iTrent People Manager Guidance

Welcome to iTrent People Manager

This guidance document outlines:

- How to navigate iTrent People Manager
- How to view personal and employment details about your staff
- How to authorise an employee’s time and expense claim and redirect claims
- How to view and add PDR Objectives for your staff

Data Protection

The data contained in this system and its usage is subject to general data protection regulations and the City of York Council’s Information Systems Security and Acceptable Use Policy, available from the ICT Homepage on the Intranet

Contents

Contents

Introduction

People Manager provides you with access to a range of information about your staff. As a manager, you are authorised to access and manage certain information relating to employees falling under your remit.

The type of information you can access for your staff includes:

- Personal details such as name, address and emergency contact details.
- Employment information like start date, length of service, hours of work and pay grade.
- Manage expenses, overtime and additional hours requests.
- Complete PDR objectives.

If you need to reset your password please use the forgotten password link on the login page. Your password for People Manager is the same as Employee Self Service.

Alternatively, you can email **ictservicedesk@york.gov.uk**

Or call 01904 551619

Should you have any queries regarding the items below, please contact the Payroll Services team by emailing **payrollservices@york.gov.uk**

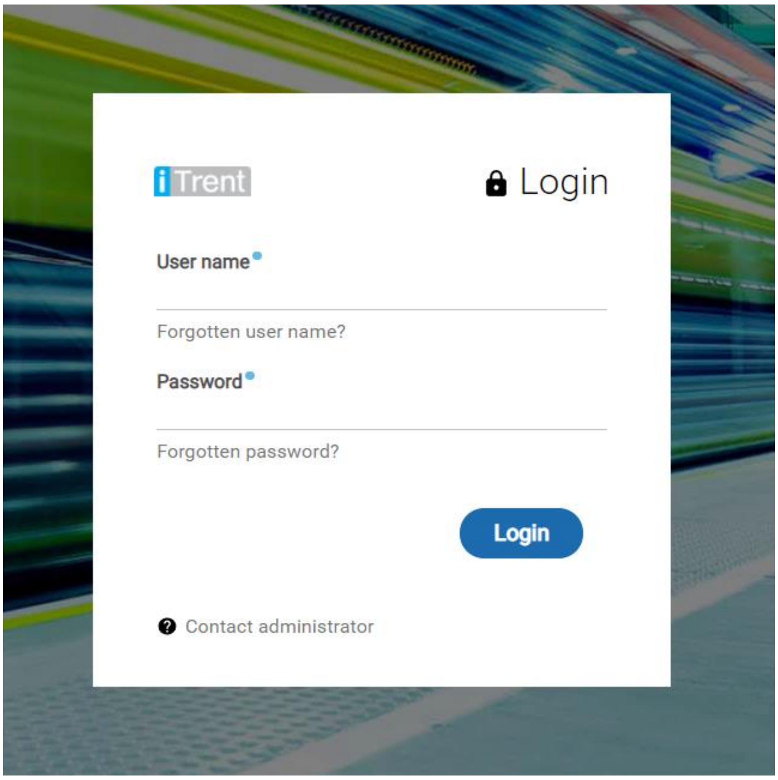
- Incorrect employee data held within the system.
- Line Manager changes.
- Time and expense claims authorisation.

Logging into iTrent People Manager

You should have an icon on your desktop for your convenience, similar to the images shown below:

If you do not have an icon please email payrollservices@york.gov.uk

When you start People Manager you will be presented with the login screen:



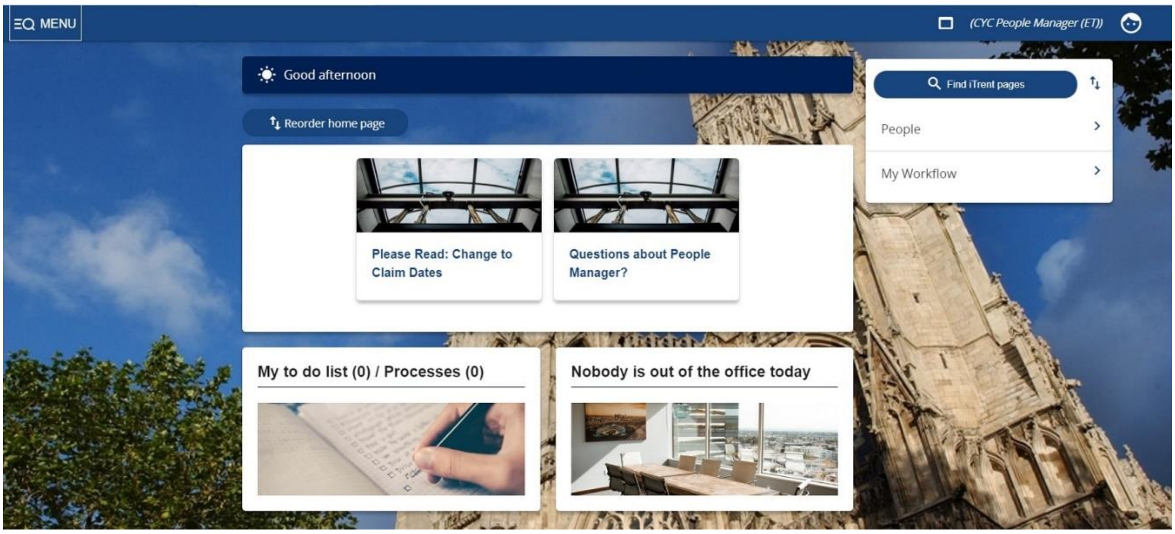
Enter your username and password then click login.

