People Manager
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.
Once you have successfully logged into iTrent as a People Manager, 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 the home page by clicking on the iTrent button in the top left hand side of the screen as shown below.
My Staff

Viewing My Staff

You are able to view all members of staff that report in to you by clicking on the “My Staff” Button on the homepage.

When you click on this button, a list of staff that reports in to you will appear down the left hand side of the screen. This list shows staff that report directly to you, however, you are able to search for a member of staff who reports to you indirectly through one of your reportees.
Clicking on a member of staff will open the below summary page where you can view certain information about that person such as their Position details, Absence information and Contact details.

Searching My Staff

It is also possible to search for a specific person that reports in to you. To do this, click on the “My Staff” button on the homepage

When you click on this button, a list of staff that reports in to you will appear down the left hand side of the screen, with a search option at the top of the list.
Enter the surname into the search field and press Enter. All staff that report in to you that match your search will be displayed below the search option.

If you have more than one person with the same surname, select that person from the list and the below summary page will open where you can view certain information about that person such as their Position details, Absence information and Contact details.
Task Redirection

Using iTrent you can redirect your tasks to another person who will then be able to complete certain tasks such as authorising annual leave for your reportees if you are going to be away from the office.

To do this, click on the “Task Redirection” button on the iTrent home page.

![](image1)

This will open the Task Redirection link page.

![](image2)

Click on the “Create New Redirection” option and this will open the My task redirection details page.

![](image3)

Enter the date that you would like to start redirecting your tasks into the **Start date** and the date that the redirection should end in to the **End date**. Select “Redirect All” from the drop down list for **Process type** and then click on the magnifying glass icon next to the **Redirect to** field. Search for the person you are redirecting your tasks to using surname or username and select them from the list. This will populate the **Redirect to** field with the correct username. Finally enter the password you would use to sign in to iTrent in the **Password** field and click save.

Any tasks for you will then be redirected to your named person during the redirection period. Any email notification will also go to them and you will not receive a copy.
You are able to update the redirection period should you need to change the end date, however, it is not possible for you to delete a redirection if it was entered in error. In this case please contact myhr@hud.ac.uk and request that the redirection be deleted.

**Working Patterns**

As a manager, you can use iTrent to review and update the working patterns of your reportees without needing to contact HR.

To do this, go to the home page and click on the “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 one of your reportees has a change in their working pattern, you will need to update their working pattern in iTrent. 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 a reportee works you must contact HR as this will involve a contractual change.

To change a reportee'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>Week 1</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></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 into 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 “Non-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.

Absence

From your home screen, you are able to quickly review all current and upcoming absences for all members of staff that report in to you using the Absence calendar. This is found in the options along the bottom of the Homepage and will look like the image below:

This button will also let you know if you have any staff that are currently absent from work.

Clicking on this button will load the Absence calendar page which will show the next 14 days and any absence along with the absence type during that time:

Annual Leave

Annual leave should be requested by your reportees using MyHR. When a new period of annual leave has been requested or an existing request has been amended in MyHR by one of your reportees, you will receive an email notifying you of this.
This email will include details about the annual leave request including the start date, end date, how many hours the request is for and will also provide some details about the remaining annual leave entitlement.

If the annual leave request spans over two different annual leave periods (i.e. the request runs from August into September) the annual leave entitlement will not be available in the email, as shown in the example below.

![Holiday Request Email Example](image)

You can still check their remaining entitlement however by following the instructions in the Reviewing Annual Leave section of this guide.

Once you have received this email, you will need to log in to iTrent in order to either authorise or reject the request.

**Please Note:** If you do not authorise or reject the request within one week of receiving the notification email you will receive an email reminding you to do so.
Authorising/Rejecting Annual Leave

In order to authorise/reject a request for annual leave, sign in to iTrent and go to the home page and click on the "My to do list/Processes" button. Clicking on this button will open your to do list where you will see all new annual leave requests.

