



Thinking a**HEAD** **iTrent** Special

Welcome to the an iTrent Special edition of Thinking aHEAD. As you will know from previous correspondence we are currently in the final stages of implementing your new Human Resources Management System. The go live date for iTrent is scheduled for November 2019 and this newsletter is designed to give you all of the information and updates that you require in order to have a successful transition to the new system.

Many of you attended our awareness sessions during May and June and would have got a good look around the new system, and were shown how many of the processes work and what the school will need to consider going into implementation.

If you were unable to attend then do not worry, the system is designed to be easy to use and on the following pages you will see a variety of updates, hints, tips and information on the following subjects to support the roll out of the system in your School.

This newsletter will give you lots of information on the new system and what you need to be aware of before, during and after implementation.

Please share this information with all staff within your school. It is recommended that you check out the following weblink for full details on everything you will need to know including FAQ's, guides and videos.

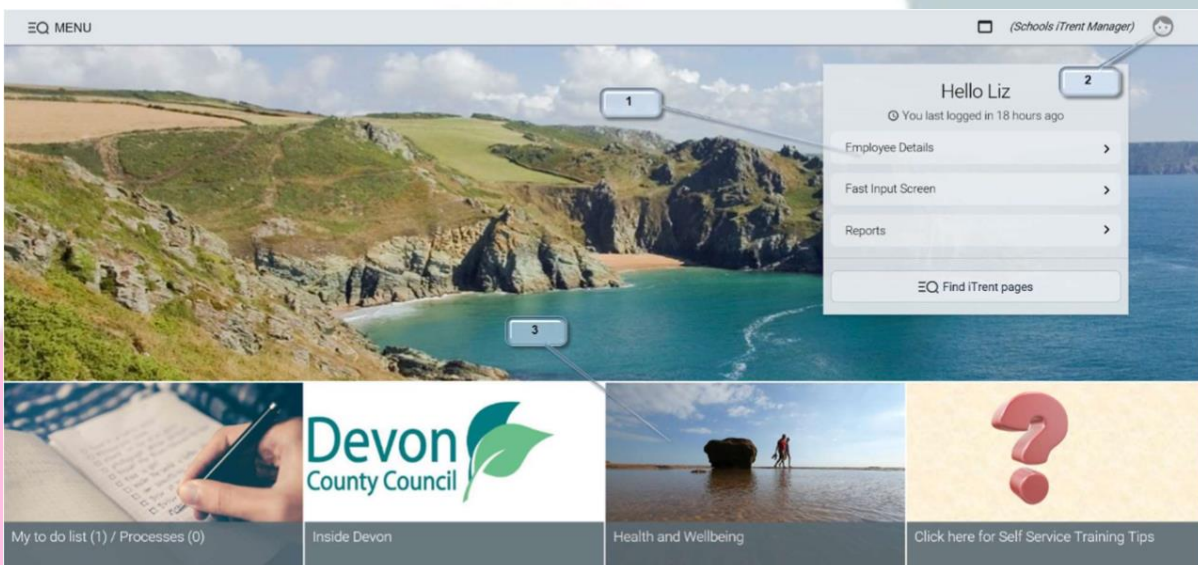


<https://inside.devon.gov.uk/task/itrent-self-service/>

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YOUR NEW HOME PAGE

During w/c 21st October, you and your staff will all be receiving details of your personal login credentials to the new system. As an iTrent Manager your home screen will look like the below:



The key areas of your home screen are as follows:

- 1) Your navigation options—this will give you quick access to details of your employees, entering absences, Reports and much more. From here you can easily search for employees in your team in order to check records, update absence information, or make contractual changes.
- 2) Your preferences—this is where you can amend your login details, and log out of the system once finished.
- 3) Alerts and Company News—this is your dashboard to alerts in your “To Do List” as well as quick links to information and news.

