iTRENT EMPLOYEE SELF SERVICE (ESS) USER GUIDE

iTrent

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1. GETTING STARTED

Logging in

To log in to your Employee Self Service portal, please visit the following link:
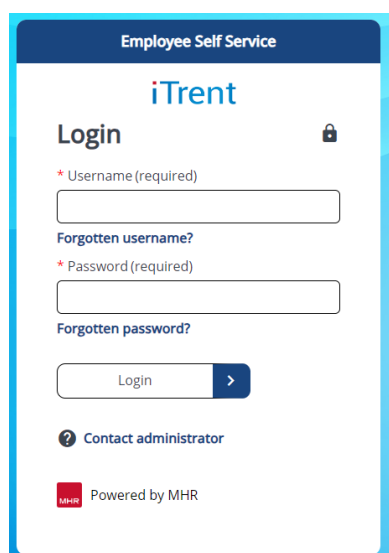
ESS - Login options

Click on 'A different account'

Enter your Username and Password into the boxes displayed and click **'Login'**.
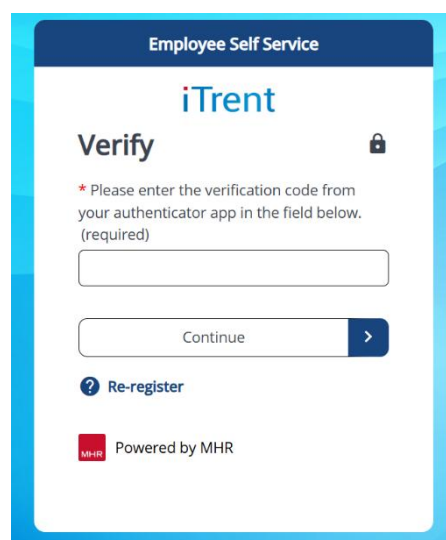
Username: work email address (for those without a work email, your personal email address)

Password: 8-digit bank account number (for the account to which we make your salary payment)

This will prompt you to add your verification code from your authenticator app (please see below on how to set this up, if logging in for the first time)
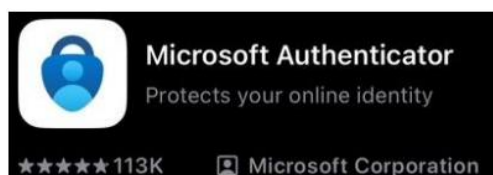

Security – setting up the multi factor authenticator

The iTrent platform is protected by Multi Factor Authentication and requires an online authentication app to log in to your account. Whilst you can use any authenticator app to access your account, we recommend using the Microsoft Authenticator application (available via the app store on your phone).

Once you have downloaded the app you will be presented with the following screen:
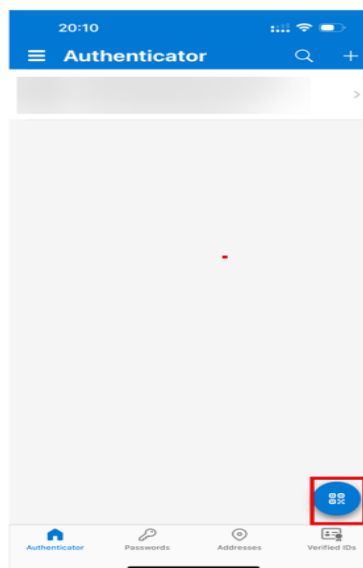
You can use the QR code finder (highlighted in the RED square above) on the QR code shown on your computer (as per the screen below).
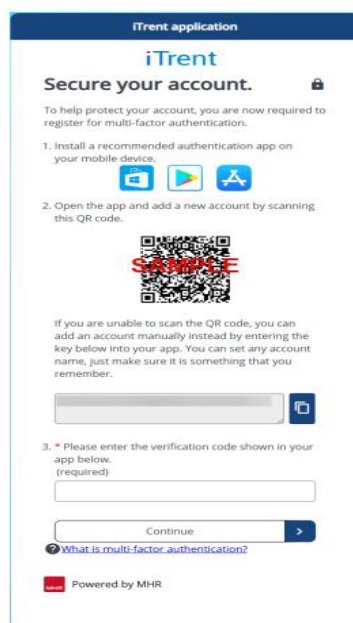

Alternatively, you can input the code shown on the ESS security screen and input this into your authenticator app.