Clicking on the annual leave request will open the Holiday absence details page where you are able to review the details of the requested period of annual leave.
At the bottom of this page you are able to review their remaining annual leave entitlement for the annual leave period by expanding the “Holiday balances” section of the page.

<table>
<thead>
<tr>
<th>Holiday period</th>
<th>Entitlement</th>
<th>Taken</th>
<th>Scheduled</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/09/2018 - 31/08/2019</td>
<td>310.8 H</td>
<td>140.6 H</td>
<td>14.8 H</td>
<td>155.4 H</td>
</tr>
<tr>
<td>01/09/2019 - 31/08/2020</td>
<td>303.4 H</td>
<td>0 H</td>
<td>22.2 H</td>
<td>281.2 H</td>
</tr>
</tbody>
</table>

To Authorise/Reject the annual leave request, select either “Authorised” or “Not Authorised” from the Authorisation status drop down list (You are able to provide a brief reason for your decision in the Reason field) and click on Save.

An email will then be sent by iTrent to the reportee informing them that their request has been authorised or rejected and the request item will be removed from your To Do list.

It is also possible to authorise or reject multiple annual leave requests from your To Do list by selecting the relevant records using the check box to the left hand side and then selecting either Authorised or Not Authorised from the “Actions” button as in the below image.
If a reportee requests a period of annual leave that will exceed their remaining annual leave entitlement, the option to authorise that period of annual leave will not be available. If you receive such a request and there is a valid reason for exceeding the current annual leave period entitlement, please contact the MyHR team at myhr@hud.ac.uk confirming how much additional leave is required and the reason. If the annual leave is approved by HR then iTrent will be updated and the additional leave taken will be deducted from the following annual leave period entitlement and you will then have the option to authorise the request.

**Amending or Deleting past Annual Leave**

Your reportees can make amendments to an annual leave request or cancel a period of annual leave via MyHR prior to the first day of their leave. If after this time a reportee believes that one of their annual leave records is incorrect, then they may contact you and ask for the details to be corrected or for an annual leave record to be deleted.

If after discussing the matter with them, you believe that the annual leave record is incorrect you should navigate to the relevant record by clicking on the “My Staff” button on the iTrent home page, you should then select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 “View Holidays” button and a list of their annual leave will appear on the left hand side of the screen listed by start date.
Selecting an annual leave record from this list will open the Holiday 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 annual leave record then you can click on Delete and the annual leave record will be removed and the reportee’s remaining annual leave entitlement will be updated accordingly.
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 “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff 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/flexi leave 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* or *Half Day – AM* as the *Holiday end type*. Select *Annual Leave* as the *Absence type* and then click on Save.

**Reviewing 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 “My Staff” button on the iTrent home page and select the staff member you wish to look at from the list or search for the staff member as described in the *My Staff* 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 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 you have a member of staff who 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 hour. Although Academic staff are not eligible for Flexi time, you can agree with them to work this time back.

To do this, sign in to iTrent and click on the “My Staff” button on the iTrent home page and select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 in to 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.

Click on the save button and the hours will be carried over in to the new annual leave period.

**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 that reports in to you.

**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 “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the [My Staff](#) 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/flexi leave options will expand.

Click on “View Holiday/Flexi Leave” 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 “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 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 flexi leave for a half day, select Part day as the **Absence period** and Half Day – AM or Half Day – PM from the **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 an “Other” 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 “My Staff” button on the iTrent home page, you should then select the staff member you wish to look at from the list or search for the staff member as described in the **My Staff** 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 “Holiday/Flexi Leave” button and the options will expand.

Click on the “View Holidays/Flexi Leave” button and a list of their annual leave 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.

**Sickness Absence**

Using iTrent, you are able to both view previous instances of sickness absence, as well as enter a new sickness absence record for any member of staff that reports in to you.

**Viewing a Sickness Absence Record**
To view previous sickness absence records for a staff member, go to the home page and click on the “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 Sickness Absences button and the sickness absence options will expand.