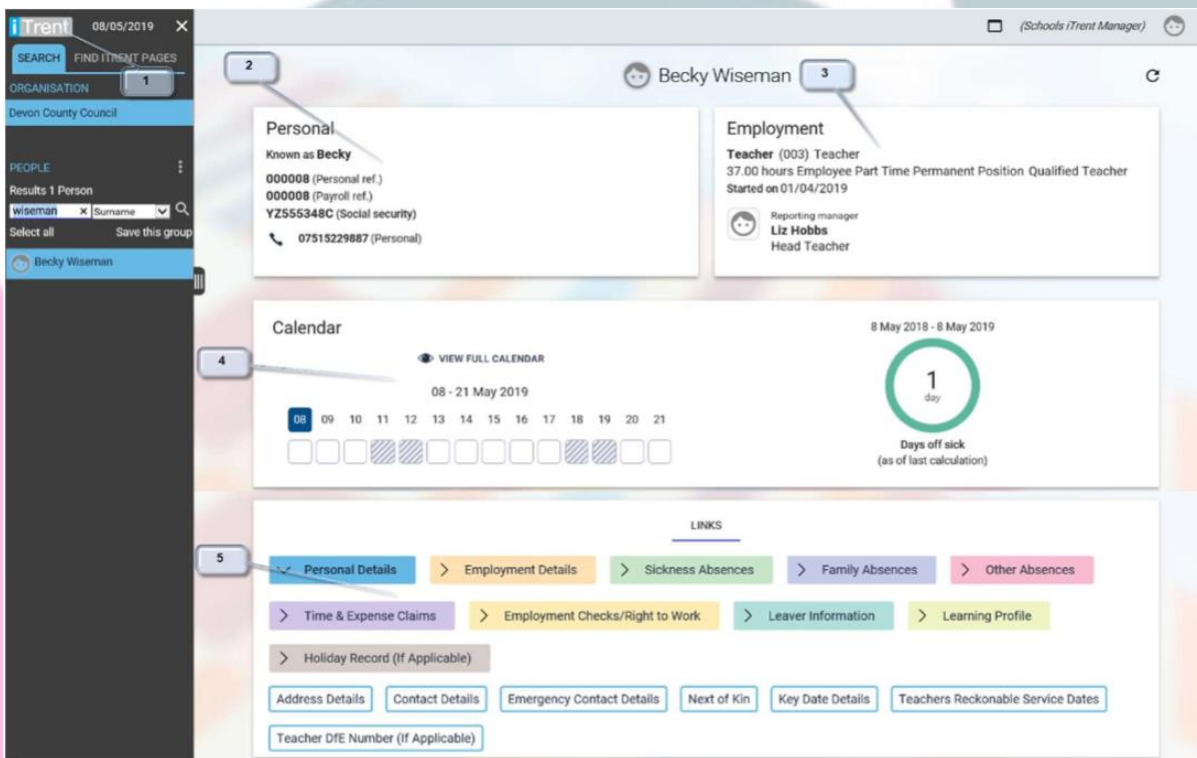
Searching for employees is really easy in iTrent. There are a number of guidance tools available to schools on our Devon webpages to help you navigate and undertake key activities in the system. A whole suite of videos and guides are available by [clicking this link](#) with a simple You Tube video on navigating around the system available here—[You Tube Video](#)

The following pages will give you an overview of the screens employees and managers see, as well as how to undertake some of the key tasks needed within iTrent. We have also included a number of tips to help you navigate the system as well as important information to be aware of during implementation.

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EMPLOYEE DETAILS

Once you have searched for a member of your team, you will be faced with the following employee screen that provides you with all the information and links to enable you to make the relevant changes, and view important information on your team.



