People Manager User Guide

University of HUDDERSFIELD

Inspiring global professionals

September 2024

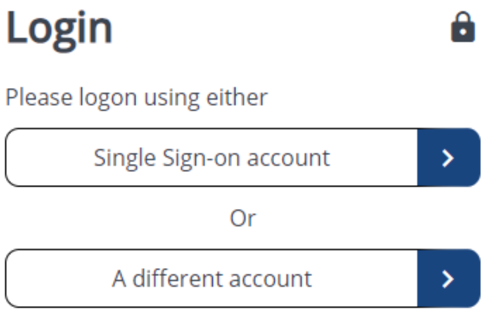
Contents

Logging In

The HR system (iTrent) can be accessed by using the following web address https://itrent.hud.ac.uk/.

iTrent uses Single Sign On (SSO) which means your University login credentials will be passed through and you will be signed into the system automatically.

If you are prompted with Login options like below, please choose “Single Sign-on account”.

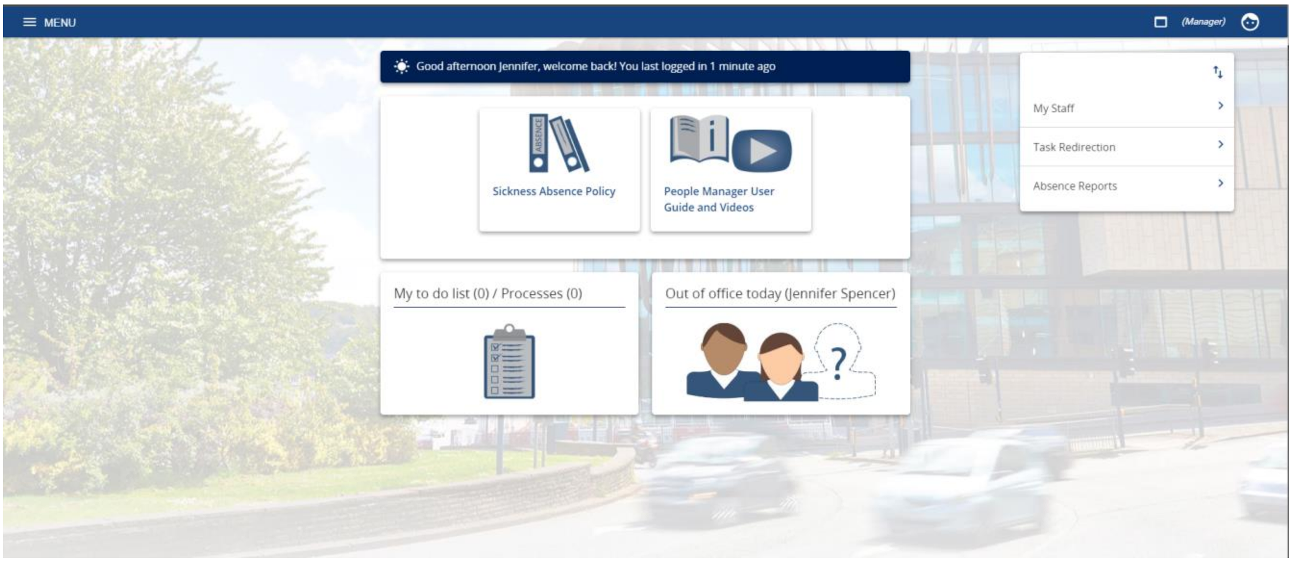


If you are experiencing any difficulties logging into iTrent and would like assistance please contact myhr@hud.ac.uk.

Note: iTrent is only available when working on campus, or when being accessed remotely via UniDesktop or the VPN.

Homepage

Once you have successfully logged into iTrent as a People Manager, you will be presented with the Homepage as shown below.

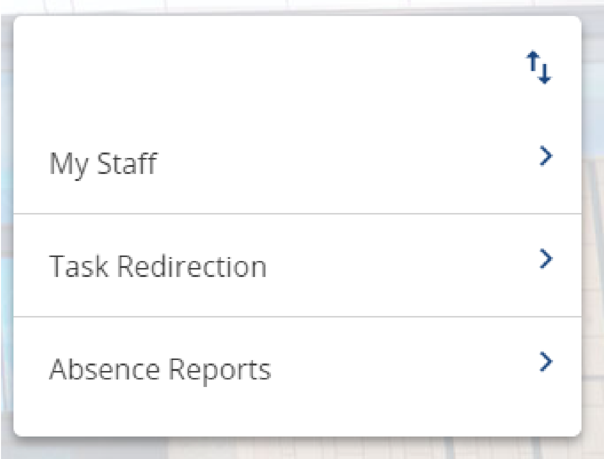


While using iTrent, if you navigate away from the homepage, you can always get back to the home page by clicking on the iTrent button in the top left-hand side of the screen as shown below.

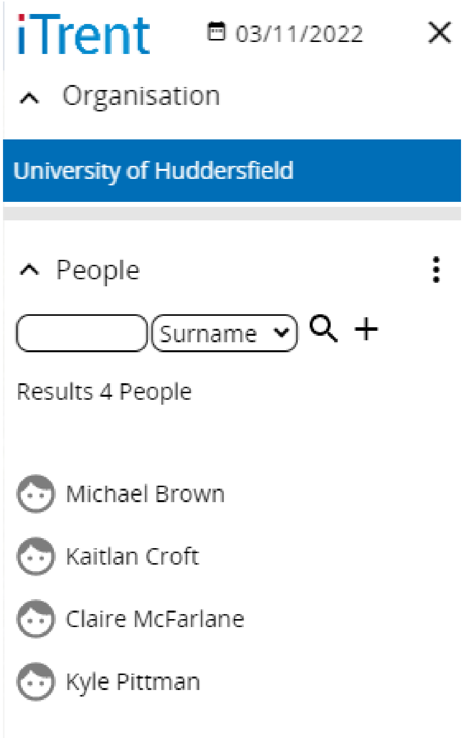
My Staff

Viewing My Staff

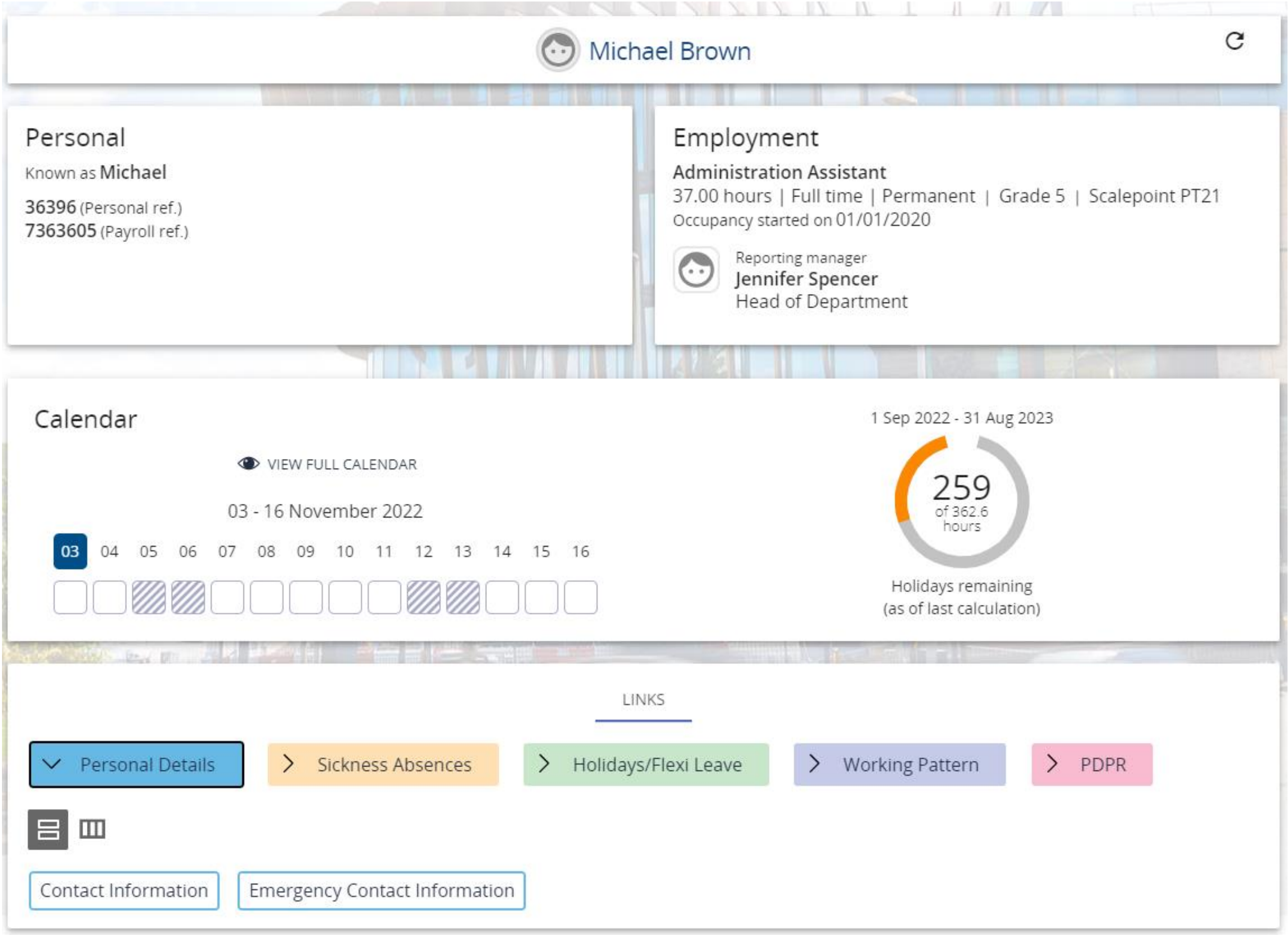
You are able to view all members of staff that report to you by clicking on the “My Staff” Button on the homepage.



When you click on this button, a list of staff that reports 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.

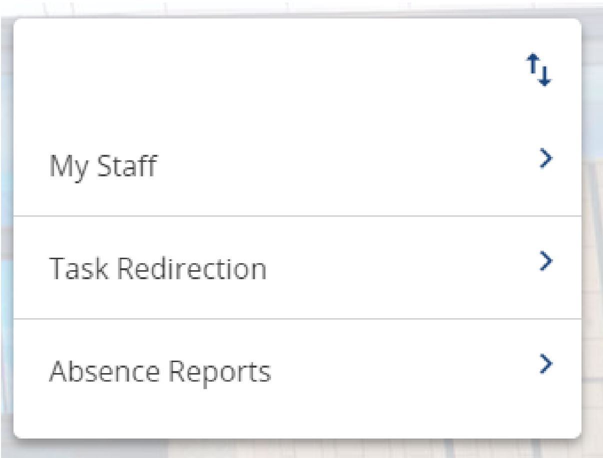


Clicking on a member of staff will open the below summary page where you can view certain information about that person such as their Position details, Absence information and Contact details.



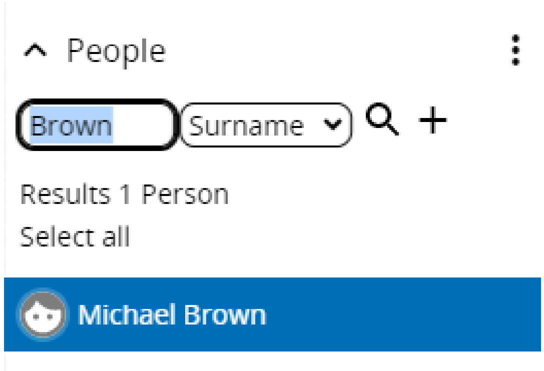
Searching My Staff

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

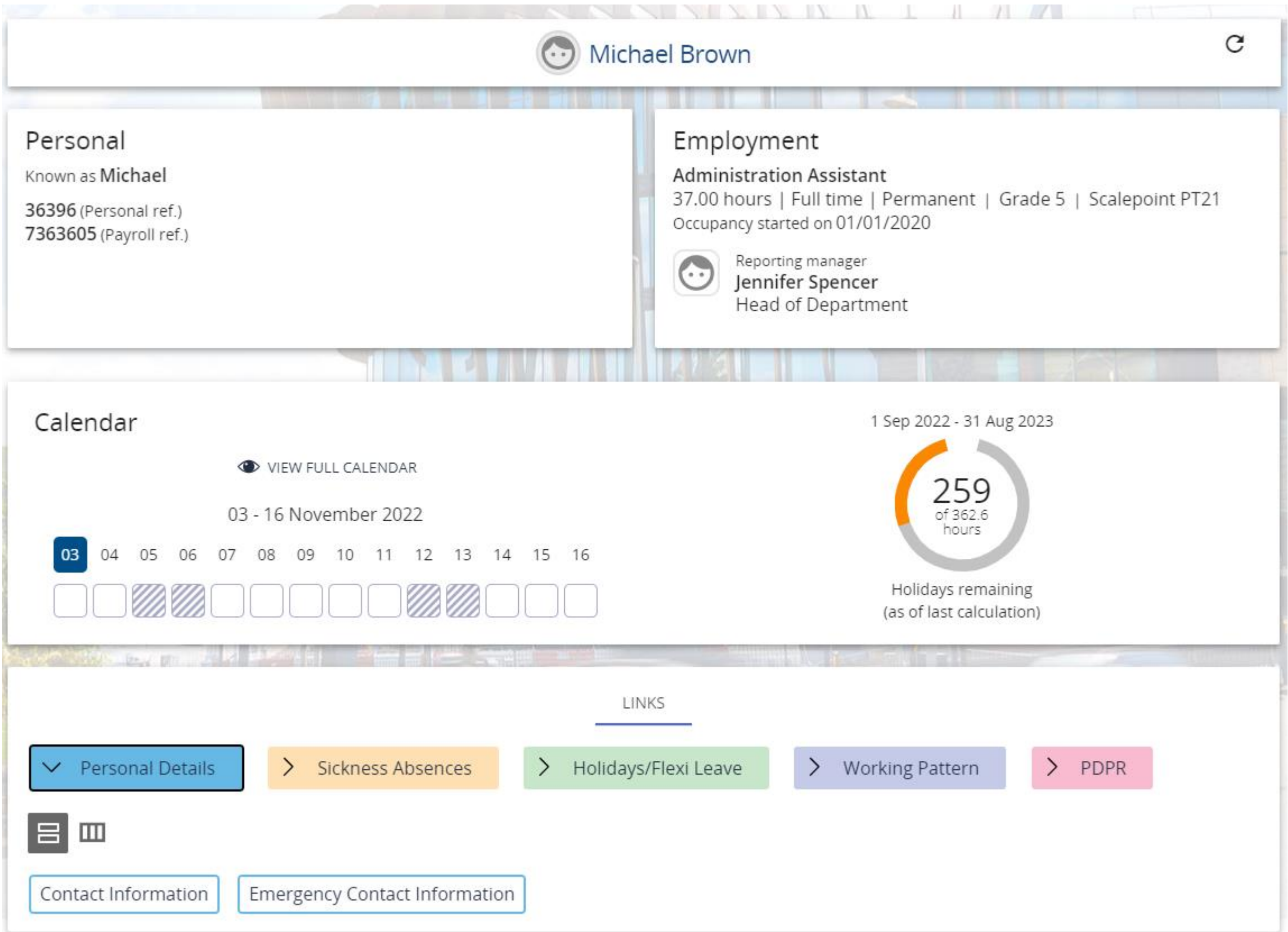


When you click on this button, a list of staff that reports in to you will appear down the left-hand side of the screen, with a search option at the top of the list.

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.



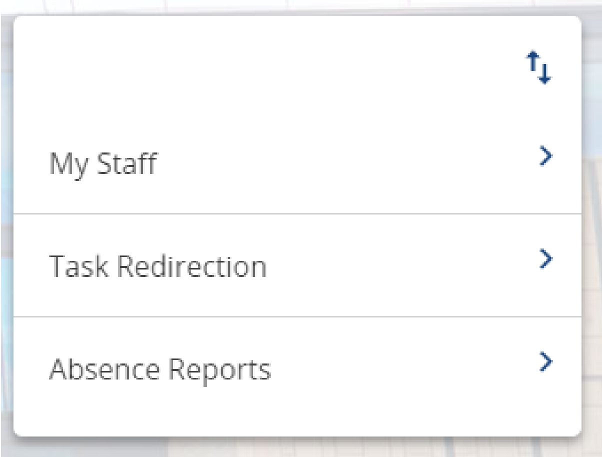
If you have more than one person with the same surname, select that person from the list and the below summary page will open where you can view certain information about that person such as their Position details, Absence information and Contact details.



Task Redirection

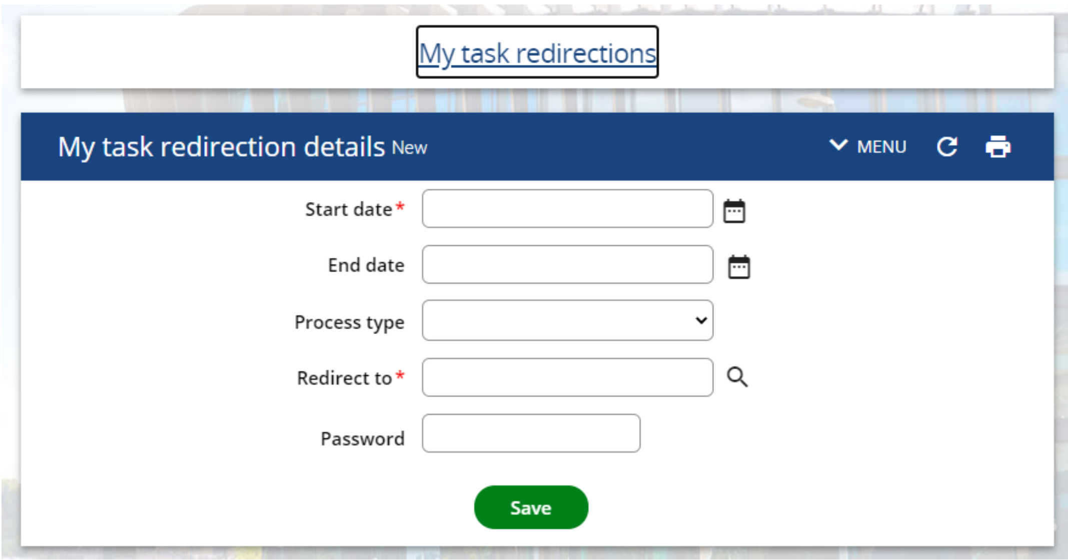
Using iTrent you can redirect your tasks to another person who will then be able to complete certain tasks such as authorising annual leave for your reportees if you are going to be away from the office.

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



This will open the Task Redirection link page.

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



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.

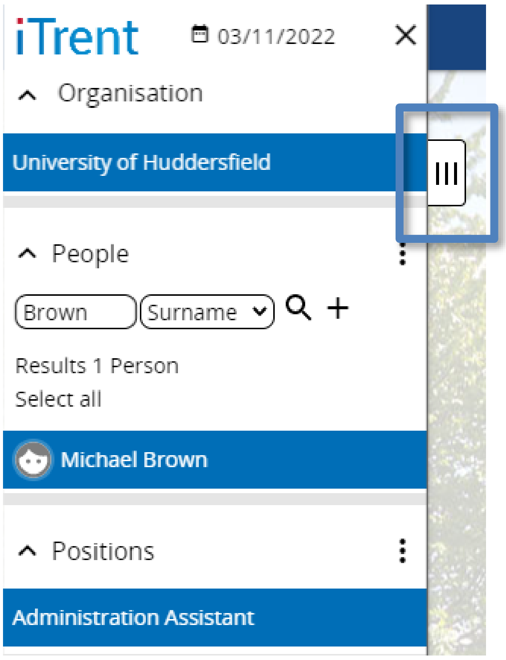
Working Patterns

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.

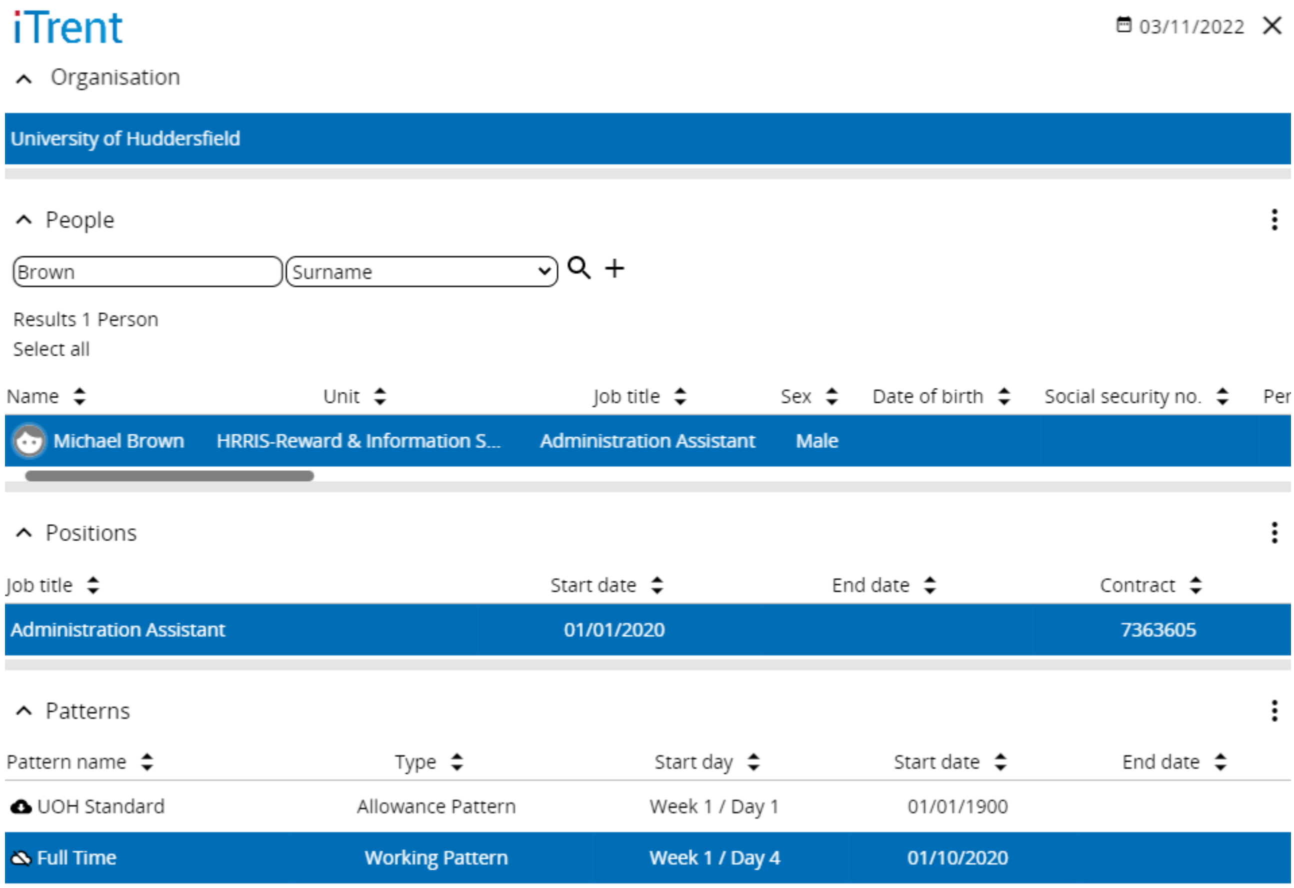
This will open the summary page for that person. At the bottom of the page there is a "Links" section, click on the Working Pattern button and the working pattern options will expand.

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.

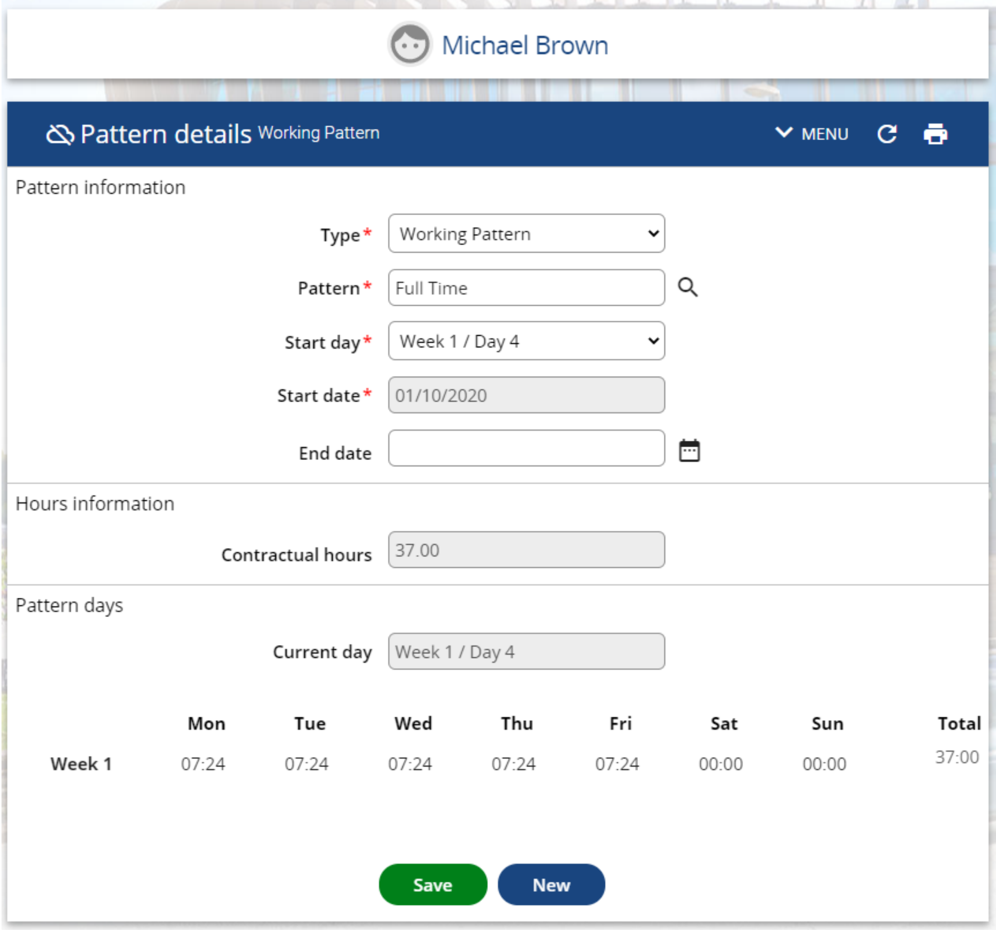


Select the relevant position and the working patterns for that position will be available. The working pattern at the bottom of the list should be the latest working pattern and you will be able to see the current working pattern using the Start Date and the End Date.

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.



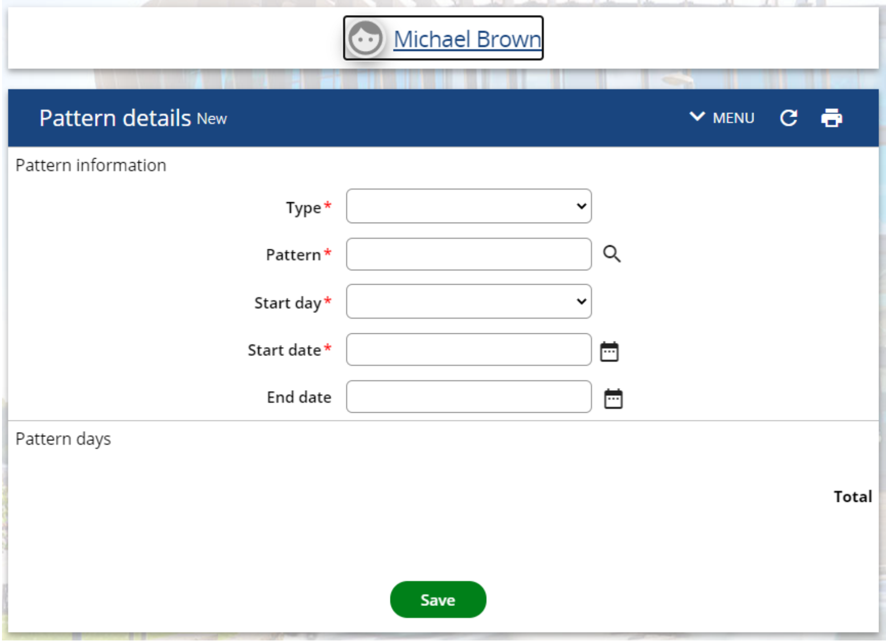
On this page you can see the number of contracted hours and see how those hours are distributed over a working week. In the image above, this shows somebody who works for 37 hours from Monday to Friday, and so each day has 7 hours and 24 minutes.

