Absence Administrator
User Guide

University of HUDDERSFIELD

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Logging In

The HR system (iTrent) can be accessed by using the following web address https://itrent.hud.ac.uk/tlive_web/ and when logging in you should be able to see the login screen as below.

Your user login details for iTrent are the same as you would use to sign in to your University PC or Email account.

If you are experiencing any difficulties logging into iTrent and would like assistance please contact myhr@hud.ac.uk.

Note: iTrent is only available when working on campus.
Homepage

Once you have successfully logged into iTrent as an Absence Administrator, you will be presented with the Homepage as shown below.

While using iTrent, if you navigate away from the homepage, you can always get back to it by clicking on the iTrent button in the top left hand side of the screen as shown below.

The following options are along the bottom of the homepage:

The *Your to do list* is not currently utilised for Absence Administrators in this release

The *Absence Administrator User Guide* option links to the User guide for Absence Administrators on the University’s webpage
The MyHR option links to the login page for MyHR.

The Absence Reporting option links to the guidance on the University website for how an employee should inform us of a sickness absence.
Searching for an Employee

To search for an employee within your School/Service, click on the “Our Staff” button on the homepage.

A search option will appear on the left hand side of the screen. Enter the surname of the employee you are searching for in this field and press return.

All members of staff with that surname will be listed below the search field.

Select the correct employee from the search results, and a summary page for that person will open.
Absence Calendar

You are able to view the absence calendar for any employees within your School/Service by using the absence calendar. To do this, search for the correct member of staff by following the steps outlined in the “Searching for an Employee” section and open their summary page.

In the “Calendar” section of their summary page, click on “View full calendar”.

This will show the next 14 days and any absence along with the absence type during that time:
Viewing Multiple Employees in the Absence Calendar

If you would like to see multiple employee’s availability within the absence calendar, first navigate to an employee’s absence calendar using the steps above and then perform a blank search when searching for an employee. **Note:** if you are the absence administrator for a large amount of people then this search may take a while.

If you would like to view all employee’s availability, click on the “Select all” button. If you would like to view specific employees, hold Ctrl and click on each employee that you would like to view the absence calendar for. The absence calendar will then reload with these employee’s absence information allowing you to see their availability in a single location.
Sickness Absence

Entering a New Sickness Absence

Using iTrent, you are able to create a new absence record for a member of staff from within your School Service. To do this, search for the correct member of staff by following the steps outlined in the “Searching for an Employee” section and open their summary page.

In the links section of their summary page, you will see an option to Add New Absence.

Click on this option and you will be taken to a new Sickness absence details page. This page is split into four sections; Sickness period, Absence start, Absence end and Absence.
In the *Sickness period* section ensure that the option for “More than one day” is selected (This should already be selected by default).

The only field which you should complete in the *Absence start* section is *Absence start date*, which should be the first day of the employee’s absence. The Absence start type field should be automatically set to “Full day”.

The *Absence end* section should look the same as the example below. The Absence end type should be automatically set to ‘Full day’. Do not add an *Absence end date* as it is the employee’s responsibility to update this via MyHR when they return to work.
If when you save the absence record, a date appears in the *Absence end date* field, delete this and save the page again.

In the *Absence* section, select “Sickness” as the *Absence type*. Do not add a value in the *Absence reason* field as it is the responsibility of the employee to do this via MyHR when they return to work.

Click on the save button and you should see the new absence record you created appear in the *Sickness Absence List* on the left hand side of the screen.

**Note:** Once you have saved a record, you will not be able to delete it. If you need to delete an absence which you have entered incorrectly, please contact the MyHR team via email myhr@hud.ac.uk.

### Entering a Sickness Absence for Multiple Positions

If the employee holds more than one position within your school or service, you will need to select the position/s that the sickness absence should be recorded against. This should be done in the *Absence* section of the *New absence details* page.

Enter the new Sickness absence record as outlined in the previous section of this guide, when you get to the *Absence* section of the page you should see the *absence type* and *absence reason* as normal, but you should also see the *Position* field as below.

This will show all current jobs the employee has in iTrent as well as any future dated jobs which they may have.

You are able to select multiple jobs by keeping hold of the Ctrl button whilst clicking on each job the absence applies to. The *Position* field only shows three lines of information and so you may have to scroll down the list to view all available options.

### Viewing an Employee’s Sickness Absence History
You can view the sickness absence history for a member of staff within your School/Service. To do this, search for the correct employee by following the steps in the previous section.