Your username and password are the same for all iTrent applications, including employee self service.

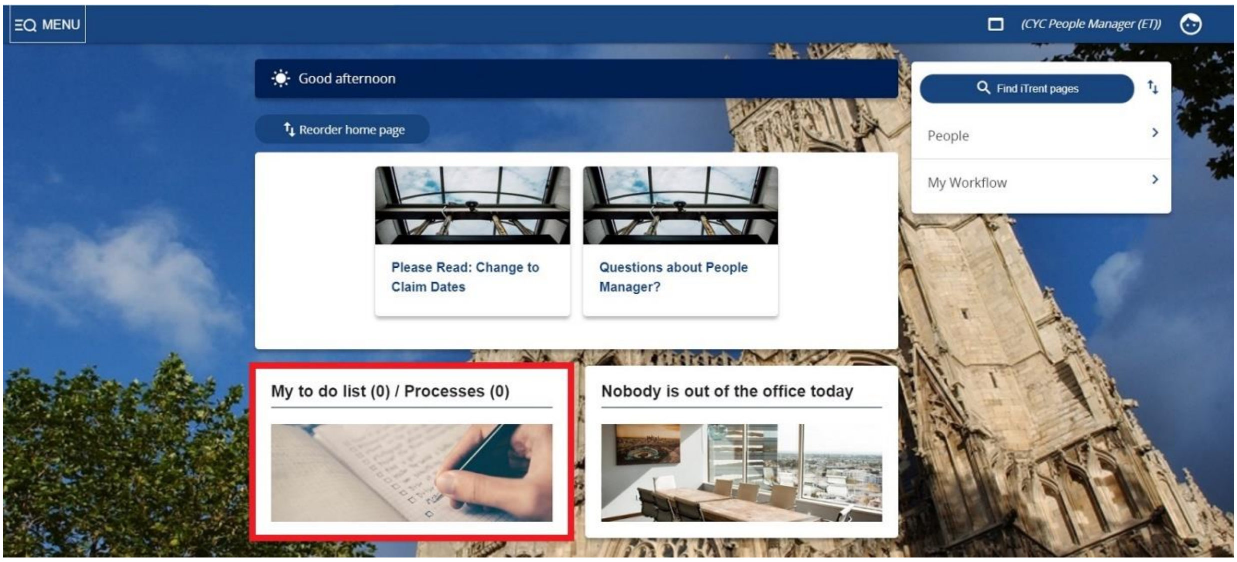
The Home Page

The Homepage contains important information so please take care to check it regularly.

The notification boxes in the middle of the screen will display messages you need to be aware of. For example:



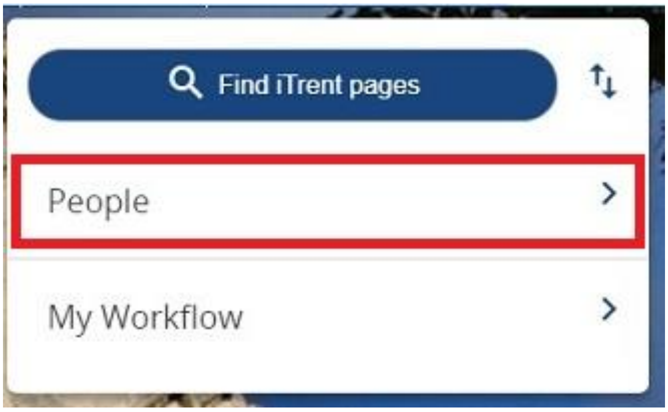
My to do list / Processes



The section will contain time and expense claims that have been sent to you from your staff. You will see a number in the brackets if you have any tasks.