The screenshot displays the iTrent interface for an employee named Becky Wiseman. The page is organized into several key sections:

- Personal:** Displays the employee's name (Known as Becky), personal reference number (000008), payroll reference (000008), social security number (YZ555348C), and a personal phone number (07515229887).
- Employment:** Shows the employee's role as a Teacher (003), 37.00 hours per week, and that they are a Part Time Permanent Position Qualified Teacher. It also indicates they started on 01/04/2019 and lists their reporting manager as Liz Hobbs, Head Teacher.
- Calendar:** Provides a calendar view for the period from 08 May 2018 to 08 May 2019. A summary indicates 1 day off sick (as of last calculation).
- LINKS:** A collection of navigation buttons for various record types, including Personal Details, Employment Details, Sickness Absences, Family Absences, Other Absences, Time & Expense Claims, Employment Checks/Right to Work, Leaver Information, Learning Profile, Holiday Record (If Applicable), Address Details, Contact Details, Emergency Contact Details, Next of Kin, Key Date Details, Teachers Reckonable Service Dates, and Teacher DFE Number (If Applicable).

- 1) Home Page - from anywhere within iTrent you can click the logo and be taken back to your home page.
- 2) & 3) Information Cards—here you will find details on your employees personal and employment record. By clicking on the cards you will be taken to additional screens where further details are available.
- 4) Calendar - this gives you an overview of the employees iTrent calendar and will show any absences in the calendar as well as summary details of their record.
- 5) Links - these links will enable you to navigate to any part of the employees record to enable you to update and amend personal details, enter absences, and change employment details.

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IMPORTANT CHANGES TO KEY PROCESSES

As a result of the introduction of iTrent, we will be replacing the current PRISM forms with access through iTrent through Employee and Manager self service, and through a number of online electronic forms to complete. The below outlines some of those key changes:

Process	New iTrent process	Date new process
New starters & additional position	Complete online starter form - Link	Immediately
Leavers	Complete online leaver form - Link	Immediately
Change of hours	Change hours (and working pattern if relevant) via Manager access See page 6 of guide	Hold changes from NOW and input from the point of Go Live
Transfer to different grade/job	Complete online transfer form - Link	Immediately
Attach a copy of birth certificate / passport as proof of age	Employee attaches copy of document to ESS	Hold documents from NOW and attach from the point of Go Live
Opt in/out of pension scheme	Complete paper form and attach to ESS	Hold forms from NOW and attach from the point of Go Live
Submit P45	Attach form to ESS	Hold forms from NOW and attach from the point of Go Live
Essential Users Amendment	Complete online allowance form - Link	Hold forms from NOW and input from the point of Go Live
Commencement/cessation of voluntary deductions e.g. union, Coaver membership	Employee attaches copy of form to ESS	Hold forms from NOW and attach from the point of Go Live

The following pages outline key information for Absence Management and Expenses and Claims.



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INPUTTING ABSENCE

A number of absences can be created and submitted by the employee via Employee Self Service. Administrators will then receive notifications to authorise absence requests via iTrent Manager. It is worth noting that Administrators also have access to create absences on behalf of employees if the employee is unable to do so, or the school request that all absences are managed centrally.

Details on how to input absence can be seen in our simple how to guides and videos at the bottom of this page.

HINTS & TIPS ON ABSENCES:

- ! When inputting absences, the dates should be the period the employee was “unfit” for work irrespective of whether they were rostered to work that day or not.
- ! Absence end dates should be the date the employee was fit to work, not the next day that they were due to be at work.
- ! Absences should be entered for all assignments that an individual holds.
- ! Employees can only add a sickness absence with an end date. Only managers can enter an open ended absence.
- ! Jury Service should be entered as a future open ended absence
- ! Maternity, adoption and maternity support should be entered as soon as possible with the expected date of birth as well as the start date for absence to ensure correct forms and notifications are received. Any changes to start dates must be notified to payroll.
- ! Please note that if you currently input absences via SIMS this will need to continue whilst we work with Capita on potential integrations

IMPORTANT - THAT ALL ABSENCES UP TO, AND INCLUDING, THE 6TH NOV SHOULD BE RECORDED AS PER EXISTING PROCESSES - ABSENCES FROM THE 7TH NOV WILL GO INTO ITRENT