Click on “Absence History” and the previous absences on record will be shown on the left hand side of the screen listed by the absence start date.

Selecting an absence from this list will open up the sickness absence record, allowing you to see details of the instance of sickness absence.
Note: The sickness absences in this list cover the previous 12 months. If you need to see absence records from before this, click on the “Show all” button and the list will change to include all sickness absence records.

Entering a New Sickness Absence

As a People Manager, you are able to use iTrent to enter a new sickness absence for a member of staff that reports in to you.

Adding a new sickness record can be done in two ways.

Entering a New Sickness Absence Method 1

To add a new sickness absence record, go to the home page and click on the “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the My Staff 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 Sickness absence button and the absence options will expand.

Click on the “Add New Absence” button. This will open a blank sickness absence details page. This page is split into four sections; Sickness period, Absence start, Absence end and Absence.
Check the **Sickness Period** section and ensure that the option *More than one day* is selected.

**Sickness period**

- **Sickness period** *More than one day*

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

**Absence start**

- **Absence start date** *16/05/2018*
- **Absence start type** *Full day*

The **Absence end** section should look the same as the example below. The *Type* should be automatically set to ‘Full day’. It is the employee’s responsibility to update the *Date* field via MyHR when they return to work.

**Absence end**

- **Absence end date**
- **Absence end type** *Full day*

In the **Absence** section you must choose an *Absence type* of ‘Sickness’. You **should not** modify the *Absence reason* and it is the employee’s responsibility to update this using the MyHR website once they return to work.
Absence

Absence type: Sickness
Absence reason

Make sure that you are entering the correct information for the correct employee because once you press ‘Save’ you are unable to delete an entry. This absence entry will then be added to the list of sickness absence records on the left hand side of the screen.

This absence will now also appear on the Absence Calendar. As there is no end date yet entered for this absence record, it will appear on the absence calendar as in the following screenshot:

Once the member of staff has returned to work and completed the sickness record in MyHR this will be reflected on the Absence calendar and the absence history.

Entering a New Sickness Absence Method 2

Alternatively, you can enter a new sickness absence via the Absence Calendar by clicking on the button below:
This will load the absence Calendar for all staff reporting in to you. Click on the box for the absence Start date and correct person and click on the “Create sickness absence” option.

This will then take you to the Sickness absence details page which you can complete as outlined in the previous method.

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**

When entering a new sickness absence for an employee who has multiple jobs at the University there are a few extra considerations to take into account in order to do this accurately.

When you first enter the sickness absence, follow the steps as detailed above until you get to the bottom section where you will now see a box entitled ‘Position’. This will show all current jobs the employee has in iTrent as well as any future dated jobs which they may have.

In these instances, you should select all positions that they currently hold from the ‘Position’ box. 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’ box only shows three lines of information so you may have to scroll down the list to view all jobs.
Once you have saved the sickness absence, you should see that a sickness absence record has been made for all of the selected positions.

Once you have entered the absence period, check each absence for any end dates that have been put against the absence you have just entered.

If an end date has been entered, select the absence with the end date and click on ‘Sickness absence details’ in the action pane. Then delete the end date field and save the page.
To update a previous sickness absence record for a staff member, go to the home page and click on the “My Staff” button. Select the relevant staff member from the list or search for the staff member as described in the My Staff 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 Sickness Absences button and the sickness absence options will expand.

Click on absence history and the previous sickness absences on record will be shown on the left hand side of the screen.
Select the correct sickness absence record from the list and the Sickness absence details page will open.

<table>
<thead>
<tr>
<th>Sickness period</th>
<th>Absence start</th>
<th>Absence end</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sickness period</td>
<td>Absence start date</td>
<td>Absence end date</td>
</tr>
<tr>
<td>More than one day</td>
<td>28/04/2017</td>
<td>02/05/2017</td>
</tr>
<tr>
<td>Full day</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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:** 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.
Completing a Return to Work Form

When a member of staff returns to work after a period of sickness, it is your responsibility to have a return to work meeting with them and record this in iTrent by completing the Return to Work form.

