



User Guide



**Employee
Service Centre**



Version Control

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0.18	06/02/2024	Nichola Millen	Addition of Sickness History search facility

Version Control History

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Reviewed & Approved By:

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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

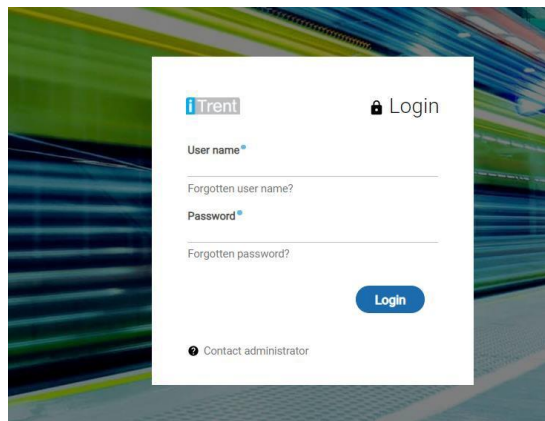
The link to myTeam is: https://ce0076li.webitrent.com/ce0076li_web/

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, please contact the ESC People Helpdesk by email at ESC-HelpDeskTeam@northlan.gov.uk or by telephone on 01698 403151.

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:

iTrent Login

Forename

Surname

Date of birth

Email address

OK Cancel

Contact administrator

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.

Prompt

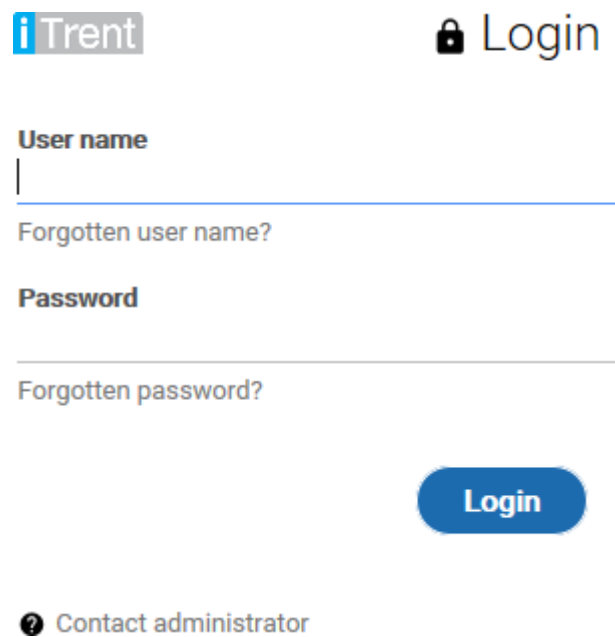
Memorable information

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, please contact the People Helpdesk Team by email ESC-HelpdeskTeam@northlan.gov.uk or telephone on 01698 403151.

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'



The screenshot shows the iTrent login interface. At the top left is the iTrent logo, and at the top right is a lock icon followed by the text 'Login'. Below the logo is a 'User name' label and an input field with a vertical cursor. Underneath the input field is a link that says 'Forgotten user name?'. Below that is a 'Password' label and another input field. Underneath the password input field is a link that says 'Forgotten password?'. To the right of these fields is a blue rounded rectangular button with the text 'Login'. At the bottom left of the form area is a question mark icon followed by the text '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

Email

Cancel

🔗 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

1234567 ×

Email address

mousem@northlan.gov.uk

Email

Cancel

🔗 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](#)

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.

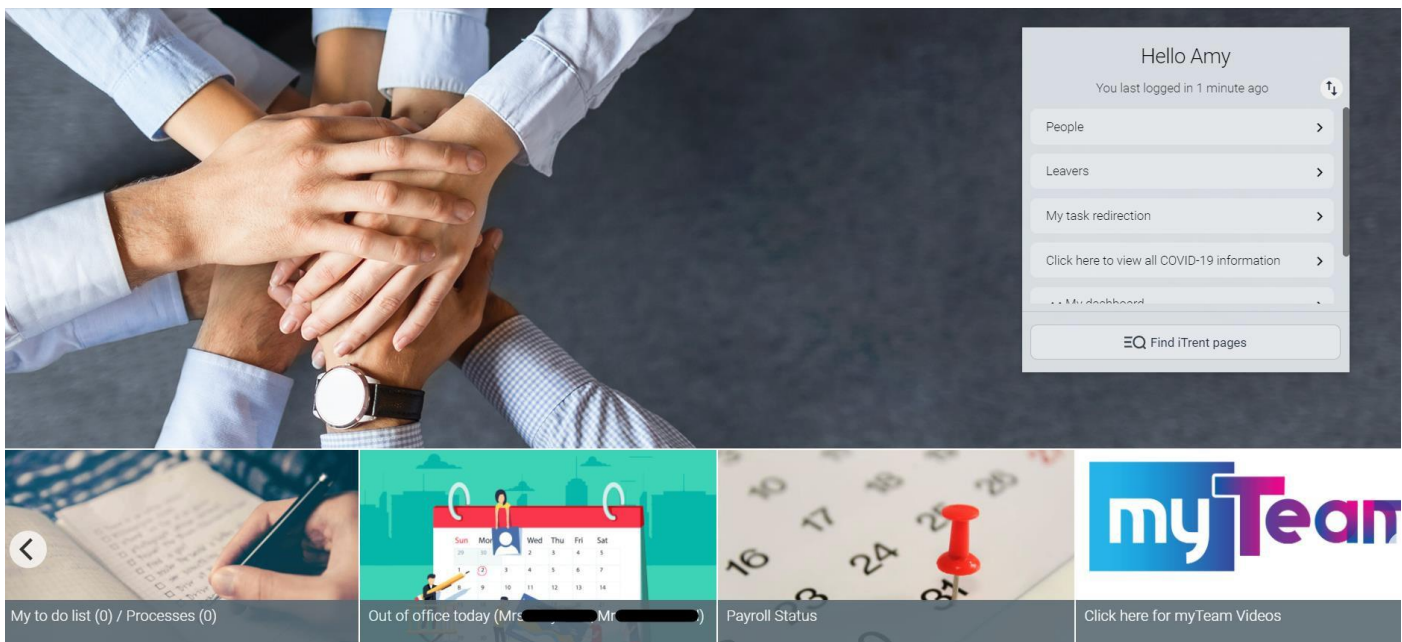
 Contact administrator

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

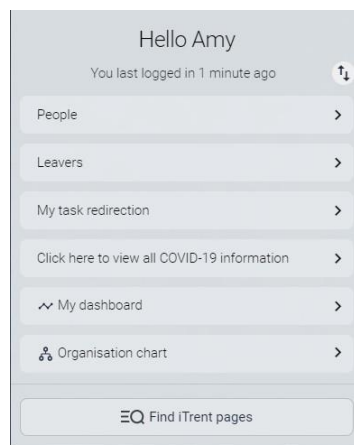
You will then be directed to the login screen where you should enter your username and the password which you have just created, press 'Login' and you will then successfully be logged into myTeam.

2. Home Page

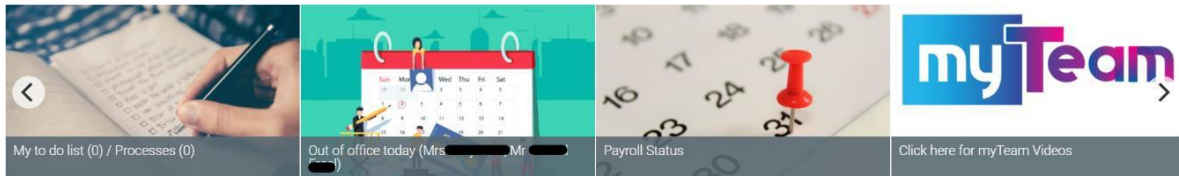
You will now see the home screen:



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



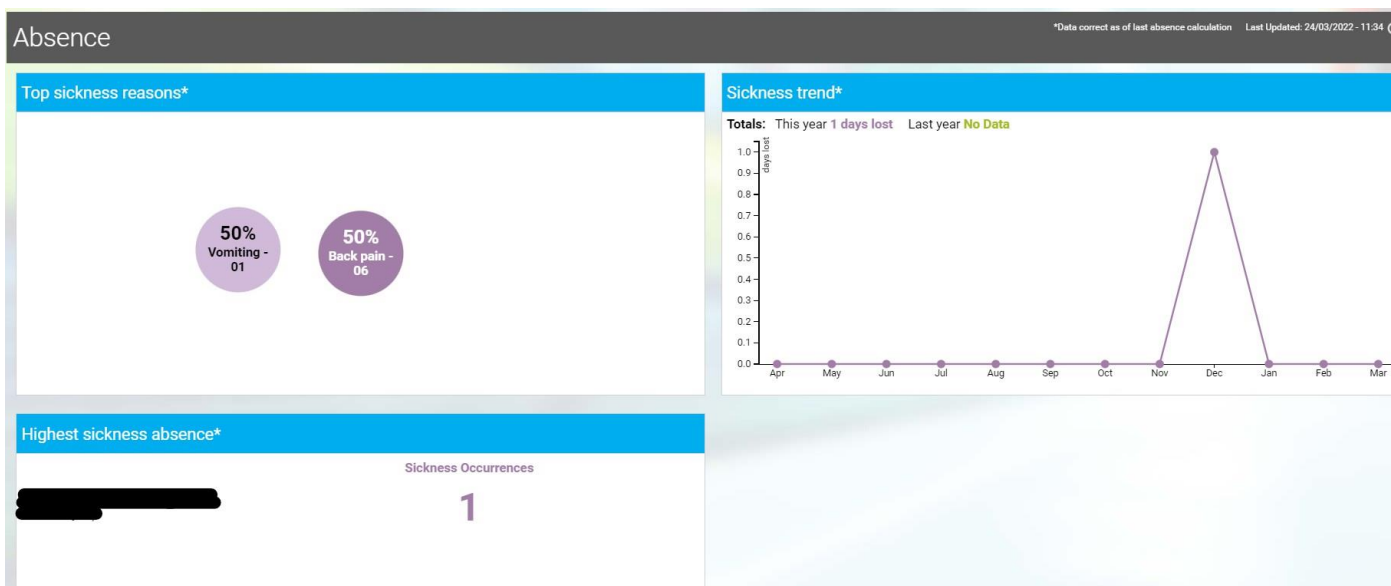
At the bottom of the home page, a carousel of items is available, you can view and click on more items on the carousel by using the arrows to see all available options:

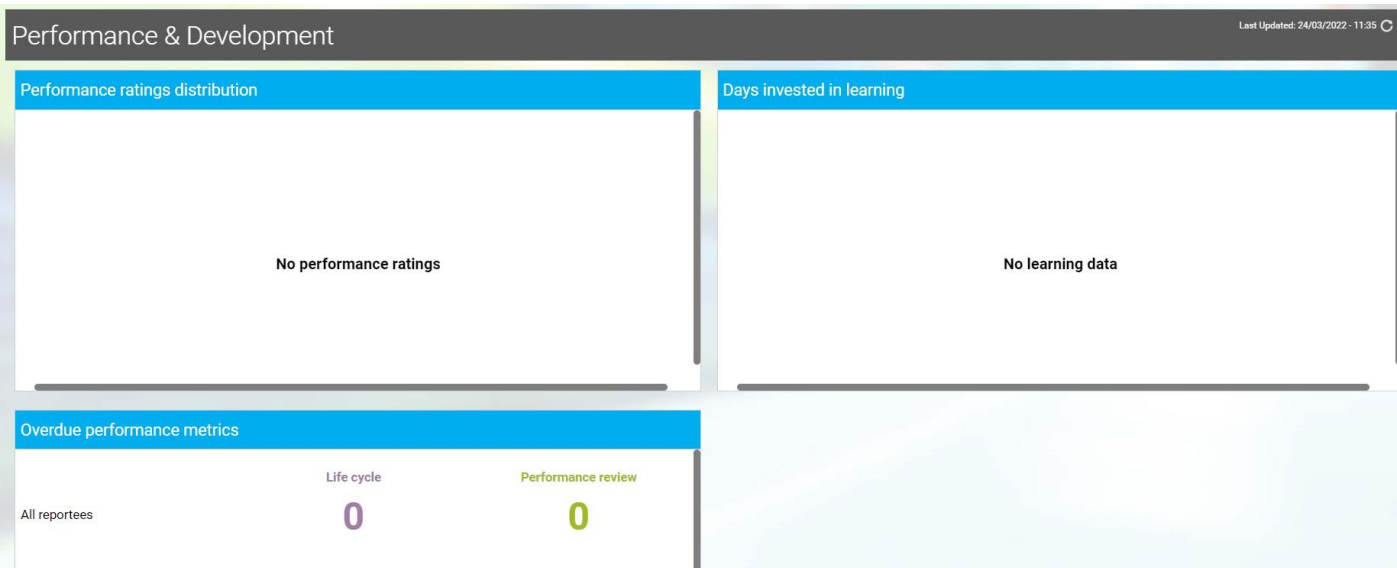


2.1 My Dashboard

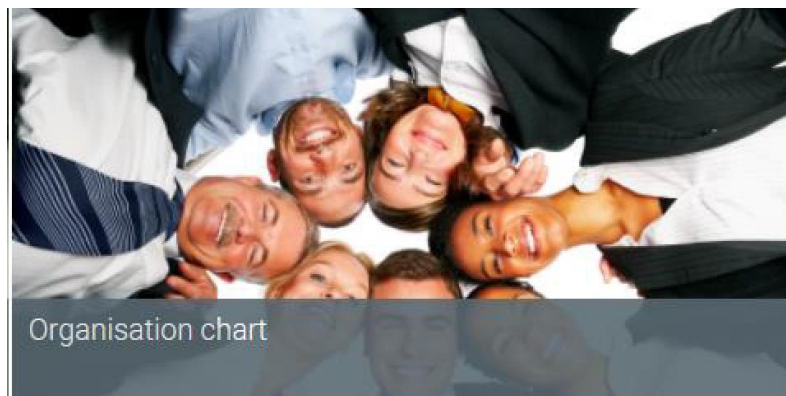


My Dashboard provides a summary of “Absence” and “Performance and Development” data relating to your reportees:





2.2 Organisation Chart



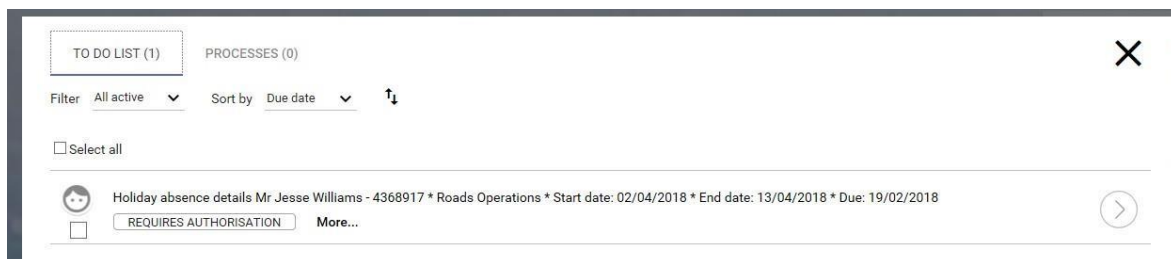
Organisation Chart allows you to view the organisational structure. This allows you to view the employees who currently report to you as a manager and who reports to them if they are also a reporting manager

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.

Absence calendar

Navigation: 29 Mar - 29 Apr 2022

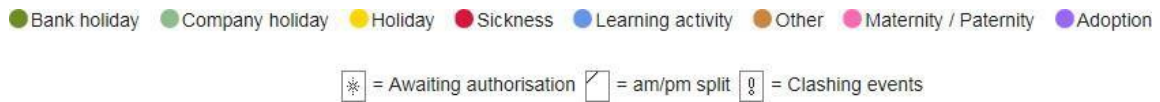
Month: April


	29	30	31	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29		
29th March • 1 Working day • 0 Holidays authorised • 0 Holidays unauthorised • 0 Other absences • 100% Availability																																		
Mrs [redacted]																																		
Agile Worker - Ho...																																		
Mr [redacted]																																		
Mrs [redacted]																																		
Home Worker																																		
Mrs [redacted]																																		

Legend: ● Bank holiday ● Holiday ● Sickness

Please click on a day for further options * = Awaiting authorisation ☐ = am/pm split ☐ = Clashing events

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



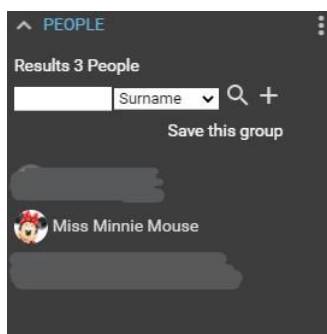
You can click on  at any time to return to the homepage.