Changing a Working Pattern

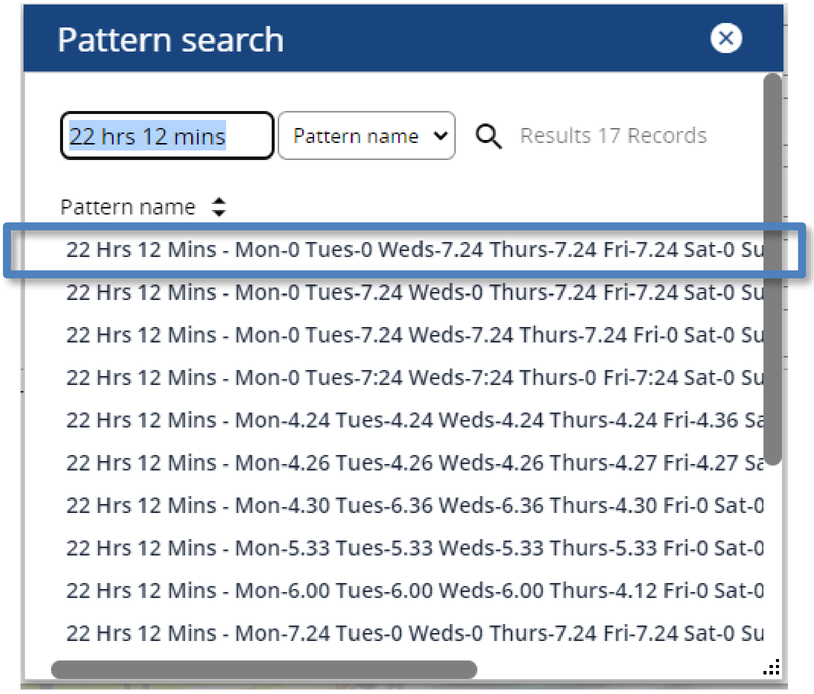
If one of your reportees has a change in their working pattern, you will need to update their working pattern in iTrent. It is important that this is completed as the working pattern is used to calculate their annual leave and sickness entitlement.

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 reportees 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.



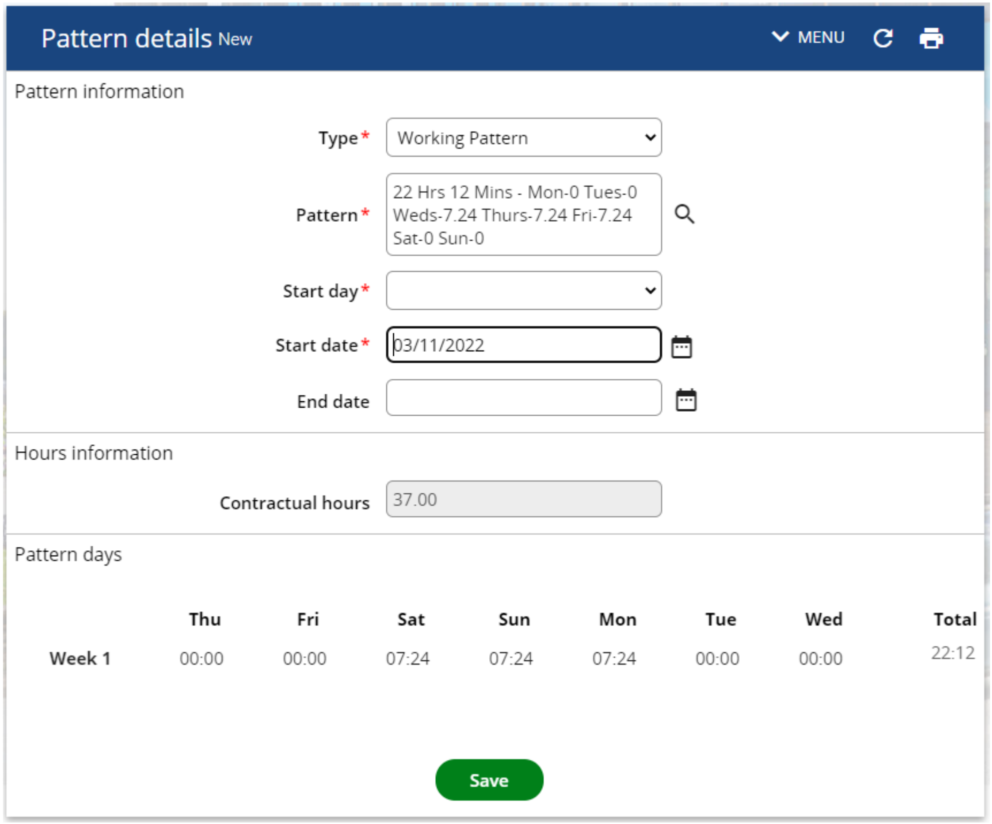
If the working pattern you need is not available, please contact myhr@hud.ac.uk for assistance.

The “Pattern day” section of the Pattern details page should have now been populated.

Pattern days

	Day1	Day2	Day3	Day4	Day5	Day6	Day7	Total
Week 1	00:00	00:00	07:24	07:24	07:24	00:00	00:00	22:12

Enter the date that the new working pattern will begin in to 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 3rd November 2022 is a Thursday and so the *Start day* field should be Week 1 / Day 4. If the *Start date* had been 4th November 2022 then the *Start day* would be Week 1 / Day 5 (Friday).

The "Pattern days" section of the page should update again with the working pattern now being correct.

Pattern days

Current day: Week 1 / Day 4

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	00:00	00:00	07:24	07:24	07:24	00:00	00:00	22:12

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

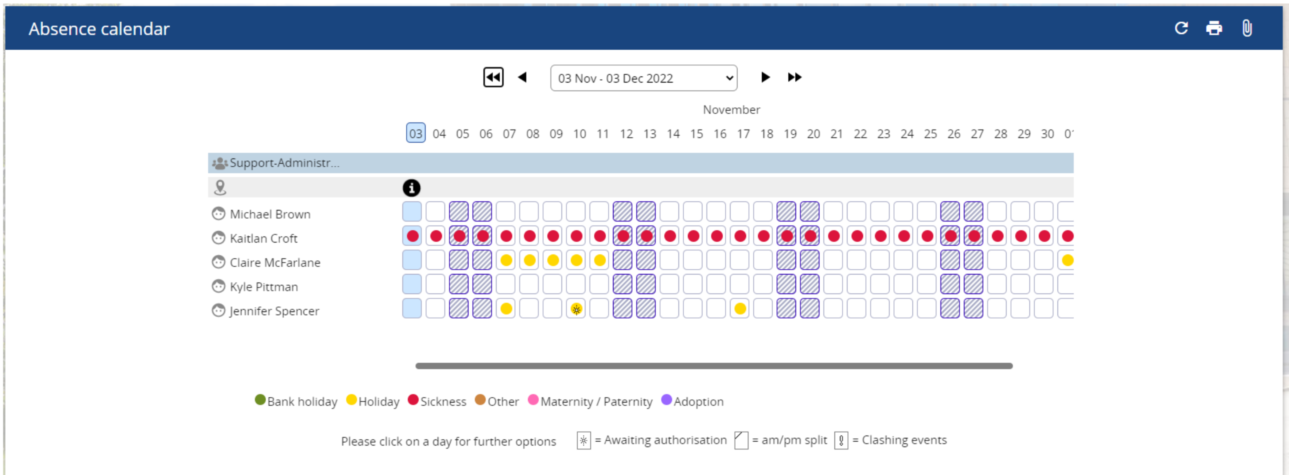
If you have an employee that works less than 52 weeks per year, you should follow the steps above and add a new working pattern using the pattern name "Non-Working Period" for the dates the employee is not contracted to work. This ensures that if they work during a period which contains a bank holiday 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.

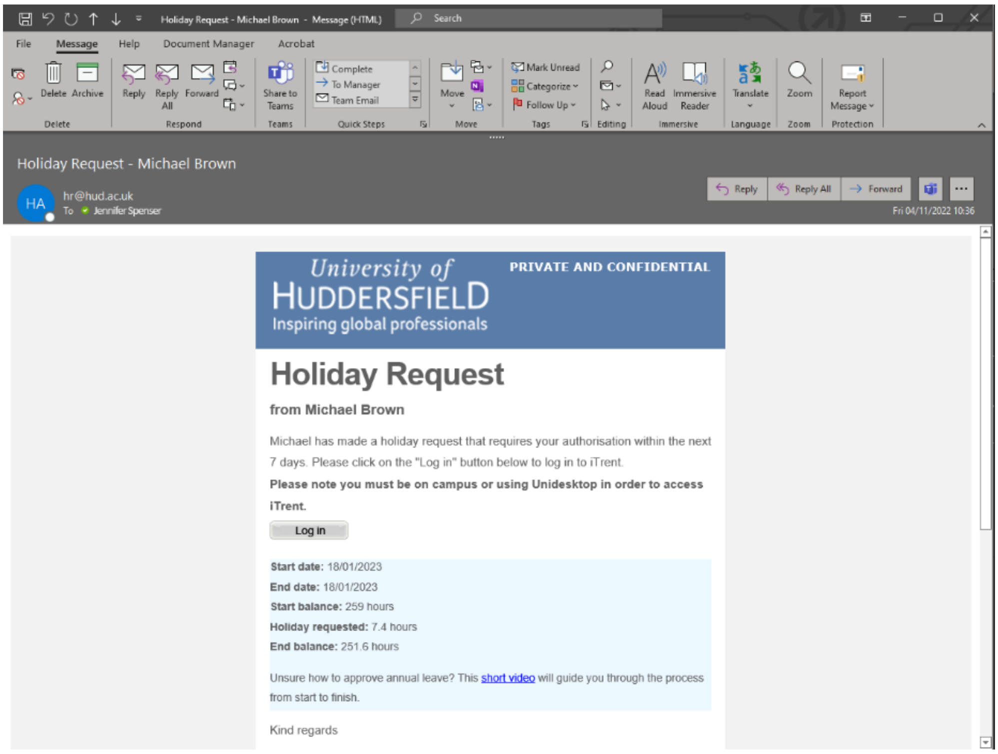
Clicking on this button will load the Absence calendar page which will show the next 14 days and any absence along with the absence type during that time:



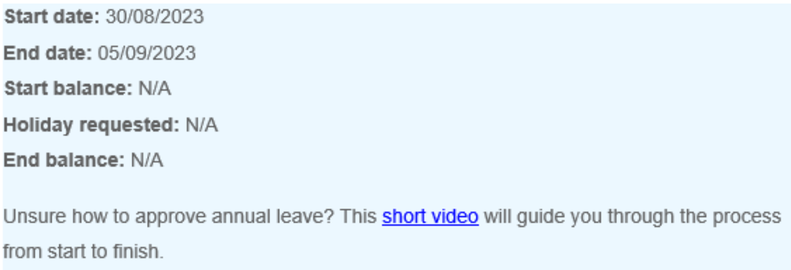
Annual Leave

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.



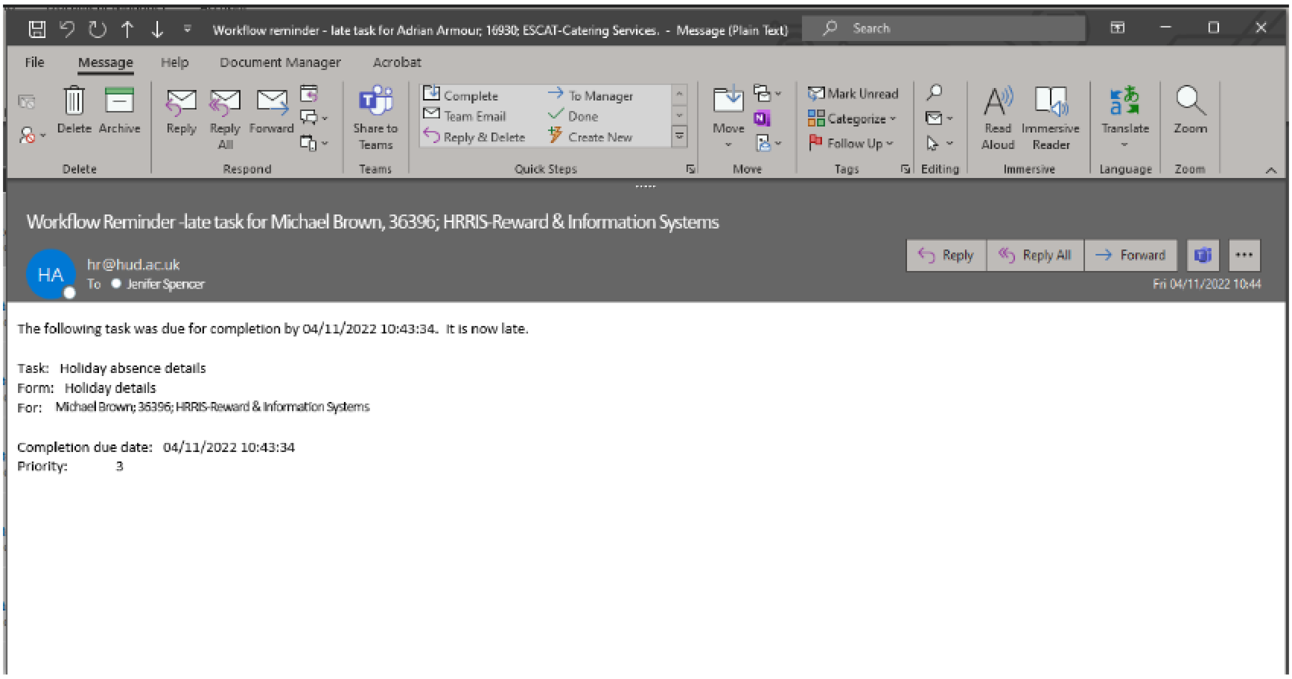
If the annual leave request spans over two different annual leave periods (i.e. the request runs from August in to September) the annual leave entitlement will not be available in the email, as shown in the example below.



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

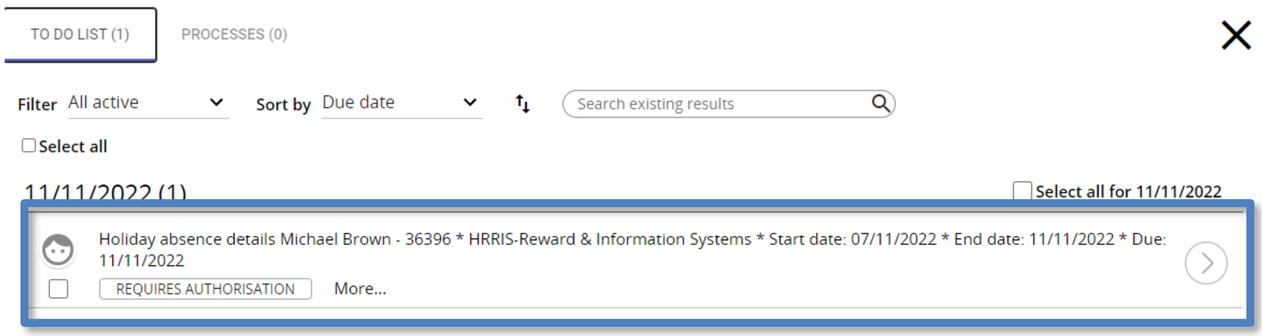
Once you have received this email, you will need to log in to iTrent in order to either authorise or reject the request.

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.

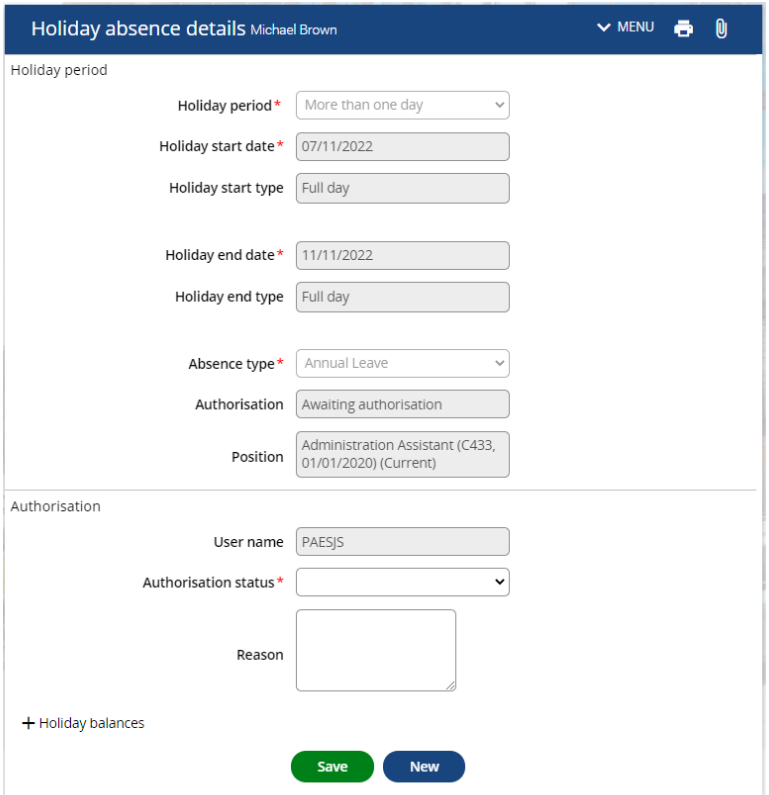


Authorising/Rejecting Annual Leave

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 of your outstanding tasks, including 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.



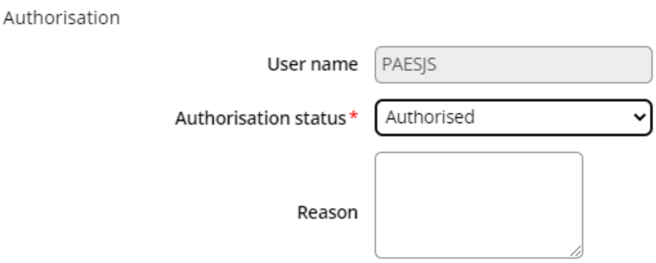
At the bottom of this page you are able to review their remaining annual leave entitlement for the annual leave period by expanding the "Holiday balances" section of the page.

— Holiday balances

Administration Assistant - Annual Leave Support

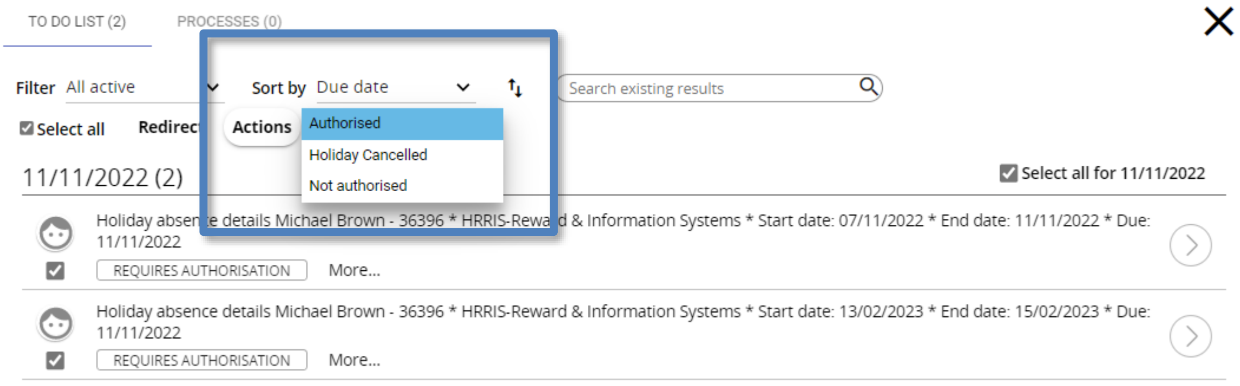
Holiday period	Entitlement	Taken	Scheduled	Balance
01/09/2021 - 31/08/2022	362.6 H	325.6 H	0 H	37 H
01/09/2022 - 31/08/2023	362.6 H	7.4 H	133.2 H	222 H
01/09/2023 - 31/08/2024	222 H	0 H	0 H	222 H

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.



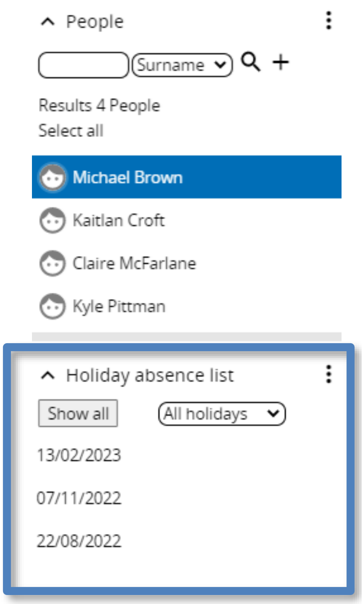
If a reportee requests a period of annual leave that will exceed their remaining annual leave entitlement, the option to authorise that period of annual leave will not be available. If you receive such a request and there is a valid reason for exceeding the current annual leave period entitlement, please 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

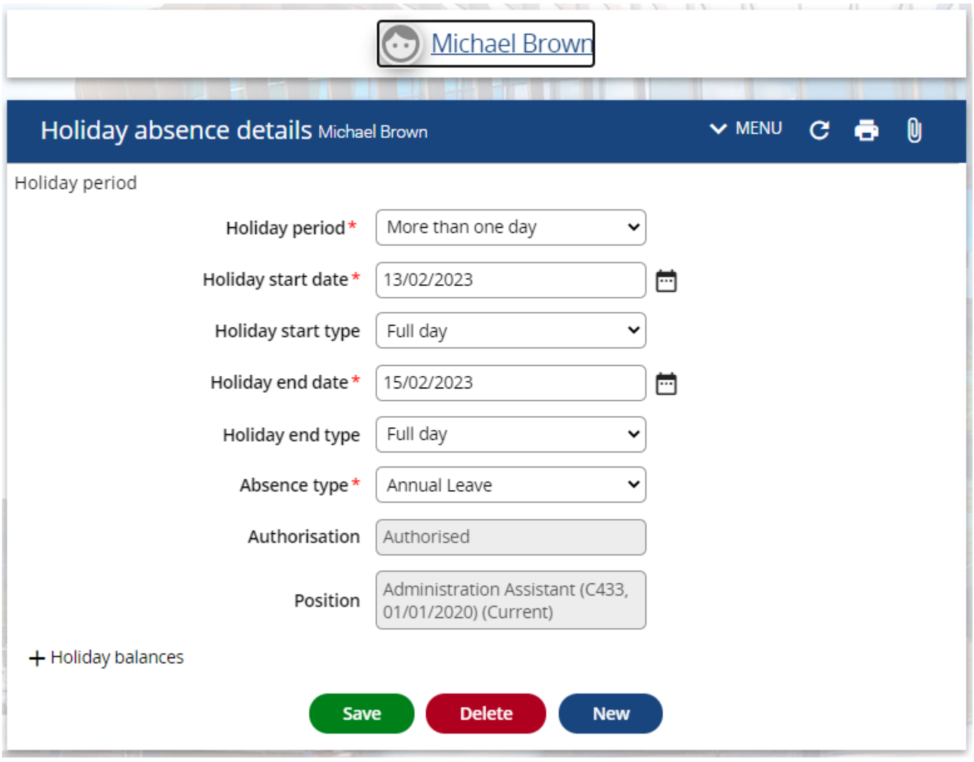
Your reportees can make amendments to an annual leave request or cancel a period of annual leave via MyHR prior to the first day of their leave. If after this time a reportee believes that one of their annual leave records is incorrect, then they may contact you and ask for the details to be corrected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

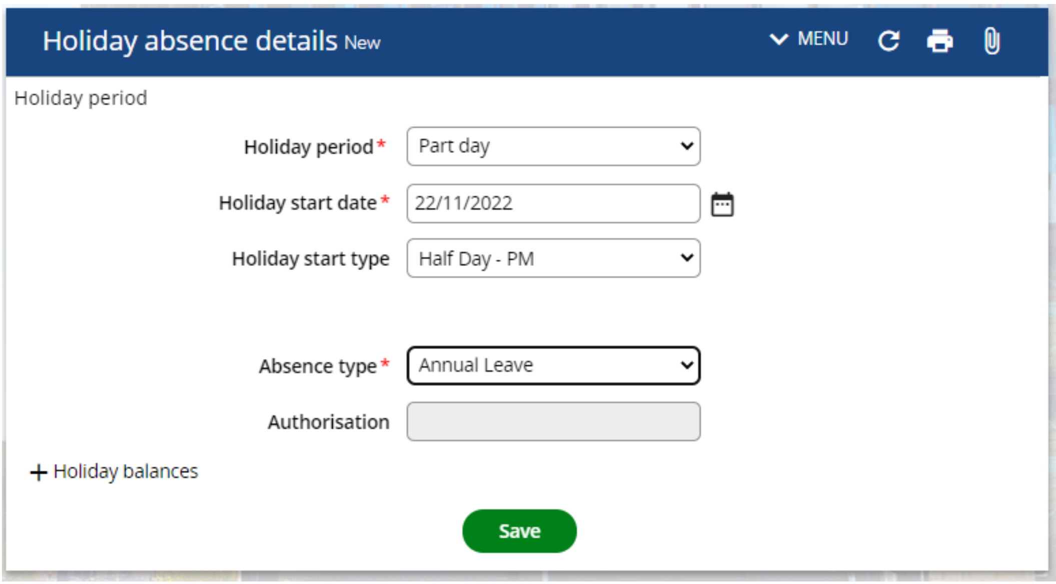
Entering a new period of Annual Leave

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.

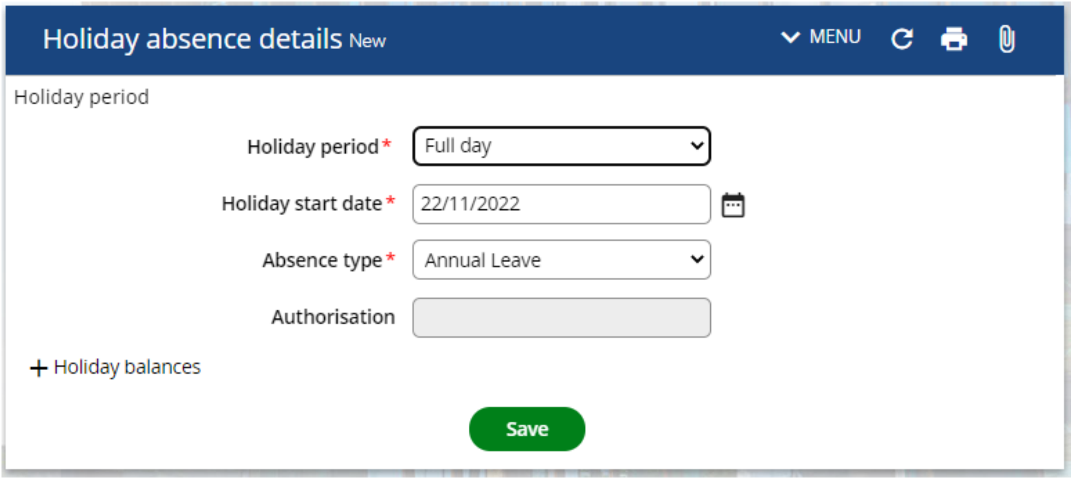
Click on the "Add New Holiday/Flexi Leave" button and a blank *Holiday absence details* page will open.

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.

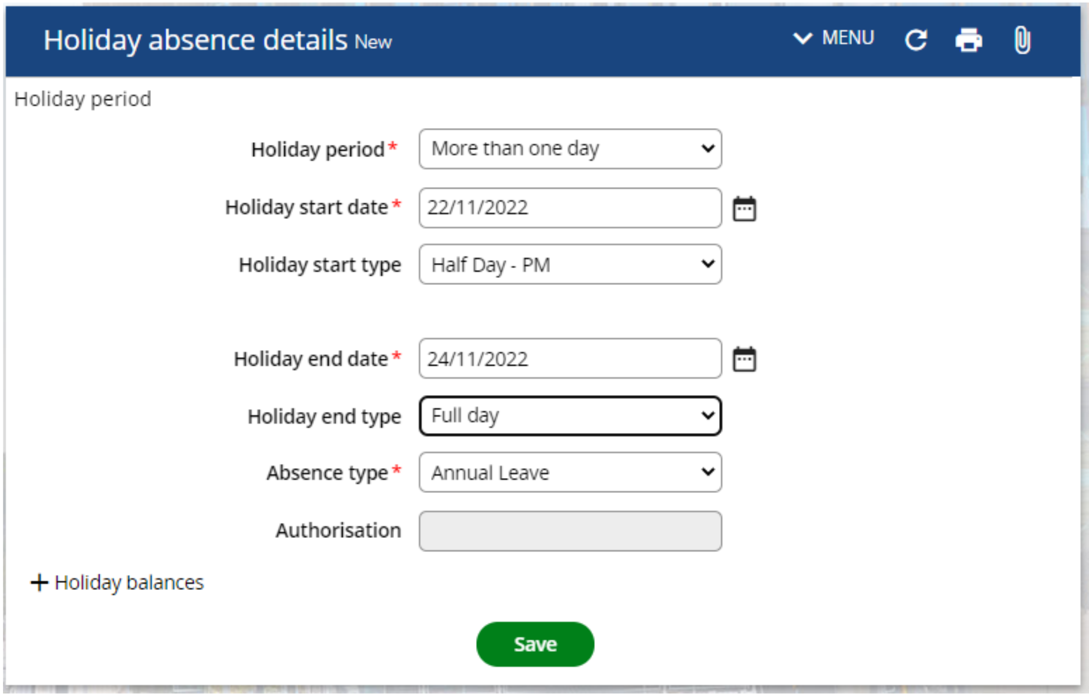
Please note: If the employee works on a part time basis and would normally only work in the morning or afternoon, you should select Full day as the *Holiday* period when entering a new period of annual leave otherwise the number of hours deducted from their annual leave entitlement will be incorrect.