It is good practice to check this daily. You will also receive an email when someone sends you a claim for authorisation.

People



This option will take you to your list of staff. You can also conduct a search here for any employees that report within your part of the structure but will not appear in your direct staff list. The search field automatically defaults to Surname but can be altered by selecting an alternative from the drop down list:

This is where you can access all the available data for your staff by clicking on the options below:

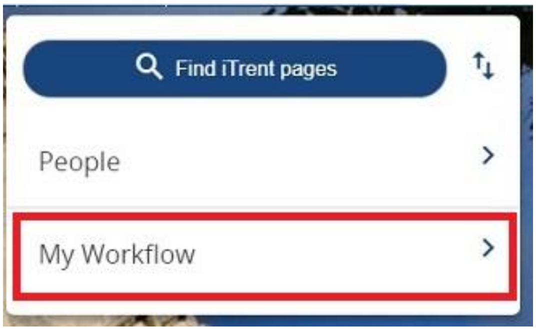
The options available under each of these links may change over time as new functionality is added to People Manager. Notifications on the Homepage will let you know when this happens

Information you can access about your staff includes:

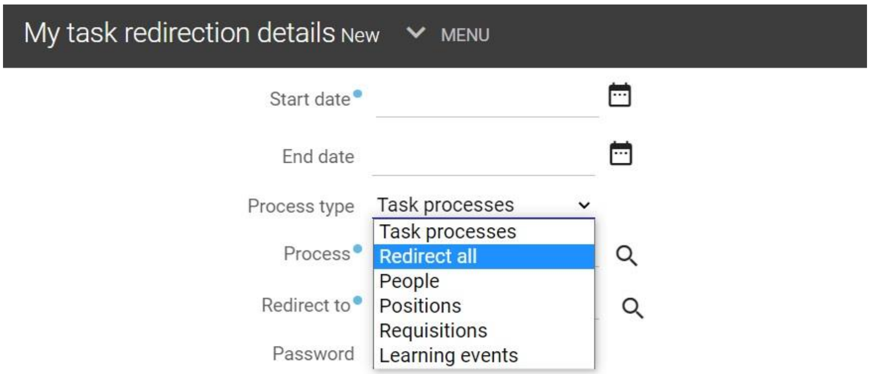
- Personal details (name, address)
- Start date/length of service
- End date (if they are on a fixed term contract)
- Means of contacting your staff outside work (if added by them through Self Service)
- Emergency contact details
- Pay grade and level
- Hours of work

Workflow

Workflow means the movement of time and expenses information around the system. This screen allows you to set up a task redirection to another manager if you are due to be absent from work and unable to authorise time and expenses claims.



Doing this will help to ensure that claims are still authorised in your absence and staff are paid in a timely manner. Please ask Payroll Services if you cannot find a manager to redirect to.



- **Start Date** this can be in the future for things like planned annual leave.

- **End Date** This would normally coincide with your return from annual leave/planned absence. If this left blank then claims will continue to be redirected to your chosen manager until an end date is entered.

- **Process Type** always select 'Redirect all'

- **Redirect to** The manager is selected by using the search icon and searching for the appropriate person.

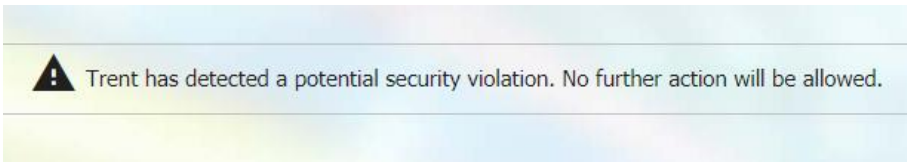
  It is critical you make your selection carefully as there are employees with the same name.

- **Password** is required before saving. This will be confirmation of your People Manager password.

Out of office today

This was used before the Council started to use Medigold to report staff absences. We are unable to remove this from the People Manager home page:

If you click on the link, a security violation message will appear:



Any CYC staff who are reporting any unplanned absence must do so by calling the following number **01904 809584**, available 24/7. They should call again to close an absence when they are due to return.

Should you have any feedback or general queries regarding the Day One absence procedure please email HRDayoneabsence@york.gov.uk

If your query relates to the MedigoldOne portal, then please submit these though MedigoldCS8@medigold-health.com rather than phoning the CYC Absence line number.