To complete a Return to Work form, select the correct person in iTrent and select the relevant sickness absence record. Click on the menu button at the top of the Absence details page and a list of options will expand.

Click the “Add Return to Work/Attendance Review Form” button and then select “Return to Work Form” from the options on the left hand side of the screen as below:
This will open a new Return to Work Form:

![Return to Work Form]

The guidance below shows how the Return to Work form should be completed:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of return to work meeting</td>
<td>Enter the date you held the return to work meeting</td>
</tr>
<tr>
<td>Number of working days lost</td>
<td>Enter the number of days the employee was absent due to sickness absence. Only count</td>
</tr>
<tr>
<td><strong>Did employee seek medical intervention from their GP or hospital?</strong></td>
<td>Choose yes or no from the dropdown</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>
| **Please provide a summary of the discussion that took place** | Enter a summary of the discussions held with the employee upon their return to work. This may include the following:  
- Details of why the employee was absent from work  
- Details of any medical attention the employee sought during their absence from work  
- Details of any further medical appointments  
- Details of any support mechanisms that you are putting into place to support the employee in their return to work |
| **Was the correct reporting procedure followed?** | Choose yes or no from the dropdown |
| **If not, why?** | Enter reasons given by employee as to why they did not follow the correct reporting procedure. |
| **Total number of days absent in past 6 months (including this absence)** | Enter the number of days the employee was absent due to sickness absence. Only count the days they would usually have worked. Include whole days only. |
| **Periods of absence in the past 6 months (including this absence)** | Enter the number of periods of absence that the employee has had due to sickness absence. |
| **Name of manager conducting return to work meeting** | Enter your full name. |

Once you have completed the form, ensure you click on the Save button to add the Return to Work Form to the Sickness absence record.

**Recording an Attendance Review**

In cases of persistent sickness absences, you may be required to carry out an attendance review with a member of staff.

- 1<sup>st</sup> attendance review – improvement in attendance expected  
- 2<sup>nd</sup> attendance review – attendance to be monitored, warning issued  
- 3<sup>rd</sup> attendance review – contact HR re formal meeting

You should consult the Management of Sickness Absence policy in the [Staff Handbook](#) to ascertain at what point each attendance review is needed.

To record an absence review meeting in iTrent, select the correct person in iTrent and select the relevant sickness absence record. Click on the menu button at the top of the Absence details page and a list of options will expand.
Click the “Add Return to Work/Attendance Review Form” button and then select “Attendance Review Meeting” from the options on the left hand side of the screen as below:

This will open the attendance review meeting form as below:
The guidance below shows how the Return to Work form should be completed

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of attendance review meeting</td>
<td>Enter the date you held the attendance review meeting.</td>
</tr>
<tr>
<td>Please provide a summary of the discussion</td>
<td>Enter a summary of the discussions held with the employee during the attendance review meeting. This may include the following:</td>
</tr>
<tr>
<td>that took place</td>
<td>• Concern shown for the employee’s welfare</td>
</tr>
<tr>
<td></td>
<td>• The impact of absence on the employee’s immediate team.</td>
</tr>
<tr>
<td></td>
<td>• Making clear your concerns about the attendance record.</td>
</tr>
<tr>
<td></td>
<td>• Asking the employee to improve their attendance record.</td>
</tr>
<tr>
<td></td>
<td>• Indicate that absences will continue to be monitored and if there is no substantial improvement formal action will be taken</td>
</tr>
<tr>
<td>Have you informed the employee they are</td>
<td>Choose yes or no from the dropdown</td>
</tr>
<tr>
<td>subject to 3 month review period?</td>
<td></td>
</tr>
<tr>
<td>Name of manager conducting attendance review</td>
<td>Enter your full name.</td>
</tr>
<tr>
<td>meeting</td>
<td></td>
</tr>
</tbody>
</table>
Once you have completed the form, ensure you click on the Save button, and the record of the meeting will be added to the sickness absence record.