The following family absences require notification via new only electronic forms into Payroll via the below links:

- Complete online Maternity Leave form – [Link](#)
- Complete online Maternity Support Leave form – [Link](#)
- Complete online Adoption Leave form - [Link](#)

Check Out the Following Resources on absences in iTrent:

User Guides on [Family Absences](#)

User Guide on [Sickness Absence](#)

User guide on [Holiday Absence](#)

YouTube Video on [Family Absences](#)

YouTube Video on [Sickness Absence](#)

YouTube Video on [Holiday Absence](#)



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CLAIMS & EXPENSES

Employees will be entering claims and expenses themselves into the system via their Employee self Service Screen. There is a comprehensive guide and videos to take employees through each step on their way to entering a claim and expense.

As a manager in the system you will be able to input on behalf of those employees that may not have access to employee self service. These will be the staff you advised us of without email addresses, access to a computer, or are unable to use a PC, tablet or smart phone. For these staff you will be able to enter claims on their behalf and these are covered in the guides at the bottom of this page.

HINTS & TIPS ON CLAIMS & EXPENSES:

- ! Mileage claims can only be entered once an employees vehicle has been registered on the system. This is done via Employee Self Service in the “Personal” tab. Full guidance on this is available in the Personal & Employment Details guide via the links below.
- ! Employees submitting claims and expenses will be requested to re-enter their passwords once they submit a claim. Claims will not be submitted until they enter their password and confirm submission. Claims will however still be saved so amendments can be made prior to submission.
- ! When fast inputting, or searching for an employee when submitting claims on their behalf, you will need to enter their personal reference number. We therefore advise that you keep a list of these securely to assist in a speedy process.
- ! Casual and Bank claims should be claimed as and when the work is carried out. If claims are stored over a period of time and then input to be paid in a single month then there may be NI and tax implications. We recommend little and often! Any claims over 90 days old will need to be entered on a separate form and will require double authorization.
- ! You can not enter claims for future dates.
- ! Budget codes are automatically entered based on the code for the post. Codes will only need to be overwritten if a different code is required.

IMPORTANT - CLAIMS PRIOR TO GO LIVE SHOULD CONTINUE TO BE ENTERED VIA EXISTING PROCESSES UNTIL THE 6TH NOV WHEN PAYROLL CLOSSES. AFTER THIS DATE CLAIMS WILL NEED TO GO INTO iTRENT

Check Out the Following Resources on absences in iTrent:

- | | |
|----------------------|---|
| Employee Guides on | Personal and Employment Details (for inputting vehicle details) |
| Employee Guides on | Pay and Benefits |
| YouTube video on | Employees Entering Time and Expenses |
| School User Guide on | Time and Expenses Claims |
| YouTube Video on | Fast Inputting |
| YouTube Video on | Time and Expenses Authorisation |

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GETTING READY FOR YOUR CHANGE IN PAY DATE

In August 2018 we [consulted on a Change in Pay date](#) to take effect upon the implementation of the new system. The consultation was to change to one pay day, which would be 25th of the month (or on the closest earlier working day if the 25th of the month falls on a Saturday, Sunday or Bank Holiday).

This will mean that your Pay Date for your non-teaching staff is on course to change from Friday 29th November to **Monday 25th November 2019** as a result of the new system going live. A final decision will be made at our Project Board meeting in October. We will then communicate confirmation of whether your pay date will change in November.

In the meantime it is worth reviewing the following areas so that when the confirmation of the pay date change is made, any personal changes can be actioned:

Bank Payments – do you need to amend any of your standing orders or direct debits as a result of the change in pay date?