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 of Half Day – AM as the *Holiday end type*. Select Annual Leave as the *Absence type* and then click on Save.

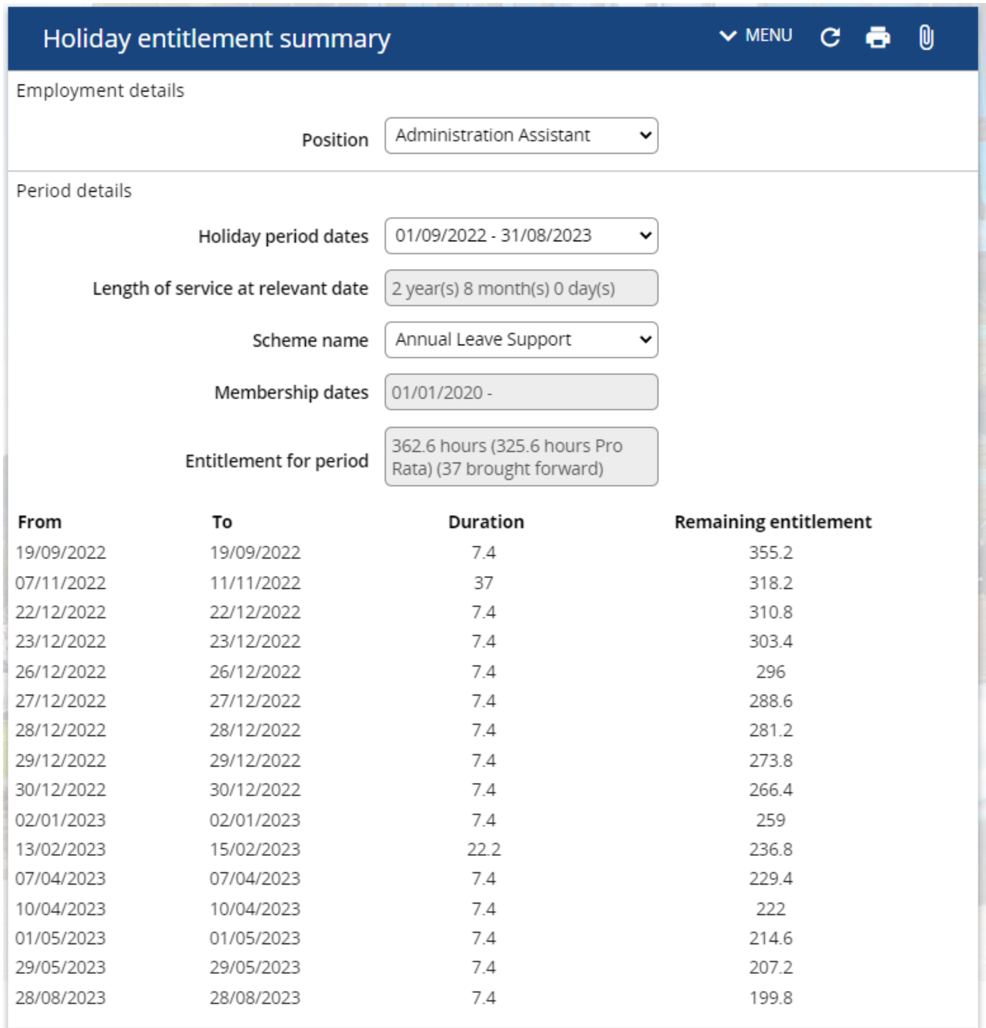


Reviewing Annual Leave

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.



Holiday entitlement summary

MENU

Employment details

Position: Administration Assistant

Period details

Holiday period dates: 01/09/2022 - 31/08/2023

Length of service at relevant date: 2 year(s) 8 month(s) 0 day(s)

Scheme name: Annual Leave Support

Membership dates: 01/01/2020 -

Entitlement for period: 362.6 hours (325.6 hours Pro Rata) (37 brought forward)

From	To	Duration	Remaining entitlement
19/09/2022	19/09/2022	7.4	355.2
07/11/2022	11/11/2022	37	318.2
22/12/2022	22/12/2022	7.4	310.8
23/12/2022	23/12/2022	7.4	303.4
26/12/2022	26/12/2022	7.4	296
27/12/2022	27/12/2022	7.4	288.6
28/12/2022	28/12/2022	7.4	281.2
29/12/2022	29/12/2022	7.4	273.8
30/12/2022	30/12/2022	7.4	266.4
02/01/2023	02/01/2023	7.4	259
13/02/2023	15/02/2023	22.2	236.8
07/04/2023	07/04/2023	7.4	229.4
10/04/2023	10/04/2023	7.4	222
01/05/2023	01/05/2023	7.4	214.6
29/05/2023	29/05/2023	7.4	207.2
28/08/2023	28/08/2023	7.4	199.8

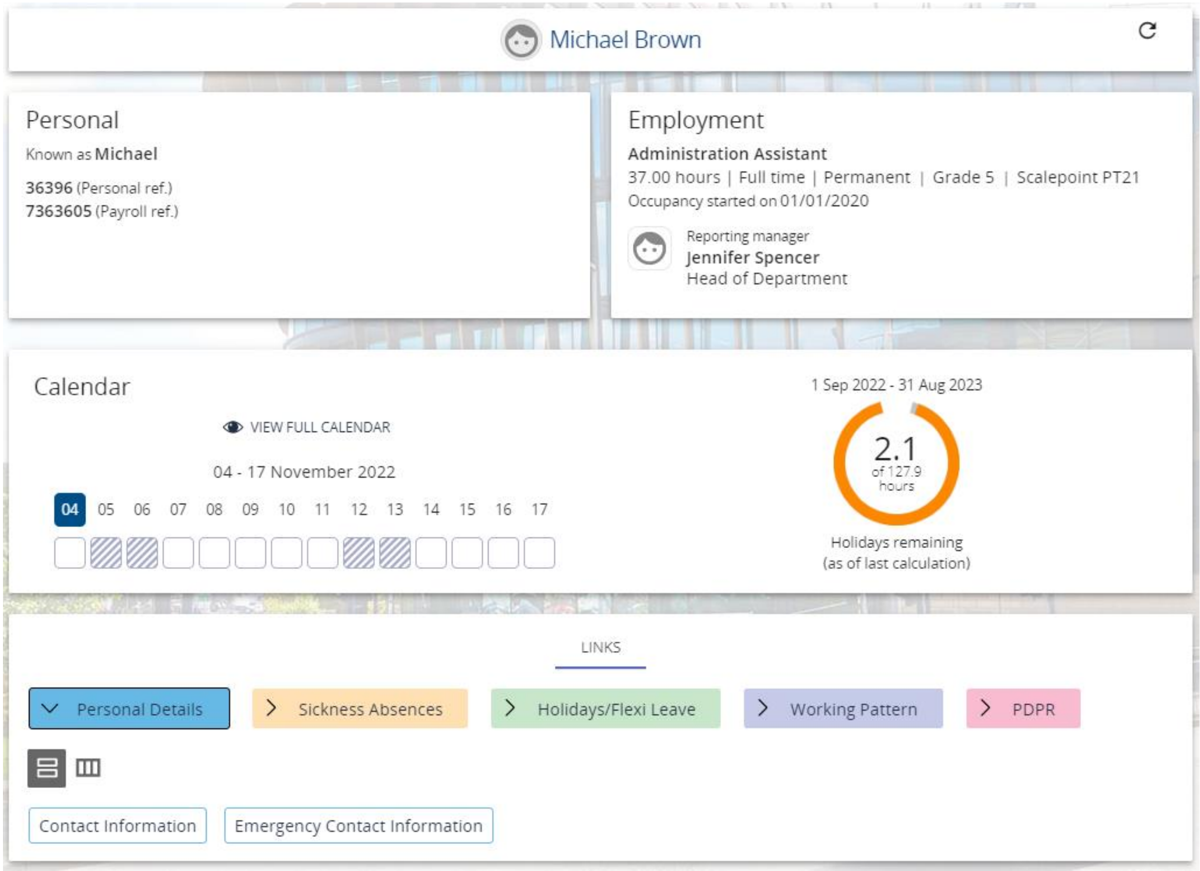
On this page you can see the total annual leave entitlement for the period (in hours) and a list of annual leave that has been taken, including the dates and the total amount of time that was taken. The remaining entitlement for the last instance of annual leave in this list is the total remaining annual 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.

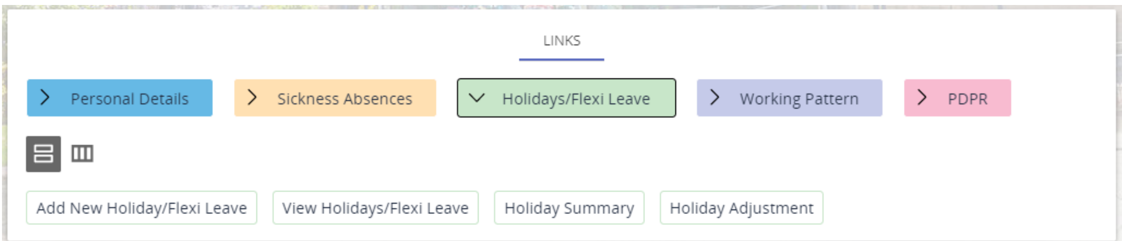
Entering an Annual Leave Entitlement Adjustment

If you have a member of staff who is unable to book their remaining leave as it does not round 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.

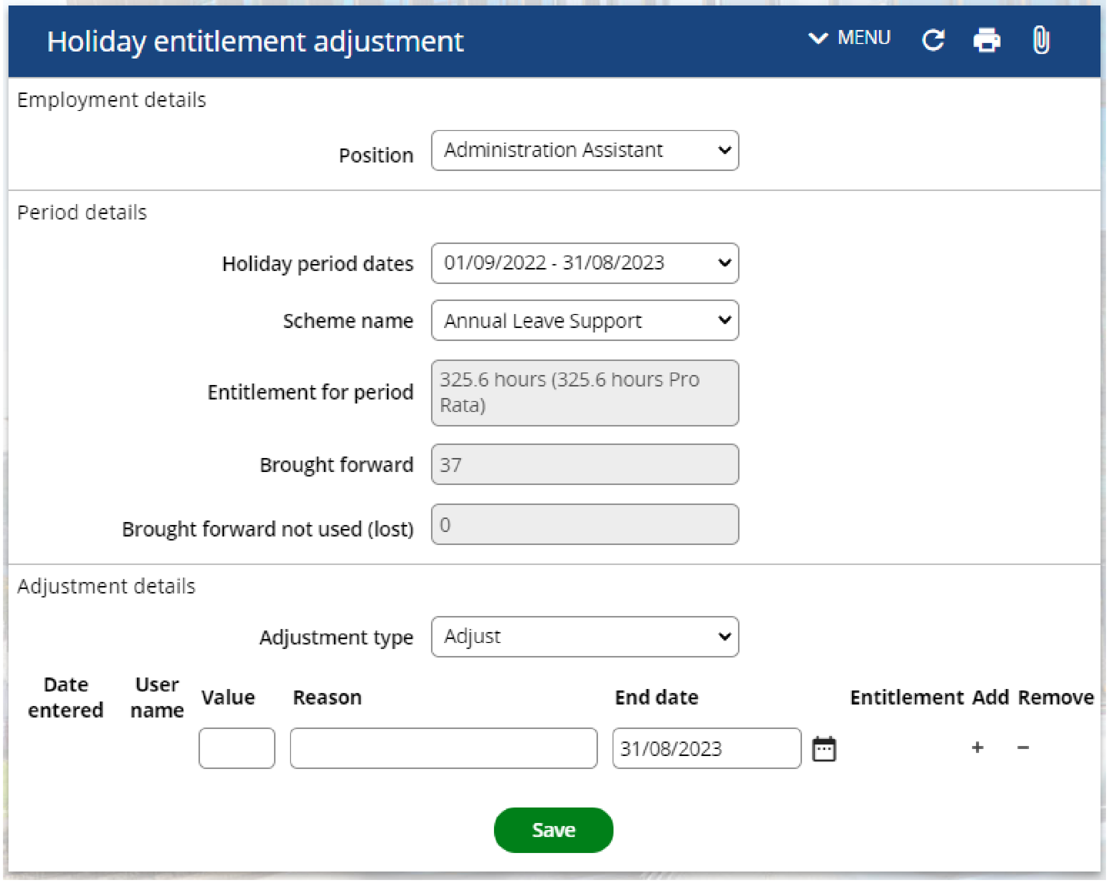
To do this, sign in to iTrent and click on the "My Staff" button on the iTrent home page and select the staff member you wish to look at from the list or search for the staff member as described in the My Staff section of this guide. This will open the summary page for that person.



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 deails 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 added to their entitlement 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 number of hours entered as a holiday adjustment 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 their holiday entitlement will be adjusted to include the time you have added, giving them enough time to book either a full or half day and use all of their remaining annual leave entitlement.

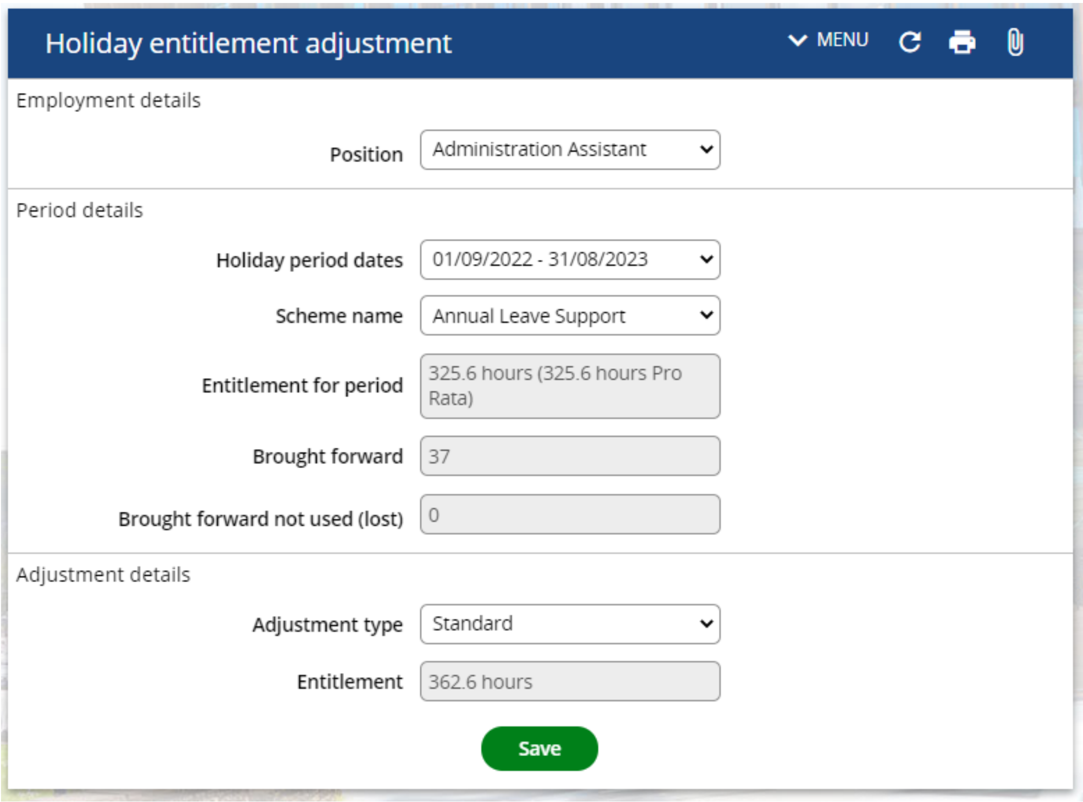
Checking Carry Forward

Staff can carry forward up to 5 days unused leave to the next holiday year (pro rata for part time staff) which should be taken within the first 4 calendar months of the new leave year.

Once a new holiday year starts, any remaining annual leave entitlement from the previous year up to their maximum amount will be automatically carried forward and will be included in the overall balance for the new holiday year.

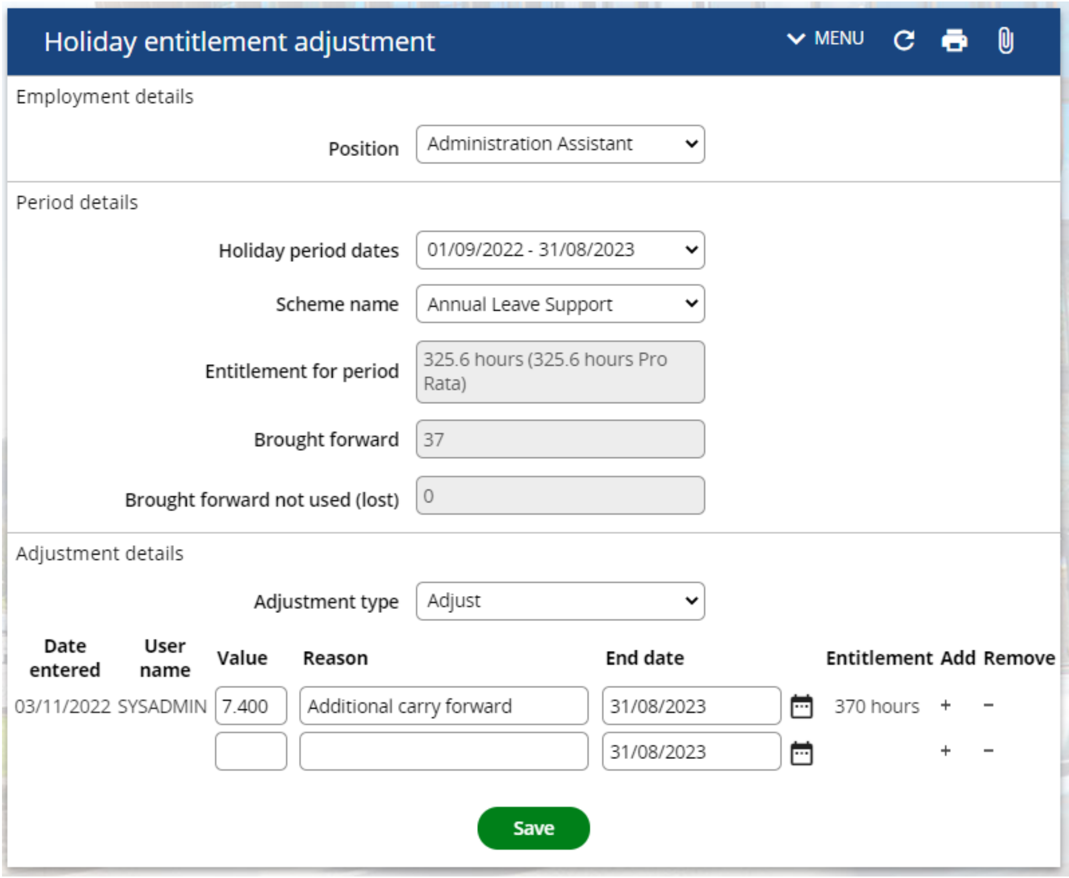
You can check how much annual leave entitlement has been carried over for staff that reports to you by checking their Holiday entitlement adjustment page in iTrent. To do this, click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff 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 Holiday Adjustment button to open Holiday entitlement adjustment page.



The number of hours carried over is displayed in the *Brought Forward* field. Any carry forward must be used before the end of December. If this has not been used by this time, the time will be lost and the number of hours that were lost will appear in the *Brought forward not used (lost)* field.

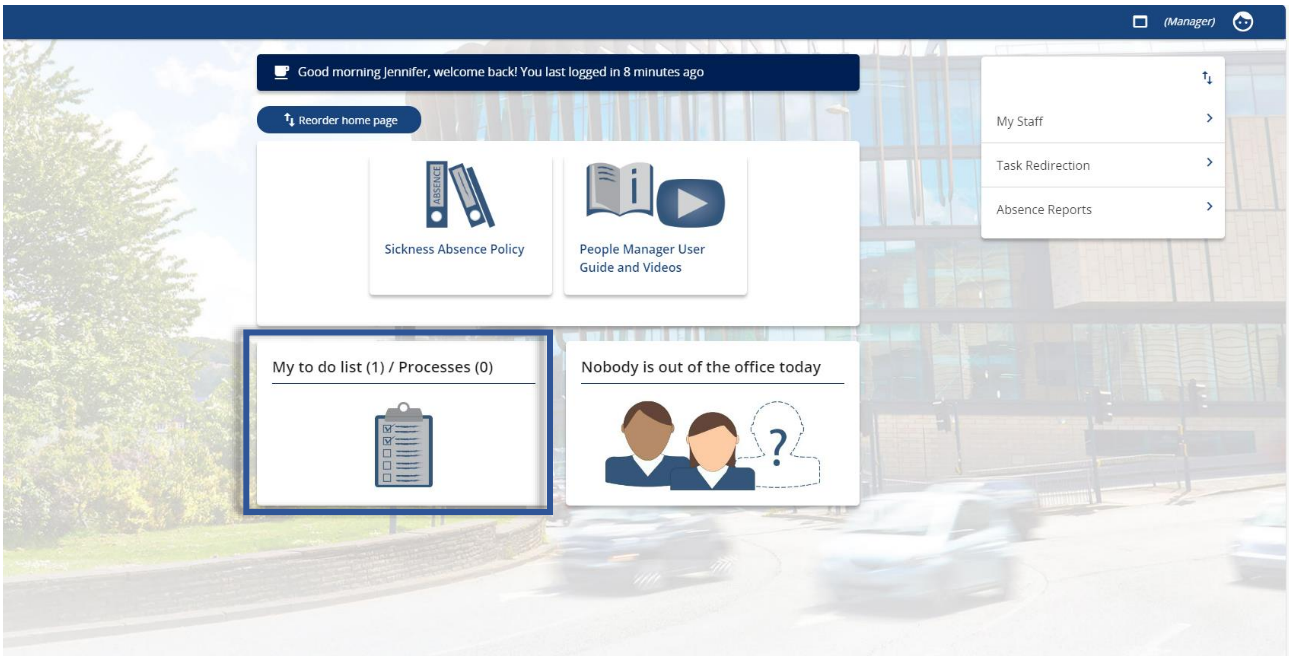
In certain circumstances a member of staff may have carried forward more than the standard allowance (e.g. if they have been on maternity leave or a period of long-term sickness). In this case, their standard carry forward would be included in the *Brought Forward* field, and the additional time would be shown as an annual leave adjustment as below.



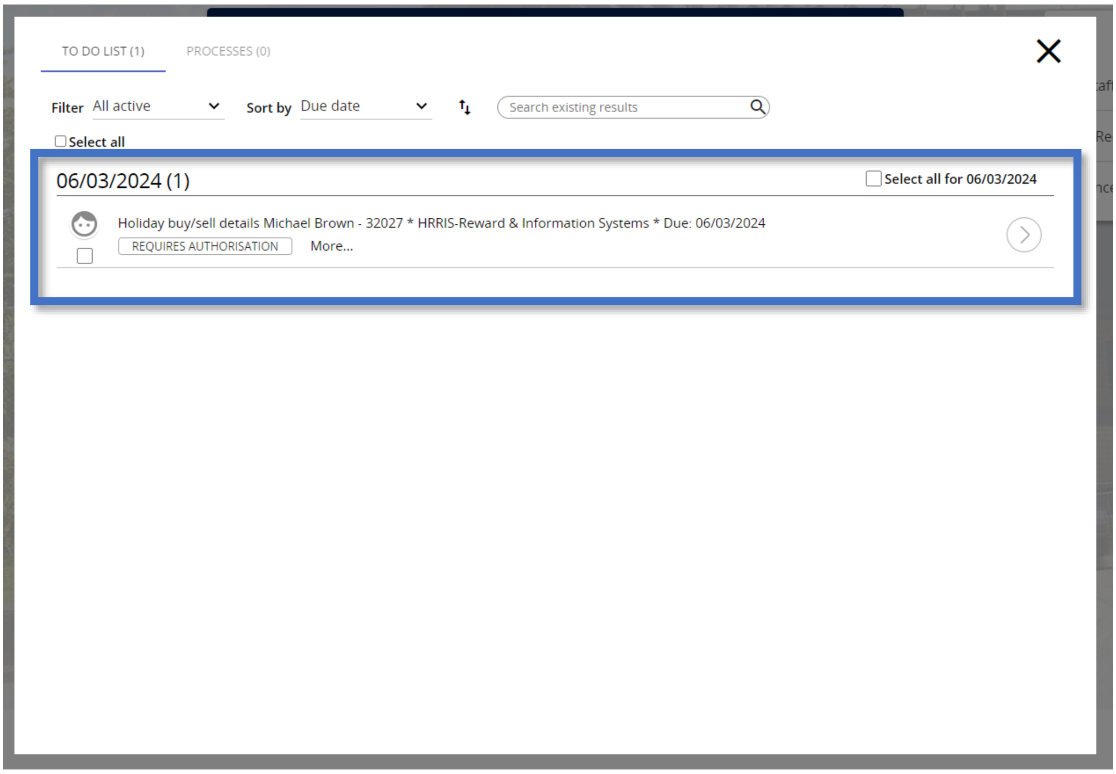
Authorising/Rejecting A Request To Buy Additional Annual Leave

Your staff can make a request to buy one week of additional annual leave (pro rata for part time staff) for each holiday year using MyHR. When they do this, you will receive an email notification informing you that they have made this request, and you will need to either approve or reject this request via iTrent. These requests must be made during the available window for each holiday year. Staff who work less than 52 weeks of the year are not eligible to buy additional holiday and so are not able to do this.

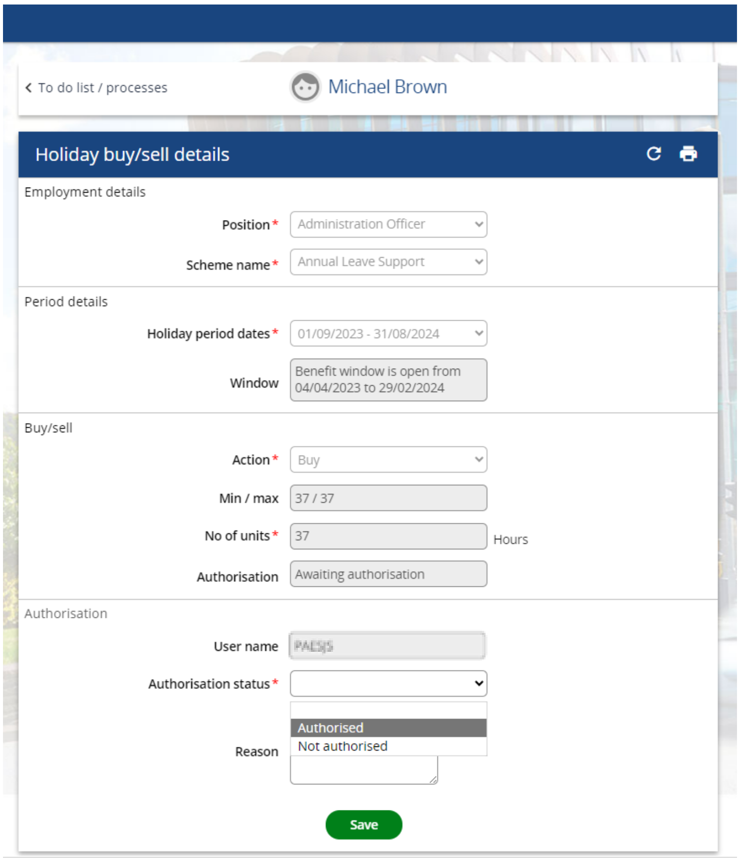
To respond to a request to buy annual leave, sign in to iTrent and go to the home page and click on the “My to do list/Processes” button.



Clicking on this button will open your to do list where you will see all of your outstanding tasks, including new requests to buy annual leave.



On your To do list, click on the “Holiday buy/sell details” task and this will open the Holiday buy/sell details page.



To Authorise/Reject the request to buy holiday, select either “Authorised” or “Not Authorised” from the *Authorisation status* drop down list. If you are not authorising a request you should include the rationale in the *Reason* box which will be included in the email notification sent to the reportee.

Click Save and 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.