**Certification**

You are able to view sickness certification for a period of absence that an employee has submitted to Payroll, such as a doctors certificate (all certificates must still be sent to Payroll and they will enter this information).

To view the details of a certificate, select the correct person in iTrent and select the relevant sickness absence record. Click on the menu button at the top of the Absence details page and a list of options will expand.

Click on the “View Certificates” button and all certificates relating to the selected period of sickness absence will appear on the left hand side of the screen.
Then by clicking on a certificate from the list you are able to see more information about each individual certificate.

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>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, earache, labyrinthitis, tinnitus, nosebleed, sinusitis, sore throat, laryngitis, toothache, tooth abscess, other oral problems, dental treatment</td>
<td>Surgery or operations e.g. tonsillectomy, tooth extractions</td>
</tr>
<tr>
<td>Respiratory (RESP)</td>
<td>Asthma, breathing problems, bronchitis, chest infection, Pneumonia, Pleurisy, chest pains, respiratory tract infection, tracheitis</td>
<td>Ears, nose, throat, cold flu</td>
</tr>
<tr>
<td>Operations, Surgical Procedures (OPER)</td>
<td>Hospital appointments, organ donation, any operation or</td>
<td>Dental appointments</td>
</tr>
<tr>
<td>Category</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Infections and Infectious Diseases (INFC)</td>
<td>Surgery, investigations, tests, tooth extraction</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, <strong>only rarely used</strong></td>
<td></td>
</tr>
</tbody>
</table>

**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 that reports to you (including indirect reportees) or for an individual employee by changing the value in the Unit/Employee field.

The example below would produce a report that shows everybody that reports to you (including indirect reportees) 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 that reports to you (including indirect reportees) 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 “Download 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 that reports to you (including indirect reportees) 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 that reports to you (including indirect reportees) 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.

![Download Output](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.

Click on the Download icon 📈 to download the report.
Personal information

You are able to view contact information that we hold for each employee that directly reports to you. For example, a Dean will be able to see contact information for every employee within their school, but a Line Manager will only be able to see contact information for each employee that reports to them.

**Note:** All personal information must only be used for University business.

Contacts

To view contact information for an employee, click on the “My Staff” button on the homepage, then either select the correct person from the list or search for the correct user as described in the My Staff section of this guide. This will open the summary page for the person.

![Image of a person's summary page](image)

The Personal Details section should be visible in the Links section of the page by default as in the image above, however, if it is not, click on the Personal details button and these options should appear.

Click on the Contact Information option and a list will appear on the left hand side of the screen listing the contact information records available for that person such as Home Telephone and User email address.
Select one of these from the list and the contact details page will open.

**Note:** You are not able to update any contact information records. It is the responsibility of the employee to keep these details up to date via MyHR.
Emergency Contacts

To view contact information for an employee, click on the “My Staff” button on the homepage, then either select the correct person from the list or search for the correct user as described in the My Staff section of this guide. This will open the summary page for the person.

The Personal Details section should be visible in the Links section of the page by default as in the image above, however, if it is not, click on the Personal details button and these options should appear.

Click on the “Emergency Contact Information” button and a list of emergency contacts that the person has provided will appear on the left hand side of the screen (Most employees usually only have one emergency contact).
Selecting the Emergency contact record from this list, will open the *Emergency contact details* page.

**Note:** If no contact details appear this means that the employee does not have any emergency contact information entered for them. They are able add this information via MyHR.
Personal Development and Performance Review/Appraisals (Professional & Technical Services)
The University of Huddersfield’s appraisals or Personal Development and Performance Review (PDPR) process is an opportunity to meet with your team on an individual basis to discuss their performance, and how their personal and professional could be supported over the next 12 months.

Management of the PDPR process is carried out via iTrent and you should ensure that you arrange a PDPR meeting for each team member every year with a short mid-year review around 6 months later.

Further details about the role of the line manager (reviewer) and what support is available to you can be found on the PDPR webpage.