It is worth noting that your monthly pay will be in your accounts earlier each month, therefore the disruption is hoped to be at a minimum. The upcoming pay dates are due to be as follows:

Month	New Pay Date	Old Pay Date
November 2019	Monday 25 th	Friday 29 th
December 2019	Friday 20 th (early due to Christmas)	
January 2020	Friday 24 th	Friday 31 st
February 2020	Tuesday 25 th	Friday 28 th
March 2020	Wednesday 25 th	Tuesday 31 st

In our communication last year we sent out to Schools a number of Frequently Asked Questions to assist in any questions or queries that staff may have. Please reuse these as you see appropriate as we get nearer the time for go live.

We would once again like to thank staff and trade union representatives for their support, comments, queries and feedback during this consultation process. We thank you for the part that everyone has played during the process.

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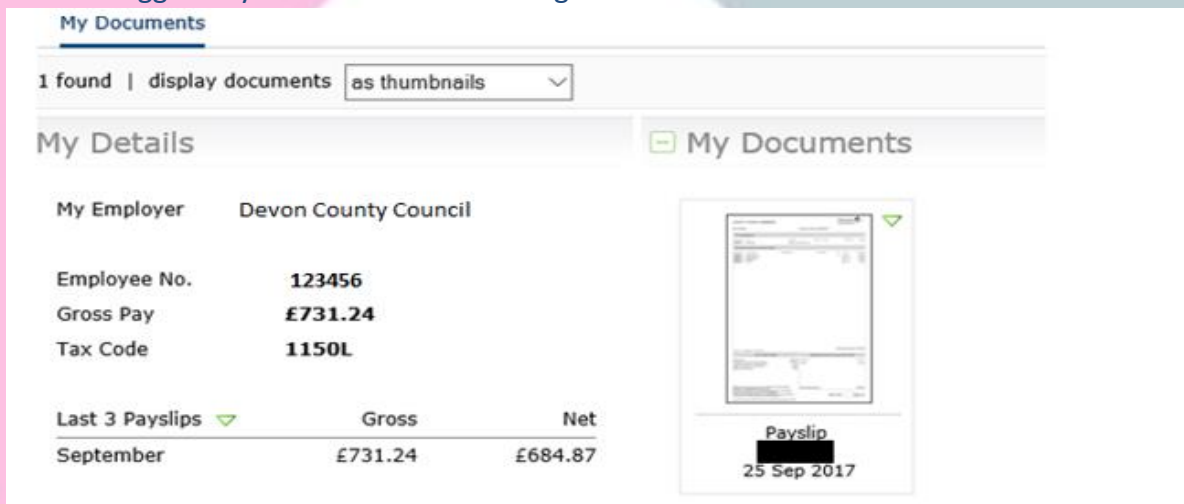
REMINDER TO STAFF TO DOWNLOAD THEIR PAYSLIPS!

With the move to iTrent, staff will be changing how they access their payslips. Payslips will be available via the employee self service portal of iTrent and staff will receive log in details to this new system nearer to go live.

The system that currently holds payslips for staff, Oracle / R Powered, will cease to be available after go live and as such we are recommending that staff use the time before the launch of the new system to download and save their historic payslips and P60's.

To do this on RPowered, staff will need to log in to the system via the portal that is accessed by typing devon.rpowered.com into the address bar of your web browser. You will then be asked to enter your login details (email address and password), or for those staff that have not already registered or forgotten your password, you will be able to do that also via this screen.

Once you have logged in you will see the following screen information



The screenshot shows the 'My Documents' interface. At the top, it says '1 found | display documents as thumbnails'. Below this, there are two tabs: 'My Details' and 'My Documents'. The 'My Details' tab is active and shows the following information:

My Employer	Devon County Council	
Employee No.	123456	
Gross Pay	£731.24	
Tax Code	1150L	
Last 3 Payslips	Gross	Net
September	£731.24	£684.87

To the right of the 'My Details' section, there is a thumbnail of a payslip document with a green checkmark. Below the thumbnail, it says 'Payslip' and '25 Sep 2017'.

