT & Expense Claims” link and select “View Mileage & Expense claim details”

LINKS

> Personal Details > Employment > Employee Annual Leave > Employee Sickness Absence

> Employee Other Absence/Flexi Leave > Employee Maternity/Paternity/Adoption Absence

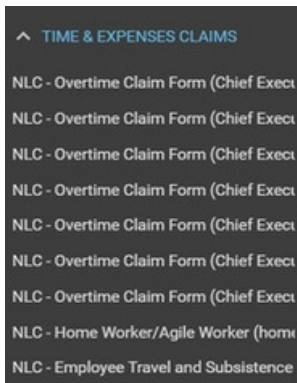
▼ Vehicle Info & Mileage, OT & Expenses Claims

☰

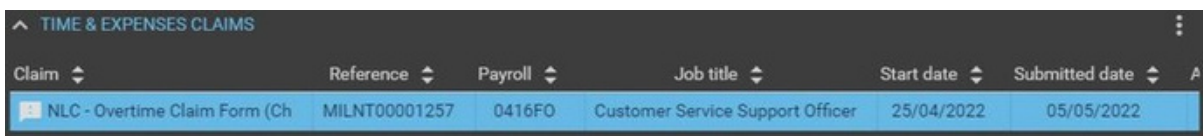
📄 Mileage Guidance 📄 myTeam Guidance for Overtime & Mileage **1. View Mileage & Expense claim details**

2. View Employee private vehicle details 3. View Employee driving licence details 4. View Employee vehicle insurance checks

You will then see a list of time & expense claims on the left-hand side:



Select which claim which you wish to view:



You will then be able to view the information about the claim at the top of the screen such as employee name, job title, work location, reference for this claim and the payroll which the employee is on:



By scrolling to the bottom of the page, you will be able to view the claim information which the employee has submitted:

Element	Date	Reason for Claim*	Start Time	Finish Time	Cost Code	Number of Hours
Additional Basic	24/04/2022	TEST			F1234	1.00

This will show you information on the element, date, reason for the claim, start and finish times, cost codes and number of hours.

There is also a “Page 2” within the claim form for mileage claims and overtime claims which relate to expenses.

Employee: Mr [REDACTED]
Job title: Workforce Systems
Advisor
Work location: Agile Worker - Home
Based
Reference: MILNT00000064
Payroll: 0416FO

Page 1 | Page 2

Click on “Page 2”

You can then view the expense details if there are any within the claim:

The type of claims which you can view are overtime claims, mileage claims, buy & bank claims, casual worker claims, flu vaccination and home working claims.
9.2 Private Vehicle Details

Select “View Employee private vehicle details”

You will then be able to view private vehicle details which has been set up by the employee:

Private vehicle details Miss Minnie Mouse MENU

Vehicle

Vehicle type* Car

Vehicle registration* MM1 WDW

Start date* 01/01/2022

End date

Make

Model

Engine size (cc)* 1400

Fuel type* Unleaded

Default vehicle for expenses

9.3 Driving Licence

Select “View Employee driving licence details”

If there is no driving licence details within the system for the employee, you will be prompted to enter the licence details:

Driving licence details New MENU

Licence details

Name on driving licence _____

Valid from _____

Valid until* _____

Date verified _____

Licence number _____

Licence categories A,B,BE,C1,C1E,D1,D1E

Issuing country United Kingdom

Disqualified

Currently disqualified

Start date _____

End date _____

Input the information which you can find on the employees driving licence:

Driving licence details Mr MENU

Licence details

Name on driving licence Mr Test Test

Valid from _____

Valid until* 04/04/2024

Date verified 25/04/2022

Licence number ABCD1234567C

Licence categories A,B,BE,C1,C1E,D1,D1E

Issuing country United Kingdom

Disqualified

Currently disqualified

Start date _____

End date _____

Press Save. This will save the driving licence details.

9.4 Vehicle Insurance Checks

Select “View Employee vehicle insurance checks”

Miscellaneous details ▾ MENU

Vehicle insurance

Valid until _____ 📅

Date verified _____ 📅

SAVE

Input the “Valid until” date and press save:

Miscellaneous details ▾ MENU

Vehicle insurance

Valid until 31/10/2022 📅

Date verified _____ 📅

Once the “valid until” date has been entered, you will then be able to input the date which you have verified this. Input the verified date within the “Date verified” column and press save.