Once the registration has completed you will be presented with a recovery code that you can use in the event of you requiring to reset your account. You can either photograph this or keep a note. Once you have completed all these steps you can use your authenticator app to access ESS.

Once you have opened the authenticator app, you will see a code (as per the screenshot below) to log. This can be entered into the verify screen shown on your ESS screen (as per the screenshot below).
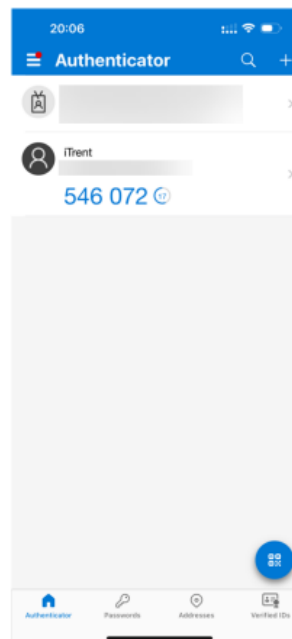
Whilst we are only endorsing an app that is on your phone, as this is the most secure method of ensuring access to the system is protected from an employer's email or computer being compromised, there are authenticator apps available on the internet that work on computers that individuals can download if required.

Forgotten Your Password?

Select the 'Forgotten password?' link:

Enter the following details:

Username: your personnel/payroll reference/work email address (if you are unsure of this then please ask your school business manager or school administrator)

Email Address: Work email address (or if you do not have a work email address then your personal email address)

An email will be sent within 15 minutes to the email address held for you on the system. Follow the link provided to reset your password.

Problems logging in

If you are unable to log in, please contact your school business manager/office manager/HR Lead or the LSP HR Central Team who can check your credentials.

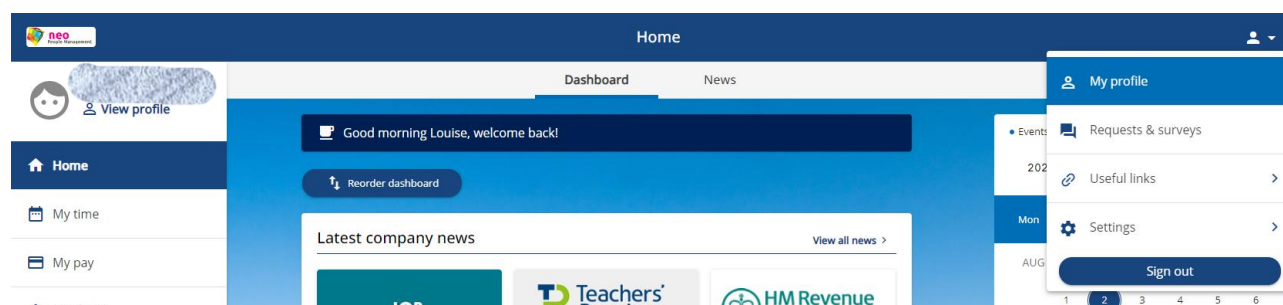## 2. GENERAL NAVIGATION

<u>Home</u>

Click the icon to return to the home screen wherever you are in the portal.
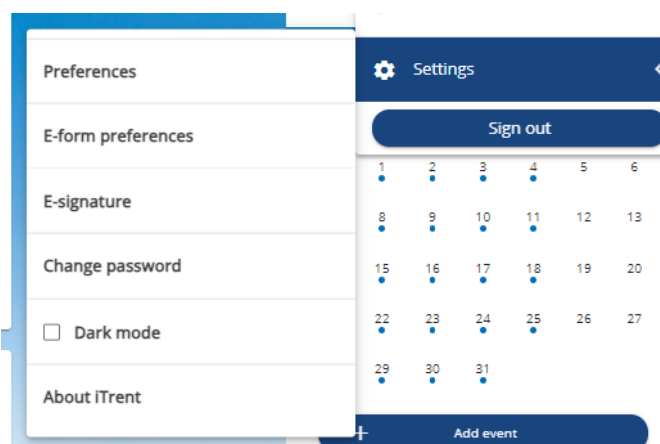
<u>Logout</u>

To logout and securely close your session, select the icon in the top right of the screen and select '**Sign Out**'.