Flexi Leave

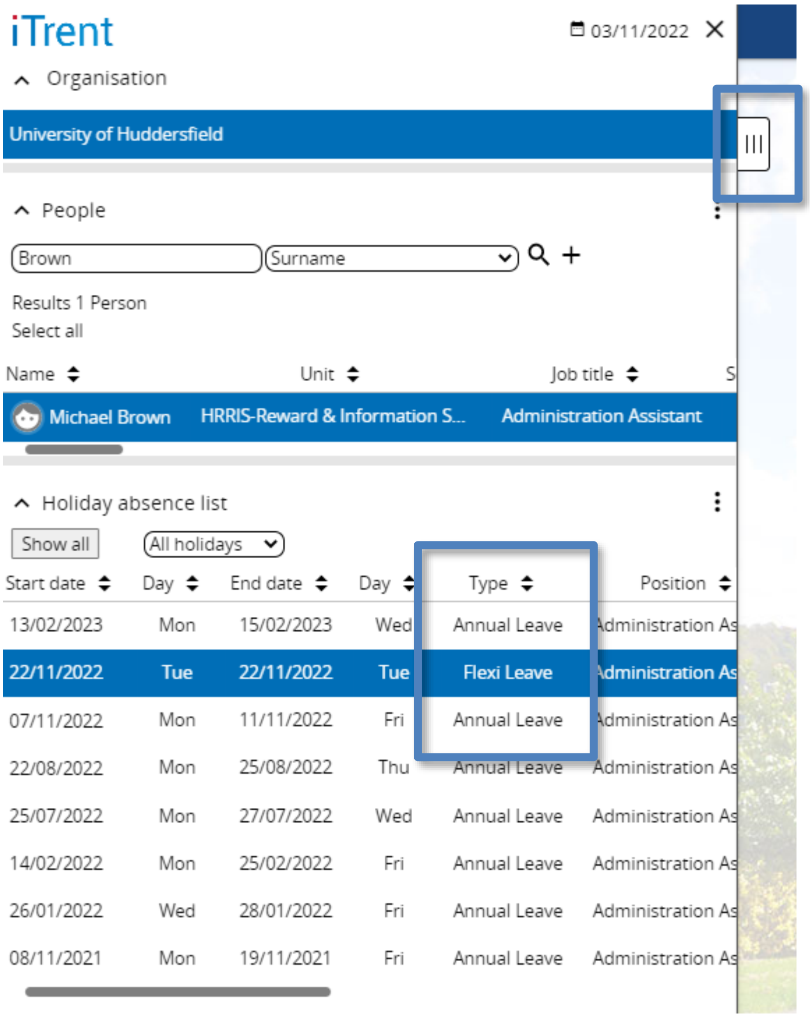
Using iTrent, you are able to both view previous instances of flexi leave, as well as enter a new flexi leave period for any member of staff that reports in to you.

Viewing a Previous Flexi Leave Record

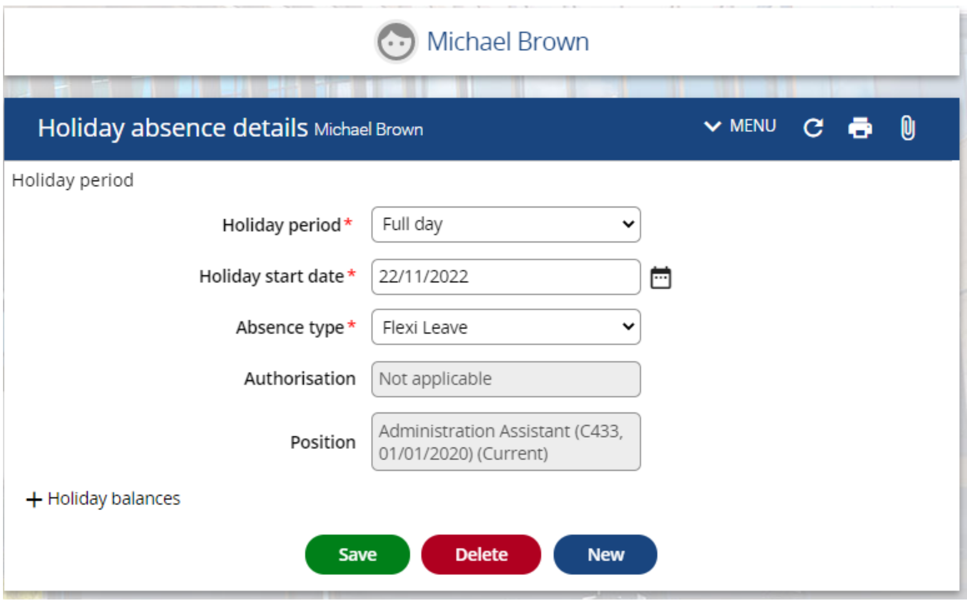
To view previous flexi leave records for a staff member, go to the home page and click on the “My Staff” button. Select the staff member you wish to look at from the list or search for the staff member as described in the My Staff section of this guide.

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.



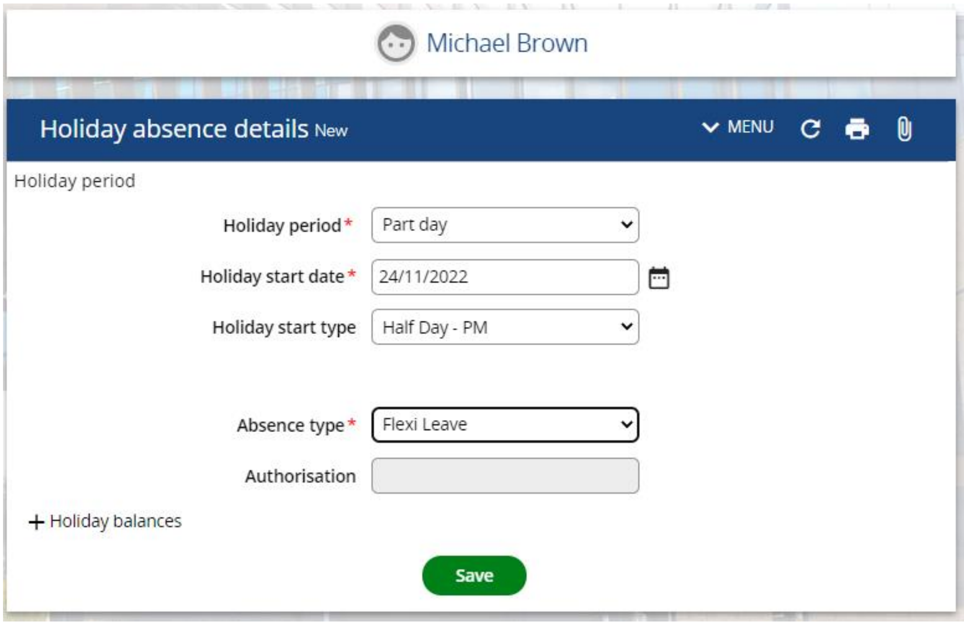
Note: The flexi leave instances in this list cover the previous 12 months. If you need to see records from before this, click on the "Show all" button and the list will change to include all flexi leave records.

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.

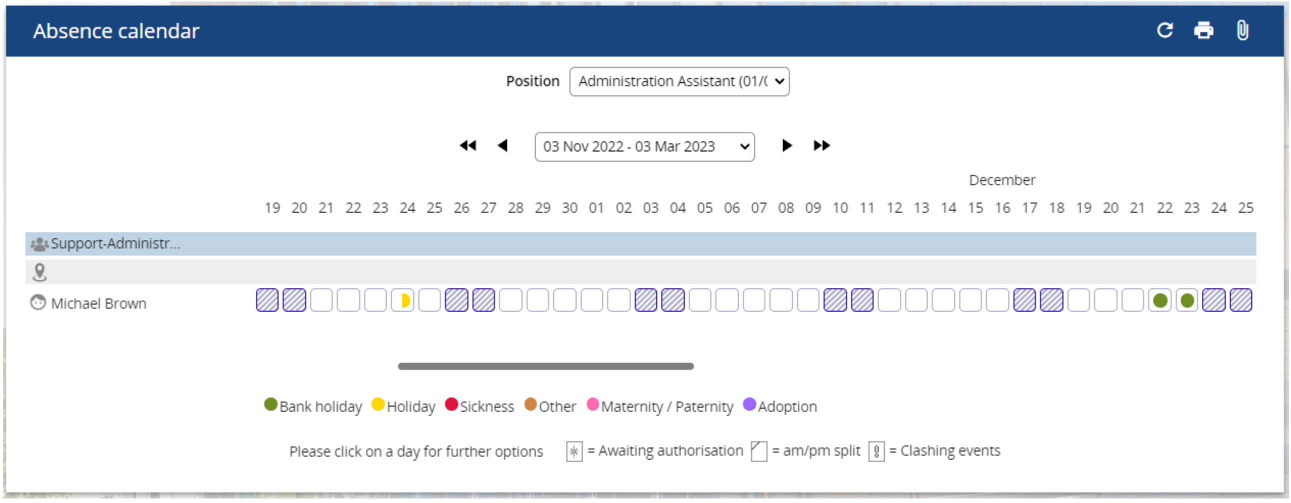
Click on the "Add New Holiday/Flexi Leave" button. This will open a blank absence details page.



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.

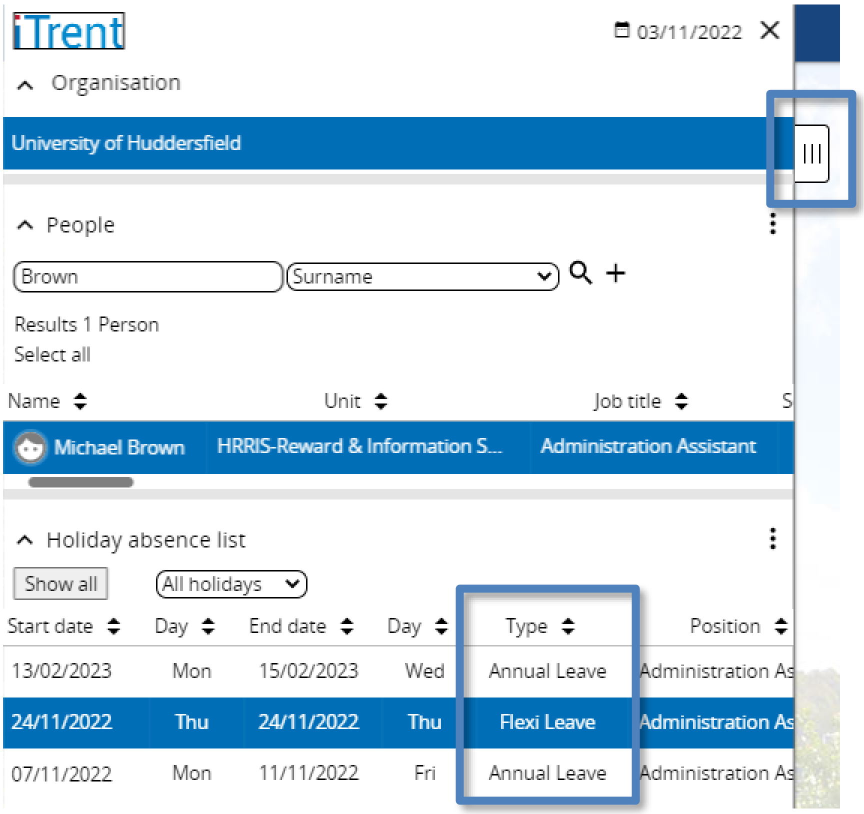
This absence will now also appear on the Absence Calendar as an "Other" absence.



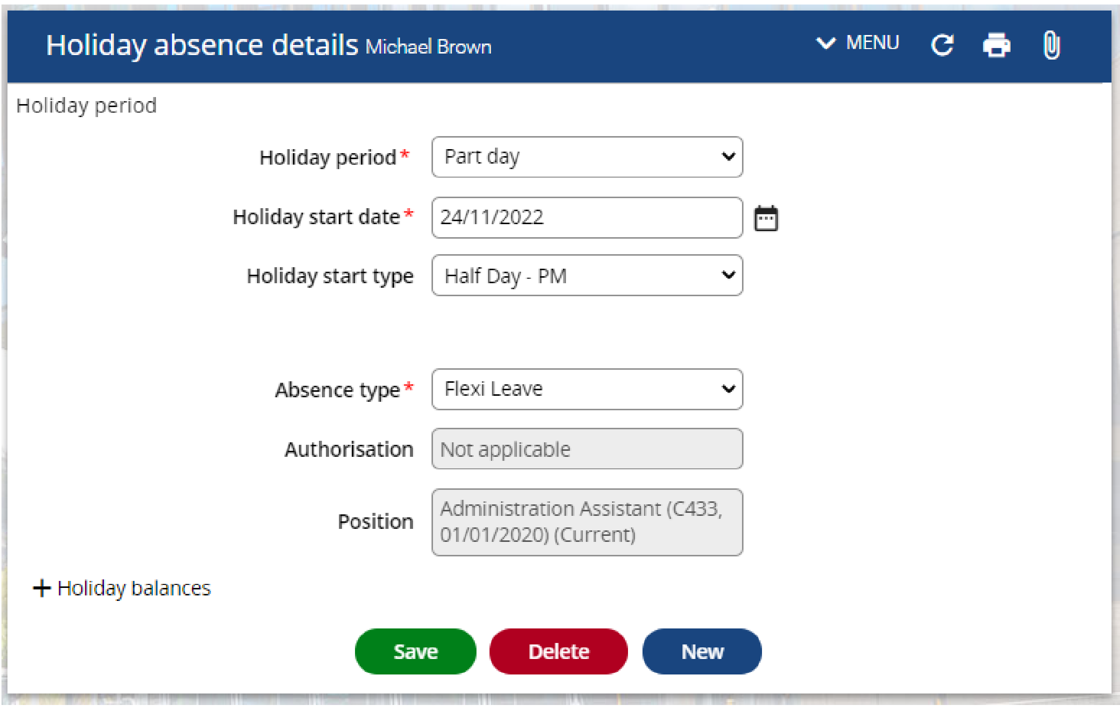
Amending or Deleting Flexi Leave

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.

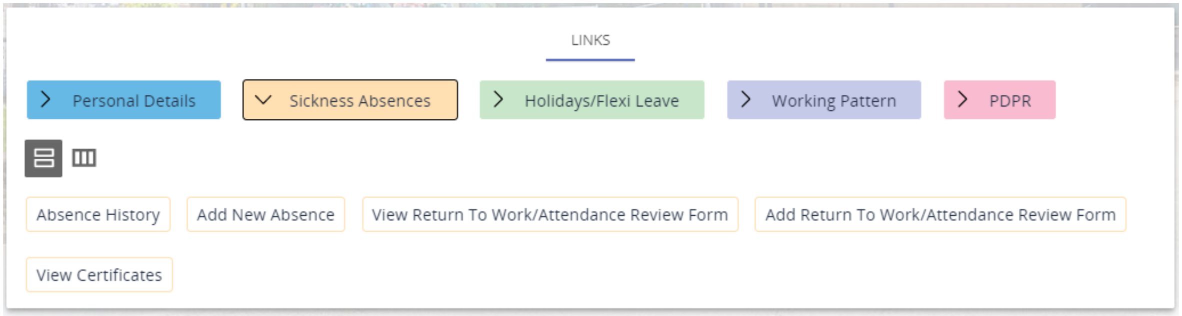
Sickness Absence

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.

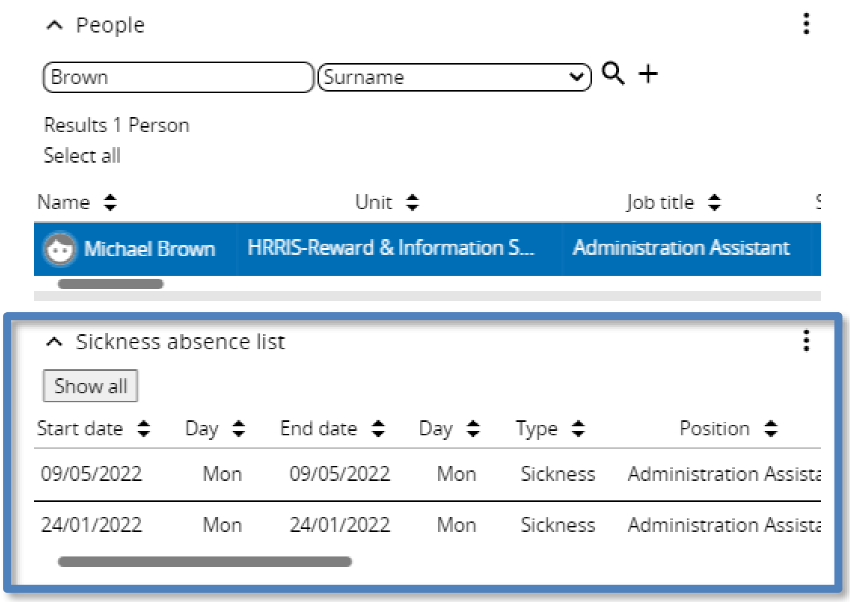
Viewing a Sickness Absence Record

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.

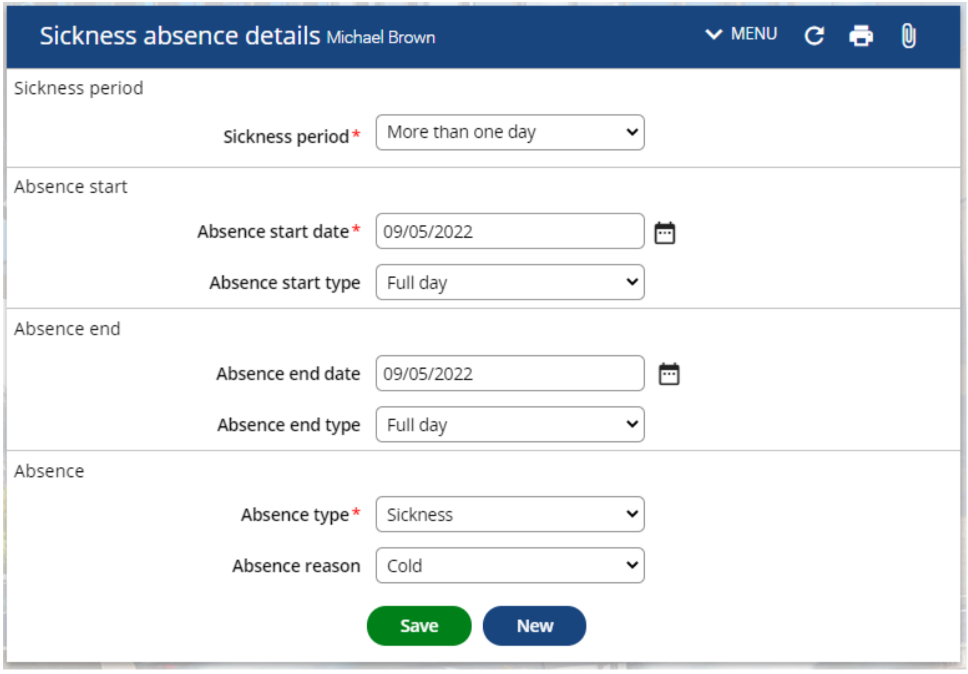
This will open the summary page for that person. At the bottom of the page there is a "Links" section, click on the Sickness Absences button and the sickness absence options will expand.



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

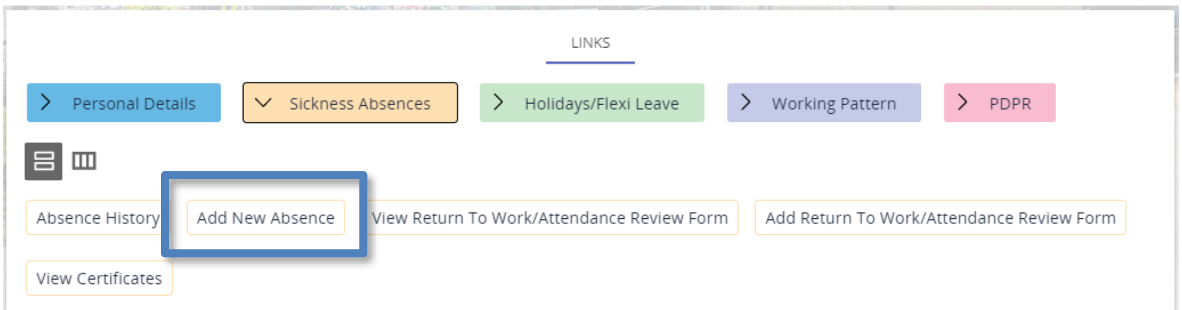
As a People Manager, you are able to use iTrent to enter a new sickness absence for a member of staff that reports in to you.

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

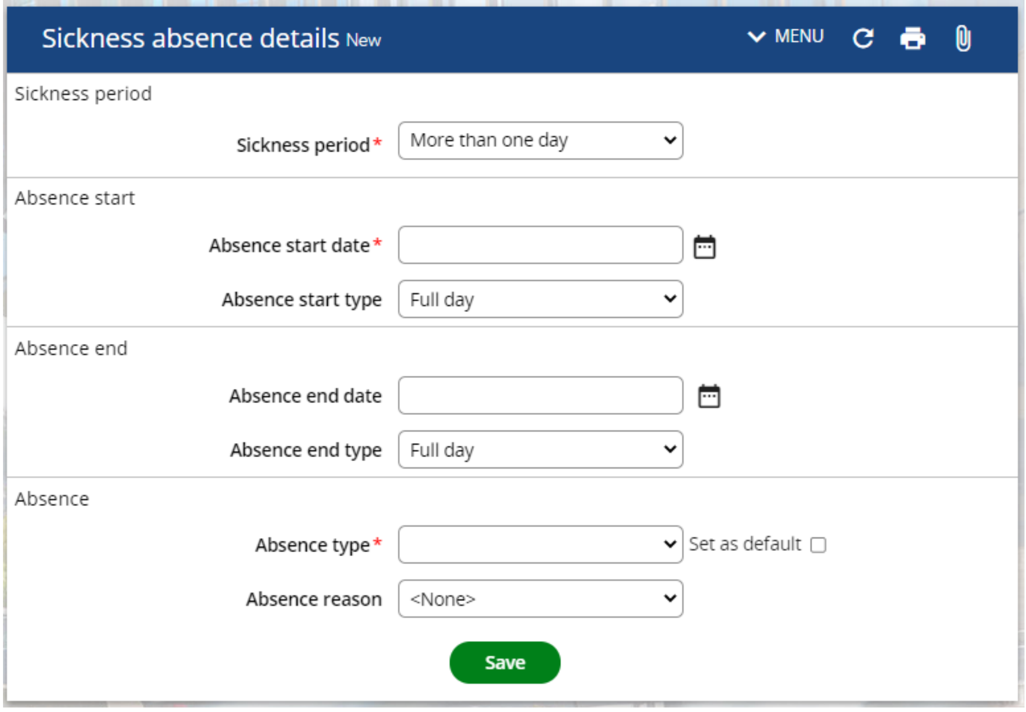
Entering a New Sickness Absence Method 1

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.



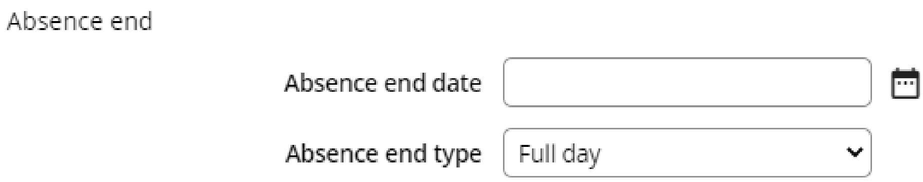
Click on the "Add New Absence" button. This will open a blank sickness absence details page. This page is split into four sections; *Sickness period, Absence start, Absence end* and *Absence*.



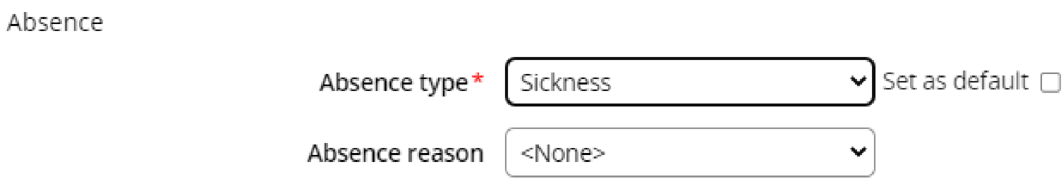
Check the *Sickness Period* section and ensure that the option *More than one day* is selected.

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'.

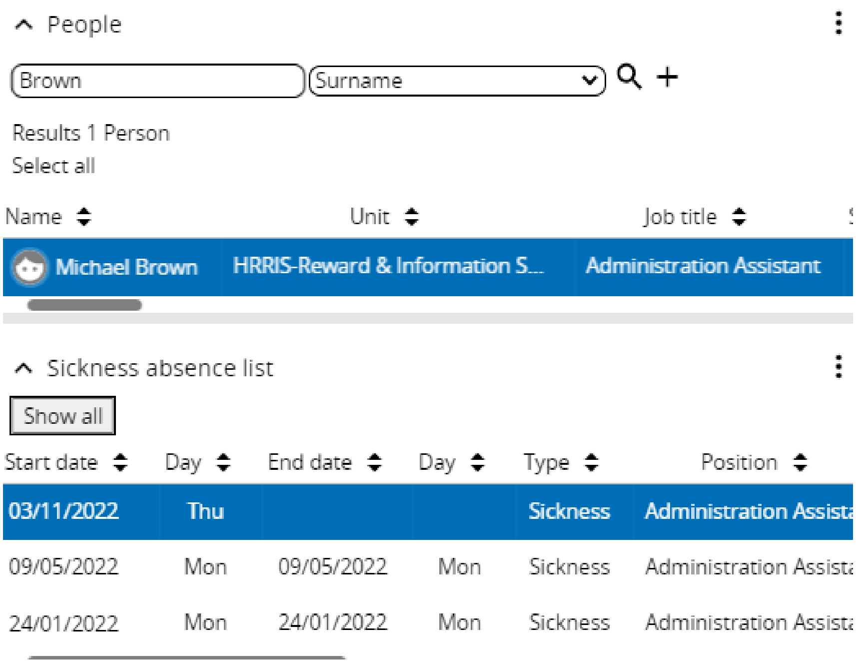
The *Absence end* section should look the same as the example below. The *Type* should be automatically set to 'Full day'. It is the employee's responsibility to update the *Date* field via MyHR when they return to work.



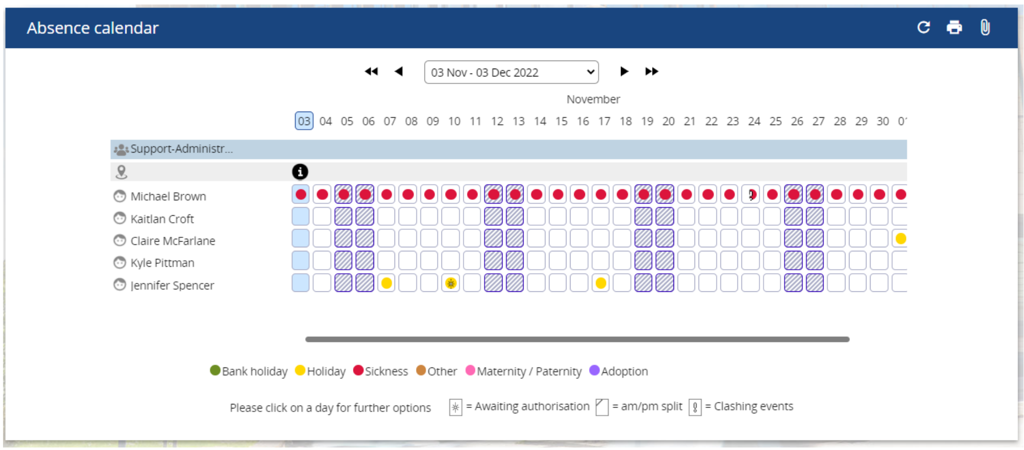
In the *Absence* section you must choose an *Absence type* of 'Sickness'. You **should not** modify the *Absence reason* and it is the employee's responsibility to update this using the MyHR website once they return to work.



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:

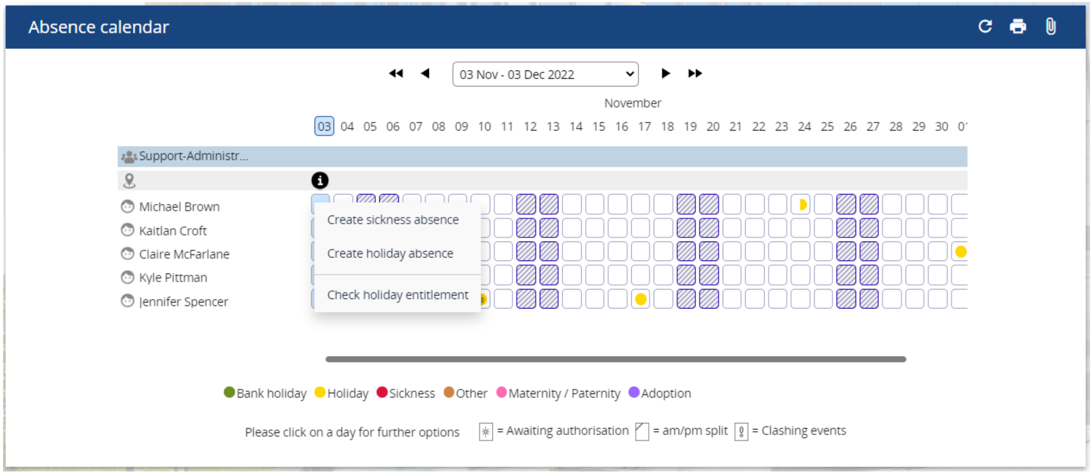


Once the member of staff has returned to work and completed the sickness record in MyHR this will be reflected on the Absence calendar and the absence history.