3. People

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

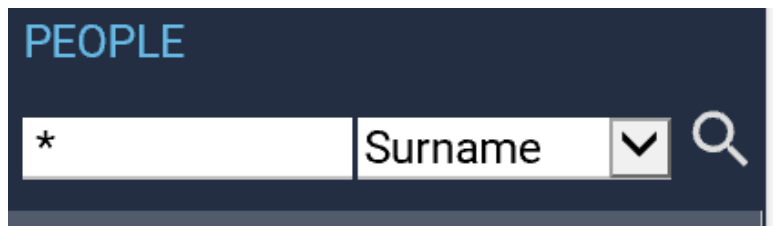


This will then bring up a list of your reportees at the left-hand side of the screen.



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:

A screenshot of an employee record for 'Miss Minnie Mouse'. The record is divided into several sections. The top section is titled 'Personal' and includes 'Born on 30/09', a smiley face icon, and '1 (Personal ref.)', 'Payroll ref.', and '(Social security)'. The right section is titled 'Employment' and includes 'Customer Service Support Officer', '17.50 hours | NLC5 | Scalepoint 18', and 'Reporting manager Mrs Workforce Systems Development Senior Advisor'. Below these is a 'Calendar' section for '03 - 16 May 2022' with a 'VIEW FULL CALENDAR' link and a grid of days. To the right of the calendar are two circular gauges: 'Holidays remaining (as of last calculation) 136.5 of 136.5 hours' and 'Flexi Balance -04:34 hours'. At the bottom is a 'LINKS' section with buttons for 'Personal Details', 'Employment', 'Employee Annual Leave', 'Employee Sickness Absence', 'Employee Other Absence/Flexi Leave', 'Employee Maternity/Paternity/Adoption Absence', and 'Vehicle Info & Mileage, OT & Expenses Claims'.

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

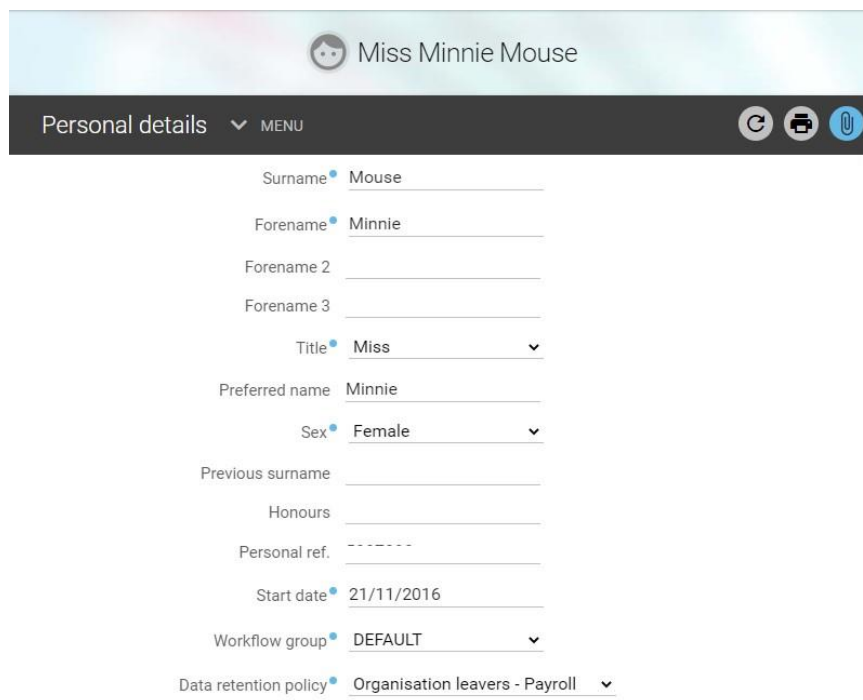
3.2 Links

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.

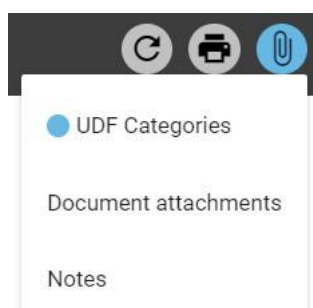


3.3 Personal Details

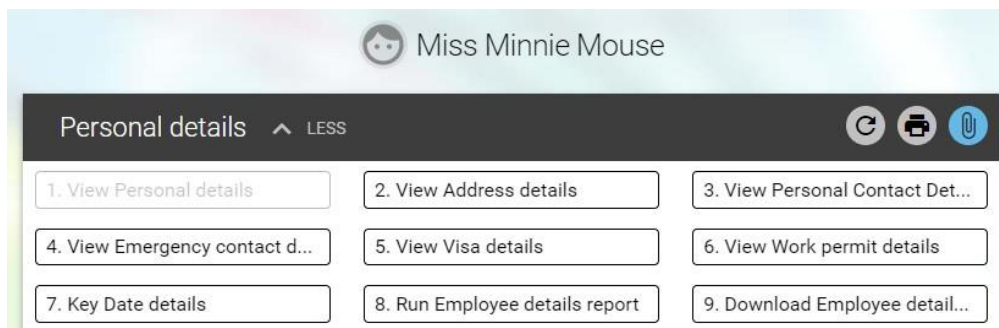
To view personal details, first select **Personal Details** followed by **1. View Personal details** and this will then allow you to view personal details for your selected reportee:



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.

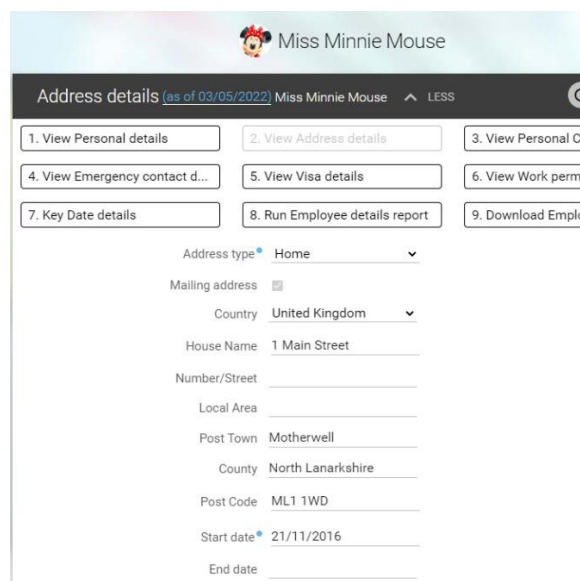


Click on the employee's name at the top of the screen to go back to the summary page. Or alternatively select the menu tab to see the other options that are available to take you directly to one of the other pages:



3.4 Address Details

The following information will be displayed on screen:



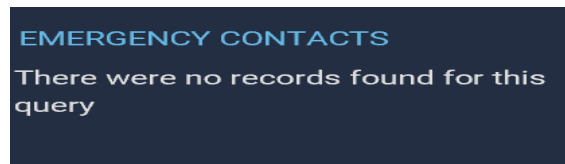
The information on this screen is read only and you will not be able to update or edit this.

3.5 Emergency Contacts

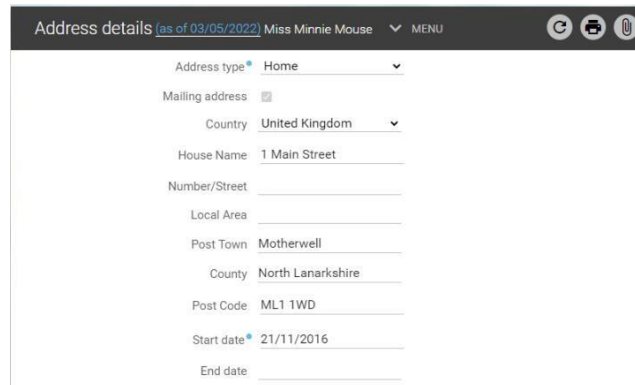
Select “View Emergency contact details” and this will show on the left-hand side of the screen the emergency contacts which the employee has set up.