<u>Change password:</u>

Select the icon in the top right of the screen and select 'Settings' and 'Change password'

3. ACCESSING YOUR INFORMATION

View Your Profile

Select the **View profile** icon from the top left-hand corner of the screen (under your name) to access and amend personal information or view employment details.
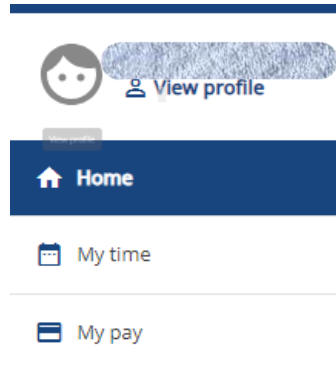
Your personal details can be reviewed and amended on the first tab '**Personal**'.

Your employment details can be viewed under the second tab '**Employment**'.

View Your Latest Payslips

You can view payslips by selecting '**My Pay**' on the left-hand side of the page, or via the quick view '**Latest Payslips**', on the homepage as shown below.

Please note, only payslips that have been issued since our payroll was processed via Neo People/iTrent, can be viewed in this portal.
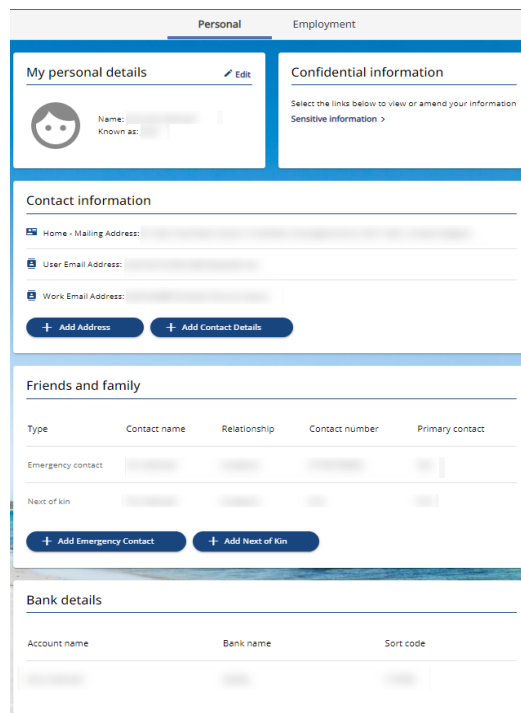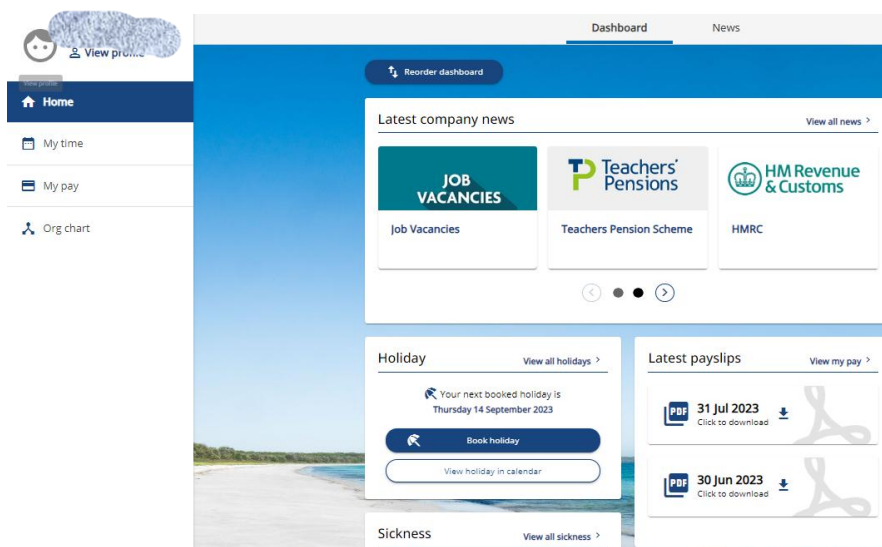