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.

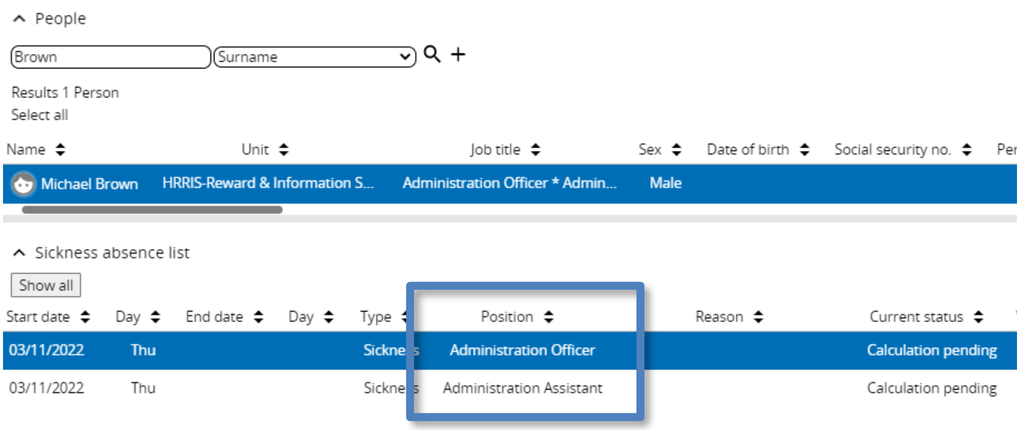
Entering a Sickness Absence for Multiple Positions

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.

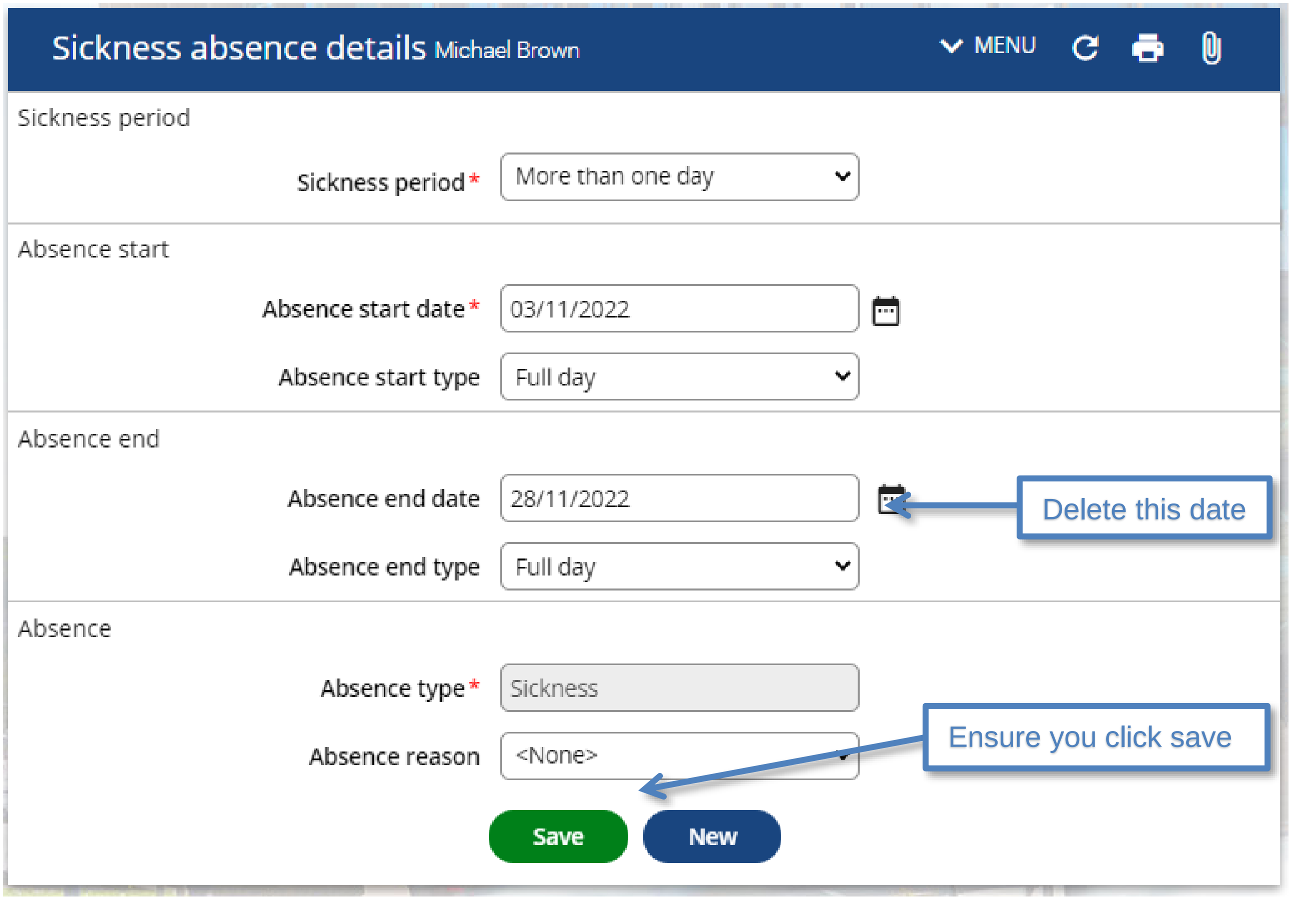
In these instances, you should select all positions that they currently hold from the ‘Position’ box. You are able to select multiple jobs by keeping hold of the Ctrl button whilst clicking on each job the absence applies to. The ‘Position’ box only shows three lines of information so you may have to 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.

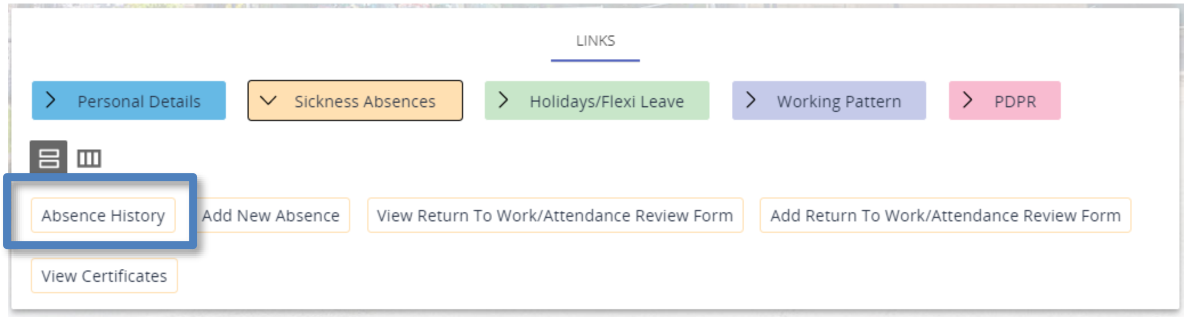
If an end date has been entered, select the absence with the end date and click on ‘Sickness absence details’ in the action pane. Then delete the end date field and save the page.



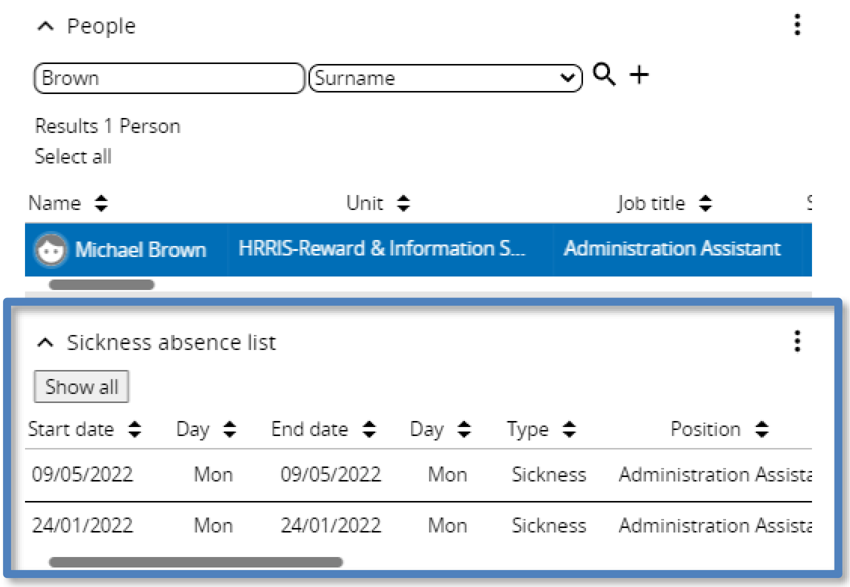
Updating a Sickness Absence Record

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.

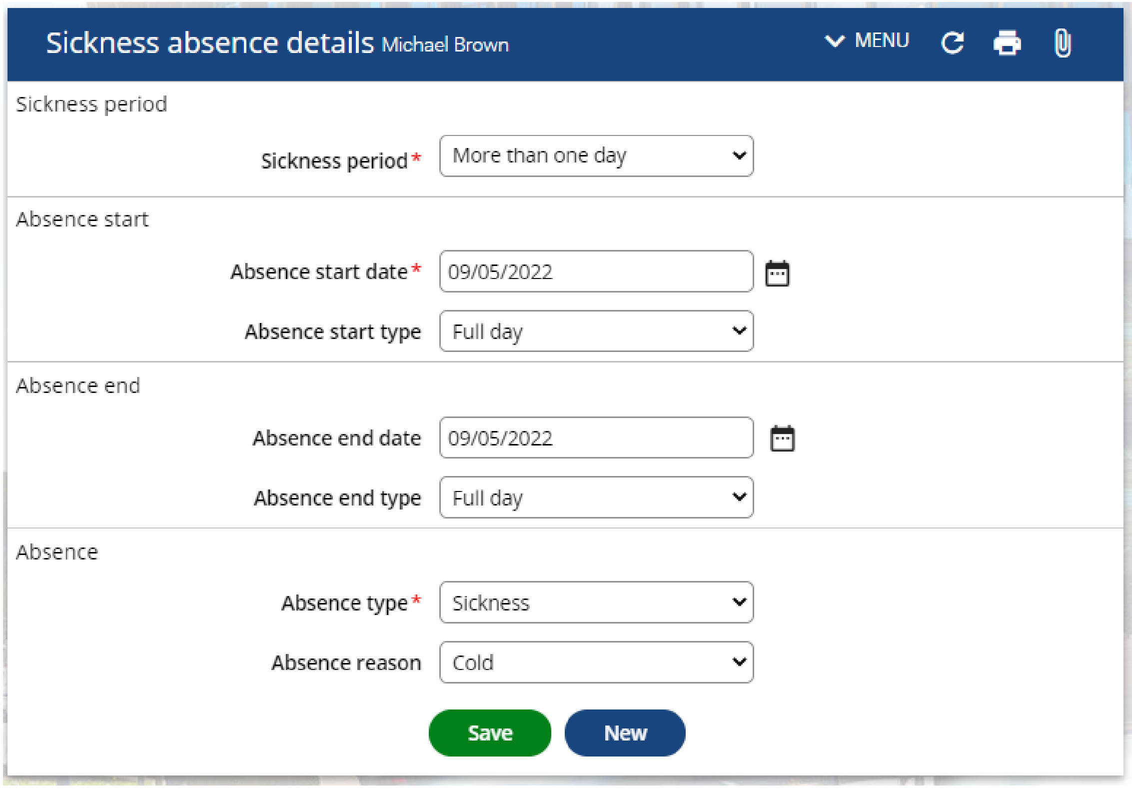
This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Sickness Absences button and the sickness absence options will expand.



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.



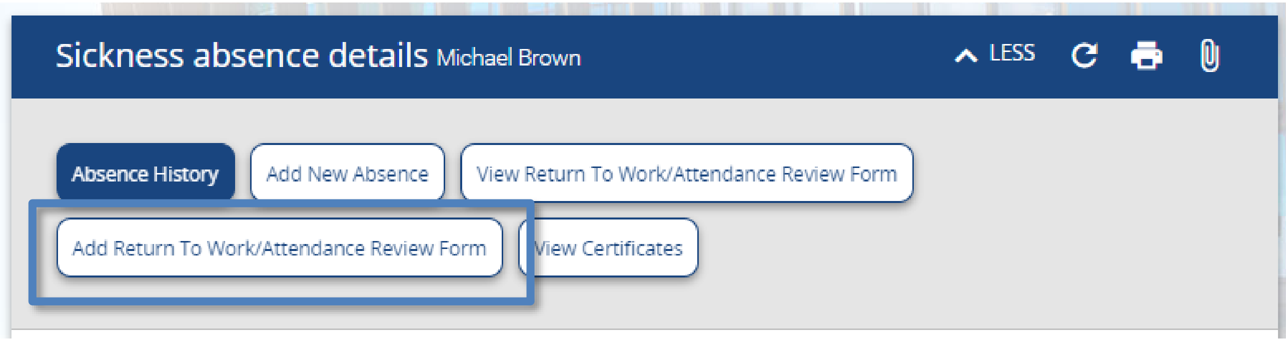
The only fields you are able to update is the *Absence start date* and the *Absence end date.* This should only be done if this was initially entered incorrectly. If an employee needs to change their absence reason or end date then they must do this via MyHR. If you change a *Start date* long after the 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.

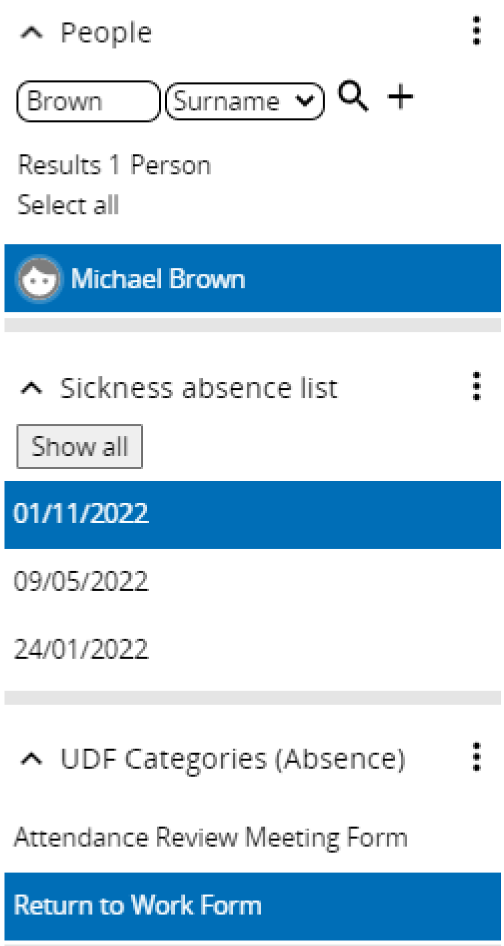
Completing a Return to Work Form

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.

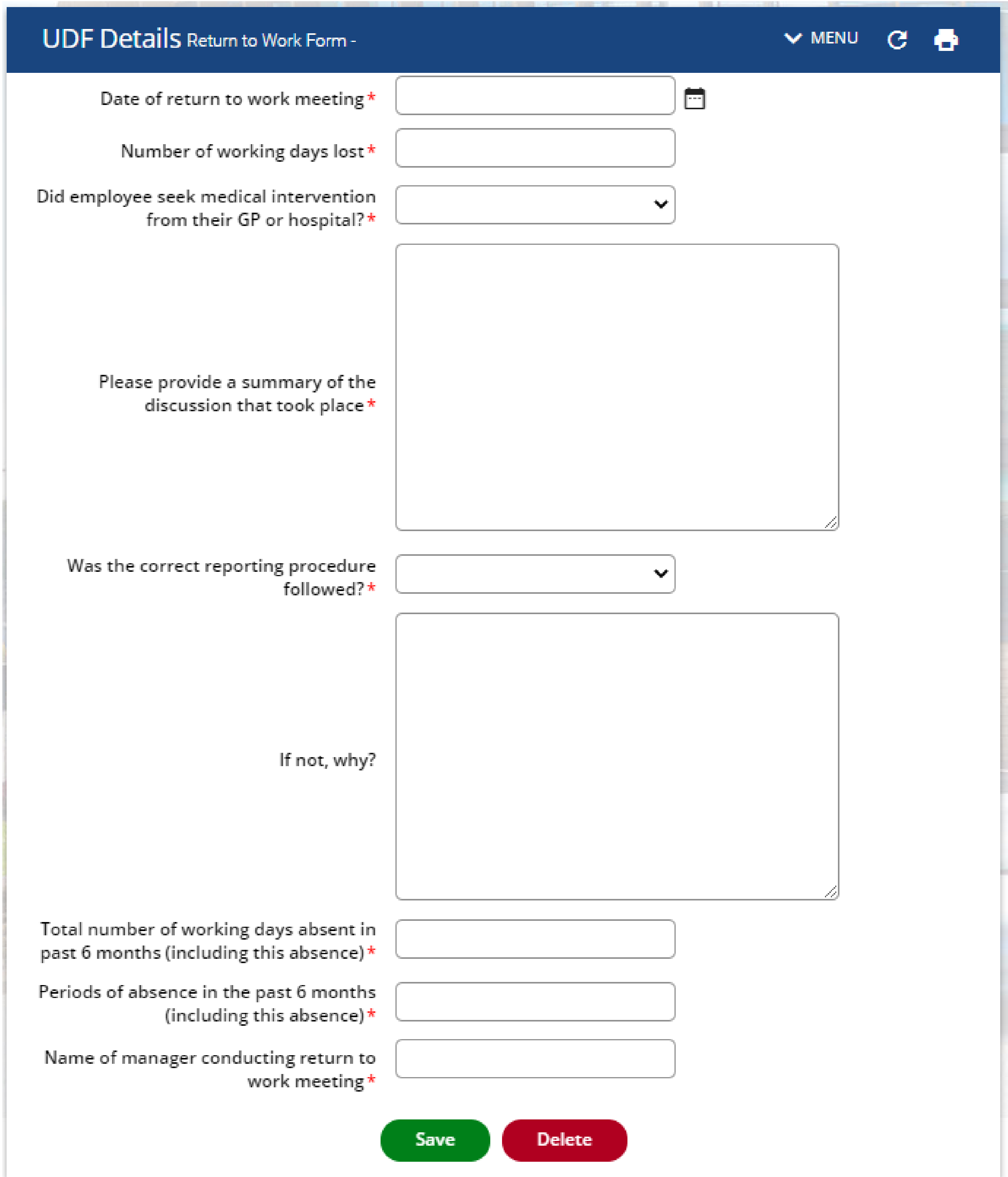
To complete a Return to Work form, select the correct person in iTrent and select the relevant sickness absence record. Click on the menu button at the top of the Absence details page and a list of options will expand.



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:



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

Field	Value
Date of return to work meeting	Enter the date you held the return to work meeting
Number of working days lost	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.

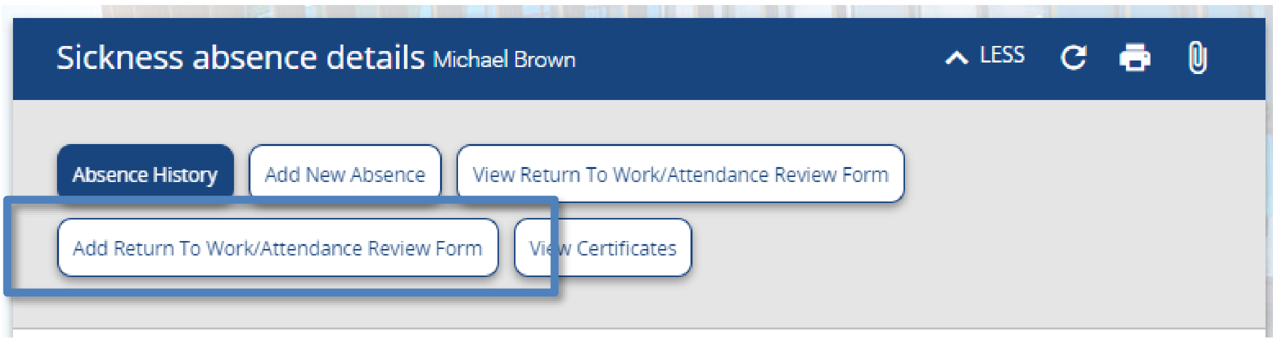
Did employee seek medical intervention from their GP or hospital?	Choose yes or no from the dropdown
Please provide a summary of the discussion that took place	Enter a summary of the discussions held with the employee upon their return to work. This may include the following: • Details of why the employee 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.

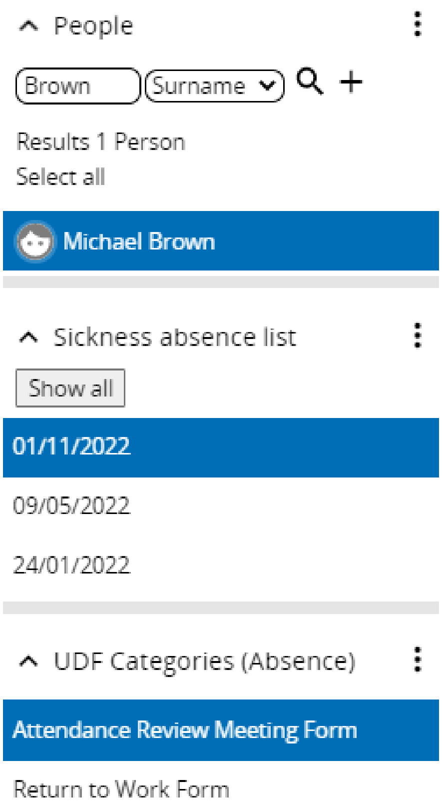
Recording an Attendance Review

In cases of persistent sickness absences, you may be required to carry out an attendance review with a member of staff. You should consult the Management of Sickness Absence policy to ascertain when you should contact HR and at what point each attendance review is needed.

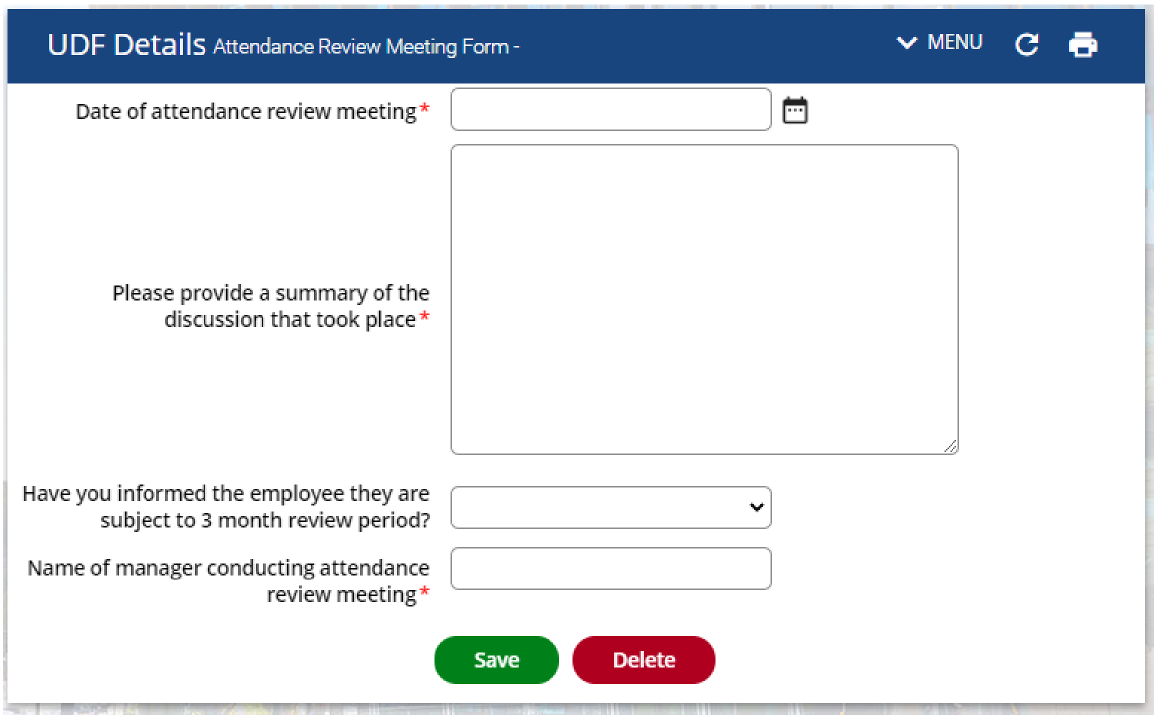
To record an attendance review meeting in iTrent, select the correct person in iTrent and select the relevant sickness absence record. Click on the menu button at the top of the Absence details page and a list of options will expand.



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

Field	Value
Date of attendance review meeting	Enter the date you held the attendance review meeting.
Please provide a summary of the discussion that took place	Enter a summary of the discussions held with the employee during the attendance

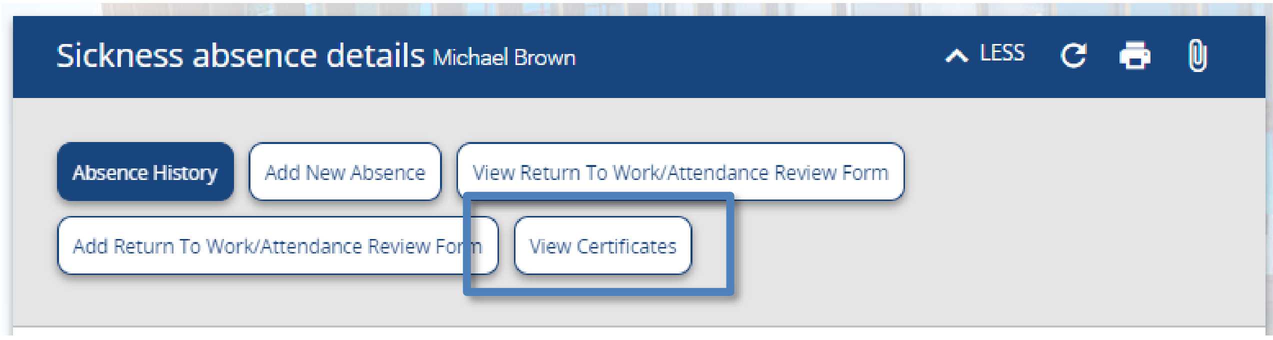
	review meeting. This may include the following: • Concern shown for the employee's welfare • The impact of absence on the employee's immediate team. • Making clear your concerns about the attendance record. • Asking the employee to improve their attendance record. • Indicate that absences will continue to be monitored and if there is no substantial improvement formal action will be taken
Have you informed the employee they are subject to 3 month review period?	Choose yes or no from the dropdown
Name of manager conducting attendance review meeting	Enter your full name.

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.