On the employee’s summary page there is an option to view Absence History in the Links section.

This will list all sickness absence records for that employee on the left hand side of the screen listed by the absence start date starting with the most recent.

Selecting a sickness absence record from this list will display the sickness absence record.
The only fields you are able to update is the Absence start date and the Absence end date. This should only be done if this was initially entered incorrectly. If an employee needs to change their absence reason or end date then they must do this via MyHR. If you change a Start date long after the absence occurred this may trigger an audit query from the MyHR team.

Note: The sickness absence list will only display absence records from within the last 12 months. If you are looking for an absence record from before this, you can do so by clicking on the Show All button.

Note: you are unable to make any amendments to your own record within iTrent. If your start date is incorrect and needs changing you should inform your Line Manager who will be able to do this for you.

**Sickness Absence categories**

The University uses UCEA absence categories and each period of absence must be classified as one of these groups. Below is a table of all UCEA absence categories which also provides examples of what should and should not be included in each category:

<table>
<thead>
<tr>
<th>Category</th>
<th>Examples to Include</th>
<th>Don't include</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cold (COLD)</td>
<td>Cold, cough, flu, fever, virus, temperature, general aches and pains, hay fever</td>
<td>Headaches</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Stomach, digestive and gastro-intestinal (STMC)</td>
<td>Vomiting, diarrhoea, nausea, upset stomach, indigestion, gastritis, ulcers, norovirus, IBS</td>
<td></td>
</tr>
<tr>
<td>Musculoskeletal (MUSC)</td>
<td>Back pain, neck pain, broken limbs, sprains, arthritis, sciatica, whiplash, muscle tears, bruises</td>
<td></td>
</tr>
<tr>
<td>Migraine and Headache (MIGR)</td>
<td>Headaches, migraine, dizzy spells, neuralgia, sunstroke, epilepsy</td>
<td></td>
</tr>
<tr>
<td>Mental Health (MNTL)</td>
<td>Stress, fatigue, debility, anxiety, depression, alcohol or drug dependency, bereavement, exhaustion, nervous debility, panic attacks</td>
<td></td>
</tr>
<tr>
<td>Eyes, Ears, Nose, Throat and Dental (ENTD)</td>
<td>Eye problems, conjunctivitis, glaucoma, ear problems, ear ache, labyrinthitis, tinnitus, nosebleed, sinusitis, sore throat, laryngitis, toothache, tooth abscess, other oral problems, dental treatment</td>
<td></td>
</tr>
<tr>
<td>Respiratory (RESP)</td>
<td>Asthma, breathing problems, bronchitis, chest infection, Pneumonia, Pleurisy, chest pains, respiratory tract infection, tracheitis</td>
<td></td>
</tr>
<tr>
<td>Operations, Surgical Procedures (OPER)</td>
<td>Hospital appointments, organ donation, any operation or surgery, investigations, tests, tooth extraction</td>
<td></td>
</tr>
<tr>
<td>Infections and Infectious Diseases (INFC)</td>
<td>Measles, mumps, chicken pox, shingles, legionnaires, foot and mouth</td>
<td></td>
</tr>
<tr>
<td>Heart, Circulatory and Blood Disorders (HEBL)</td>
<td>Heart attack, angina, stroke, seizure, irregular heartbeat, blood disorders, blood pressure, blood clots, DVT, anaemia</td>
<td></td>
</tr>
<tr>
<td>Pregnancy Related (PREG)</td>
<td>Pregnancy related problems, miscarriage</td>
<td></td>
</tr>
<tr>
<td>Skin (SKIN)</td>
<td>Eczema, rash, psoriasis, alopecia, cellulitis, allergies</td>
<td></td>
</tr>
<tr>
<td>Genitourinary and Gynaecological (GNIT)</td>
<td>Cystitis, bladder infection, kidney problems, menstrual pain, urinary tract infections</td>
<td></td>
</tr>
<tr>
<td>Cancer (CNCR)</td>
<td>Cancer and cancer treatments (Chemotherapy, radiotherapy), lymphoma, biopsies, mastectomy, breast cancer</td>
<td></td>
</tr>
<tr>
<td>Diabetes, Endocrine and Glandular (DEGP)</td>
<td>Diabetes, Glandular fever, swollen glands, thyroid problems</td>
<td></td>
</tr>
<tr>
<td>Injury, Burns and Poisoning (INBP)</td>
<td>Burns, frostbite, sunburn, wasp sting, industrial injury</td>
<td></td>
</tr>
<tr>
<td>Other, Unknown (OTUN)</td>
<td>Other reasons not classified elsewhere, <em>only rarely used</em></td>
<td></td>
</tr>
</tbody>
</table>
Annual Leave

Entering a new period of Annual Leave

You are able to use iTrent to add a new period of annual leave for a member of Staff in your School/Service. To do this, click on the "Our Staff" button on the iTrent home page and search for the staff member as described in the Searching for an Employee section of this guide. This will open the summary page for that person. At the bottom of the page there is a "Links" section, click on the "Holidays/Flexi Leave" button and the holidays options will expand.