View All Payslips/P60's or P45's

Select the '**My Pay**' tab to the left-hand side of the page, as shown in the screenshot above.
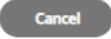
Select the relevant time period and click search, and you will be presented with all the pay information that has been created whilst your payroll has been provided via the iTrent system. These items can be viewed, downloaded, or printed as required. If you do not enter any dates, then this will return all payslips.
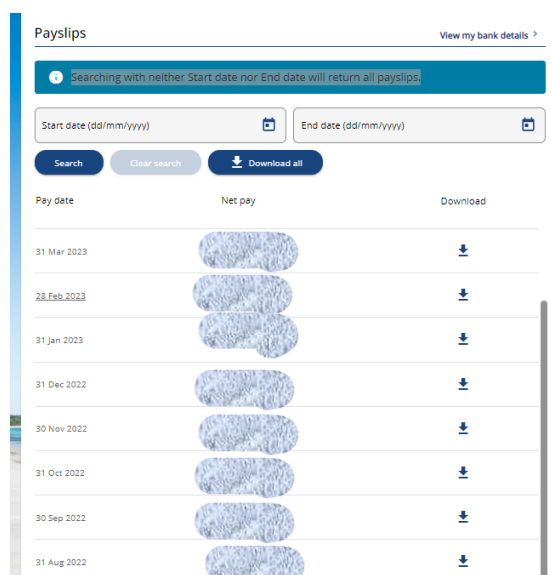
View Your Documents

Select the '**View profile**' icon from the top left hand corner of the screen (under your name) to access your personal details. Click on '**Edit**' within '**My personal details**' and scroll to the bottom of the page to see all the attachments on your record:

You can select the document by clicking the name of the document and this will allow you to download the document by selecting the blue download arrow.

*Please note, only documents attached to your iTrent record by the school/Trust can be viewed within this area.

Absence (sickness)

You can view any sickness absence (if it has been logged by your school) via the calendar on your Home Page or via the left-hand side and selecting 'My time'
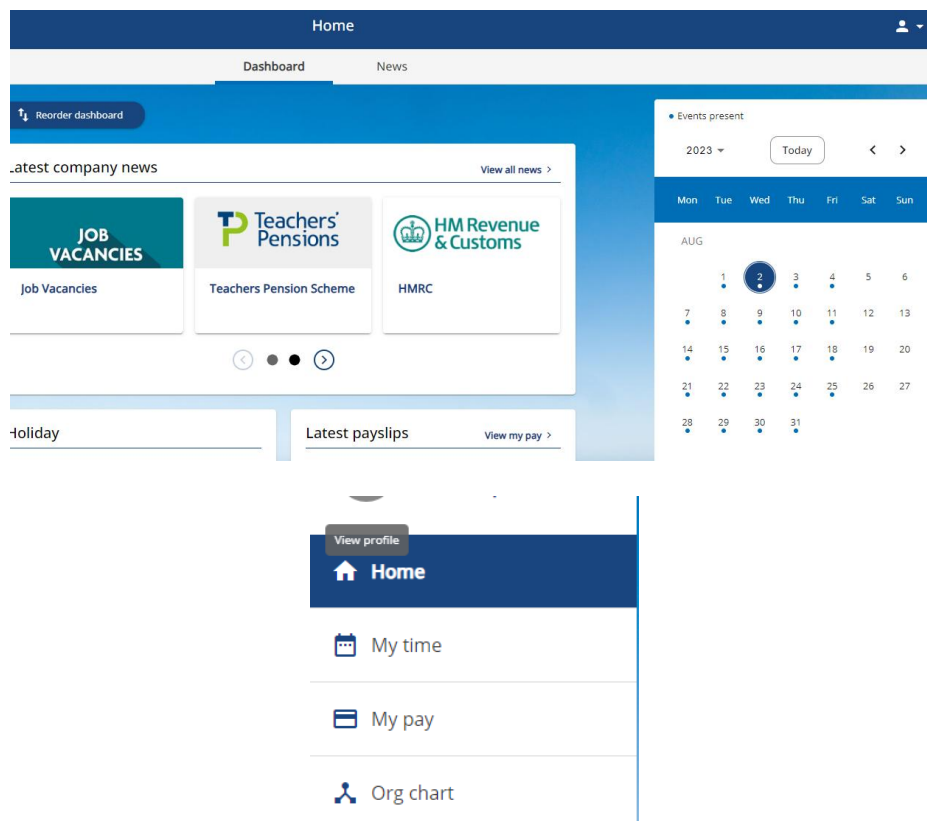
Selecting **'View all sickness'** will populate a list of all sickness absence input on your record:
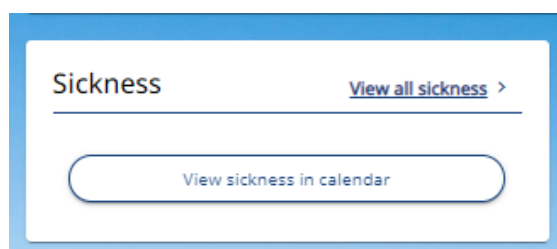
4. AMENDING YOUR PERSONAL INFORMATION