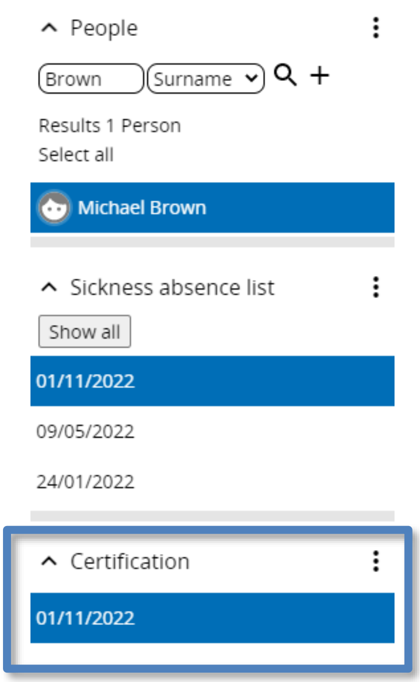
Certification

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 perid 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

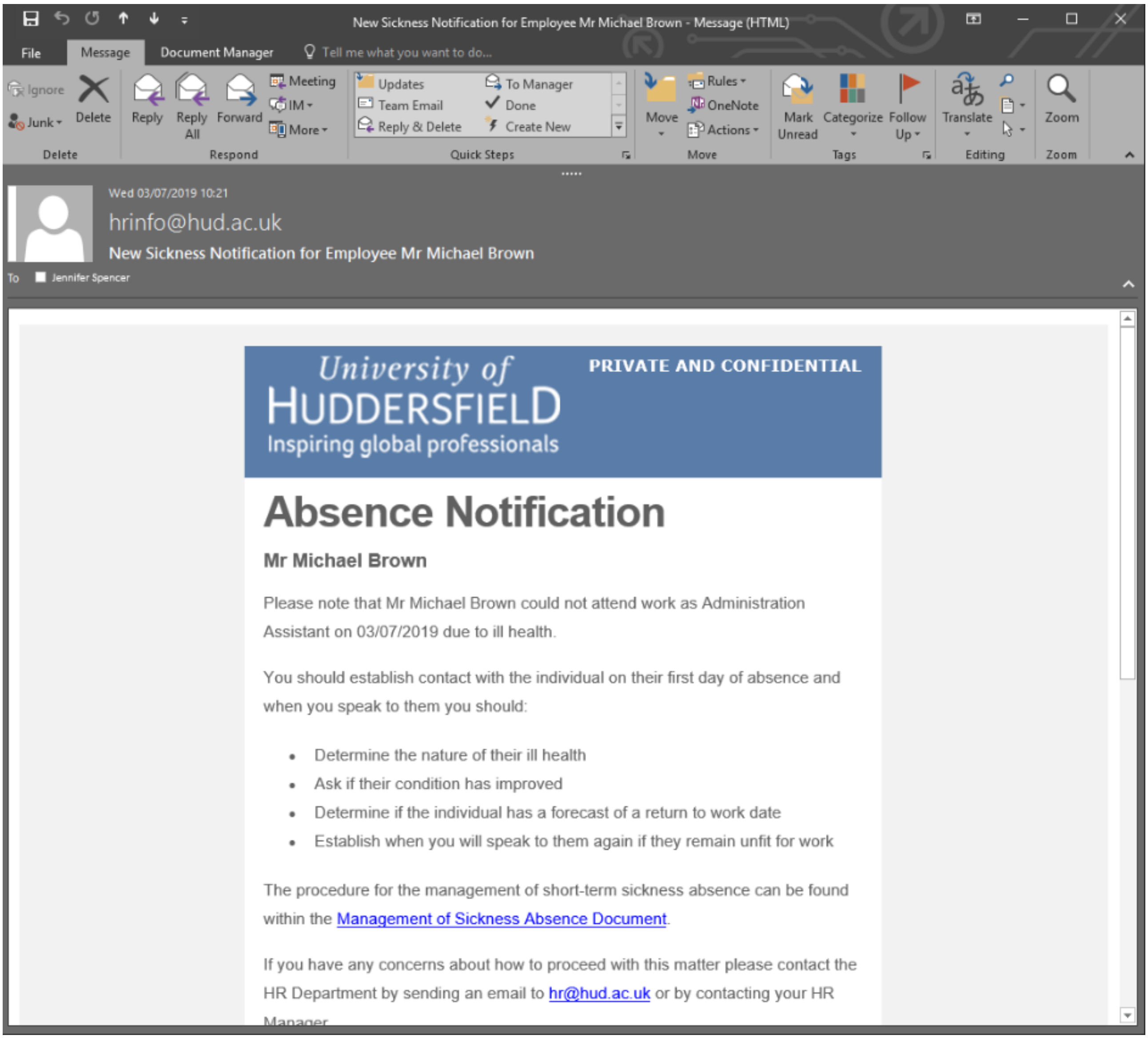
The University uses UCEA absence categories and each period of absence must be classified as one of these groups. Below is a table of all UCEA absence categories which also provides examples of what should and should not be included in each category:

Category	Examples to Include	Don't include
Cancer **(CNCR)**	Cancer and cancer treatments (Chemotherapy, radiotherapy), lymphoma, biopsies, mastectomy, breast cancer	
Cold **(COLD)**	Cold, cough, flu, fever, virus, temperature, general aches and pains, hay fever	Headaches
Diabetes, Endocrine and Glandular **(DEGP)**	Diabetes, Glandular fever, swollen glands, thyroid problems	

Eyes, Ears, Nose, Throat and Dental **(ENTD)**	Eye problems, conjunctivitis, glaucoma, ear problems, earache, labyrinthitis, tinnitus, nosebleed, sinusitis, sore throat, laryngitis, toothache, tooth abscess, other oral problems, dental treatment	Surgery or operations e.g. tonsillectomy, tooth extractions
Genitourinary and Gynaecological **(GNIT)**	Cystitis, bladder infection, kidney problems, menstrual pain, urinary tract infections	Pregnancy related problems
Heart, Circulatory and Blood Disorders **(HEBL)**	Heart attack, angina, stroke, seizure, irregular heartbeat, blood disorders, blood pressure, blood clots, DVT, anaemia	
Infections and Infectious Diseases **(INFC)**	Measles, mumps, chicken pox, shingles, legionnaires, foot and mouth	Throat infections
Injury, Burns and Poisoning **(INBP)**	Burns, frostbite, sunburn, wasp sting, industrial injury	
Menopause or Perimenopausal Symptoms **(MENP)**	Menstrual changes specifically heavy periods especially flooding	
Mental Health **(MNTL)**	Stress, fatigue, debility, anxiety, depression, alcohol or drug dependency, bereavement, exhaustion, nervous debility, panic attacks	
Migraine and Headache **(MIGR)**	Headaches, migraine, dizzy spells, neuralgia, sunstroke, epilepsy	
Musculoskeletal **(MUSC)**	Back pain, neck pain, broken limbs, sprains, arthritis, sciatica, whiplash, muscle tears, bruises	
Operations, Surgical Procedures **(OPER)**	Hospital appointments, organ donation, any operation or surgery, investigations, tests, tooth extraction	Dental appointments
Other, Unknown **(OTUN)**	Other reasons not classified elsewhere, only rarely used	
Pregnancy Related **(PREG)**	Pregnancy related problems, miscarriage	
Respiratory **(RESP)**	Asthma, breathing problems, bronchitis, chest infection, Pneumonia, Pleurisy, chest pains, respiratory tract infection, tracheitis	Ears, nose, throat, cold flu
Skin **(SKIN)**	Eczema, rash, psoriasis, alopecia, cellulitis, allergies	Burns, hay fever
Stomach, digestive and gastro-intestinal **(STMC)**	Vomiting, diarrhoea, nausea, upset stomach, indigestion, gastritis, ulcers, norovirus, IBS	

Emails

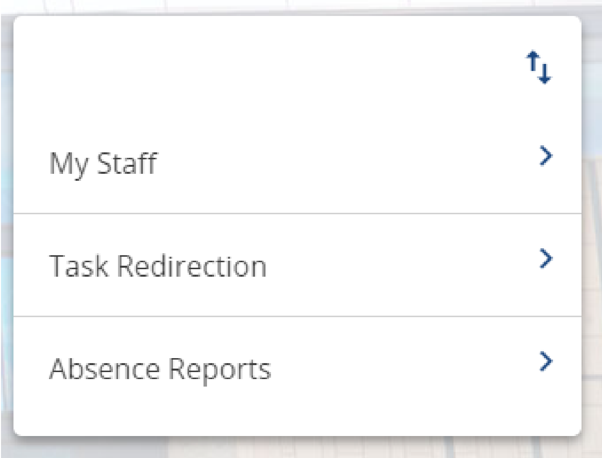
As a manager you will receive emails at key points relating to your employee's absence. Once an absence has been entered into iTrent you will receive an automatic notification email that your employee is absent. You will receive an email once an employee has been absent for 3, 7 and 28 days which might 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.



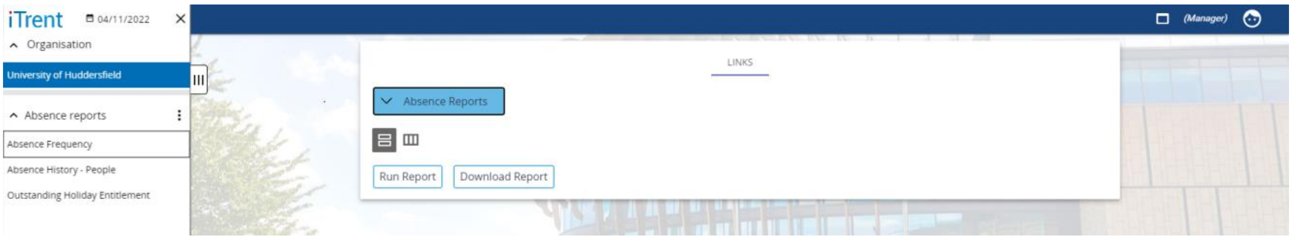
These emails can also serve as useful reminders to complete the Return to Work form once they have returned to work, or to record an absence review meeting in iTrent.

Absence Reports

You are able to view some absence reports within iTrent by clicking on the "Absence Reports" button on the homepage.



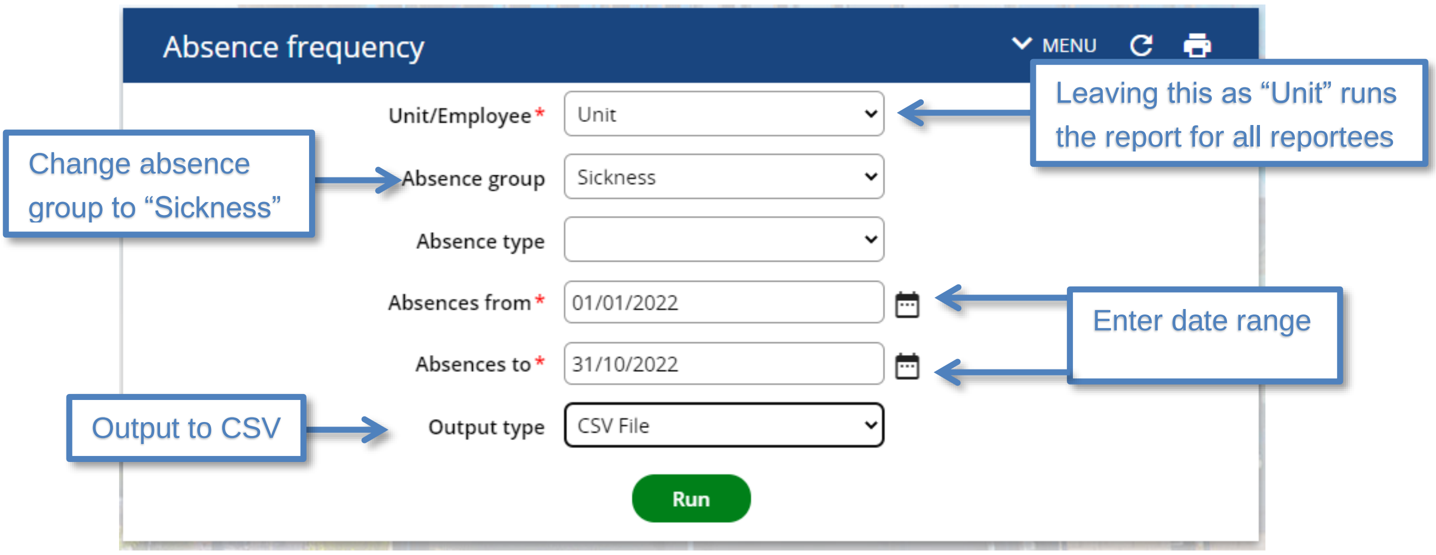
When you click on this button you will see a list of available reports appear down the left-hand side of the screen. Click on the name of the report you would like to view and then click on “Run Report”.



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.

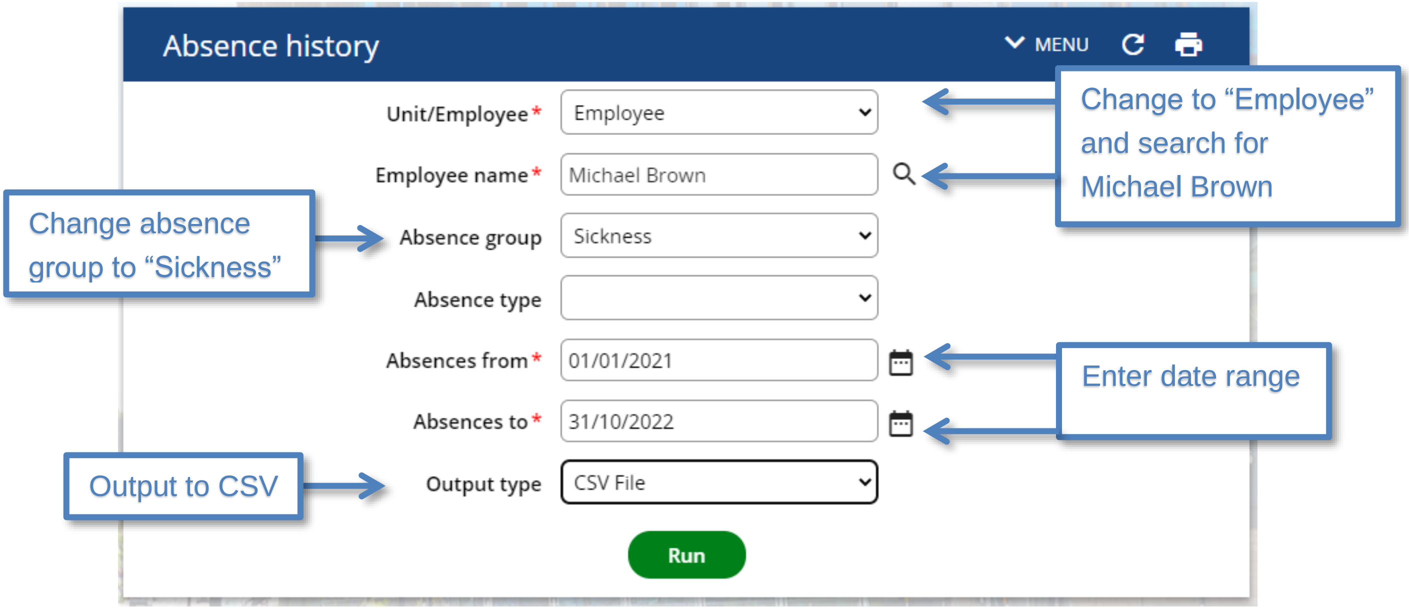


When you click on the "Run" button, iTrent will start running this report ready for you to download. You can then use the instructions in the "Downloading a Report" section of this user guide to download this report.

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.



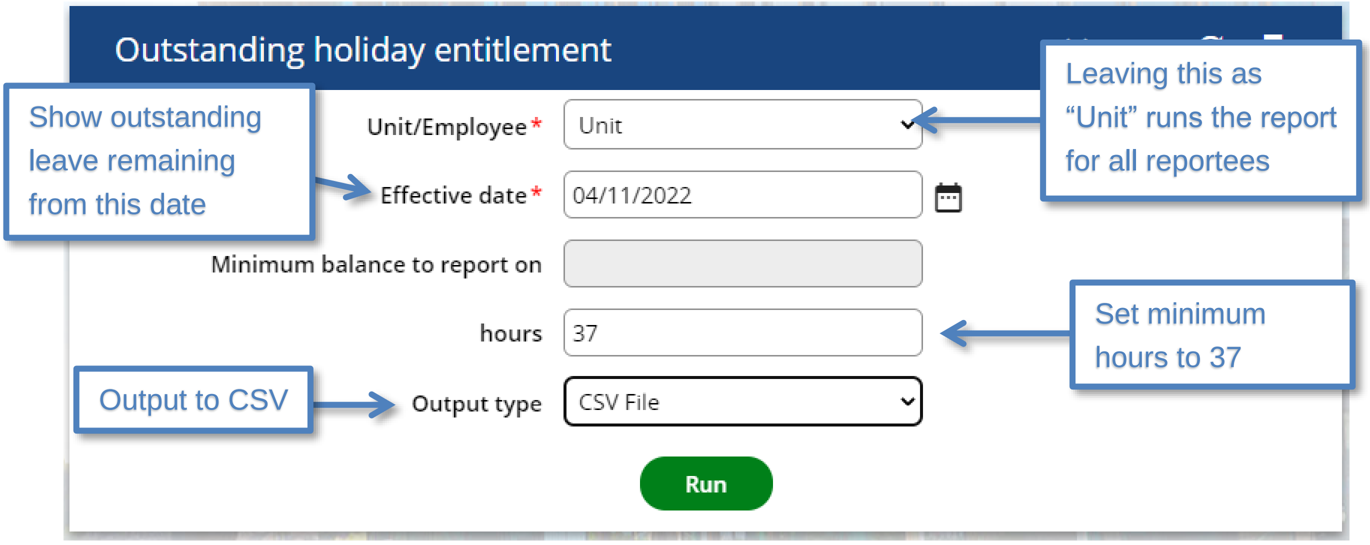
When you click on the "Run" button, iTrent will start running this report ready for you to download. You can then use the instructions in the "Downloading a Report" section of this user guide to download this report.

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.

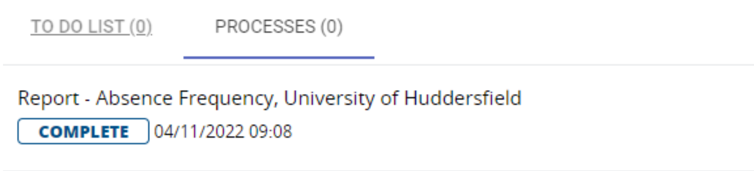
The example below would produce a report that shows everybody that reports to you (including indirect reportees) with at least 37 hours entitlement remaining (i.e. the maximum carry forward allowance) as of 01/08/2019. This would allow you to contact them before the end of the annual leave entitlement period so that they can arrange to book this annual leave otherwise they will lose it.



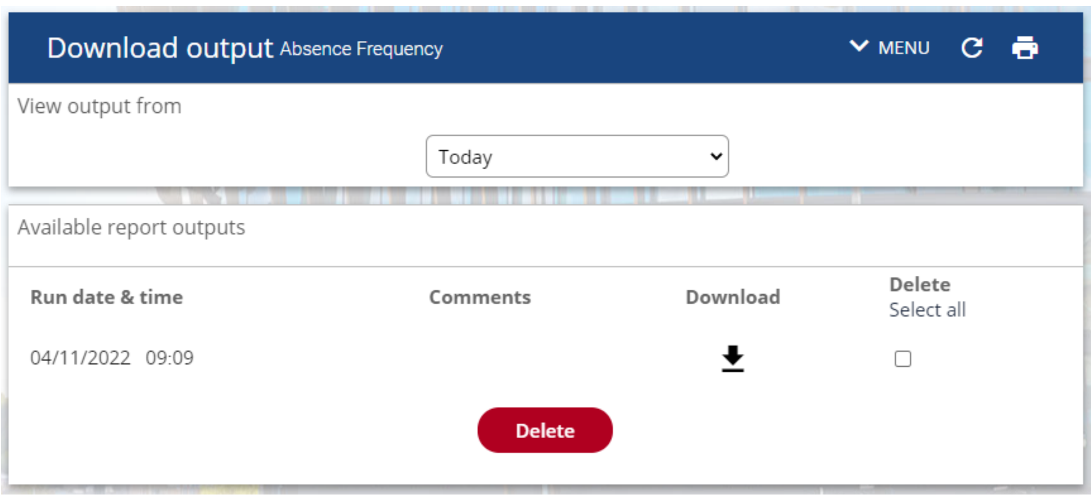
When you click on the "Run" button, iTrent will start running this report ready for you to download. You can then use the instructions in the "Downloading a Report" section of this user guide to download this report.

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.



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.

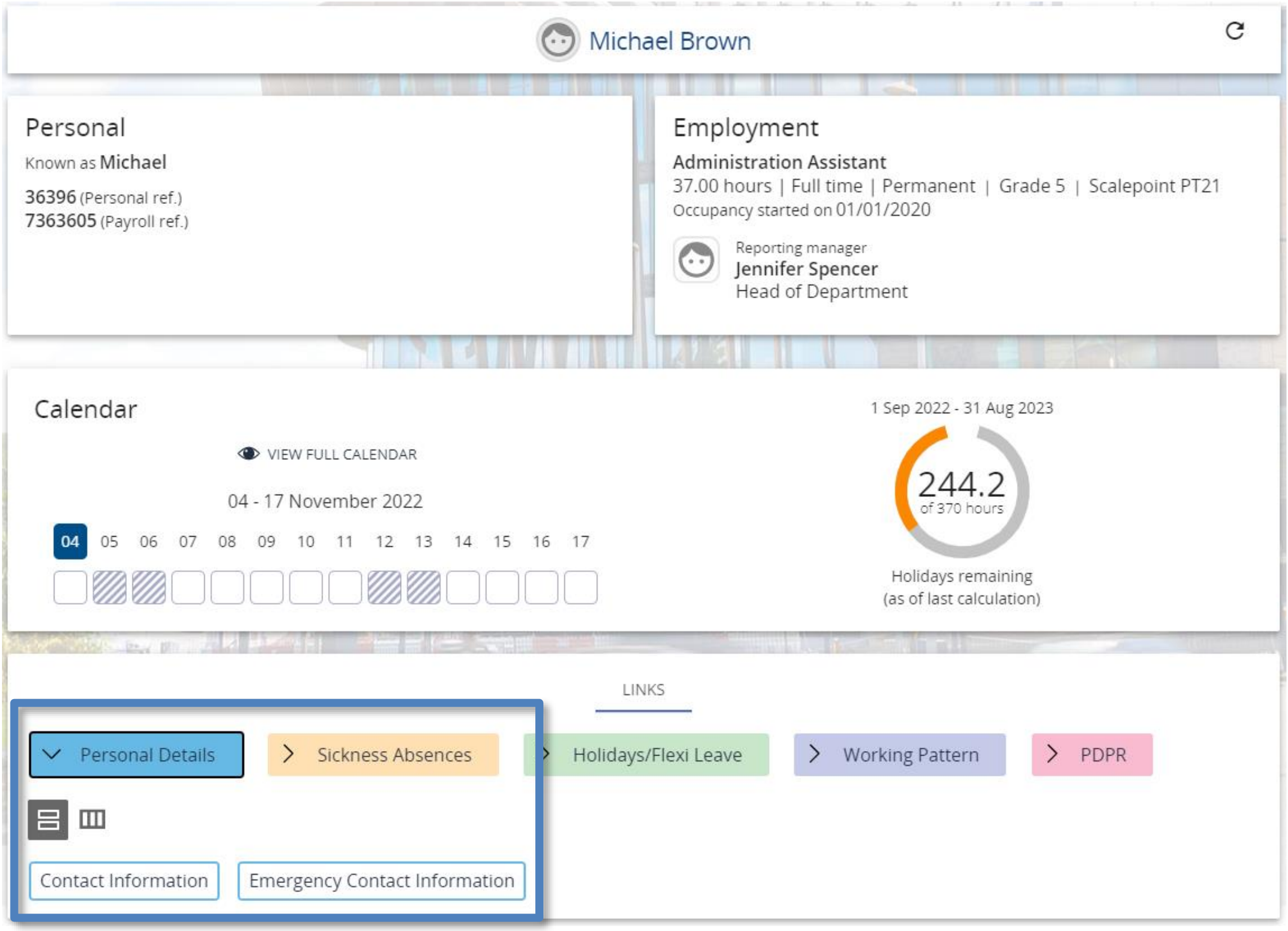
Personal information

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.

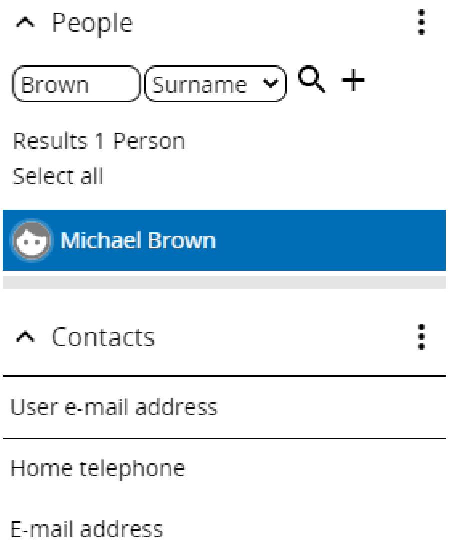
Contacts

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.

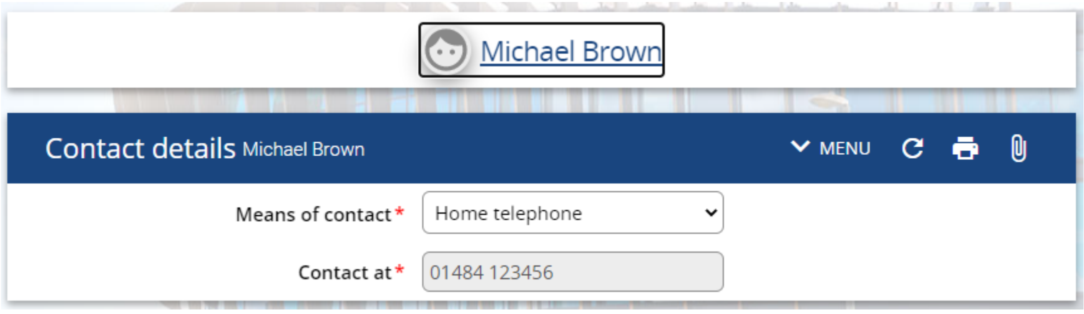


The *Personal Details* section should be visible in the *Links* section of the page by default as in the image above, however, if it is not, click on the Personal details button and these options should appear.

Click on the *Contact Information* option and a list will apear 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.



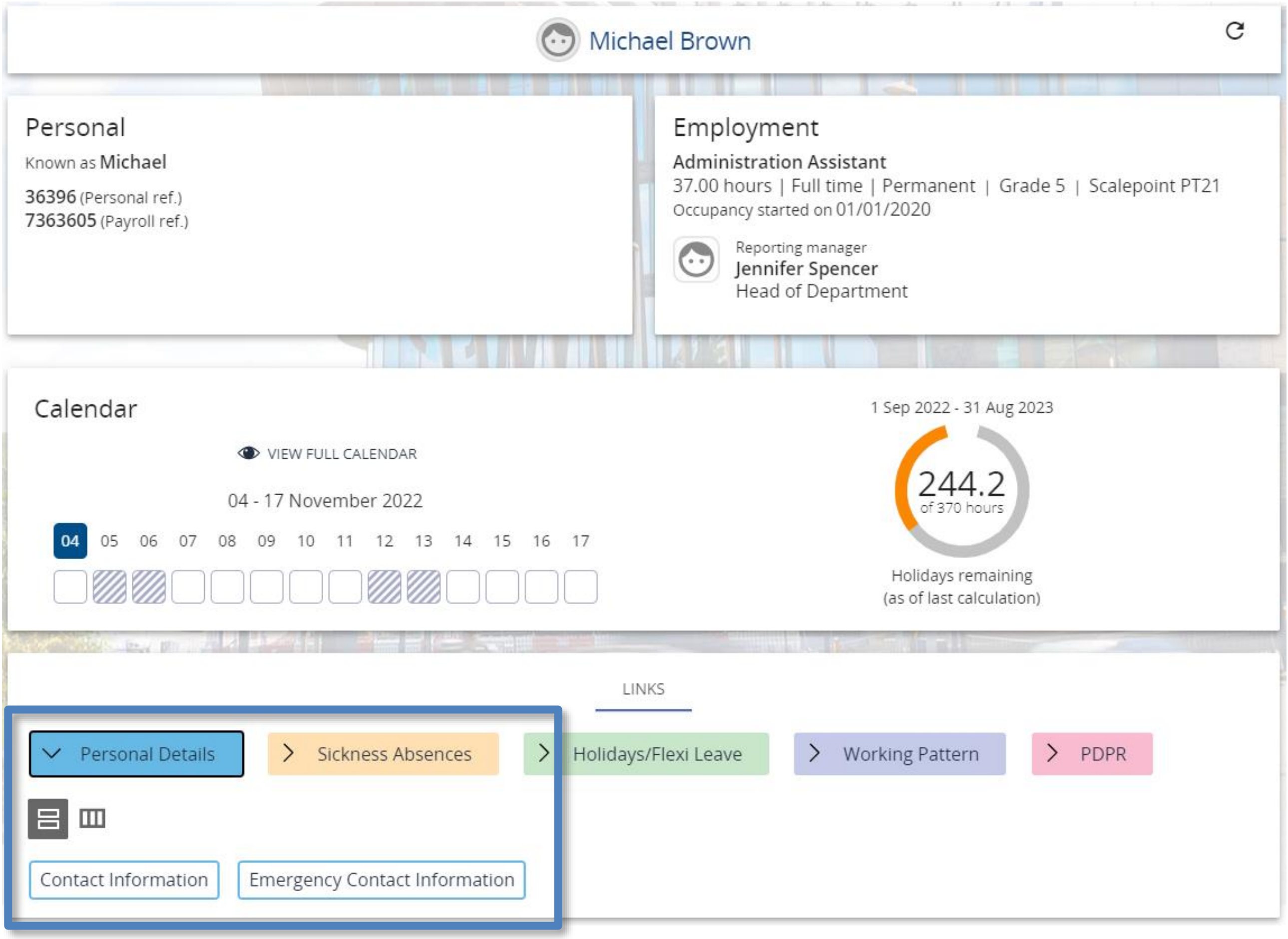
Select one of these from the list and the contact details page will open.



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.

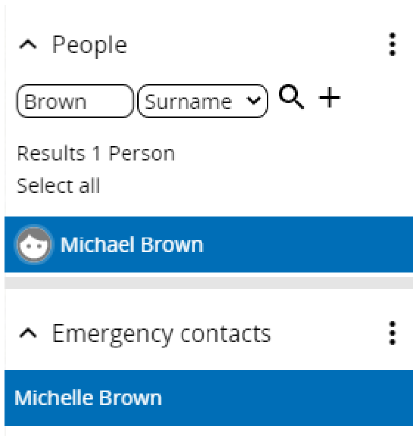
Emergency Contacts

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.

