

iTrent People Manager Sickness Absence Guidance

Entering Sickness Details

To enter an employee's absence detail you need to:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select Absence folder
- Select Sickness absence list
- Select New – Sickness Absence Details to enter a new absence

The screenshot displays the iTrent People Manager interface for entering sickness absence details. The left-hand navigation pane shows a tree structure with folders such as 'Sickness', 'Certification', and 'Absence calendar'. The main content area is titled 'Sickness absence details: New' and contains the following fields and controls:

- Sickness period:** A dropdown menu currently set to 'More than one day'.
- Absence start:** Includes an 'Absence start date' text input field and an 'Absence start type' dropdown menu set to 'Full day'.
- Absence end:** Includes an 'Absence end date' text input field, an 'Absence end type' dropdown menu set to 'Full day', and an 'Expected end date' text input field.
- Absence:** Includes an 'Absence type' dropdown menu and an 'Absence reason' dropdown menu set to '<None>'. There is also a 'Set as default' checkbox.

At the bottom of the form, there are two buttons: 'Save' and 'Calculate'.

Entering the information onto the Sickness Absence Details Page

- The sickness period will default to be the drop down option of More than one day, this will show a field for the start date and the end date on the page. If this option is changed it will change the display. If you change it to Full day it will remove the end date (as it will put the end date to be the same as the start date). If you choose Part day it will allow you to put half a day's absence in.

Please note that you should only enter sickness absence in the system as full days or half days, part days should not be entered.

- The “start date” on iTrent is the date the employee fell ill and would be unable to work.
- The Absence start type is the proportion of the day that the employee was absent. Please select the relevant option, either Full Day or Half Day Am or PM.

- The Absence type is the nature of Sickness Absence, for example Sickness – Disability Related. The majority of absences will be recorded as Sickness.
- The Absence reason must also be entered on the system at the time the absence is opened. If the absence reason is not known because the employee is going to see the doctor/hospital there is a reason for this in the drop down list.

Please note: If the reason for sickness changes during the absence period then you must amend the reason on the system to match the current reason for that absence.

Calculation Button

Once the absence details have been entered the “Calculation button” needs to be pressed. Pressing this button saves the absence details and also calculates the working days lost.

Entering a Statement of Fitness for Work (SOFFW)

If an employee has been off sick and has received a SOFFW from the doctor/hospital this will need to be entered into iTrent People Manager. Every SOFFW will need to be recorded in against the employee’s sickness.

To enter the SOFFW against the sickness record:

- Search and select the employee from the Organisation Structure, then People Folder
- Scroll down to the Absence folder
- Select Sickness Absence List
- Select the Sickness Absence the SOFFW relates to from the top left hand box.
- Scroll down and click into the User Defined Forms folder
- Click on UDF Categories (Absence)
- From the list in the top left hand corner select SOFFW
- Click on UDF Details (Absence) in the bottom left hand corner
- Select New – UDF Details (Absence) – this will then bring the form up for you to complete.
- Click Save once the form has been filled in.

(Screenshot on following page)

Absence End Date

To enter the absence end date once the employee has returned to work you need to:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select Absence folder
- Select Sickness absence list
- Ensure the correct sickness is highlighted from the list in the top left hand box
- Select Sickness Absence Details and enter the absence end date
- Click Calculate button

Please note - The end date on iTrent is the date the absence ended and not the date the employee returned to work.

If an end date has not been entered the absence will remain open which will result in higher sickness figures being reported for the employee, they may hit a trigger and department figures will be over reported.