Amending Your Personal Details

As employees of an organisation working with children, the recording and checking of your personal information is important.

You can amend your personal details via the online portal at any time by selecting the '**View Profile**' icon from the upper left part of the screen.

Changing Your Address or Contact Details

Select the '**View profile**' icon in the top left-hand corner of the screen (under your name). Select '**Add address**' or '**Add contact details**', and this will enable you to amend or replace your current home address or contact details.

Once amended, select '**Save**', and this will save the details onto your record. A confirmation email will be sent to your email address within 15 minutes, to confirm the change has been actioned.

Changing/Inputting Emergency Contact and Next of Kin Information

Select the '**View profile**' icon in the top left-hand corner of the screen (under your name).

Click onto your emergency contact or next of kin details, and this will allow you to amend the details already there, or add new details as required.

Once amended, select '**Save**', and this will save the details onto your record. A confirmation email will be sent to your email address within 15 minutes, to confirm the change has been actioned.

Changing Your Bank Details

You can change your bank account details online via your Employee Self Service portal. Select the '**View profile**' icon in the top left-hand corner of the screen (under your name). Click onto any of the bank details shown in the personal information screen, and you will be taken to the Bank Details change screen:

Change the bank details as you require, and press **'Save'**.

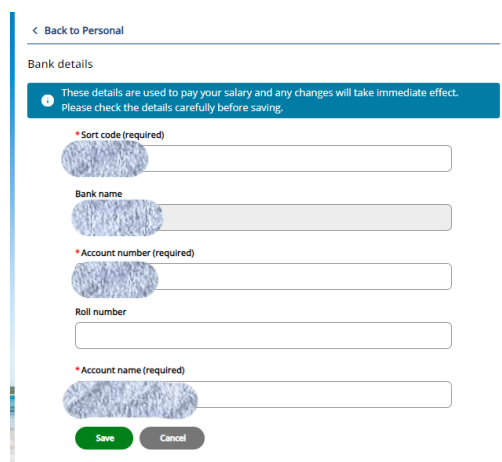**Please note, it is important to take care when changing your bank account details - these are the account details to which we will pay your next salary, and any errors will cause a delay in your salary arriving in the correct account.**

When any change is made to your bank account details, the payroll system will e-mail your work email address to confirm that a change has been made. If you did not make the change then please contact your school business manager or school administrator urgently.

IMPORTANT: Please ensure that any changes to bank account details are submitted at least 5 working days before your next pay date.

5. SIGNING AND COMPLETING DOCUMENTS

Childcare Disqualification

👤 View profile   Click on the View profile, under your name (top left of the screen) and go into the Employment tab (middle top of the screen).

Scroll to the bottom of the screen and to **'Requests & surveys'** where you will see the Childcare Disqualification Declaration link.