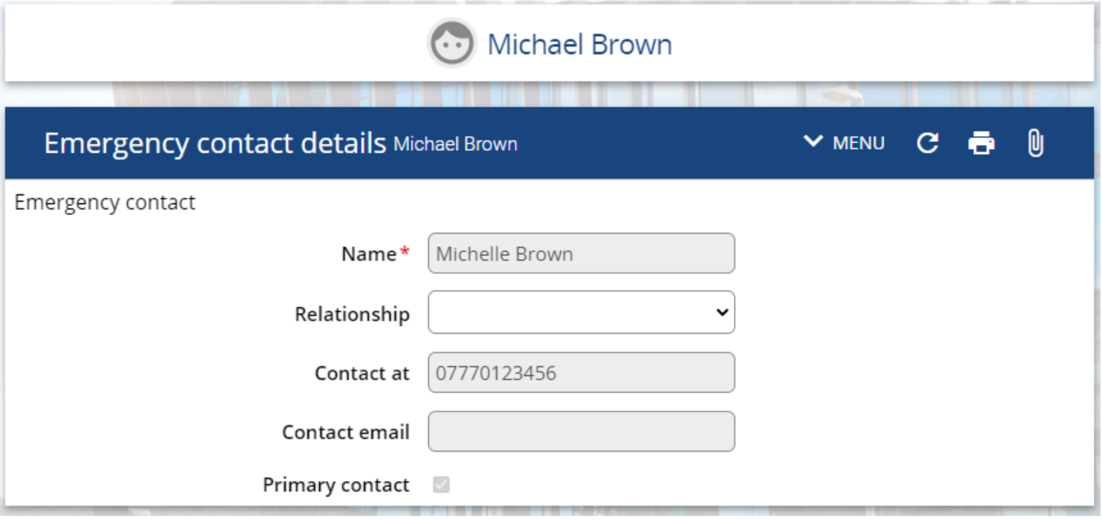


The *Personal Details* section should be visible in the *Links* section of the page by default as in the image above, however, if it is not, click on the Personal details button and these options should appear.

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 Reviews/Appraisals

The University of Huddersfield's appraisal 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 development 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 shorter mid-year review around 6 months later.

In the PDPR process, as the line manager you are referred to as the "reviewer" and your team member is referred to as the "reviewee".

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

The PDPR process covers a 12-month period and includes two PDPR meetings. The actions and who are responsible are outlined below:

Step 1
- **Who**: Reviewer
- **Action**: Schedule a PDPR review for the revewee in iTrent

Step 2
- **Who:** Reviewee
- **Action:** Enter and submit their reponses to the talking points in the review in MyHR.

Step 3
- **Who:** Reviewer and Reviewee
- **Action:** Hold a constructive PDPR meeting.

Step 4
- **Who:** Reviewer
- **Action:** Enter and save their responses to the talking points in the review in iTrent

Step 5
- **Who:** Reviewer
- **Action**: Submit responses within iTrent once the reviewee and reviewer are both happy with the comments.

Step 6
- **Who:** Reviewer
- **Action:** Complete the review in iTrent

Step 7
- **Who:** Reviewer
- **Action:** Schedule a PDPR mid-year review for the reviewee in iTrent for 6 months after the start of the PDPR year.

Step 8
- **Who:** Reviewee
- **Action:** Enter and submit responses to the talking points in the the mid-year review in MyHR.

Step 9
- **Who:** Reviewer and Reviewee
- **Action:** Hold a constructive Mid Year Review meeting.

Step 10
- **Who:** Reviewer
- **Action:** Enter and save their responses to the talking points in the Mid Year Review form

Step 11
- **Who:** Reviewer
- **Action:** Submit responses within iTrent once the reviewee and reviewer are both happy with the comments.

Step 12
- **Who:** Reviewer
- **Action:** Complete the mid-year review in iTrent

Step 13
- **Who:** Reviewer and Reviewee
- **Action:** Start at step 1 again for the new PDPR year

Types of PDPRs

PDPRs are made up of questions, known as “talking points”, designed to facilitate an open conversation between you and the reviewee during the PDPR meeting. There are different PDPRs available depending on the type of work the reviewee does and what stage of the process you are at.

Annual PDPR – Academic: This is the annual review form for academic and research staff.

Annual PDPR – Facilities Support Services (completed by the reviewer only): This is the annual review form typically for colleagues within Estates & Facilities who may not regularly use PCs. These staff members are not expected to complete it themselves and instead the reviewer will complete it fully following the PDPR meeting.

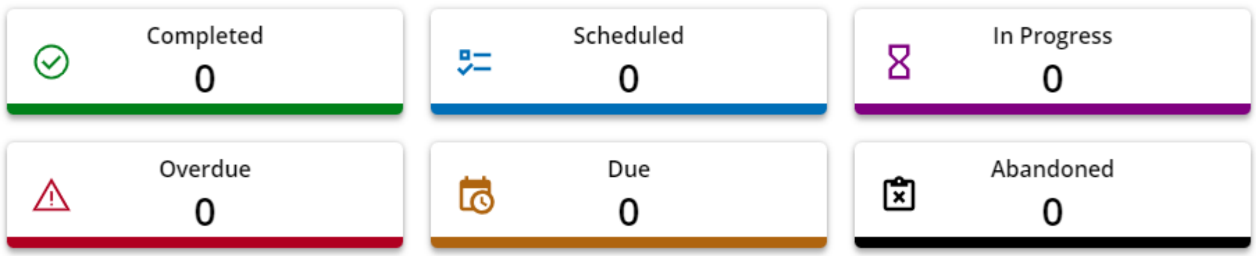
Annual PDPR – Professional and Technical Services: This is the annual review form for staff that work within professional or technical services.

Mid-Year Review: This is the mid-year review form for academic, research, professional and technical services staff.

Mid-Year Review - Facilities Support Services (completed by reviewer only): This is the mid-year review form typically for colleagues within Estates & Facilities stage who may not regularly use PCs. These staff members are not expected to complete it themselves and instead the reviewer will complete it fully following the PDPR meeting.

PDPR Statuses

The following statuses are used in iTrent to indicate the stage where the PDPR is at:



Scheduled: This is the first status of PDPR and indicates it has been created but no responses have been saved by either the reviewee or reviewer yet.

In progress: When responses are saved by either a reviewee or reviewer the status changes to “In progress”. As soon as comments are saved, they can be read by the other party. It is recommended that the reviewee submits their responses in advance of the meeting, this will notify the reviewer and allow them to read the responses in preparation for the meeting.

Submitted: If only the reviewee has submitted, the status will remain as “In progress”. It is recommended that the reviewer only submits their responses after the meeting, if required additional points from the meeting can then be included in the reviewer’s responses. The status changes to submitted when both reviewee and reviewer have submitted.

Completed: Once both the both reviewee and the reviewer have submitted, the reviewer needs to complete the review. The completed status confirms it has been concluded successfully and no further actions are required.

Overdue: The status only appears on the Review summary page and indicates that the review's due date has passed, and the review has not been completed yet.

Abandoned: Once a review has changed to "In progress" in can no longer be deleted but it can be abandoned, this will indicate that review was started but never finished.

Creating a New PDPR

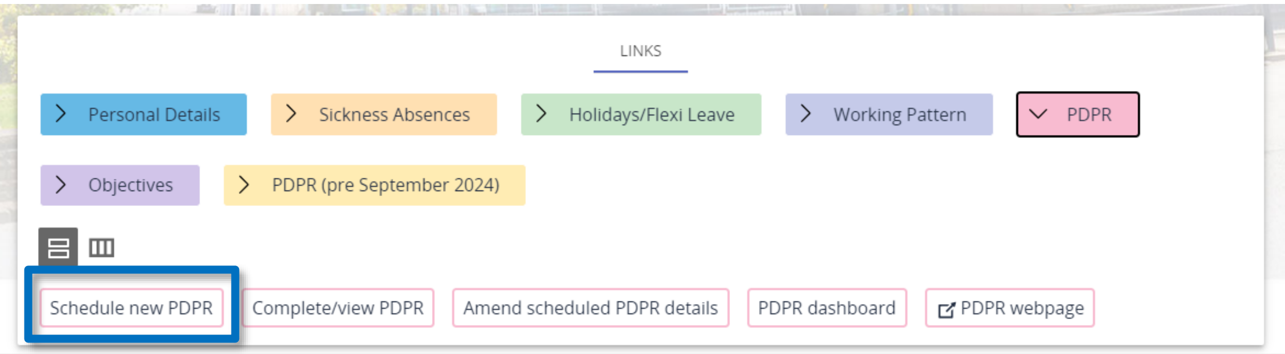
It is recommended that a PDPR meeting is scheduled 30 days in advance and the PDPR is created on iTrent at the same time. This gives the reviewee time to write and, ideally, submit their responses at least 5 days before the meeting.

Although they relate to the same PDPR year, the annual PDPR and mid-year review exist as separate "reviews" on iTrent and you will need to create each one individually, ideally 30 days before the respective scheduled meetings.

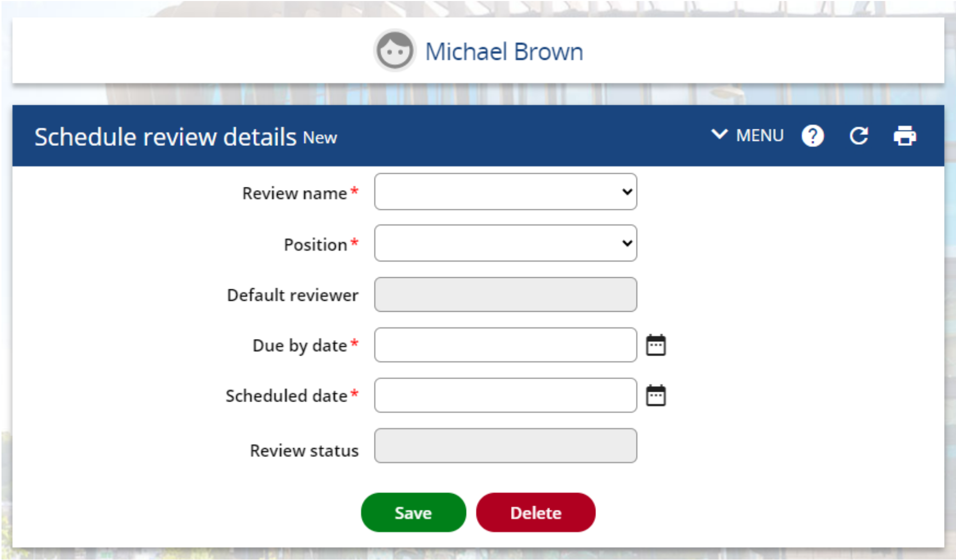
By scheduling each review 30 days before, a timely notification is sent to the reviewee to prompt them to add and submit their responses before the meeting.

To create a new PDPR you should complete the following steps:

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 "Schedule new PDPR" option.



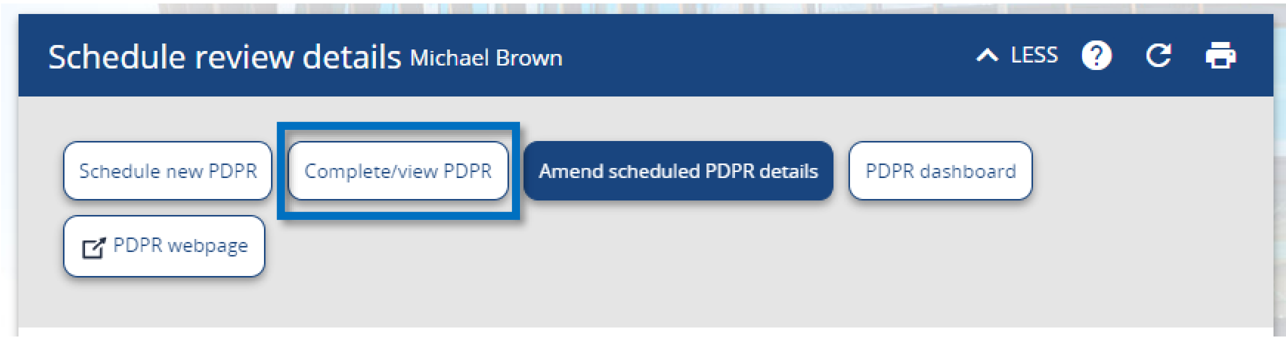
4. This should open a blank Schedule review details page.



5. For *Review name*, select the relevant PDPR from the list, for more information about this see the Types of PDPRs section of this guide.
6. For *Position*, select the job the review applies to, in most cases there will only be one option but where your team member has more than one position that reports to you, there will be a multiple choice.
7. Set the *Due by date* as the date you expect the PDPR to be completed, this should be after the scheduled PDPR meeting date.
8. Set the *Scheduled date* as the date the PDPR meeting will take place.
9. Click on the **Save** button. This will send an email to the reviewee informing them a PDPR has been created for them and advising them to write and submit their responses in advance of the meeting.

Please note: You can change the details on this page until either the reviewer or reviewee saves a change to the PDPR form. Once that happens the status of the form will change to "in-progress" and you will be unable to update this page.

10. To view the PDPR talking points straight away, click on the menu button at the top of the Schedule review details page and a list of options will expand. Click the “Complete/view PDPR” button.

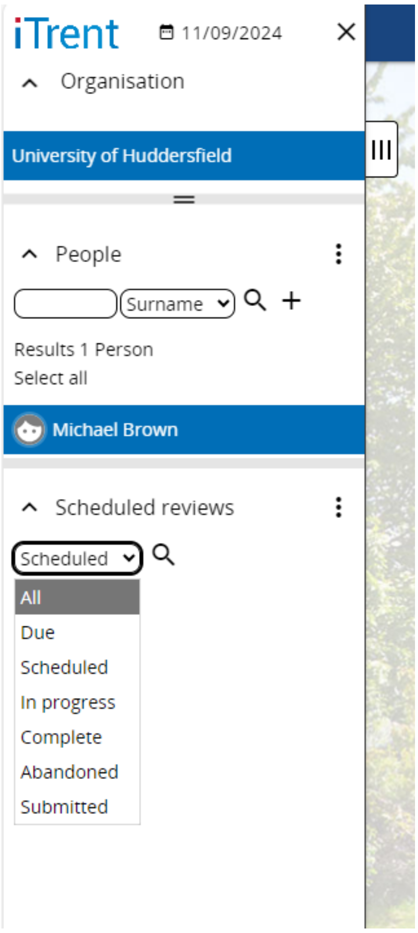


11. This will open the PDPR that you have just created.

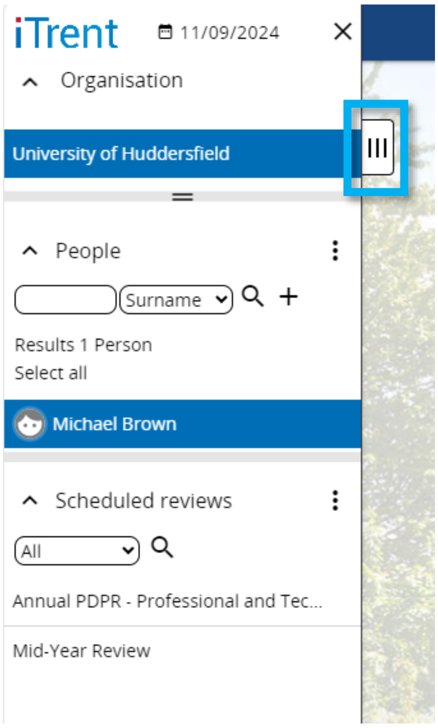
Finding An Existing PDPR

When finding an existing review, there are some actions that can make finding the correct review easier.

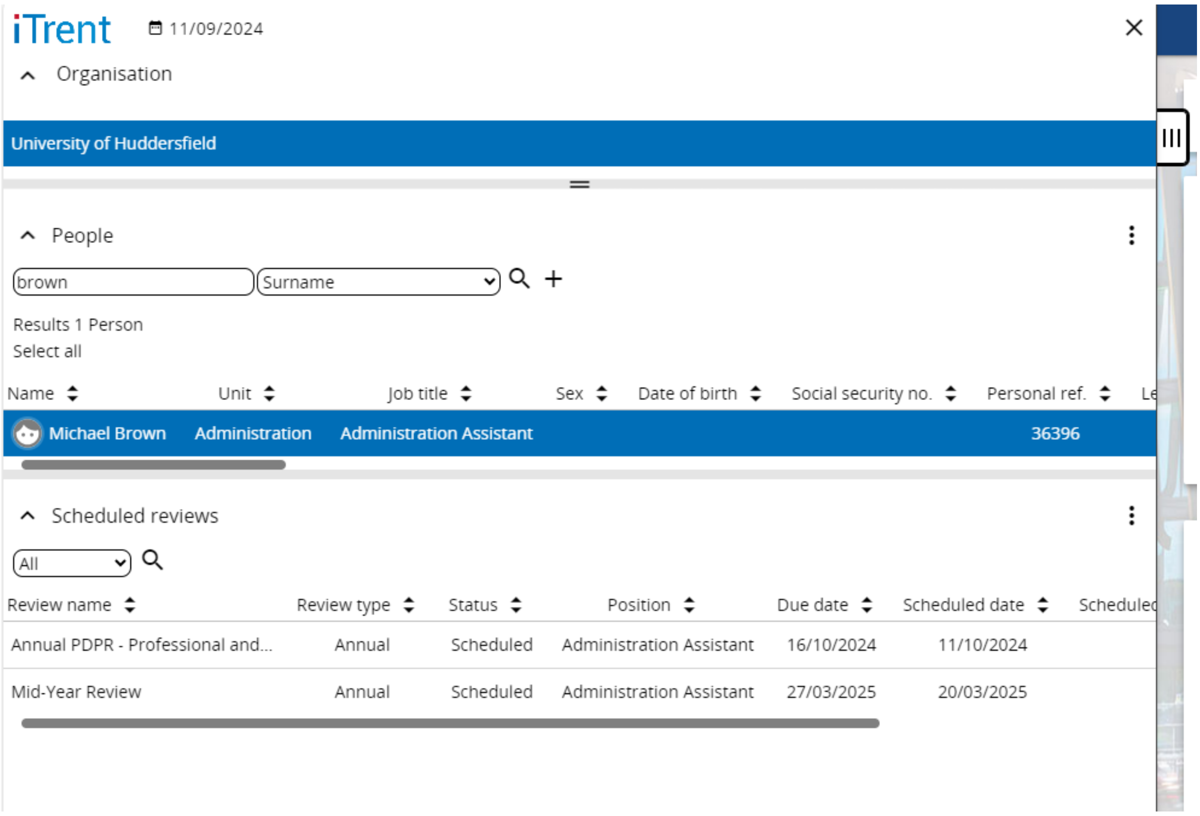
1. Sign in to iTrent and click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.
2. In the "Links" section, click on the "PDPR" button to expand the PDPR options.
3. Click on either **"Complete/view PDPR"** or **"Amend scheduled PDPR details"** depending on what task you are performing.
4. A scheduled reviews prompt will appear on the left-hand side of the screen. By default, the drop-down list is set to "Scheduled" which will display reviews with a status of "Scheduled" only. If you know the status of the review you want to find, you can choose it from the list, alternatively you can select "All" and this will be display everything.



5. Click the magnifying glass icon to search for reviews that match the choice from the drop-down list.
6. When the reviews are displayed under the magnifying glass, click on the handle on the sidebar and the sidebar will expand to provide more information.



7. The expanded sidebar will display additional information about each PDPR including status and the scheduled meeting date. Clicking on any of the details will select and open that review.

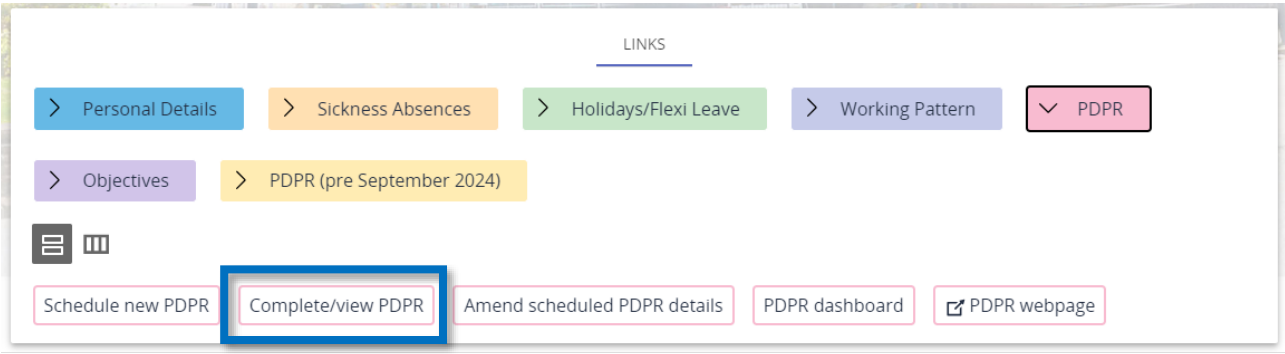


Reading and Adding Responses to a PDPR

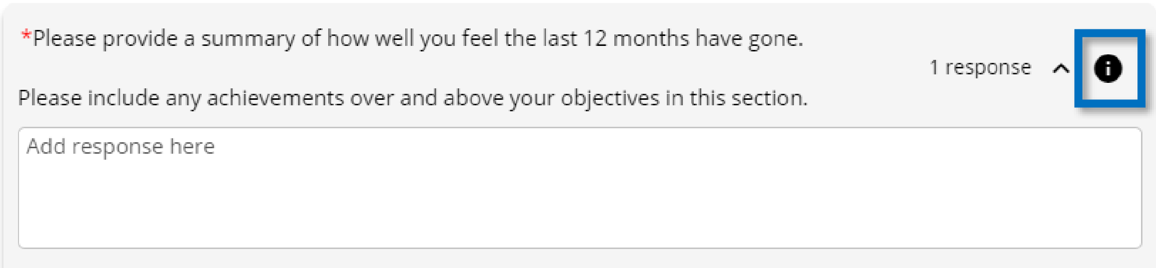
It is recommended that the reviewee submits their responses five days before the meeting, this will trigger a notification email to you and give you time to read their responses and prepare for the meeting. You can then add your responses after the meeting and ask the reviewee to read them.

To read the reviewees responses and add your own as a reviewer, follow these steps:

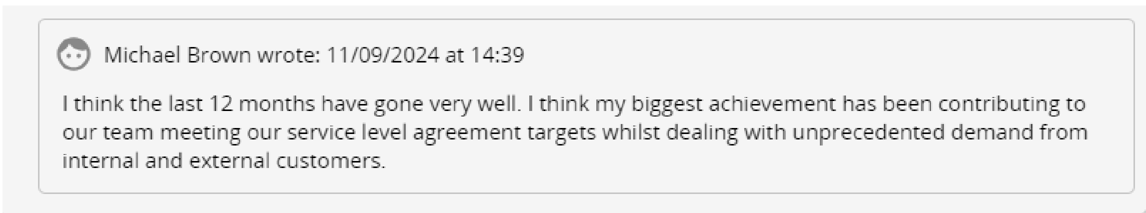
1. Sign in to iTrent and click on the “My Staff” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.
2. In the **“Links”** section, click on the **“PDPR”** button to expand the PDPR options.
3. Click the **“Complete/view PDPR”** option.



4. Find and select the PDPR review, as described in the Finding an Existing PDPR section of this guide.
5. Once the PDPR is open, talking points which you can respond to as a reviewer have a box underneath with an “Add response here” message. Click your cursor in the box and start typing to enter your response. There is information available for each talking point by clicking the ‘i’ icon in the right.

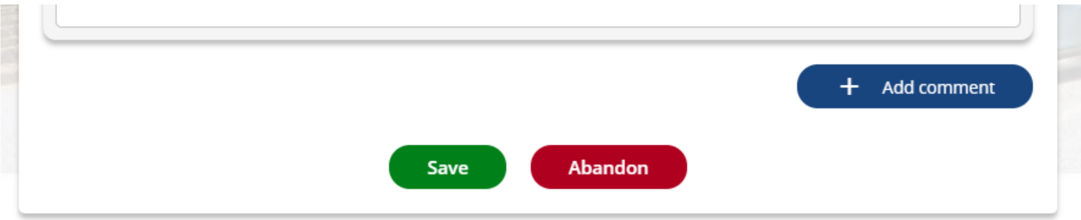


6. Responses from the reviewee are shown underneath with their name and the date and time they were saved.

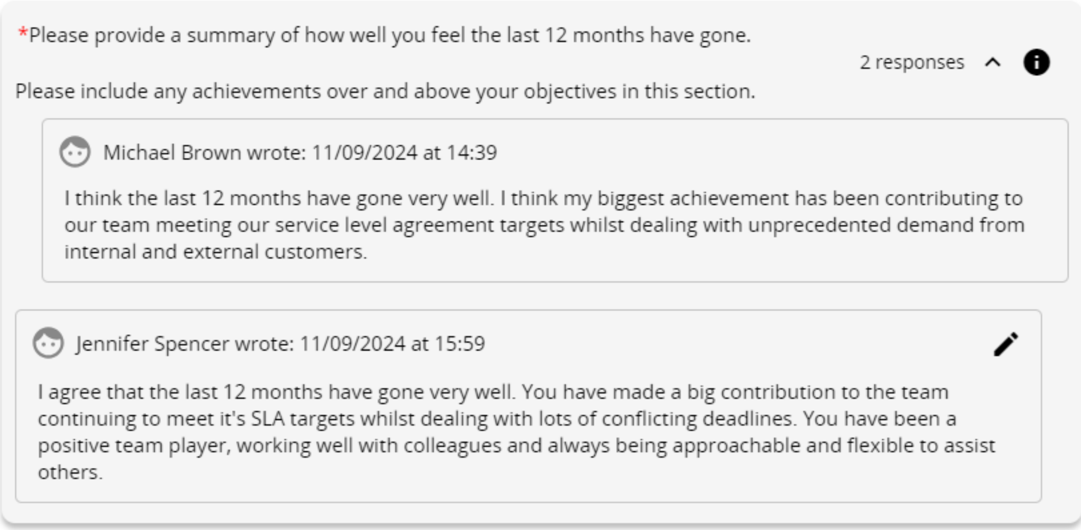


7. Responses can be saved by using the green save icon on the bottom right-hand side…

…or the Save button at the bottom of the page.



8. Once responses have been saved, they appear with your name and the date and time. They can be amended by clicking the pencil icon in the top right-hand corner of the response. Any amendments then need to be saved using the save button.

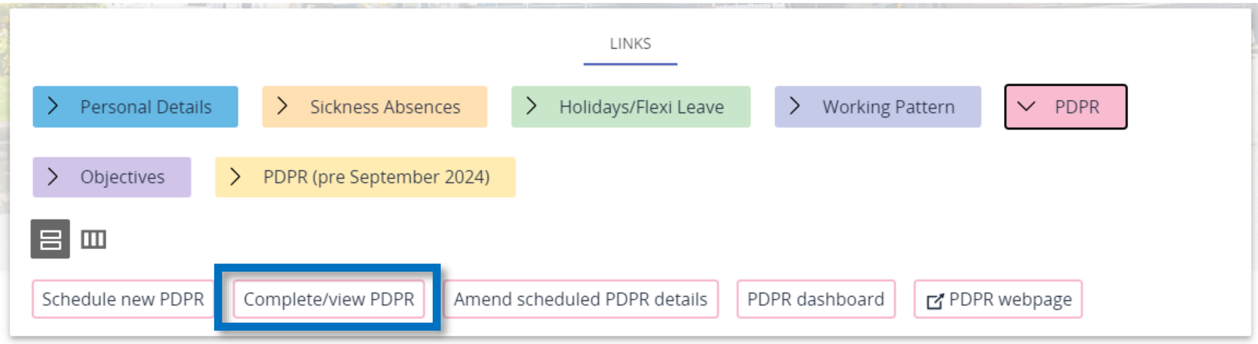


9. Talking points that require a response have a * red asterisk symbol before them. A review can be saved at any stage, but it can only be submitted once all the mandatory talking points have a response.
10. Once you have added and saved your responses, it's recommended that you give the reviewee an opportunity to read your responses in MyHR before you submit them. That way you can make amendments before it is submitted and becomes read-only.
11. Once you and the reviewee are happy to finalise the PDPR, follow the Submitting and Completing a PDPR section of this guide.