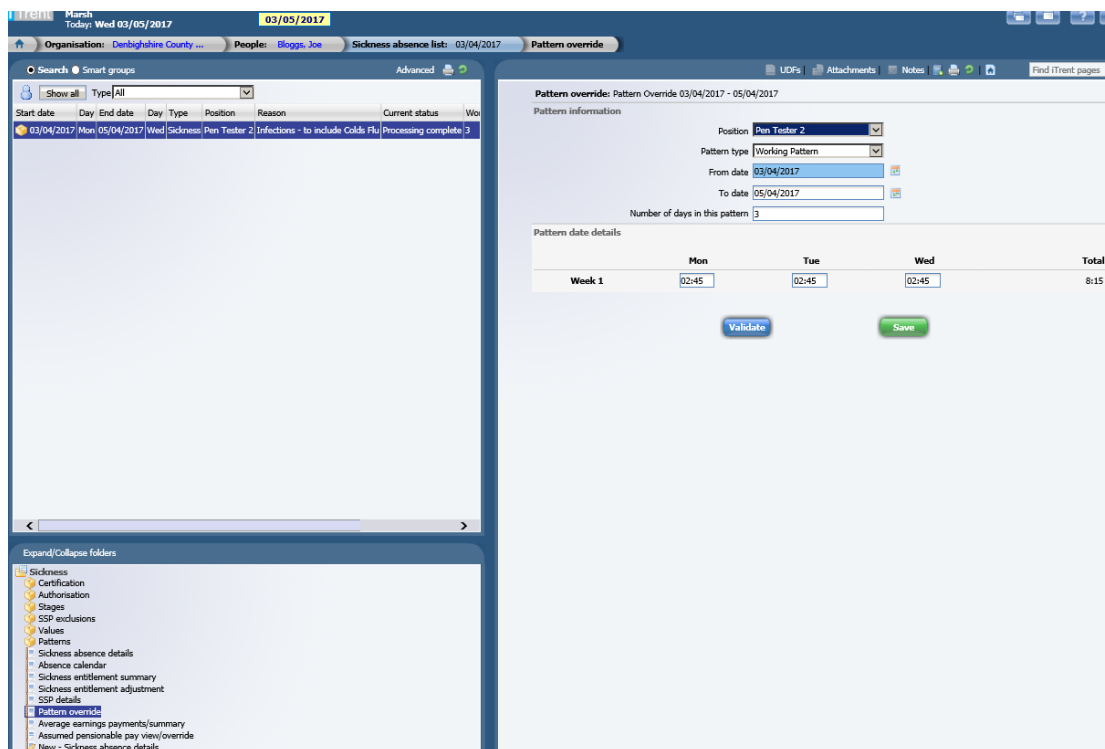
Days Lost & Pattern Override

If the days lost calculation is not calculating correctly it is likely that the working pattern for the employee is not correct and this will need to be amended. It may be that you need to inform HR that the pattern needs to be corrected or it may be that you need to do a pattern override so the days the employee was due to work is captured correctly in iTrent.

To view the working pattern against the sickness absence and to do a pattern override you will need to navigate to:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select Absence folder
- Select Sickness absence list
- Ensure the correct sickness is highlighted from the list in the top left hand box
- Click Pattern override
- Check the pattern and amend where necessary (the pattern will show fir the absence start and end date or current date if open)
- Click Save

Please note - You will then need to recalculate the sickness absence by going to the sickness absence details page and clicking the calculate button



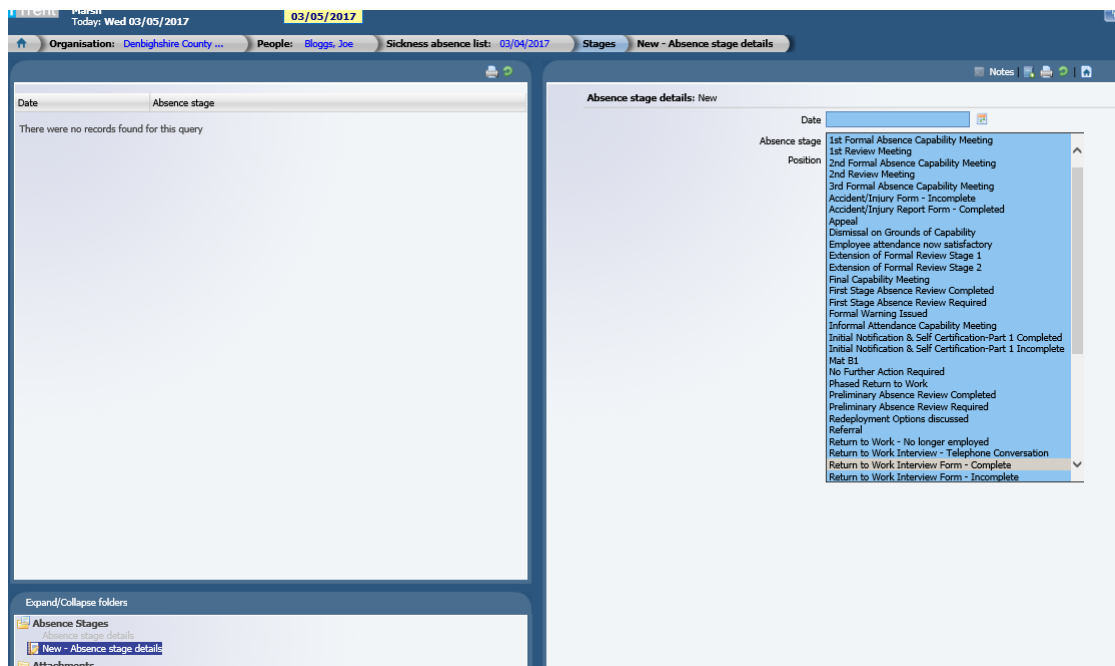
Referrals, Return to Work, Absence Procedure Stages