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

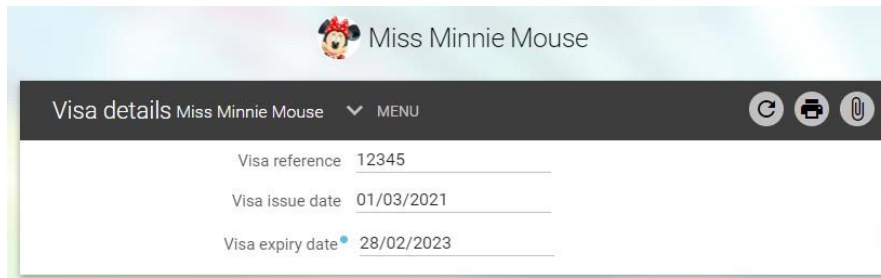


By selecting an emergency contact you will have access to their information however this screen is read only.

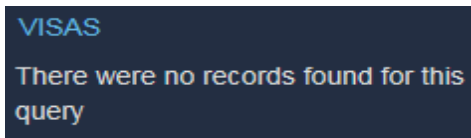


3.6 Visa Details

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.

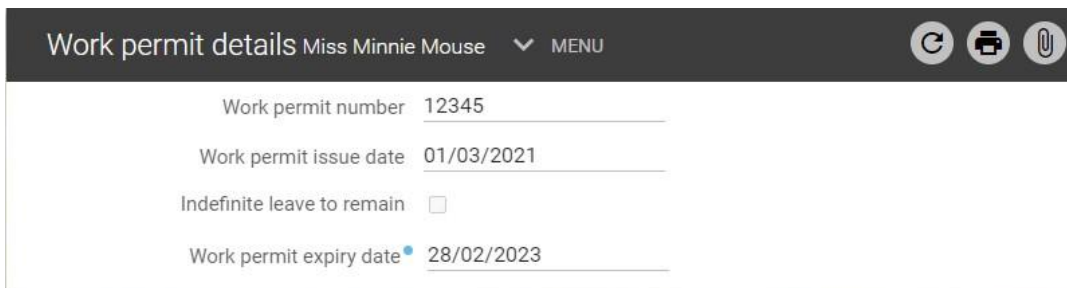


If there are no visa details held on file for the employee, the following message will appear on the left-hand side of the screen:

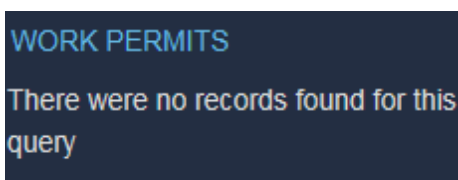


3.7 Work Permit Details

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

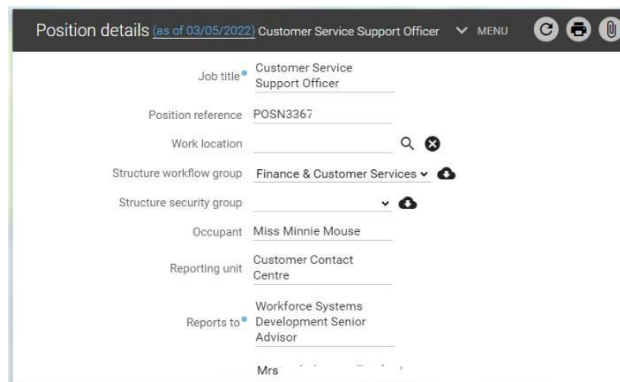
4. View Payscale values 5. View Hours and basis 6. View Work Pattern details 7. View Leaver information details

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 [Notification of Change Guidance](#) which is a form required when you make a change to an employee's position.

4.2 Position Details

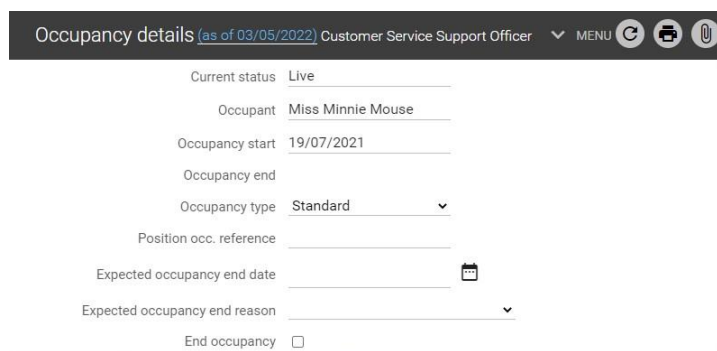
This will provide you with information on the employees' position within the council. You can view the position reference, work location and reporting manager information within this screen.



The 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 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.

Payscale values (as of 06/04/2022) Workforce Systems Advisor

Grade	NLC5
Payment table	
FT Salary	19 - 12.2869
Protected	
Override minimum	
Override bar point	
Override maximum	
Grade payment table	H - NLC Payscale
Grade minimum	16 - 11.5036
Bar point	
Grade maximum	19 - 12.2869
Next increment date	01/01/2099
Additional increment points	
Protected rate of pay	
FTE value (rounded to 5 DP)	1.00000
Change reason	

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.

Hours and basis (as of 05/05/2022) Customer Service Support Officer

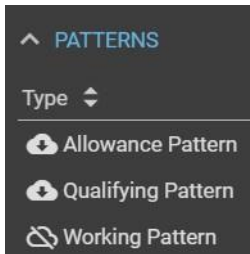
Contractual Hours	17.50
FTE hours	35.00
Post budgeted hours	35.00
Annual weeks worked	52
FTE weeks	52
Employment is term-time only	<input type="checkbox"/>
Category	Employee
Basis	Part time
Type	Temporary
Change reason	

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

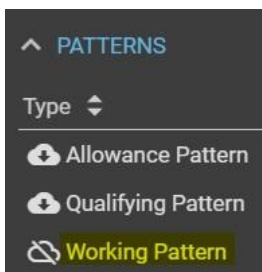
4.6 Pattern Details

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

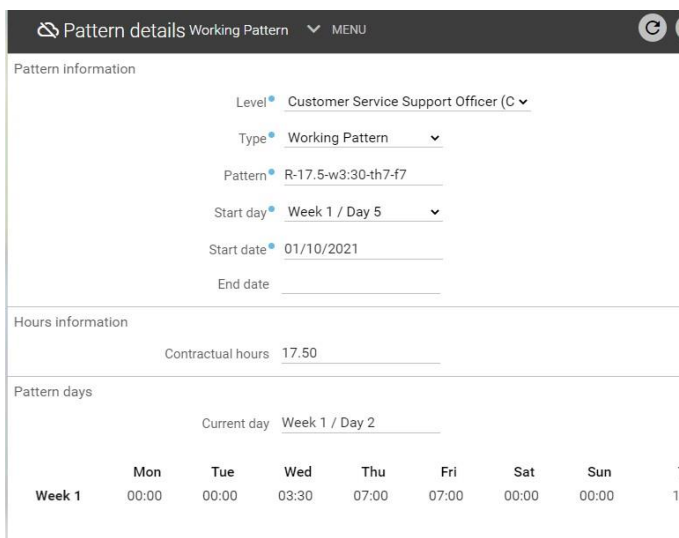
If the employee has more than one pattern type within their position, you will be prompted to select which pattern you wish to view on the left-hand side:



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:



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 Sickness 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](#)

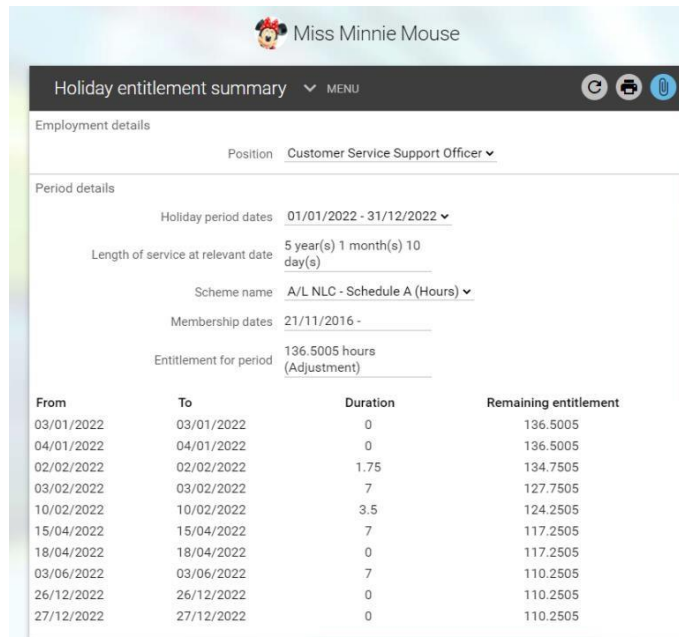
[2. View Annual Leave details](#) [3. Run Absence report](#) [4. Download Absence report](#)

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.