Click on the “Add New Holiday/Flexi Leave” button and a blank Holiday absence details page will open.

When entering a period of annual leave for a part day, select Part day as the Holiday period and you will be presented with options for the Holiday start date and Holiday start type. Enter the date in to the Holiday start date and then select either Half Day – AM or Half Day – PM from the Holiday start type field. Select Annual Leave from the Absence type drop down and then click on the Save button.

Please note: If the employee works on a part time basis and would normally only work in the morning or afternoon, you should select Full day as the Holiday period when entering a new period of annual leave otherwise the number of hours deducted from their annual leave entitlement will be incorrect.

When entering a period of annual leave for a Full day, Select Full day from the Holiday period dropdown. Enter the holiday date in to the Holiday start date and select Annual Leave from the Absence Type dropdown and then click on the Save button.
When entering a period of annual leave for more than one day, select More than one day as the Holiday period. Enter the first day of annual leave in to the Start date and then select either Full day or Half Day – PM as the Holiday start type, then enter the last day of annual leave in the End date field and select either Full day of Half Day – AM as the Holiday end type. Select Annual Leave as the Absence type and then click on Save.

Reviewing Previous Annual Leave

Using iTrent, you are able to review previously taken annual leave, upcoming annual leave and remaining annual leave entitlement for the annual leave period which runs from the 1st September to the 31st August of each year.

To do this, click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the Searching for an Employee section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays” button and the holidays options will expand.
Click on the “Holidays Summary” button and this will open the Holiday entitlement summary page.

On this page you can see the total annual leave entitlement for the period (in hours) and a list of annual leave that has been taken, including the dates and the total amount of time that was taken. The remaining entitlement for the last instance of annual leave in this list is the total remaining annual leave entitlement for that person.

Please note: Public holiday entitlement was previously worked out separately and the employee had to add any surplus entitlement to their overall annual leave manually. The system now calculates public holiday entitlement automatically and deducts the correct number of hours based on the employee’s working pattern. In the example above, this relates to a full time employee employed throughout the entire leave period therefore they have been given an extra 88 hours (12 days) within their “Entitlement for period”, but then had these 88 hours deducted which you can see listed above meaning their annual leave entitlement remains unchanged. Part time staff will end up with hours being added or deducted from their overall entitlement based on their working pattern.

Entering an Annual Leave Entitlement Adjustment
If a member of staff will have some remaining annual leave entitlement that does not come to either a half or full day, you can enter an adjustment against their entitlement and “top up” their entitlement with Flexi time to the next half day. In the example below Michael Brown has 2.1 hours of annual leave left so we would top up his annual leave to 3.7, if he had 6 hours remaining we would top it up to 7.4 hours. Although Academic staff are not eligible for Flexi time, they can agree with their manager to work this time back.

To do this, sign in to iTrent and click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the Searching for an Employee section of this guide. This will open the summary page for that person.

At the bottom of the page there is a “Links” section, click on the Holidays button and the holidays options will expand.

Click on the Holiday Adjustment button to open Holiday entitlement adjustment page.
In the Period details section of the page, check that the drop down menu for Holiday period dates is for the current annual leave period and in the Adjustment details section change the Adjustment type option to “Adjust” as in the screenshot above.

Enter the number of hours to be carried forward into the value field and type “Top up of annual leave” into the Reason field.

In the example above, Michael Brown will be leaving part way through the annual leave period and so only has 2.1 hours available as remaining annual leave before he will finish working at the University. This would not leave him with enough hours to book either a full day (7.4 hours) or a half day (3.7 hours) and so his manager would agree with him to work an extra 1.6 hours and top up his entitlement so that he will be able to book off his remaining annual leave.

Please Note: the hours carried forward should be decimalised i.e. one full day of 7 hours and 24 minutes should be entered as 7.4 hours. In the example above 3 full working days of 7 hours and 24 minutes will be carried forward as 7.4 x 3 is 22.2.