**PDPR lifecycles**

The PDPR lifecycle in iTrent is the full PDPR process and lasts for a 12-month period. The PDPR lifecycle is outlined below:

| Step 1 | • Who: Reviewer  
|        | • Action: Attach PDPR lifecycle to reviewer in iTrent |
| Step 2 | • Who: Reviewee  
|        | • Action: Complete the Looking back and Looking forward sections of the PDPR form |
| Step 3 | • Who: Reviewer  
|        | • Action: Review the reviewer's comments on the Looking back and Looking forward sections of the PDPR form |
| Step 4 | • Who: Reviewer and Reviewee  
|        | • Action: Hold a constructive PDPR meeting |
| Step 5 | • Who: Reviewer  
|        | • Action: Complete the Reviewer's comments section of the PDPR form |
| Step 6 | • Who: Reviewee  
|        | • Action: After 6 months, reviewer should complete the Mid Year Review section of the PDPR form |
| Step 7 | • Who: Reviewer and Reviewee  
|        | • Action: Hold a constructive Mid Year Review meeting |
| Step 8 | • Who: Reviewer  
|        | • Action: Add comments to the Reviewer Comments section of the Mid Year Review form |

**Attaching a PDPR lifecycle to a Reportee**
To begin the PDPR process you will need to attach a PDPR lifecycle to your team members in iTrent. This should be done within the 30 days prior to your meeting and should allow them time to reflect on their development and complete the PDPR form. They (the reviewee) should complete and submit their section of the form at least 5 working days prior to your PDPR meeting with them.

To attach a PDPR Lifecycle to a reportee, you should follow the steps below:

1. Sign in to iTrent and click on the “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the “Links” section, click on the “PDPR” button to expand the PDPR options.

3. Click on the “2. Attach Lifecycle (PDPR) to person” option.

4. Set the Attachment Date Field to 30 days before your meeting date.

5. Click on the search icon next to the Life cycle field and a list of available lifecycles will be displayed.

6. The PDPR form varies slightly depending on the type of work that your reportee does and so it is important that you attach the right PDPR lifecycle.

   - **PDPR Catering and Cleaning** – Should only be used with Catering and Cleaning staff.
   - **PDPR People Manager** – Should be used for staff in professional support roles who also have people management responsibilities.
   - **PDPR Professional Services** – Should be used for people in professional support roles.
   - **PDPR Technical Services** – Should be used for staff who are technicians.
   - **PDPR Technical Services People Manager** – Should be used for staff who are technicians and also have people management responsibilities.

   If you have attached the wrong lifecycle for a member of your team you should contact the MyHR support team at myhr@hud.ac.uk as soon as possible and contact your reportee informing them that they should not begin their preparation. The MyHR support team will remove the incorrect lifecycle for you, but this is no longer possible once the reportee has begun completing their PDPR form.

7. Click on the Save button. This will attach the selected PDPR lifecycle to your reportee. They will now receive an automated email informing them that you have created the PDPR lifecycle and that they need to complete their section of the form prior to your PDPR meeting with them.
8. Go back to the reportee’s summary page by clicking on their name and you will see that the stage and actions for their PDPR have been added.

Note: In some cases, you may need to click on the refresh button (highlighted above) for these PDPR actions to appear.

Prior to Meeting - Reviewing PDPR Form

You will receive an automated email once your reportee has completed their sections of the PDPR form. When you receive this email, you should sign in to iTrent and review their form and objectives and prepare for your meeting. To do this, you should follow the steps below:

1. Sign in to iTrent and click on the “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the “Links” section, click on the “PDPR” button to expand this section.

3. Click on the “3. View/Update objectives” option.

4. This will open the Objective summary page.

1. In the Links section, click on the PDPR button to expand this section.

2. Click on the “4. Complete PDPR” option.

3. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.
Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

4. You will see that the “Reviewee to complete PDPR ahead of meeting” section of the form is ticked to indicate that it has been completed. Clicking on this will take you to this section of the form.