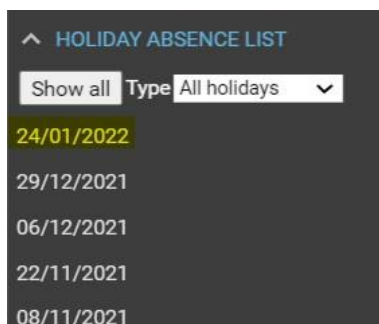


The information on this screen is read only and you will not be able to update or edit this.

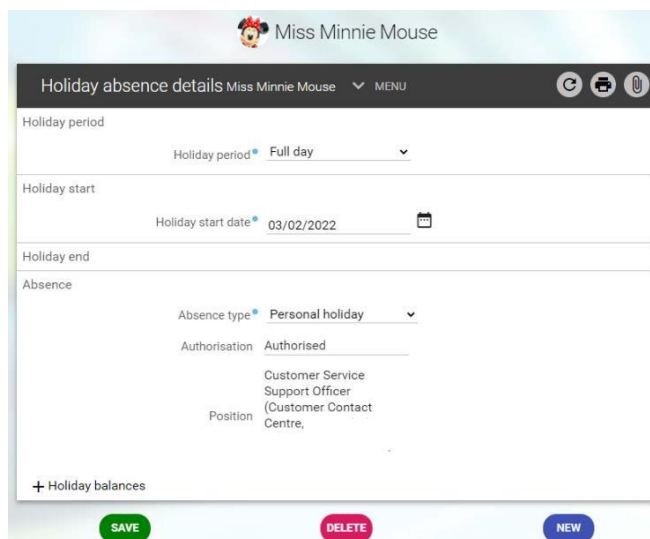
5.2 Holiday Absence Details

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.

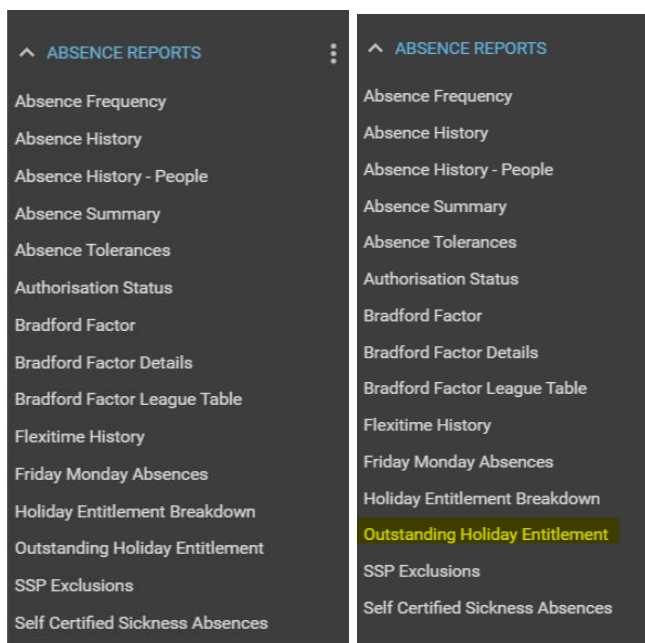
In a situation where an employee has annual leave booked within the system and the employee reports unfit for work, if the employee has submitted a medical GP sick note dated on or before the annual leave was due to commence, then the sickness absence will supersede the prearranged annual leave.

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

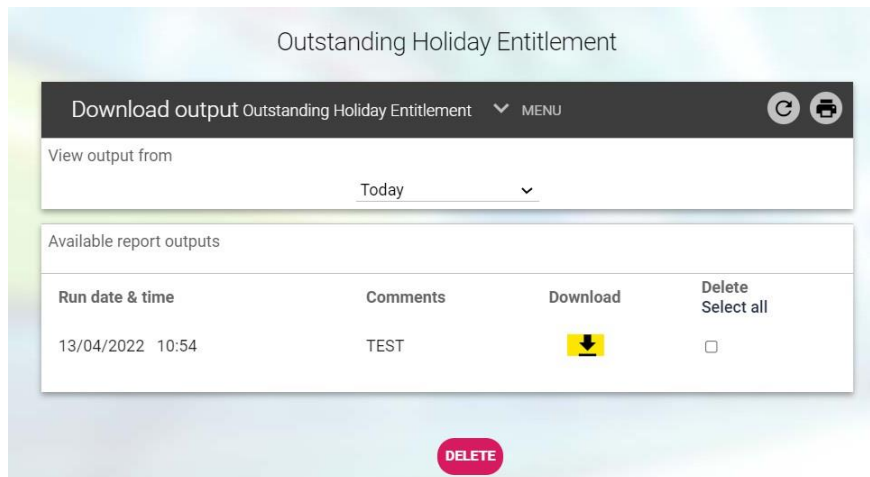
RUN

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

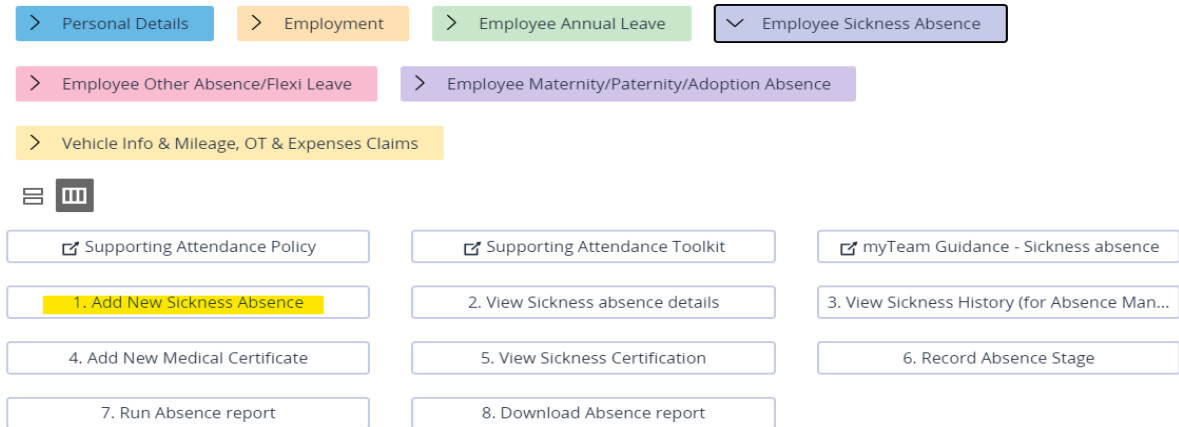
Sickness absence should be recorded in whole days only. Where an employee has went home ill, this should be recorded via “Home Ill” via Other Absence details in line with the Supporting Attendance Policy which can be found on www.mynl.co.uk or by clicking on the

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.

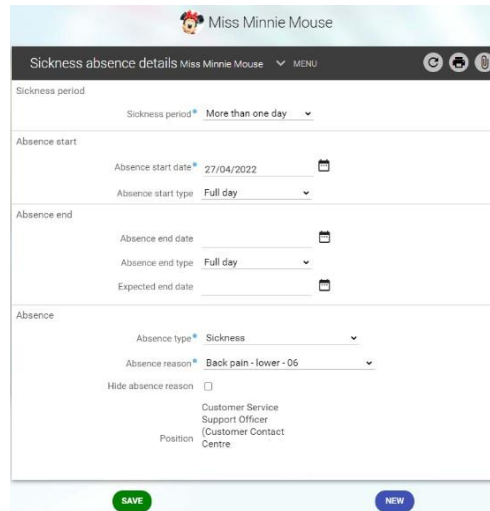
A screenshot of a web form titled 'Sickness absence details' for an employee named 'Miss Minnie Mouse'. The form is divided into several sections: 'Sickness period' with a dropdown set to 'More than one day'; 'Absence start' with 'Absence start date' set to '27/04/2022' and 'Absence start type' set to '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 'Set as default' checkbox and a 'Hide absence reason' checkbox. A green 'SAVE' button is located at the bottom of the form.