Click on the save button and the hours will be carried over into the new annual leave period.
Checking Carry Forward

Staff can carry forward up to 5 days unused leave to the next holiday year (pro rata for part time staff) which should be taken within the first 4 calendar months of the new leave year.

Once a new holiday year starts, any remaining annual leave entitlement from the previous year up to their maximum amount will be automatically carried forward and will be included in the overall balance for the new holiday year.

You can check how much annual leave entitlement has been carried over for a member of staff by checking their Holiday entitlement adjustment page in iTrent. To do this, sign in to iTrent and click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the Searching for an Employee section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Holidays button and the holidays options will expand.

Click on the Holiday Adjustment button to open Holiday entitlement adjustment page.

The number of hours carried over is displayed in the Brought Forward field. Any carry forward must be used before the end of December. If this has not been used by this time, the time will be lost and the number of hours that were lost will appear in the Brought forward not used (lost) field.

In certain circumstances a member of staff may have carried forward more than the standard allowance (e.g. if they have been on maternity leave or a period of long-term sickness). In this
case, their standard carry forward would be included in the Brought Forward field, and the additional time would be shown as an annual leave adjustment as below.

Flexi Leave

Using iTrent, you are able to both view previous instances of flexi leave, as well as enter a new flexi leave period for any member of staff within your School/Service.

Viewing a Previous Flexi Leave Record

To view previous flexi leave records for a staff member, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the Searching for an Employee section of this guide.

This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays/Flexi Leave” button and the flexi leave options will expand.

Click on “Holidays/Flexi Leave History” and the previous absences on record will be shown on the left hand side of the screen listed by the absence start date. You can expand the side bar by clicking on the handle as in the screenshot below which will allow you to see if an absence was annual leave or Flexi leave more easily.
Selecting an absence from this list will open up the flexi leave record, allowing you to see details of the instance of flexi leave.

Note: The flexi leave instances in this list cover the previous 12 months. If you need to see records from before this, click on the “Show all” button and the list will change to include all flexi leave records.

Entering a New Flexi Leave Absence

To add a new flexi leave record, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the Searching for an Employee section of this guide.
This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Holidays/Flexi Leave button and the options will expand.

Click on the “Add New Holiday/Flexi Leave” button. This will open a blank absence details page.

When entering a period of annual leave for a half day, select Part day as the Holiday period and Half Day – AM or Half Day – PM from the Holiday start type field. Select Flexi Leave from the Absence type drop down and then click on the Save button.

**Please Note:** Flexi leave should only be booked as a half or full day – the “More than one day” option should not be used.

This absence will now also appear on the Absence Calendar as a “Holiday” absence.
Amending or Deleting Flexi Leave

You can make amendments to a period of flexi leave or cancel a period of flexi leave via iTrent. This can be done by navigating to the relevant record by clicking on the “Our Staff” button on the iTrent home page. Search for the staff member as described in the Searching for an Employee section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays/Flexi Leave” button and the options will expand.

Click on the “View Holidays/Flexi Leave” button and a list of their holidays and flexi leave will appear on the left hand side of the screen listed by start date. You can expand the side bar by clicking on the handle as in the screenshot below which will allow you to see if an absence was annual leave or Flexi leave more easily.

Selecting a flexi leave record from this list will open the absence details page.
On this page you can amend the record by changing the relevant details and clicking the save button. If you need to delete the flexi leave record then you can click on the Delete button.

Absence Reports

You are able to view some absence reports within iTrent by clicking on the “Absence Reports” button on the homepage.

When you click on this button you will see a list of available reports appear down the left hand side of the screen.
Click on the name of the report you would like to view and then click on “Run Report”.

**Absence Frequency Report**

This report provides a summary of the number of absences, days lost and hours lost during a specified time period and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

The example below would produce a report that shows everybody within the School/Service who had a period of sickness absence between 01/02/2019 and 31/07/2019. Changing the Unit/Employee field to employee would allow you to run the report for a specific employee.

When you click on the “Run” button, iTrent will start running this report ready for you to download. You can then use the instructions in the “Downloading a Report” section of this user guide to download this report.

**Absence History - People Report**

This shows each absence that an employee has had within a given time period and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

The example below would produce a report that shows all of the instances of sickness absence that Kyle Pittman has had during the 6 month period between 01/02/2019 and 31/07/2019.
When you click on the “Run” button, iTrent will start running this report ready for you to download. You can then use the instructions in the “Downloading a Report” section of this user guide to download this report.