From here you will be able to download and save your documents to a suitable location, or print your documents if you would prefer.

It is important to note that following the implementation of the new system, it will not be possible for HR One Payroll to quickly access previous payslips for you, therefore it is important that you retain the relevant documents yourself for your records

For information on how Payslips and P60's will be accessed via iTrent Employee Self Service going forward, please refer to pages 4-6 of this [User Guide](#) or watch this short [You Tube video](#)



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CHANGES TO TERM TIME ONLY CALCULATIONS

The Local Government Association have updated the NJC Green Book with guidance about the payment to term-time employees (section 14.2 pages 179 – 190). This points out that term-time employees should be aware of the payments made to them, including the element of holiday pay. It also recommends that adjustments are made if they leave on a date other than the anniversary of their start date.

We are currently not able to provide this for all term-time employees, but iTrent provides several enhancements which will satisfy the guidance. Please note that the information below relates to all term-time employees, including term-time annual hours, who would not previously have had an adjustment to their pay on leaving.

The first one is to display on the pay advice the number of weeks worked in the contract and provide a separate line to show the payment of holiday pay. The budget code for both payments will be the salary code.

For example, a mealtime assistant, with more than 5 years' service, is paid for 45.8 weeks a year, is made up of 38 weeks worked and 7.8 weeks for holiday and bank holidays. On the pay advice and budgets this will show as Salary for the 38 weeks payment and a separate line for Salary Term Time Holiday for the 7.8 weeks payment. This may result in the employee's salary being different by a matter of pence, which will be adjusted accordingly.

The second is to pay an equated pay adjustment on leaving for all term-time positions (this will also include transfers to a new position and changes to weeks worked). Currently an equated pay adjustment is paid to some term-time employees but not all, due to historical payment methods.

The equated pay adjustment will check the hours that the employee was due to work compared to the payment they have received. Adjustments can be positive or negative, as generally, in the autumn term term-time employees will work more weeks than they are paid, remembering they are paid 12 equal payments through the year, whilst in the summer they may work less than they are paid. Please note, the calculation refers to the position's annual salary at the date of leaving, therefore employees on higher hours and grades may see larger adjustments.

PLEASE TURN OVER FOR MORE INFORMATION AND EXAMPLES

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CHANGES TO TERM TIME ONLY CALCULATIONS cont.....

We are aware that schools receive a number of queries from term-time employees, questioning the hours they have been paid for at the point of leaving, so this should address these, whilst also complying with the new guidance.

Some examples are:

1. An employee with an anniversary start date of 1 September, an annual pro rata pay of £6,000 and contracted to work for 195 days a year leaves employment at the end of February.

At the point at which they leave employment, in this example they have worked for 108 of their contracted 195 working days in the year, (55.38% of their working year). However, they will only have received 50% of their annual pay, (six of twelve equal monthly instalments of £500). Therefore, at the point of their termination of employment, they will be owed 5.38% of their annual pay. i.e. $5.38\% \times £6,000 = £322.80$.

If the employee was earning a pro rata pay of £15,000, the payment would be 5.38% of their salary i.e. $5.38\% \times £15,000 = £807.00$

2. The same employee leaves at the end of June. At the point at which they leave employment, they have worked for 179 days (91.79% of their working year) and will have been paid for 83.33% of the year. They will be due 8.46% of their annual pay i.e. $8.46\% \text{ of } £6,000 = £507.60$.

3. If an employee has an anniversary start date of 1 July, an annual pro rata pay of £6,000 and contracted to work for 195 days a year leaves employment at the end of September, at the point of leaving they will have worked for 40 days (20.51% of their working year) and will have been paid for 25% of the year. They will have a deduction of 4.49% of £6,000 = £269.40.

Please note that if you are an Academy then the new leavers and transfer forms will ask you to confirm whether you wish to have the equated adjustment made to your employee in their final payment. If you do, you will be asked to complete the start date of their term-time contract, which will be used for the calculation.