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:

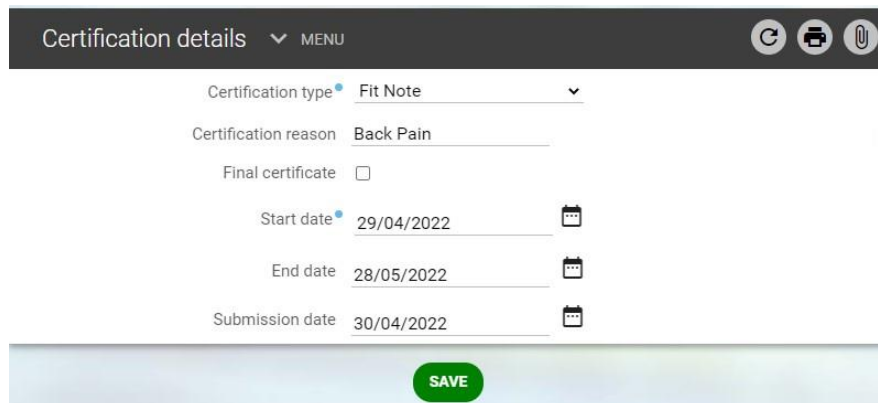


The screenshot shows a web interface for 'Miss Minnie Mouse' with the title 'Sickness absence details'. The form is divided into several sections: 'Sickness period' with a dropdown set to 'More than one day'; 'Absence start' with 'Absence start date' (27/04/2022) and 'Absence start type' (Full day); 'Absence end' with 'Absence end date', 'Absence end type' (Full day), and 'Expected end date'; and 'Absence' with 'Absence type' (Sickness), 'Absence reason' (Back pain - lower - 06), and a 'Hide absence reason' checkbox. At the bottom, there are 'SAVE' and 'NEW' buttons.

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:

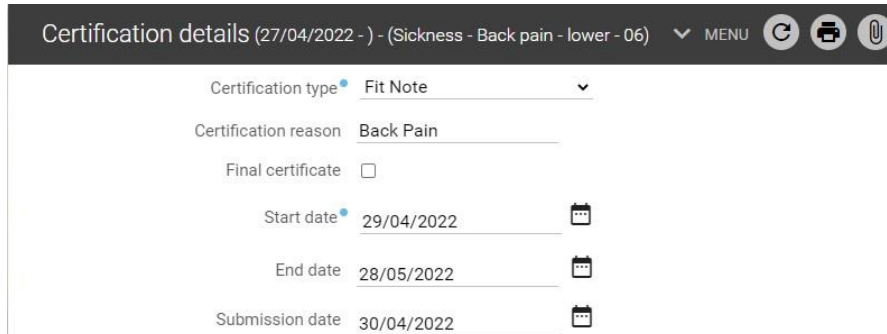


The screenshot shows a web interface titled 'Certification details'. The form includes: 'Certification type' (Fit Note), 'Certification reason' (Back Pain), 'Final certificate' (checkbox), 'Start date' (29/04/2022), 'End date' (28/05/2022), and 'Submission date' (30/04/2022). At the bottom, there is a 'SAVE' button.

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:



Certification details (27/04/2022 -) - (Sickness - Back pain - lower - 06) MENU

Certification type: Fit Note

Certification reason: Back Pain

Final certificate:

Start date: 29/04/2022

End date: 28/05/2022

Submission date: 30/04/2022

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):



> 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

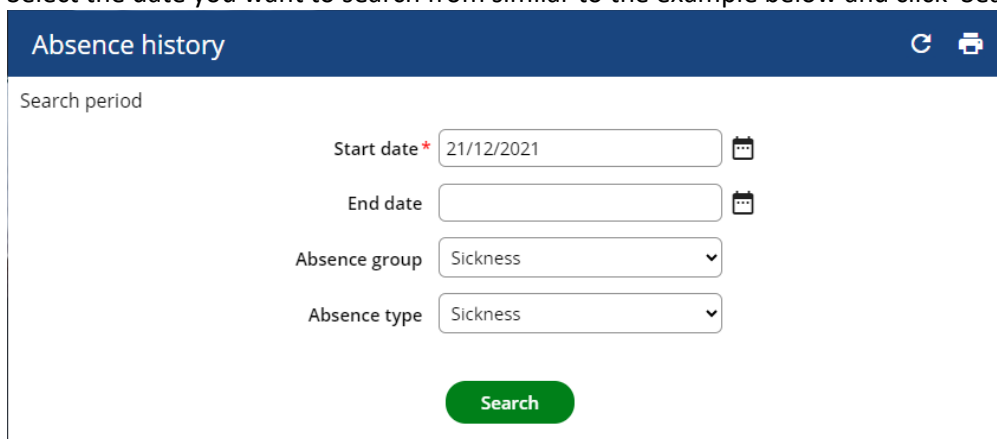
Supporting Attendance Policy Supporting Attendance Toolkit myTeam Guidance - Sickness absence

1. Add New Sickness Absence 2. View Sickness absence details 3. View Sickness History (for Absence Man...)

4. Add New Medical Certificate 5. View Sickness Certification 6. Record Absence Stage

7. Run Absence report 8. Download Absence report

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



Absence history

Search period

Start date*: 21/12/2021

End date:

Absence group: Sickness

Absence type: Sickness

Search

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

Absence history										
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.

6.7 Absence Reports

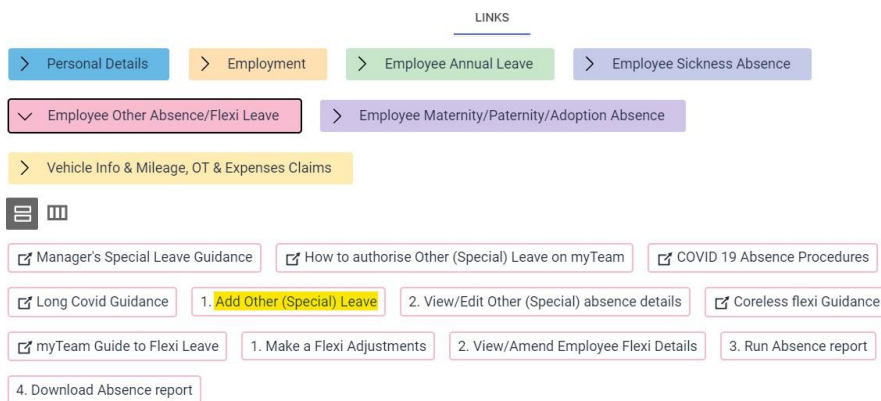
The process for sickness absence reports is the same process as annual leave absence reports. For guidance on this, please see point [5.4](#) in this guide.

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 screenshot shows the 'Other absence details' form with the following fields:

- Absence period: Full day
- Absence start: Date 04/02/2022
- Absence end: Expected end date 04/02/2022
- Absence: Absence type Home ill, Absence reason <None>
- Hide absence reason:
- SAVE button

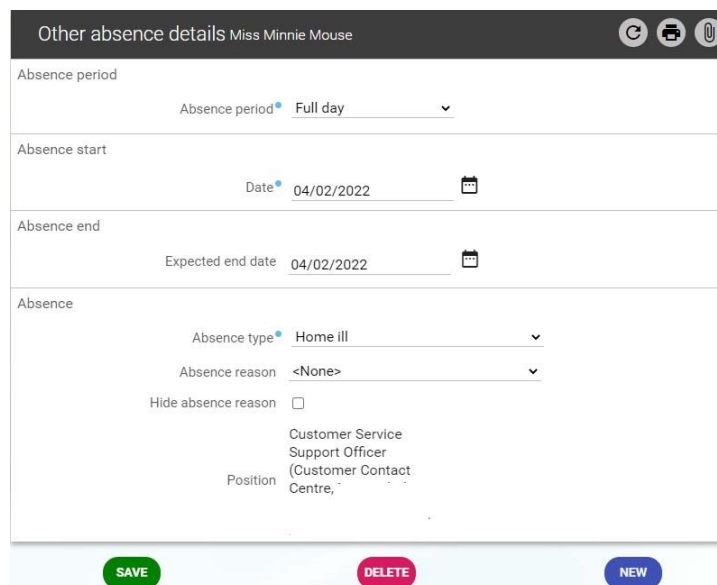
7.2 View Other Absence Details

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

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



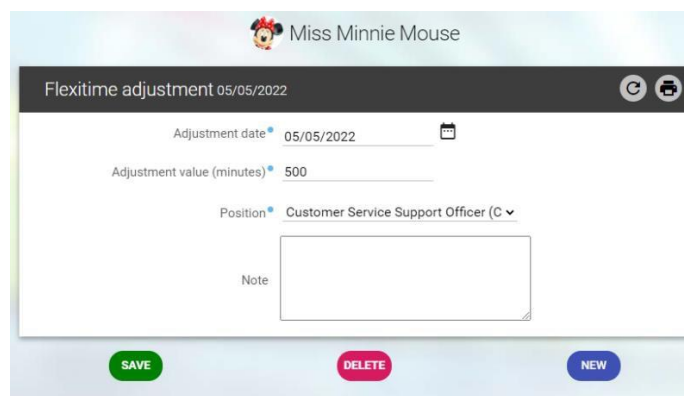
This will show you the absence details, and you will be able to view and edit this.