Time and Expenses claims

Authorising Time and Expenses

It is your responsibility to ensure all information contained in a claim is accurate before you authorise it.

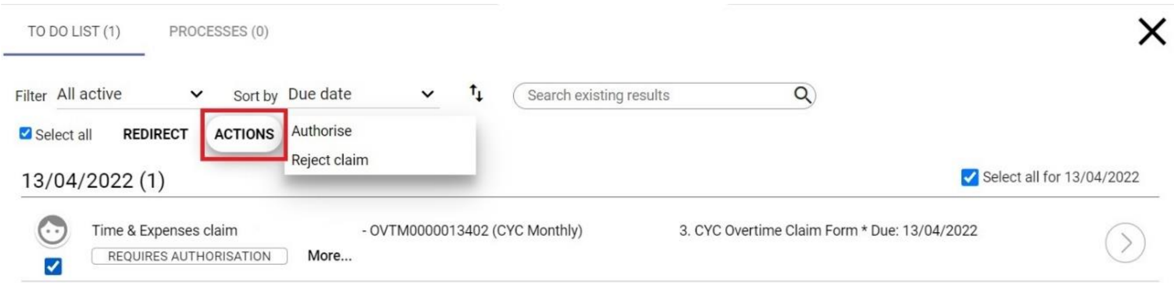
When an employee submits a claim, an email will be sent to the line manager’s email address containing a basic summary of the claim. To action this you will need to log in to People Manager.

Appendix 2 shows an example of this email.

In addition to the email above, on the home page of People Manager, you will see a notification appear in your to do list:

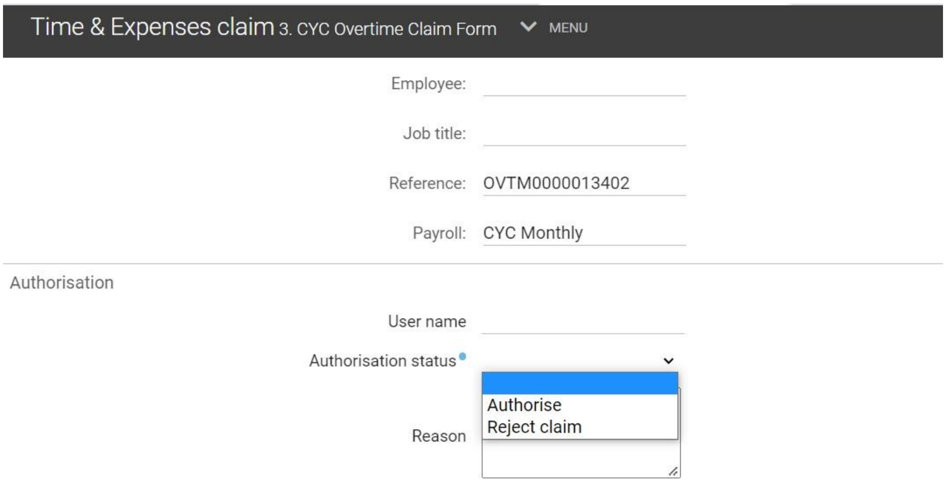
Clicking on this box will bring up the claim as it shown in your to do list. Claim can be authorised on this page if you are already happy with the details.

Please place a tick in the box next to the claim and select authorise and then either authorise or reject as shown in below:



If you want to see further details of the claim please click anywhere on the claim in your to do list. From here you are able to authorise by selecting authorisation status and choosing either Authorise or Reject.

The member of staff will be notified when a claim is authorised or rejected.



Additional Notes:

- The payroll cut-off date is the date by which the manager must authorise the claim for it to be paid the same month. This date is the 9^{th} of each month.

- Both the Manager (through People Manager) and the employee (through Self Service) will be able to view both current and historic claims that have been submitted.

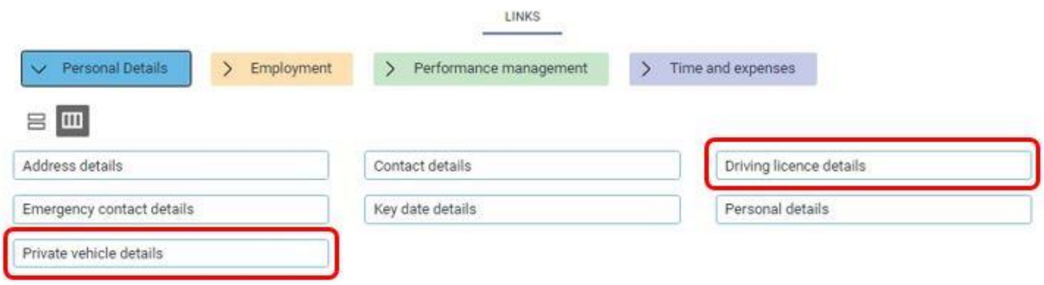
- Staff will not be able to submit claims that are older than 90 days. If a claim needs to be paid that is over 90 days please email payrollservices@york.gov.uk