Miscellaneous details ▾ MENU

Vehicle insurance

Valid until 31/10/2022 📅

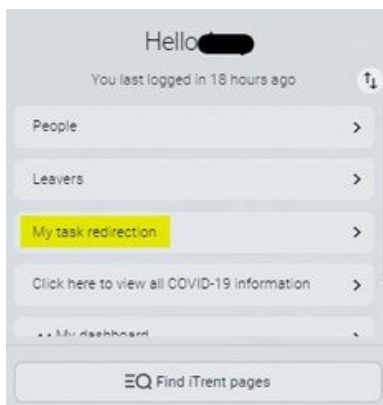
Date verified 05/05/2022 📅

10. Tasks Redirection

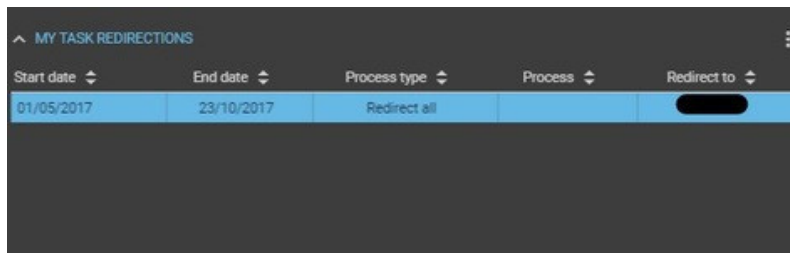
10.1 View/Amend Previous Task Redirection

If you are going to be absent from work, for example on holiday, you can set up a task redirection to another manager. However, it is important that the manager you are going to redirect to has the necessary security access or they will not be able to action the tasks.

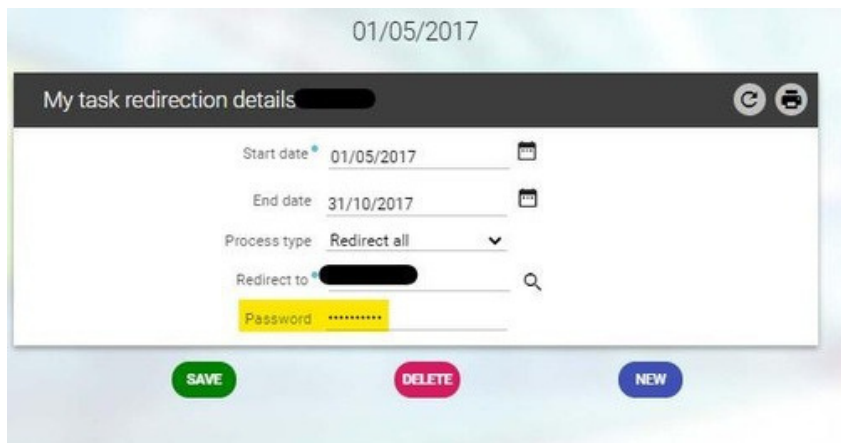
From the main home page, click on “My task redirection”:



On the left-hand side of the screen, you will be able to view previous or any current redirections which you have set up:



If you click on this, you will be able to amend the current/previous redirection – you should enter your password into the “Password” box before saving to ensure any changes are saved successfully:

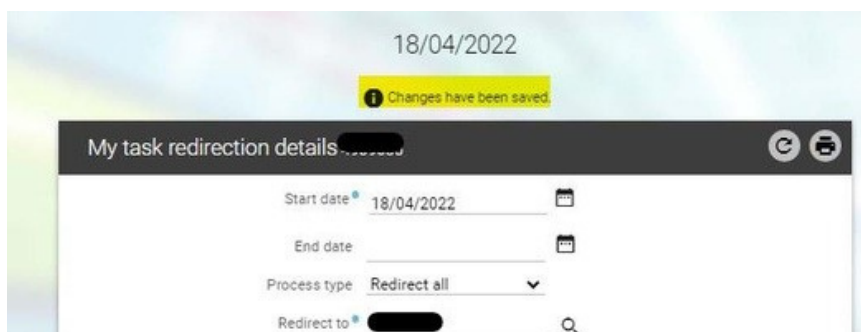


10.2 Add a Redirection

To add a redirection, select “Add/Amend My task redirection details”

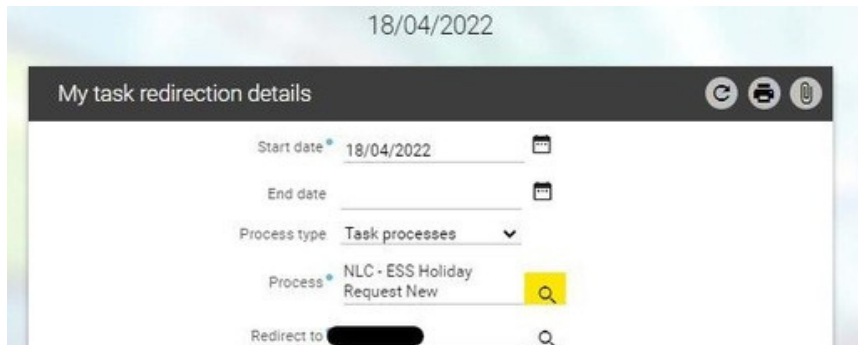
You should then input the required information – the start date, the end date (if known), the process type and who you wish to redirect the tasks too. You will also have to enter your log in password for myTeam for the redirection to save.

You will receive confirmation on the screen that the redirection has saved successfully.