Requests & surveys

(All)   (New)   (✓ Current)   (In Progress)   (Completed)

Title	Due date	Position(s)	Status
0900 - Childcare Disqualification Declaration	16 Aug 2023	0901 HR Administrator	New

Click on the link and press **'Start'**

‹ Back to Employment

0900 - Childcare Disqualification

As part of our duty to safeguard pupils, we nee

guidance of who should complete this form, ple

Please answer the questions and sign this dec

Please note that you are not required to disclos

Offenders Act 1974 (Exceptions) Order 1975 (a

[Start]   [Cancel]

Complete the questions, by selecting the correct response from the drop-down boxes and tick the declaration, and date the document. Click the **'Save'** button. You will see confirmation that the form has been saved.

> ☑ * By ticking this box I declare that I will make the school aware of any changes in my circumstances, including any cautions or convictions that affect my suitability to care for children.
> (required)
>
> * Date: (dd/mm/yyyy) (required)
>
> [   ] 📅
>
> (Save) (Cancel)

You then need to click the 'Submit' button by scrolling to the bottom of the page. Your declaration is now complete.

> ☑ * By ticking this box I declare that I will make t including any cautions or convictions that affec
> (required)
>
> * Date: (dd/mm/yyyy) (required)
>
> [09/08/2023] 📅
>
> (Save) (Submit) (Cancel)

Annual Declaration

This document will appear as a pop up when you log in:

iTrent

Correspondence (1 of 2)   ✕

LIGHTHOUSE
SCHOOLS PARTNERSHIP

ANNUAL DECLARATION FOR SAFEGUARDING 2023

PART 1

Code of Conduct Policy
Please click Here to review the Code of Conduct Policy. By signing this form you are confirming that you have read and fully understand the policy. The link will open in a new window so that once you have read the document you may close the window and return to this screen to sign acceptance below.

PART 2

Safeguarding Declaration
All employees must read and understand the following documents.

* Signature (required)

Read the document and click on the required links (these documents will populate in a new window). Your name will pre-populate in the signature box, and you can select **'Sign'**, the green button.

* Signature (required)

L Gilhespy

| ‹ Previous | Next › | Sign | 🖶 Print |

You can view all documents you have signed in ESS via the Employment section of My Profile.

👤 View profile

Click on the View profile, under your name (top left of the screen) and go into the Employment tab (middle top of the screen).

'My correspondence' will show all the documents (in date order):

My correspondence

| Template name | Correspondence status
All ▾ |

| Start date (dd/mm/yyyy)
10/08/2022 📅 | End date (dd/mm/yyyy)
09/08/2023 📅 |

| Search | Clear search |

| Correspondence | Created | Status | Changed date/time | Download |

You can click on and view any of the documents and you can download any of the documents by clicking on the blue download arrow