Driving Licence and Insurance Policy Checks

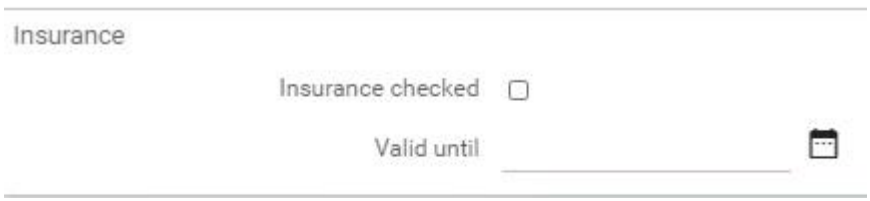
Staff are able to add private vehicle details through iTrent Self Service.

Once they have done this, you will receive an email asking you to check their Driving Licence and Insurance details.

You will see links available in People Manager for both Driving licence details and Private vehicle details:



The Private vehicle details screen includes a box to confirm Insurance has been checked:



Please ensure that you have checked the employee's driving licence and that their Insurance policy is up to date.

You must make these checks, and record it in People Manager, before authorising any mileage claims against a new vehicle.

Performance Development Reviews (PDRs)

PLEASE NOTE: The PDR process has changed. You are encouraged to hold meetings with your employees and review objectives. More details can be found on the [PDR page on the Intranet]()

Your staff can enter objectives via self service. You will be able to view these objectives and comment on them if you wish. Objectives should be treated as a working document; there to be shared and updated by both manager and employees at any time.

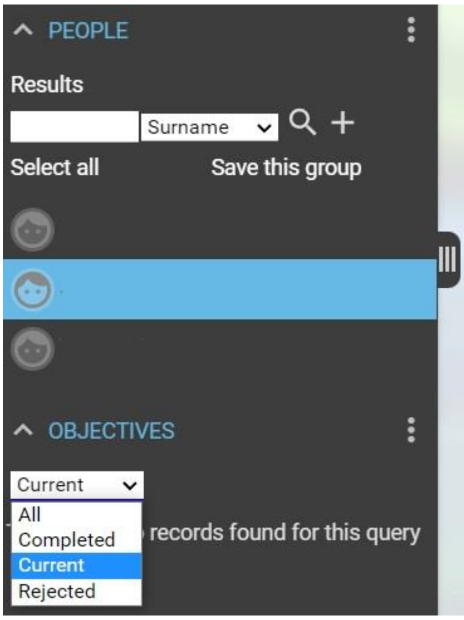
Viewing and updating your Employee's Objectives

To view an employee's objectives - Select your employee, by clicking on the people tab.

Your staff will be listed on the left-hand side of the page.

Click on the employee you wish to view and the following options will appear under Performance Management:

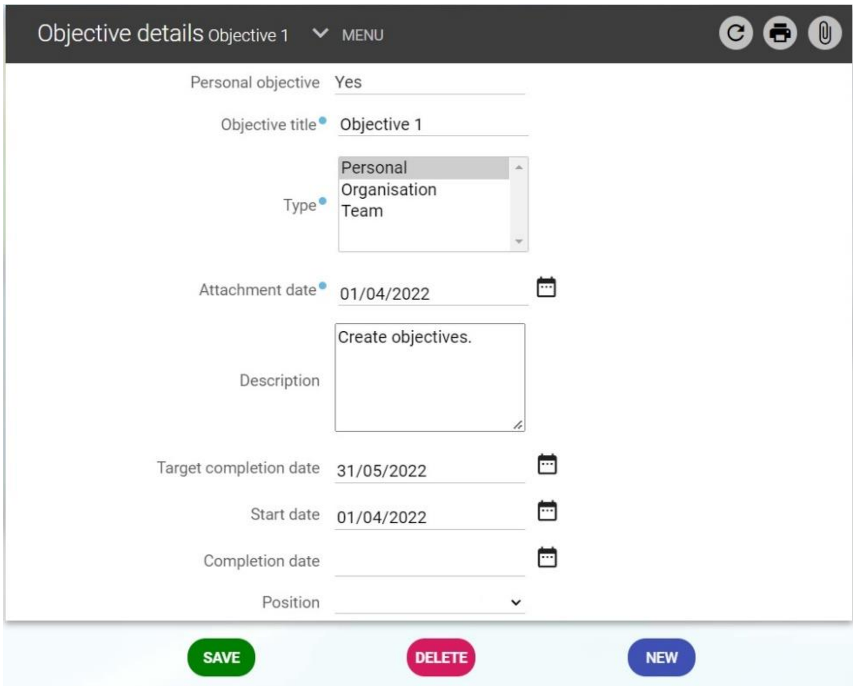
If the employee has entered their objectives via self service they will be displayed on the left hand side of the page. Use the drop down menu to see either **'current'** objectives or **'all'** current and completed objectives.