5. The PDPR form is made up of three sections:
   - Looking Back - to be completed by the reviewee before the PDPR meeting takes place.
   - Looking Forward - to be completed by the reviewee before the PDPR meeting takes place.
   - Reviewer comments - to be completed by the reviewer during or after your PDPR meeting has taken place.

Use the drop-down menu to select the “Looking Back” and “Looking Forward” sections to review the comments.

Following Meeting - Adding Your Comments

Once the PDPR meeting with the reportee has been completed, you should update the PDPR lifecycle with your comments. To do this, follow the steps below:
1. Sign in to iTrent and click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the "Links" section, click on the "PDPR" button to expand this section.

3. Click on the “4. Complete PDPR” option.

4. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.

   Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

5. Click on “Reviewer to complete PDPR after meeting”

6. Click the Start button, this will take you to the first page of the PDPR form.

7. Use the drop-down menu to select the “Reviewer comments” section.
8. You will see that the reviewer’s comments are shown on the left-hand side of the page with a free-type field on the right-hand side for your own comments. Add your comments in these fields for each section.

1. Looking back

Please note the reviewee comments are displayed as read only on the left hand side below. Please add your own comments to the right.

Please provide a summary of how well you feel the last 12 months have gone. Please include any achievements over and above your objectives in this section.

I feel that the last 12 months have gone very well. I have achieved the main objectives set in my previous PDPR and have now enrolled on the course to obtain an ECDL.

9. In the “3. Performance (Looking forward)” section, you can add any new objectives that you agreed with your reportee during the PDPR review meeting. NB: This includes the reviewees proposed objectives, which might need amending. To do this, complete the Objectives form and click the Add button.

- Objective
  - Type: Personal
  - Objective title: Update customer forms
  - Objective type: 3-Team
  - Description: We need to update the forms issued to customers over the
  - Target start date: 25/06/2021
  - Target completion date: 01/12/2021

NB: The Type field (shown in the blue square) should be set to “Personal”, and the second Objective Title field (shown in the orange square) should be left blank.

10. After clicking the Add button, the objective will be added to this section.
11. Complete the reviewer comments section of the PDPR form and add the date that the meeting took place.

8. Next steps

Date of review meeting  25/06/2021

NOTE: You are not expected to complete section “7. Talent” until the 2022 PDPR cycle and once you have completed relevant training.

12. Click the Save button at the bottom of the page to save your work.

13. Click on the Summary button to be taken back to the PDPR summary page.

14. Click on the Submit button. This will update the PDPR Lifecycle and send an automated email to your Reportee informing them that you have added your comments for them to review. Any Objectives you added will also be added to their Current objectives.

Mid-Year Review

After 6 months has passed you should hold a short mid-year review meeting with your reportees. This is intended as a catch up and does not need to be as in depth as the annual review meeting.

As this meeting approaches, your reportees will receive an automated email asking them to sign in to MyHR and complete the mid-year review meeting form in preparation for this PDPR meeting. Once they have done so, you will receive an automated email informing you of this and you should sign in to iTrent to review their comments. To do this, you should follow the steps below:

1. Sign in to iTrent and click on the “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the “Links” section, click on the “PDPR” button to expand this section.

3. Click on the “4. Complete PDPR” option.

4. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.
Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

5. You will see that the “Reviewee to complete PDPR ahead of meeting” for the Mid-Year review section of the form is ticked to indicate that it has been completed. Clicking on this will take you to this section of the form.

6. Use the drop-down menu to select the Mid Year Review section to review the comments.

7. Once you have completed the PDPR meeting, you should update the Reviewer comments page in the same way as described in the Adding your Comments section of this guide.

Objectives

Reviewing objectives

You can use iTrent to review your reportee’s current and completed objectives at any time of the year and if required add a comment/note on the progress so far. To do this, you should follow the steps below:
1. Sign in to iTrent and click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the "Links" section, click on the “PDPR” button to expand this section.