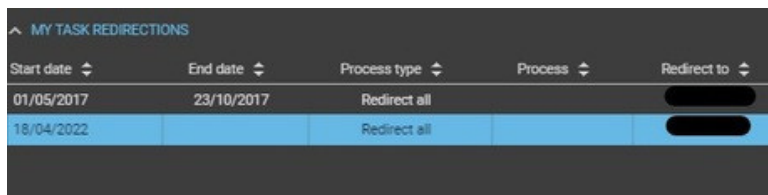


If you wish to redirect all tasks, select “redirect all” within the process type drop down and this is shown in the example above.

However, if you wish to only redirect one process type, for example holidays only, you should change the process type drop down to “Task processes” and then search for the process using the magnifying glass highlighted below:



Press Save and this will save your redirection, you can view this from the left-hand side of the page:



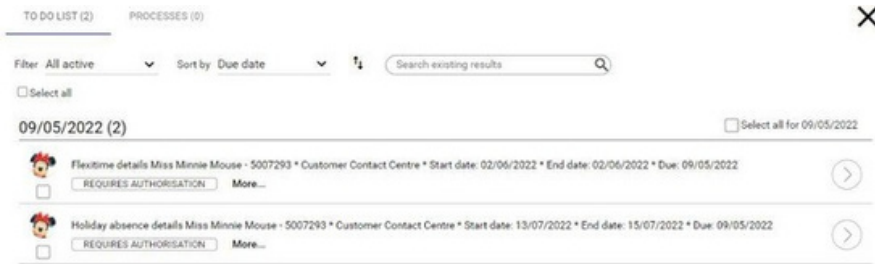
11. To Do List/Processes

11.1 To Do List – Authorising and Rejecting Requests

From the carousel on the myTeam homepage, select “To do list/Processes”

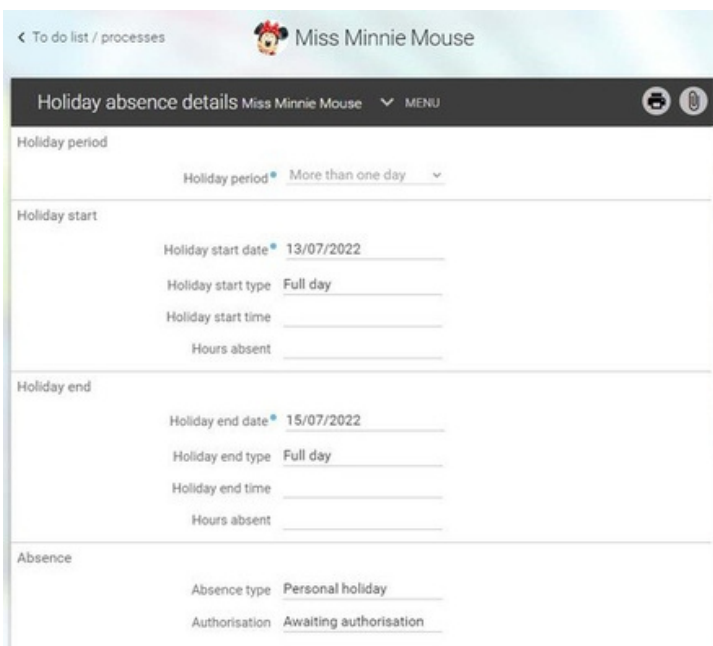


You will then see a list of tasks on your to do list which require to be actioned:

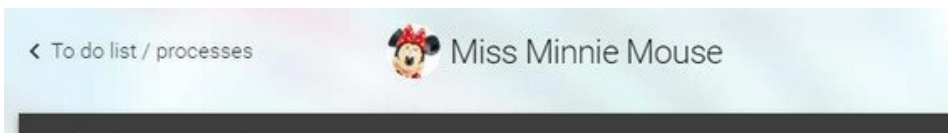


To view the full details of the request, press the arrow button:

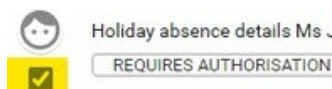
This will give you the full details of the request:



To go back to the to do list to approve or reject, press the “To do list/processes” at the top left-hand side of the screen:



Tick the relevant box within the request as shown below:



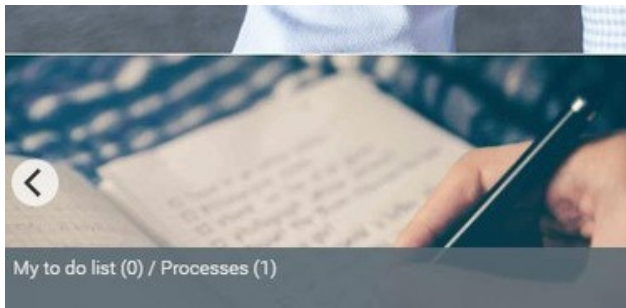
Following ticking this box, an “Action” button will appear, click on the action button and you can then select “Authorised” or “Not Authorised” and this will approve or reject:



11.2 Processes

You can view your process status of actions you take within iTrent, for example running reports.

From the carousel on the myTeam homepage, select “To do list/Processes”



Ensure that you are sitting within the “Processes” tab.

If a process is still running, you will see a “running” status:



Once the process has completed, this will change to “Complete”:



[END OF GUIDANCE]