Current objectives are those without an end date against them.

Completed objectives are those with an end date against them.

To view the objective, click on the objective title. The details will be displayed on the right of the screen; you are able to view or edit this information.

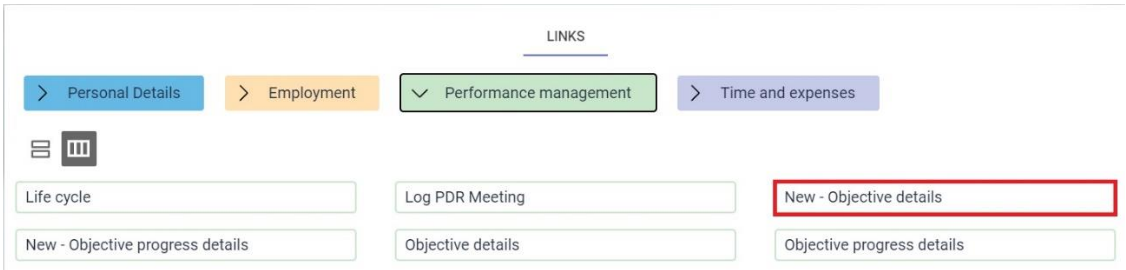


The target completion date is there for you and your staff to monitor the progress of the objective and, eventually, to compare this to the actual 'Completion date'.

A Completion Date should only be entered by a manager or employee when the objective has been completed. When the date in the completion date field passes, it will no longer show in employee self service. It can be viewed however by selecting 'all'.

Setting a New Objective

It is possible for managers to add an objective for staff. Please select 'New – Objective details as shown below:



A new objective details page will be opened. Complete the sections and press Save. The objective will be added to the list on the right hand side of the page and the employee will be able to view the objective in employee self service.

Paper Performance Development Review guidance

A paper PDR form should be used to record the details of an annual review meeting in situations where employees do not have access to Employee Self Service. You can also use this as a guide when having your PDR meeting and deciding what objectives to set.

This guide is available on Colin: [Intranet | Performance and Development Review (PDR) (york.gov.uk)]

There is a download section in the bottom left hand side of the page.

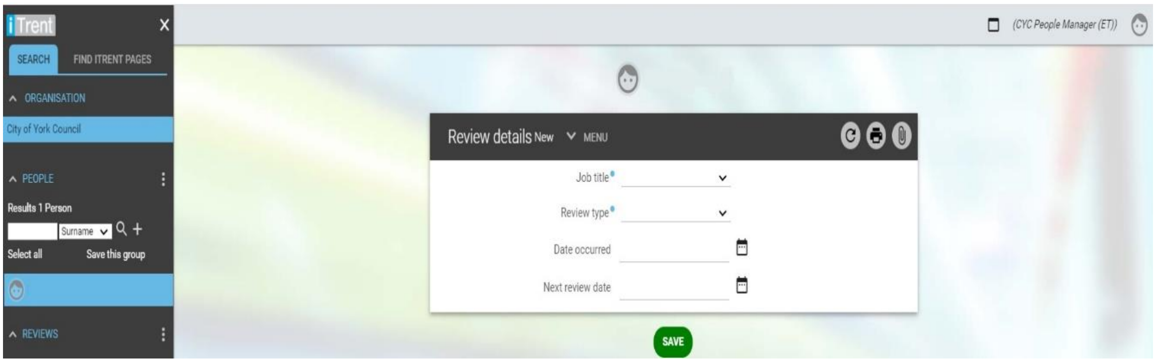
When a Paper PDR form is used, the manager must record the date the PDR was completed via iTrent via People Manager. This is described in the next section.

An employee's PDR will only be recorded as complete when this date has been recorded.