Outstanding Holiday Entitlement Report

The “Outstanding Holiday Entitlement” report shows a summary of outstanding annual leave as of the effective date provided and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

This report can be used to identify staff who have too much annual leave remaining to carry in to the next annual leave entitlement period.

The example below would produce a report that shows everybody in your School/Service with at least 37 hours entitlement remaining (i.e. the maximum carry forward allowance) as of 01/08/2019. This would allow you to contact them before the end of the annual leave entitlement period so that they can arrange to book this annual leave otherwise they will lose it.

When you click on the “Run” button, iTrent will start running this report ready for you to download. You can then use the instructions in the “Downloading a Report” section of this user guide to download this report.
**Downloading a Report**

You can view the progress of a report by clicking on the “My to do list/Processes” button on your homepage and then clicking on the “Processes” tab. This shows you the status of all recent processes you have run.

![Report Image]

When the report has changed to a status of “Complete” then you can click on the name of the report to take you to the Download Output page.

![Download Output Image]

Click on the Download icon to download the report.

**Working Patterns**

As an Absence Administrator, you can use iTrent to review and update the working patterns of employees within your School/Service without needing to contact HR.

To do this, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the [Searching for an Employee](#) section of this guide.

This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Working Pattern button and the working pattern options will expand.
Click on the Change Working Pattern button and a list of their positions will appear on the left hand side of the screen. Click on the handle on the sidebar (shown below) and the sidebar will expand providing more information.

Select the relevant position and the working patterns for that position will be available. The working pattern at the bottom of the list should be the latest working pattern and you will be able to see the current working pattern using the Start Date and the End Date.

**Please Note:** The latest working pattern should not have an end date against it.
Clicking on a working pattern from this list will open the Pattern details page.

On this page you can see the number of contracted hours and see how those hours are distributed over a working week. In the image above, this shows somebody who works for 37 hours from Monday to Friday, and so each day has 7 hours and 24 minutes.
Changing a Working Pattern.

If an employee has a change in their working pattern, the working pattern held in iTrent will need updating either by their manager or an Absence Administrator. It is important that this is completed as the working pattern is used to calculate their annual leave and sickness entitlement.

Please Note: If you want to change the number of hours an employee works you must contact HR as this will involve a contractual change.

To change an employee’s working pattern, follow the steps outlined above to open the Pattern details page and click on the New button. This will open a new Pattern Details page for you to complete.

Select Working Pattern the dropdown list for Type and then click on the magnifying glass icon next to the Pattern field which will open the Pattern search box. Enter the number of hours that the employee works during a week and click search. This will return all of the working patterns available for that number of hours. For example, if you were changing the working pattern for an employee that works 22 hours and 12 minutes over Wednesday to Friday search for 22 Hrs 12 Mins and select the relevant pattern.
If the working pattern you need is not available, please contact myhr@hud.ac.uk for assistance.

The “Pattern day” section of the Pattern details page should have now been populated.

<table>
<thead>
<tr>
<th>Pattern days</th>
<th>Day1</th>
<th>Day2</th>
<th>Day3</th>
<th>Day4</th>
<th>Day5</th>
<th>Day6</th>
<th>Day7</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>00:00</td>
<td>00:00</td>
<td>07:24</td>
<td>07:24</td>
<td>07:24</td>
<td>00:00</td>
<td>00:00</td>
<td>22:12</td>
</tr>
</tbody>
</table>

Enter the date that the new working pattern will begin in to the Start date field and then press the tab key on your keyboard. This will update the “Pattern days” section of the page so that instead of listing the days by number it has the names of each day.

Change the Start day field to reflect which day of the week the Start date is with a Monday being day 1. In the example above, the 10th July 2019 is a Wednesday and so the Start day field should be Week 1 / Day 3. If the Start date had been 11th July 2019 then the Start day would be Week 1 / Day 4 (Thursday).

The “Pattern days” section of the page should update again with the working pattern now being correct.

Click on the Save button and the working pattern will be saved and will take effect from the Start date that was specified when setting the working pattern up.
Employee's Working Less Than 52 Weeks Per Year

If you have an employee that works less than 52 weeks per year, you should follow the steps above and add a new working pattern using the pattern name “None Working Period” for the dates the employee is not contracted to work. This ensures that if they work during a period which contains a bank holiday then this entitlement is not deducted from their overall entitlement.