Dates of Referrals to Occupational Health and Return to Works must be entered into the system. You can also enter in the different stages of the absence procedure into the system against the sickness absence. This information is held in the stages folder against the sickness absence.

To enter this information:

- Select Organisation Structure folder
- Select People folder (Select a person from the search box)
- Select Absence folder
- Select Sickness absence list
- Ensure the correct sickness is highlighted from the list in the top left hand box
- Select Stages Folder

- Select New – Absence Stage Details



Open Ended Absences

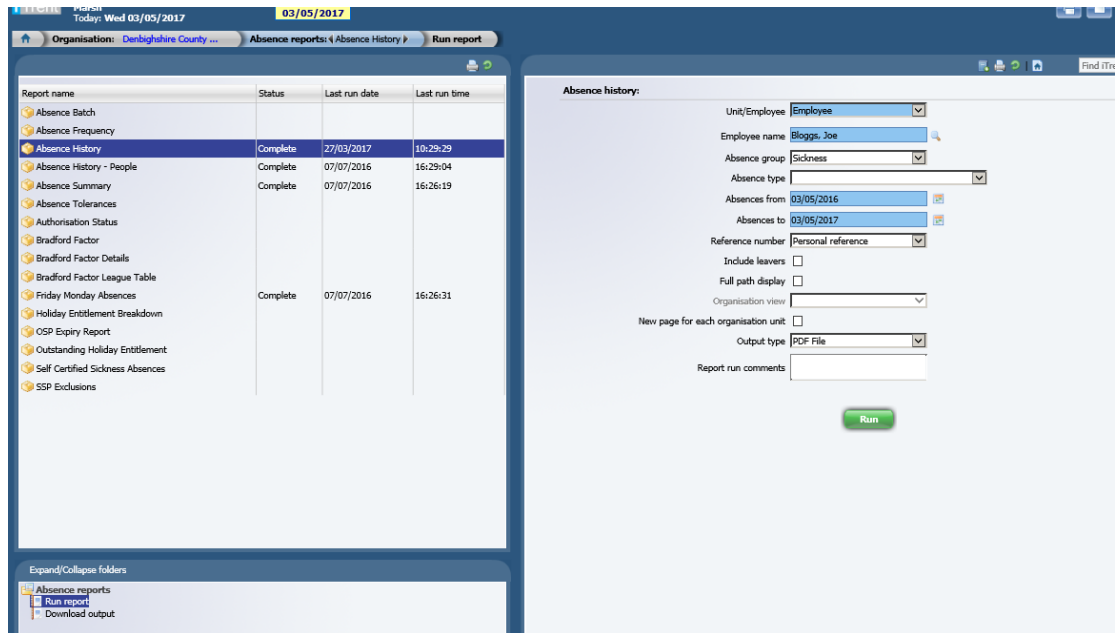
In order to see how many days lost for an open ended absence you need to select the Sickness Absence Details option for that absence in question and click the calculate button in order to re-calculate the days lost.

Absence Reports

There a number of absence reports you can run from iTrent. These will also help identify if an employee has hit an absence trigger. It is good practice to run an Absence History or Absence Summary Report before conducting the return to work.

To run a report you need to

- (Not have any employee searched for)
- Select the Management Information folder
- Select Absence Reports folder
- Select the report you wish to run (Absence History and Absence Summary are recommended)
- Click on Run Report
- Complete the fields. You must complete the blue fields and it is recommended that you put the name of the employee in the comments box
- Click the Run button



The report will run in the background and you can run more than one report at a time. Reports tend to take a few minutes to run.

Once the report has finished you should get an email and you a pop up box in the bottom right hand corner will appear for a minute.

To open the report you can get to it from your homepage by clicking the Processes folder or by navigating to the Download Output page which is the same place as running the report:

- (Not have any employee searched for)
- Select the Management Information folder
- Select Absence Reports folder
- Select the report you have run from the list
- Click on Download output

This page will show you any reports you have run today by default. You will need to click the icon under the download title to open the report up.