Entering a PDR completion date

Please select the employee you wish to view. Click on the Performance management tab and then the Log PDR Meeting option:

Ensure the correct job is selected if the employee has more than one position. Then select the Review type of ‘Annual’ and the date the meeting occurred:



Definitions of fields

Job Title: Role for which the PDR has been completed. Where an employee has multiple positions you need to select the relevant position.

Review Type: This should be set to 'Annual' for annual PDR

Date Occurred: Date the PDR meeting was held

Next review date: Enter the date of next scheduled PDR - leave this blank if it is unknown.

Once all the fields are completed press the Save button at the bottom of the page. A saved message will be displayed and detail of the review will be displayed in the left hand side of the screen. The PDR will now be recorded as complete.

All paper PDRs needs to be scanned and emailed to Payroll services to be kept on personnel file.

Further Information and Support

For further information about how to see objectives or log a completed PDR meeting please email iTrent@york.gov.uk

Appendix 1 – Claim Form Elements

These are the choices of specific ‘Elements’ to select from when making a claim. They are chosen from the drop down list when making a Time and Expenses claim entry.

1. Basic/Casual Claims – Elements in the drop down list

Element (page 1 of claim form unless stated)	Description
Bank Holiday Hours – pens	Paid at normal hourly rate for number of hours worked, and is in addition to the normal pay an employee would have received
Callout claiming	Starts from the time of the request to attend work and ends at the time the employee returns home
Casual Pay	All casual employees paid on this element *only*
Night Enhancement claiming – pens	Paid for hours worked between 7pm and 7am (additional 10% on top of hourly rate)
Normal Pay	Normal pay claimed by staff who are not autopaid as they work different hours each week. Not to be used by Casual staff
Standby	Standby allowance paid to staff on a claiming basis that is not part of their contracted rota
Weekend Pay	Paid for hours worked between 12pm on Friday and 12pm on Sunday (additional 10% on top of hourly rate)
Sleep in allowance (**Page 2**)	Paid to staff who work an occasional sleep-in shift which is not part of their contracted rota

2. Additional Hours Claims – Elements in the drop down list

Element (page 1 of claim form unless stated)	Description
Additional Hours	Paid for working extra hours (where contracted to work less than 37), up to a maximum of 37 hours
Bank Holiday Hours	Paid at normal hourly rate for number of hours worked, and is in addition to the normal pay an employee would have received
Callout claiming	Starts from the time of the request to attend work and ends at the time the employee returns home
Night enhancement claiming	Paid for additional hours worked between 7pm and 7am (additional 10% on top of hourly rate)
Standby	Standby allowance paid to staff on a claiming basis that is not part of their contracted rota

Element (page 1 of claim form unless stated)	Description
Weekend enhancement	Paid for additional hours worked between 12pm on Friday and 12pm on Sunday (additional 10% on top of hourly rate)
Sleep in allowance (**Page 2**)	Paid to staff who work an occasional sleep-in shift which is not part of their contracted rota

3. Overtime Claims – Elements in the drop down list

Element (page 1 of claim form Unless stated)	Description
Bank Holiday Hours	Paid at normal hourly rate for number of hours worked, and is in addition to the normal pay an employee would have received
Callout claiming	Starts from the time of the request to attend work and ends at the time the employee returns home
Night Enhancement claiming	Paid for overtime worked between 7pm and 7am (additional 10% on top of hourly rate)
Overtime	Paid to all employees after they have worked 37 hours
Standby	Standby allowance paid to staff on a claiming basis that is not part of their contracted rota
Weekend enhancement	Paid for overtime worked between 12pm on Friday and 12pm on Sunday (additional 10% on top of hourly rate)
Sleep in allowance (**Page 2**)	Paid to staff who work an occasional sleep-in shift which is not part of their contracted rota

4. Travel Claims – Elements do not apply

5. Bank Holiday claim supplement – for auto paid staff ONLY

Element (single element only)	Description
Bank Holiday Hours – pens	Paid at normal hourly rate for number of hours worked, and is in addition to the normal pay an employee would have received