7.3 Making a Flexi Adjustment

Select “Make a Flexi Adjustments”

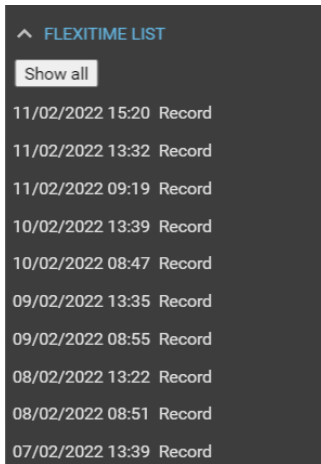
Input the adjustment date, adjustment value (minutes) and any notes which relate to this action. Press Save.



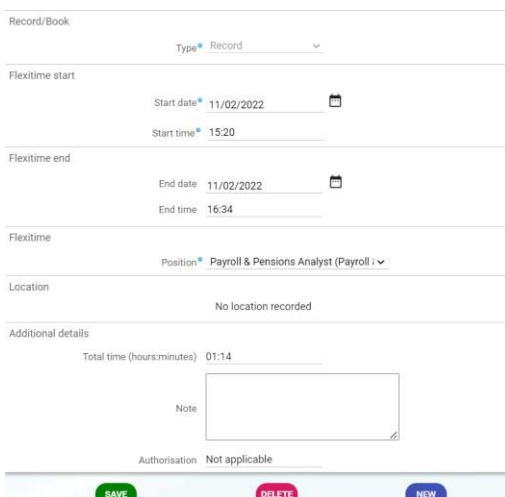
7.4 View/Amend Flexi Details

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)
- 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)
- 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”

[> Employee Other Absence/Flexi Leave](#)
[Employee Maternity/Paternity/Adoption Absence](#)

[> Vehicle Info & Mileage, OT & Expenses Claims](#)

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

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

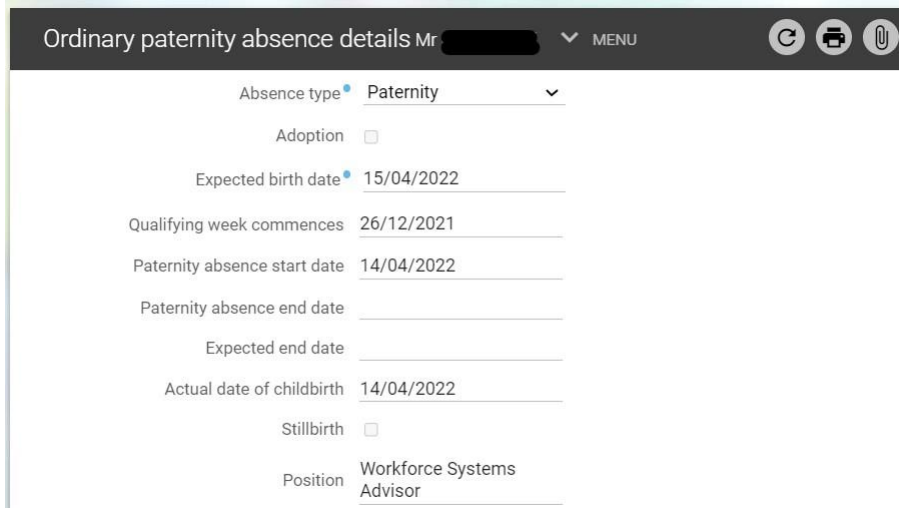
SMP pay value

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:



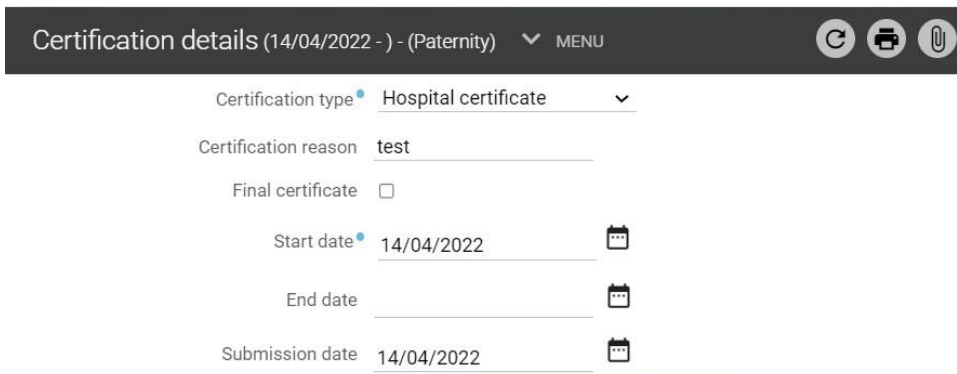
The screenshot shows a web form titled "Ordinary paternity absence details Mr [redacted] MENU". The form contains the following fields and values:

Absence type	Paternity
Adoption	<input type="checkbox"/>
Expected birth date	15/04/2022
Qualifying week commences	26/12/2021
Paternity absence start date	14/04/2022
Paternity absence end date	
Expected end date	
Actual date of childbirth	14/04/2022
Stillbirth	<input type="checkbox"/>
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 form titled "Certification details (14/04/2022 -) - (Paternity) MENU". The form contains the following fields and values:

Certification type	Hospital certificate
Certification reason	test
Final certificate	<input type="checkbox"/>
Start date	14/04/2022
End date	
Submission date	14/04/2022

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:

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	
Expected end date	
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:

Certification details (22/04/2022 -) - (Adoption)	
Certification type	Other
Certification reason	Adoption Certification
Final certificate	<input type="checkbox"/>
Start date	22/04/2022
End date	
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

Sunday of matching week

Adoption pay period start date

APP end date

KIT values

Date

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

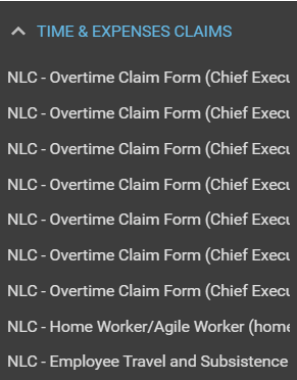
▼ Vehicle Info & Mileage, OT & Expenses Claims

☰ ☰

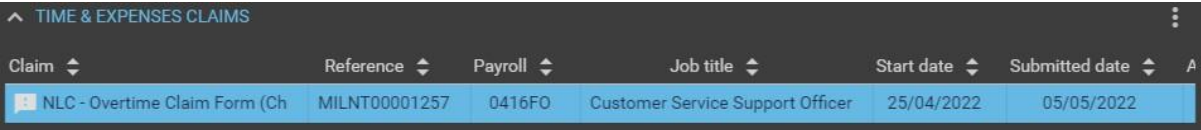
🔗 Mileage Guidance 🔗 myTeam Guidance for Overtime & Mileage **1. View Mileage & Expense claim details**

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

Vehicle registration

Start date

End date

Make

Model

Engine size (cc)

Fuel type

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”:

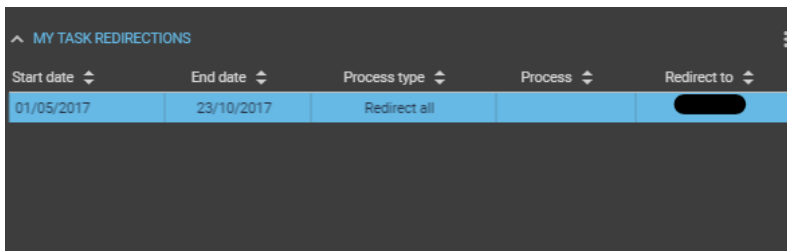
Hello [redacted]