3. Click on the “3. View/Update objectives” option.

4. Your reportee’s current objectives will then be listed on the left-hand side of the screen. If your Reportee does not have any current objectives, you will be taken to the New Objective Details Page.

5. Click on the objective in this list to open the objective details page.

6. If required, you can add a comment to the “Additional information” field.

7. If you have added a comment, you can save this by clicking on the Save button.

Marking Objectives as Complete

Once a reportee has achieved their objective you should mark this as complete in iTrent. This can be done at any time throughout the PDPR lifecycle, but you may choose to do this as part of the review process.
Objectives should be specific to the lifecycle in which it was set, if an objective was not met, or was partially met, during the PDPR lifecycle, it should be ended and re-added (if required) in the next PDPR lifecycle.

To mark an objective as complete, you should follow the steps below:

1. Sign in to iTrent and click on the “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

2. In the “Links” section, click on the “PDPR” button to expand this section.

3. Click on the “3. View/Update objectives” option.

4. Your reportee’s current objectives will then be listed on the left-hand side of the screen.

5. Click on the objective in this list to open the objective details page.

4. If required, you can add a comment to the Additional information field.

5. Add the completion date to the Completion Date field.

6. Select the appropriate value from the Objective rating field:
<table>
<thead>
<tr>
<th>Objective Rating</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 – Objective removed/amended</td>
<td>This option should be used if the objective (or the objective as it was set) is no longer relevant. For example, if the objective related to a specific project which is no longer taking place.</td>
</tr>
<tr>
<td>1-Not met objective</td>
<td>This option should be used if an objective was not met during the PDPR lifecycle. In this case, the objective should be set again if it is still relevant.</td>
</tr>
<tr>
<td>2-Partially met objective</td>
<td>This option should be used if an objective has been partially met. For example, if an objective had several elements to it, some of which have been met, but not all. In this case, the elements of the objective that have still not been met may be set as a new objective as part of the next PDPR lifecycle.</td>
</tr>
<tr>
<td>3-Met objective</td>
<td>This rating should be selected if an objective has been completed in its entirety.</td>
</tr>
</tbody>
</table>

It is important that PDPR objectives are marked as completed, as failing to do so will hinder your ability to accurately monitor your reportee’s performance in relation to the objectives set during the PDPR process.

7. Click the **Save** button and the objective will be added to the objective summary page.

### Adding New Objectives

You can use iTrent to add new objectives for your reportees. This should be done if an objective from the previous PDPR lifecycle was not met and needs to be re-added for the following year.

To do this you should follow the steps below:

1. Sign in to iTrent and click on the “**My Staff**” button on the iTrent home page and search for the staff member as described in the *Searching My Staff* section of this guide. This will open the summary page for that person.

2. In the “**Links**” section, click on the “**PDPR**” button to expand this section.

3. Click on the “**3. View/Update objectives**” option.

4. Your reportee’s current objectives will then be listed on the left-hand side of the screen. If your reportee does not have any current objectives, this will open the New Objective Details page and you can proceed to step 7. If they do have current objectives, these will be listed on the left-hand side of the screen.
5. Select one of the current objectives from the list. This will open the Objective details page for that objective.

6. Click on the **New** button at the bottom of the **Objective details** page. This will open a blank **New Objective details** page.

7. Tick the **Personal Objective** box and fill in the form as in the screenshot below:

![Objective details form](image)

8. Click the **Save** button and the objective will be added to the list of current objectives.
OBJECTIVES

Current

Obtain ECDL

Update Customer Forms
Emails

As a manager you will receive emails at key points relating to your employee’s absence. Once an absence has been entered into iTrent you will receive an automatic notification email that your employee is absent. You will receive an email once an employee has been absent for 3, 7 and 28 days which might help as both a reminder and also with guidance should you need it. If one of your employees has entered a return to work date for their absence via MyHR you will also receive an email acknowledging this.

These emails can also serve as useful reminders to complete the Return to Work form once they have returned to work, or to record an absence review meeting in iTrent.