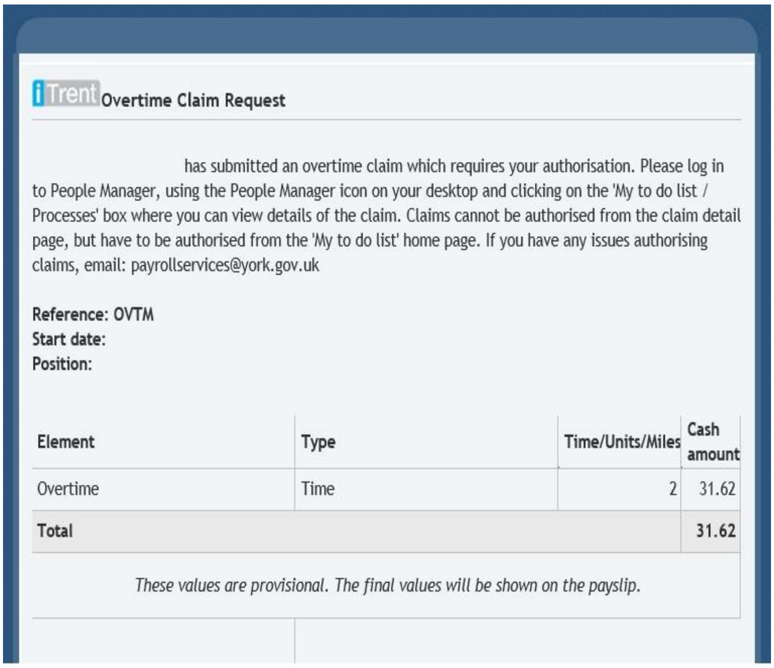
6. Claim Adjustment form – for auto paid staff ONLY

Element	Description
Bank Holiday Hours – pens	Paid at normal hourly rate for number of hours worked, and is in addition to the normal pay an employee would have received
Callout claiming	Starts from the time of the request to attend work and ends at the time the employee returns home
Casual Pay	All casual employees paid on this element *only*
Night Enhancement claiming – pens	Paid for hours worked between 7pm and 7am (additional 10% on top of hourly rate)
Normal Pay	Normal pay claimed by staff who are not autopaid as they work different hours each week. Not to be used by Casual staff
Standby	Standby allowance paid to staff on a claiming basis that is not part of their contracted rota

Element	Description
Weekend Pay	Paid for hours worked between 12pm on Friday and 12pm on Sunday (additional 10% on top of hourly rate)

Appendix 2 – Email notification of a submitted claim

Example email triggered to the Manager, when one of their staff submits a claim:



iTrent **Overtime Claim Request**

has submitted an overtime claim which requires your authorisation. Please log in to People Manager, using the People Manager icon on your desktop and clicking on the 'My to do list / Processes' box where you can view details of the claim. Claims cannot be authorised from the claim detail page, but have to be authorised from the 'My to do list' home page. If you have any issues authorising claims, email: payrollservices@york.gov.uk

Reference: OVTM
Start date:
Position:

Element	Type	Time/Units/Miles	Cash amount
Overtime	Time	2	31.62
Total			**31.62**

These values are provisional. The final values will be shown on the payslip.

Note: The email will contain a brief summary of the claim. Please log in to People Manger to see more details and authorise/reject the claim.

Appendix 3 – Converting minutes into decimal

When completing your Time and Expenses Claim Forms using iTrent Employee Self Service, you are required to record the number of hours being claimed in *‘decimal’* hours, rather than in Hours and Minutes.

For example, if you are claiming for **2hrs 30mins** overtime, this would be recorded as **2.5**.
Note: Claiming 2.30 instead of 2.5 will result in you *under*-claiming

This is because the hour is divided into 100 parts instead of 60 minutes. The table below provides the decimal equivalent of each 1 minute value in the hour:

Mins	Hour/100	Mins	Hour/100	Mins	Hour/100	Mins	Hour/100	Mins	Hour/100
1	0.02	13	0.22	25	0.42	37	0.62	49	0.82
2	0.03	14	0.23	26	0.43	38	0.63	50	0.84
3	0.05	**15**	**0.25 (¼hr)**	27	0.45	39	0.65	51	0.85
4	0.07	16	0.27	28	0.47	40	0.67	52	0.87
5	0.08	17	0.28	29	0.48	41	0.68	53	0.88
6	0.1	18	0.3	**30**	**0.5 (½hr)**	42	0.7	54	0.9
7	0.12	19	0.32	31	0.52	43	0.72	55	0.92
8	0.13	20	0.33	32	0.53	44	0.73	56	0.93
9	0.15	21	0.35	33	0.55	**45**	**0.75 (¾hr)**	57	0.95
10	0.17	22	0.37	34	0.57	46	0.77	58	0.97
11	0.18	23	0.38	35	0.58	47	0.78	59	0.98
12	0.2	24	0.4	36	0.6	48	0.8	**60**	**1.0 (1hr)**

Note that City of York Council operates a standard 37 hour working week, which over a typical Monday to Friday 5-day pattern works out to 7hrs 24mins per day.