You last logged in 18 hours ago

- People >
- Leavers >
- My task redirection >
- Click here to view all COVID-19 information >
- My dashboard >

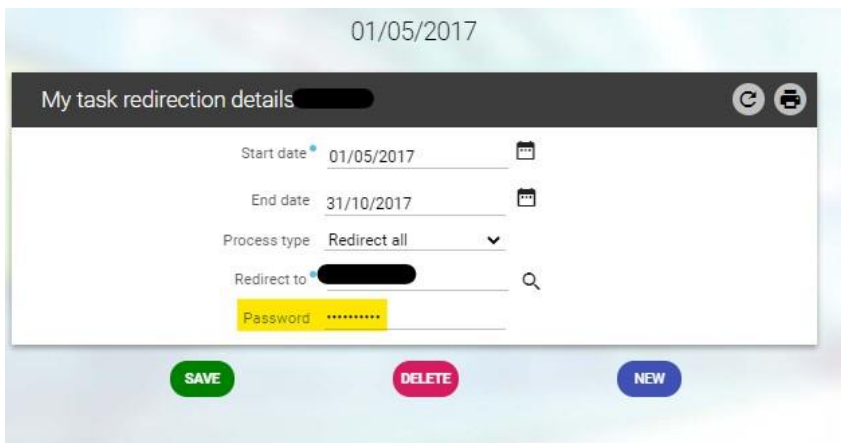
Find iTrent pages

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



Start date	End date	Process type	Process	Redirect to
01/05/2017	23/10/2017	Redirect all		

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:



01/05/2017

My task redirection details

Start date: 01/05/2017

End date: 31/10/2017

Process type: Redirect all

Redirect to: [Redacted]

Password: [Redacted]

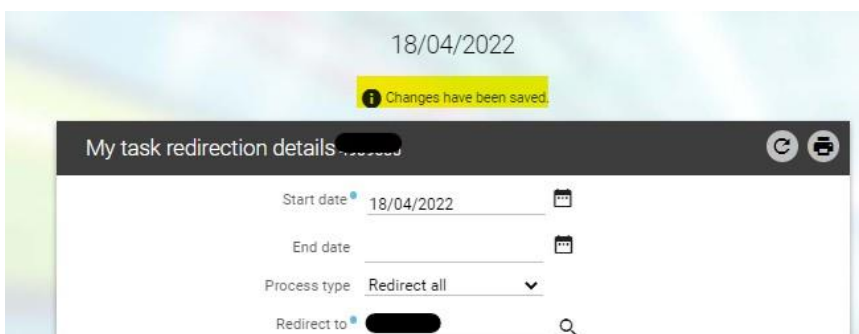
SAVE DELETE NEW

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.



18/04/2022

Changes have been saved.

My task redirection details

Start date: 18/04/2022

End date:

Process type: Redirect all

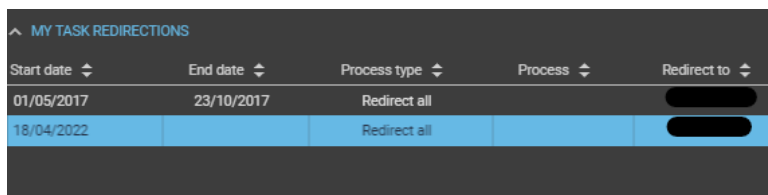
Redirect to: [Redacted]

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:



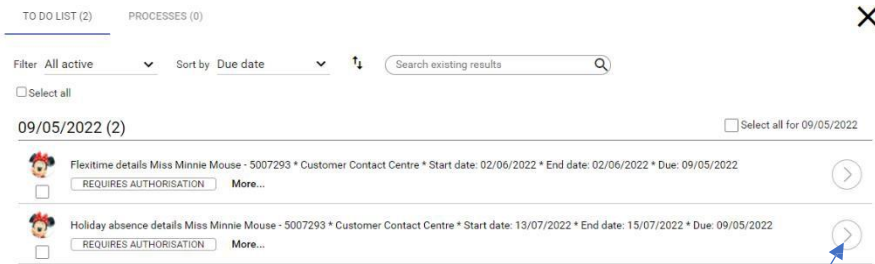
11. To Do List/Processes

11.1 To Do List – Authorising and Rejecting Requests

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

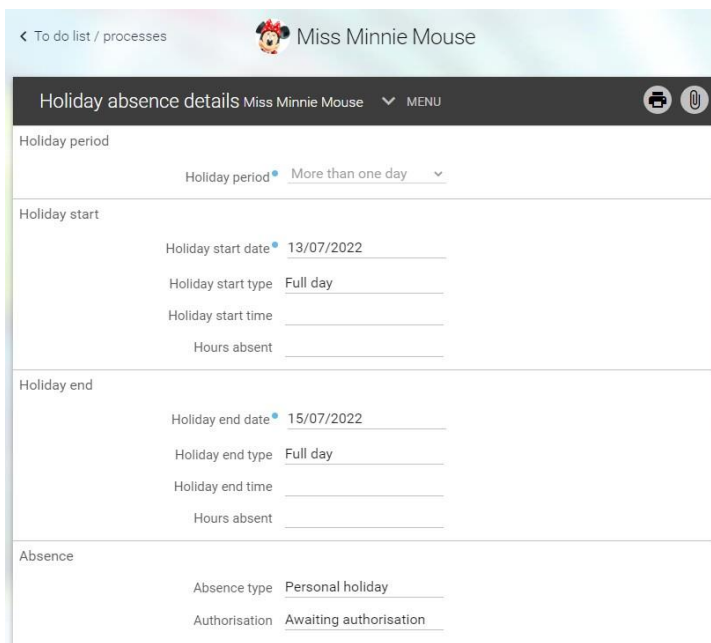


You will then see a list of tasks on your to do list which require to be actioned:

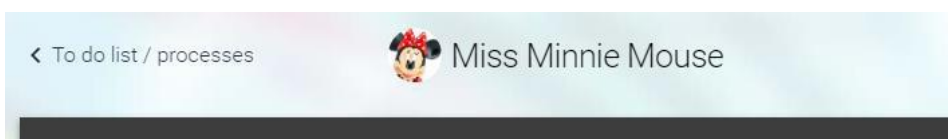


To view the full details of the request, press the arrow button:

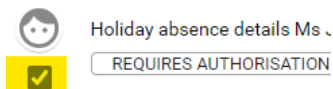
This will give you the full details of the request:



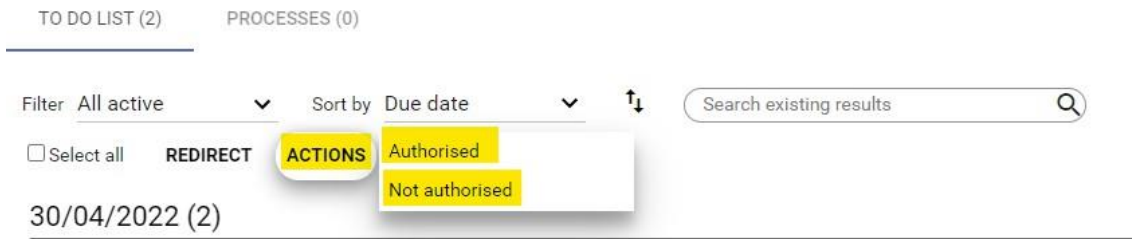
To go back to the to do list to approve or reject, press the “To do list/processes” at the top left-hand side of the screen:



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

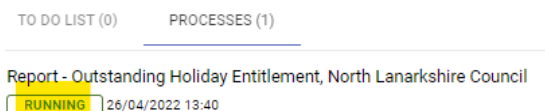
You can view your process status of actions you take within iTrent, for example running reports.

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

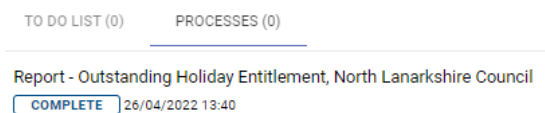


Ensure that you are sitting within the “Processes” tab.

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]