⬇

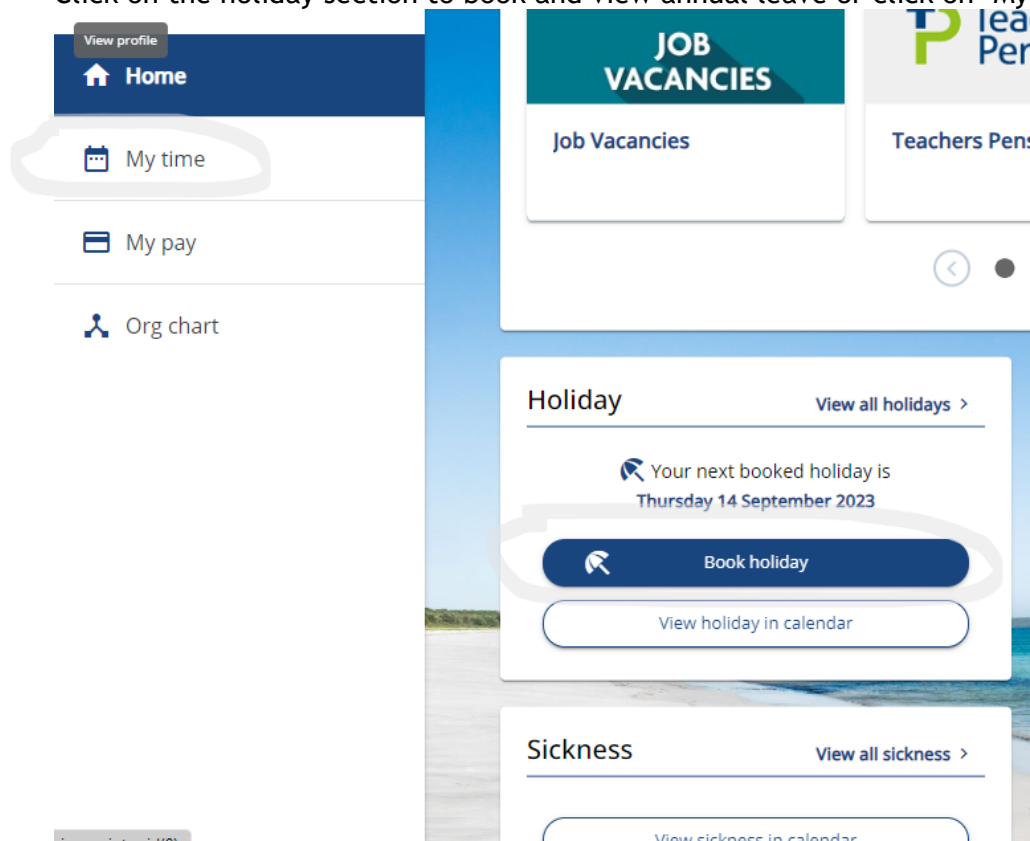# SUBMITTING A LEAVE REQUEST
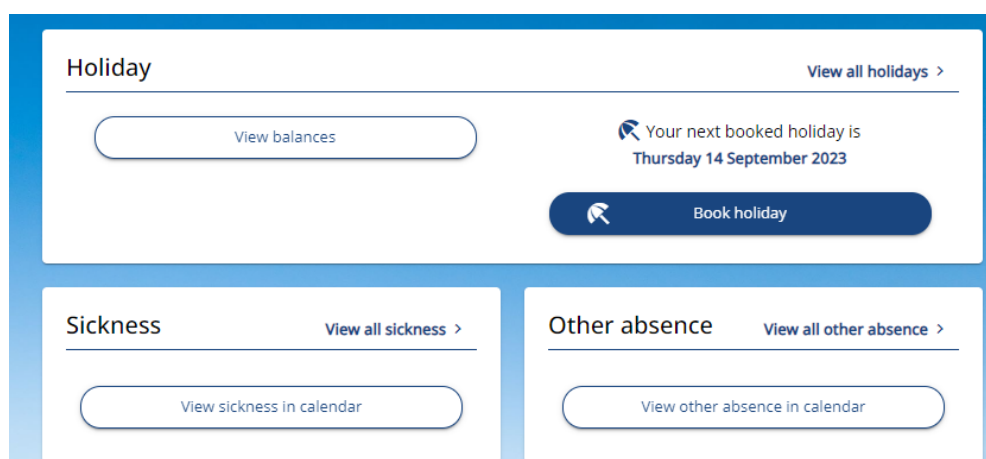
Booking Annual Leave (all year round staff only)

Log in to ESS:

ESS - Login (webitrent.com)

Click on the holiday section to book and view annual leave or click on 'My time':

This will give an overview of your time including holiday, sickness, and any other absence:

To submit a request for annual leave, click '**Book holiday**' – this will populate the form below. Enter details of your annual leave request click '**Save**' at the bottom of the form.

When clicking '**Save**', the annual leave request will automatically be sent to your line manager for authorisation.

Click on 'View all holidays' and you will note that the request will be seen as 'Awaiting authorisation' in the holiday details screen.

You will receive an email from the system confirming that your request has been successfully submitted to your line manager for approval and a further email once the request is authorised:

Dear Louise

The following holiday request has been Authorised.

Line Manager: Mrs Tania Newman
Holiday Start: 21/12/2023 (FULL)
Holiday End: 22/12/2023 (FULL)

Manager notes (if any):

Your ref: 901000072

Employee Self-Service

Please do not reply to this email, as it has been automatically generated.

As you book annual leave, this will automatically be reflected in your total balance:

Holiday

Holiday

View balances

‹ 01 Sep 2022 - 31 Aug 2023

17
Days available