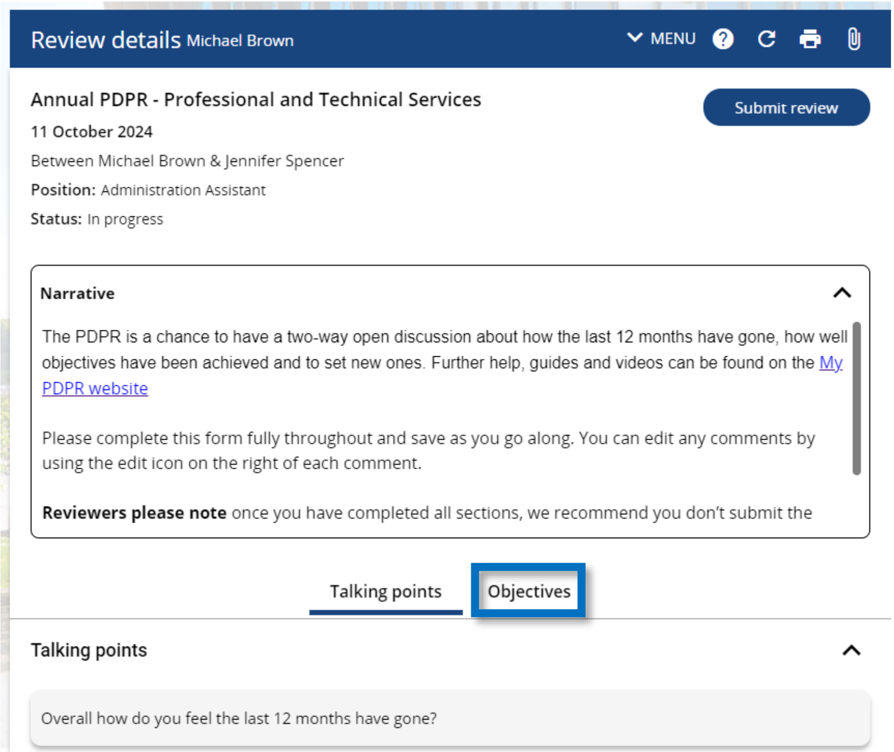
Objectives in a PDPR

Objectives are the goals for the PDPR year that you agree with the reviewee during your PDPR meetings. Objectives can be created, viewed and updated through a tab within the PDPR review. To access objectives within a PDPR review:

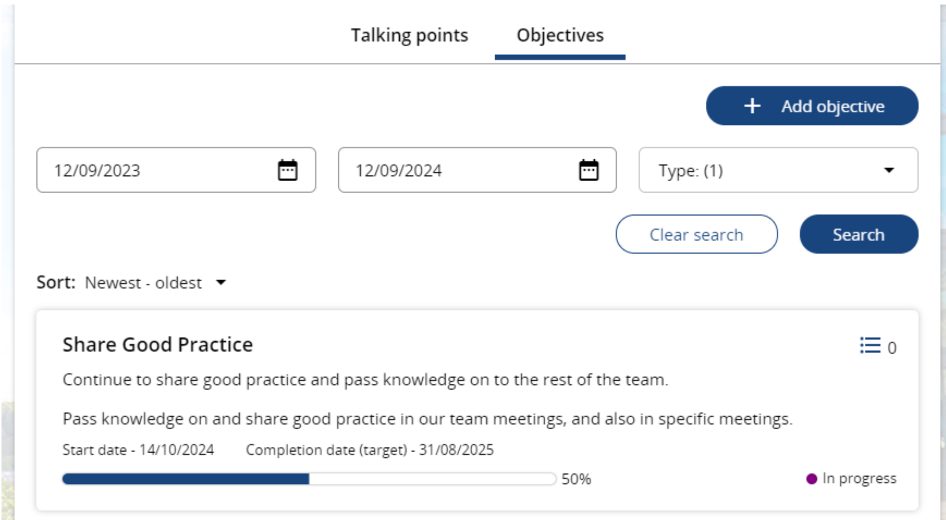
1. Sign in to iTrent and click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.
2. In the **"Links"** section, click on the **"PDPR"** button to expand the PDPR options.
3. Click the **"Complete/view PDPR"** option.



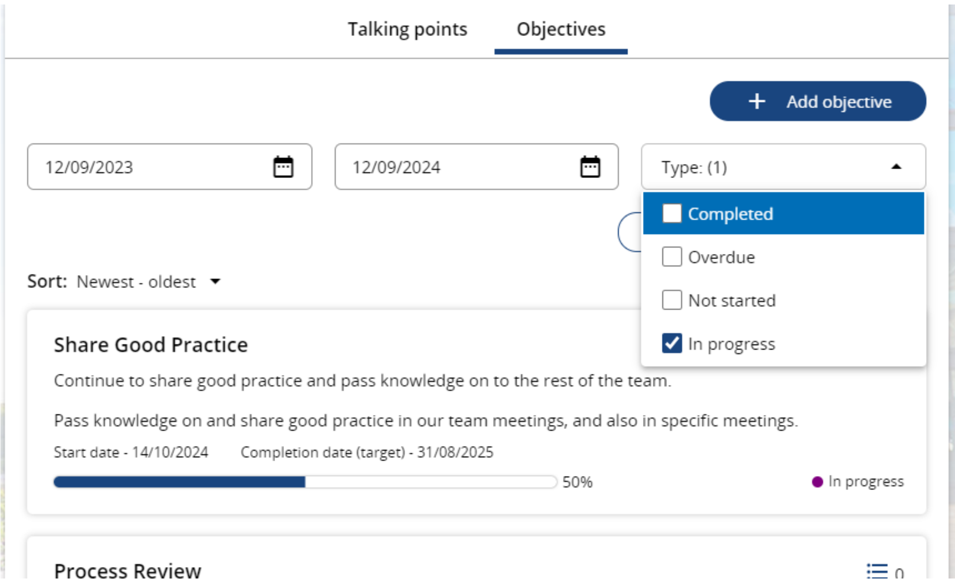
4. Find and select the PDPR review as described in the Finding an Existing PDPR section of this guide.
5. In the PDPR, click the “Objectives” tab, between the narrative and the talking points.



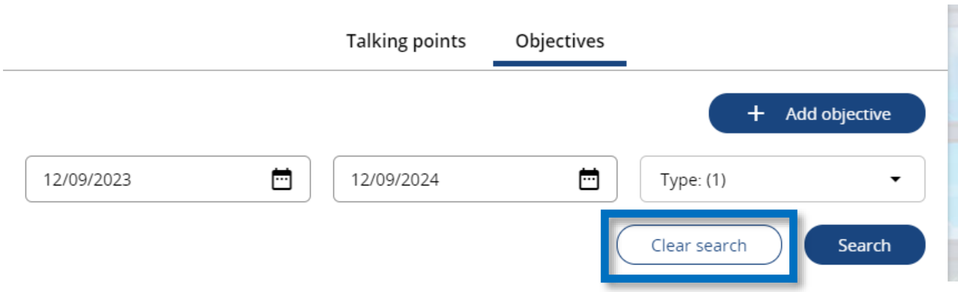
6. By default, any in-progress objectives that have been created within the 12 months will show.



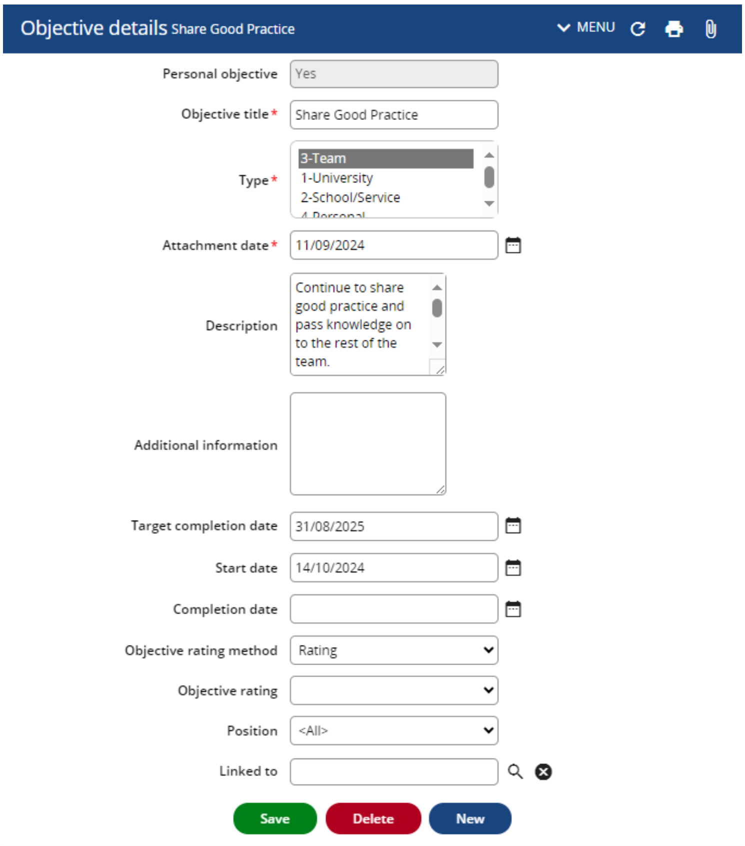
7. You can change the date range and update the objective status and then click **Search** to see more objectives. For an objective to appear the *Attachment date* on the Objective details page needs to be within the specified date range.



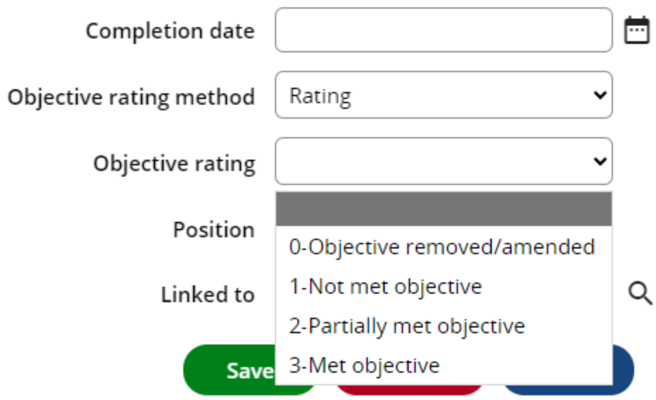
8. You can also show all objectives current and past for the reviewee by using the **Clear search** button. You can then re-apply a filter on status or a date range to narrow down the results.



9. To view an objective, click on the objective name. This will open the objective details page. You can amend any of the details and apply these changes by clicking the **Save** button.

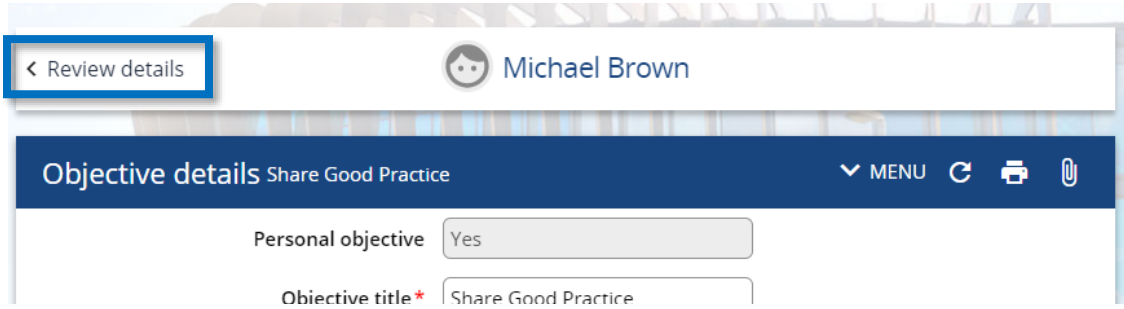


10. To mark an existing objective as complete, add the completion date and select the rating from the Objective rating list and then click **Save**.



Objective Rating	Summary
0 – Objective removed/amended	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.
1-Not met objective	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.
2-Partially met objective	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.
3-Met objective	This rating should be selected if an objective has been completed in its entirety.

11. To return to the Objectives tab in the PDPR, click the **Review details** link in the top left-hand corner of the Objective details page.

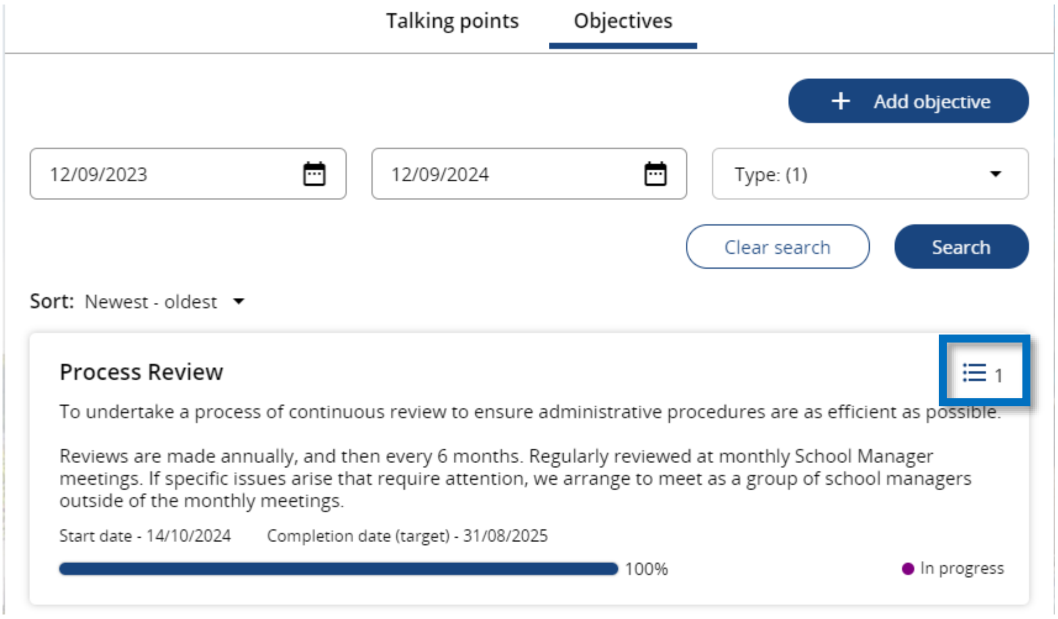


12. From the objectives tab, you can create a new objective for the reviewee by clicking the **Add objective** button, just above the objective filter options. This will open a blank new objective details page where you can enter the objective details and click **Save** to create the objective.

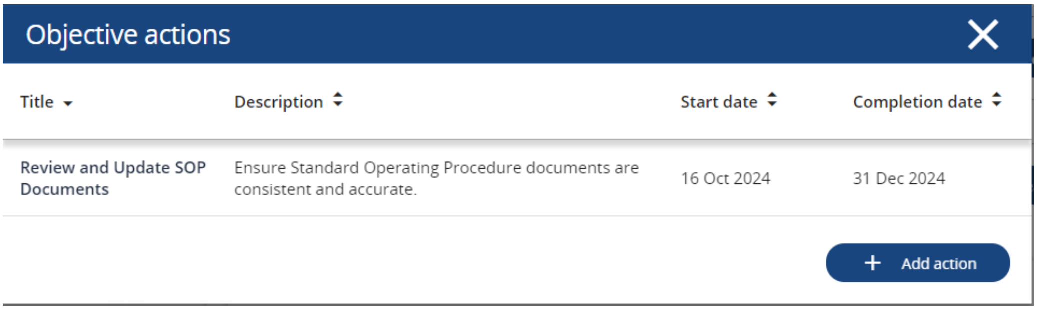
Objective Actions

Objective actions are linked to an individual objective and are a way of breaking it down into more specific and detailed steps and tasks. They can help to plan and track progress towards achieving the overall objective. To add or view actions:

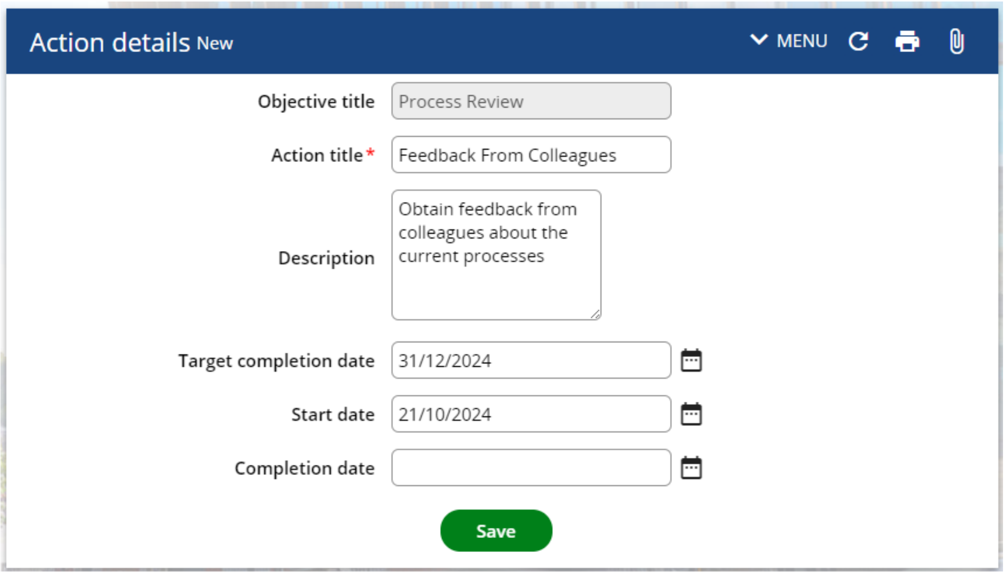
1. In the *Objectives* tab in a PDPR, click the three lines icon in the top-right hand corner of an objective. The number indicates how many actions exist for that objective.



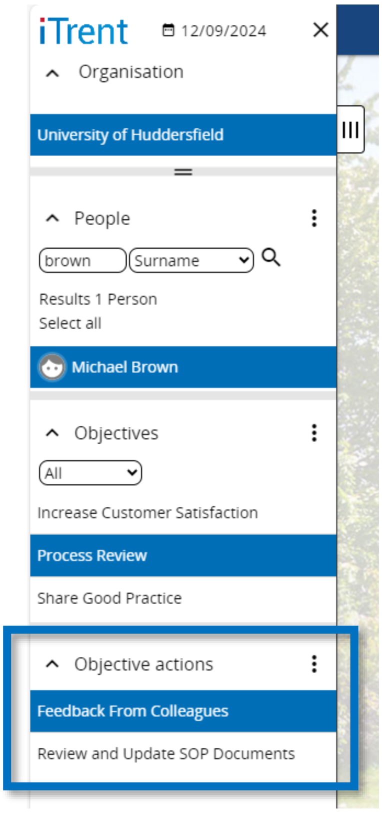
2. When the *Objective actions* window opens, click on an existing action title or click the **Add action** button to take you to the Action details page.



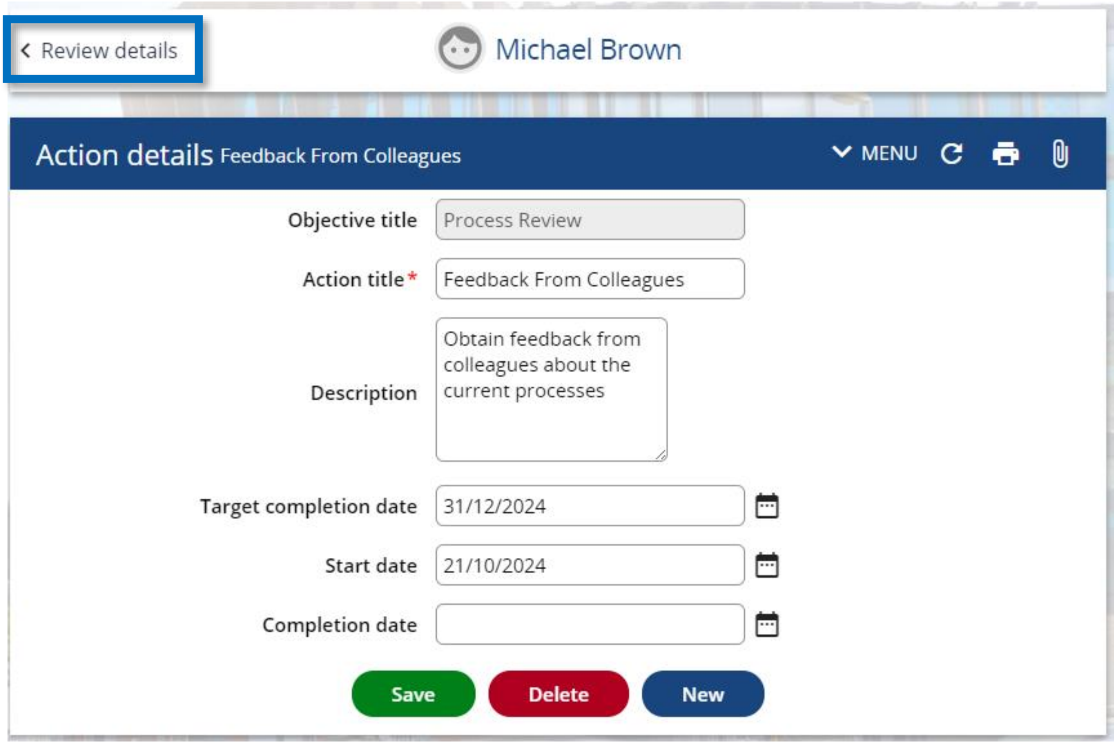
3. On the *Action details* page, if you are creating a new action enter the details, or if you are updating an existing one, make your changes, then click the **Save** button.



4. Once an action is saved, the **Delete** and **New** buttons will appear at the bottom of the Action details page. It should also be listed in the panel on the left-hand side under "Objective actions", from there you can also navigate to other actions by clicking on the action title.



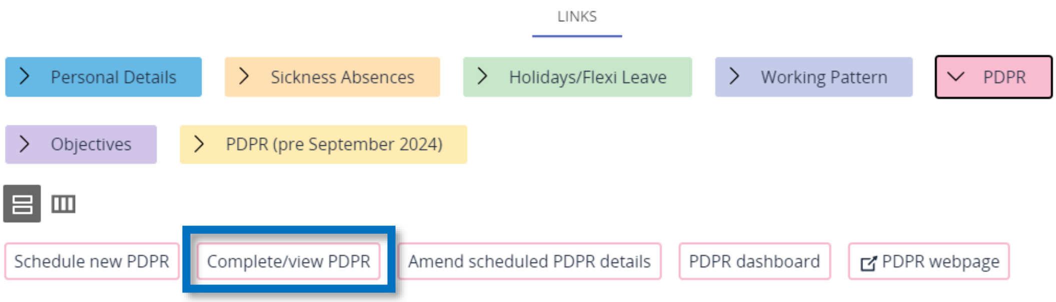
5. To return to the *Objectives* tab in the PDPR, click the **Review details** link in the top left-hand corner of the Action details page.



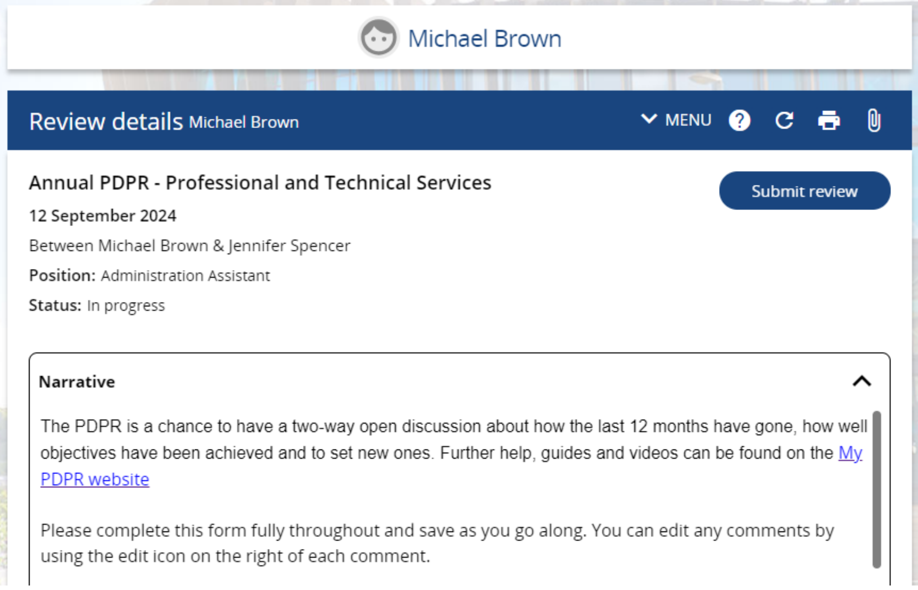
Submitting and Completing a PDPR

It's recommended that you give the reviewee an opportunity to read your responses in MyHR before you submit them. That way you can make amendments before it is submitted and becomes read-only. Once you are both happy, you can submit your responses and then mark the PDPR as complete.

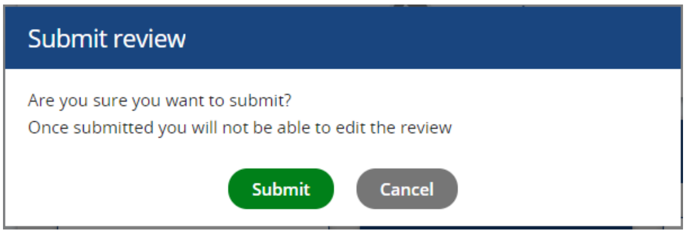
1. Sign in to iTrent and click on the "My Staff" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.
2. In the **"Links"** section, click on the **"PDPR"** button to expand the PDPR options.
3. Click the **"Complete/view PDPR"** option.



4. Find and select the PDPR review as described in the Finding an Existing PDPR section of this guide.
5. If you want to make any amendments to your responses, make sure you save them before submitting otherwise they will be lost. When you are ready, click the **Submit review** button in the top right-hand corner.

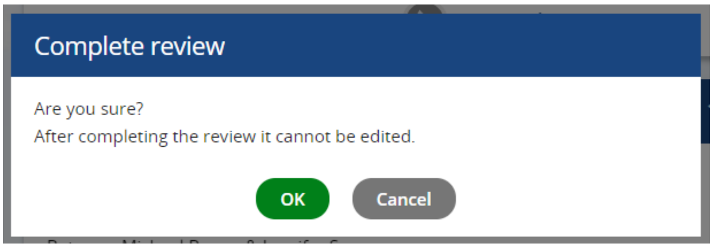


6. When the Submit review prompt appears click the **Submit** button.



7. Once submitted, the status of the PDPR should change to “Submitted”, click the **Complete review** button which is now available in the top right-hand corner.

8. When the Complete review appears, click the green OK. This will send an email to the reviewee to confirm the PDPR review has been completed.

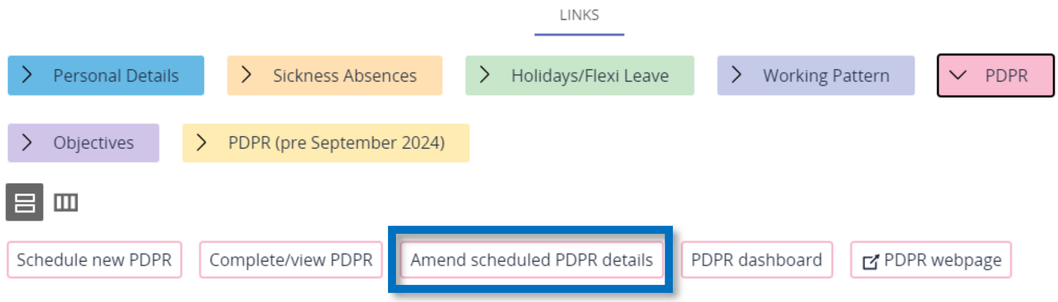


Amending Details or Deleting a PDPR

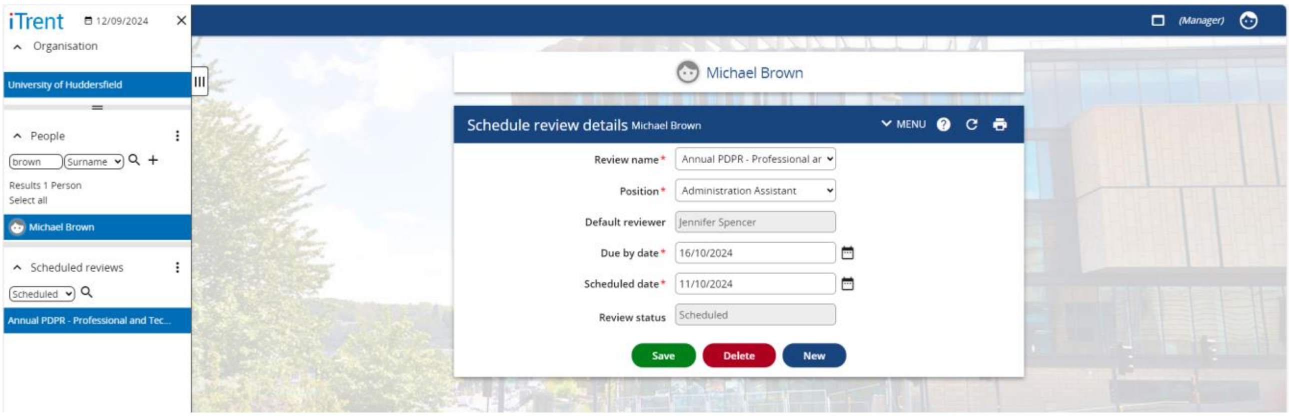
Sometimes you may need to change some of the details of a PDPR or delete it altogether. These actions can be performed provided the PDPR still has a status of “Scheduled”. To do this:

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. Click the **"Amend scheduled PDPR details"** option.



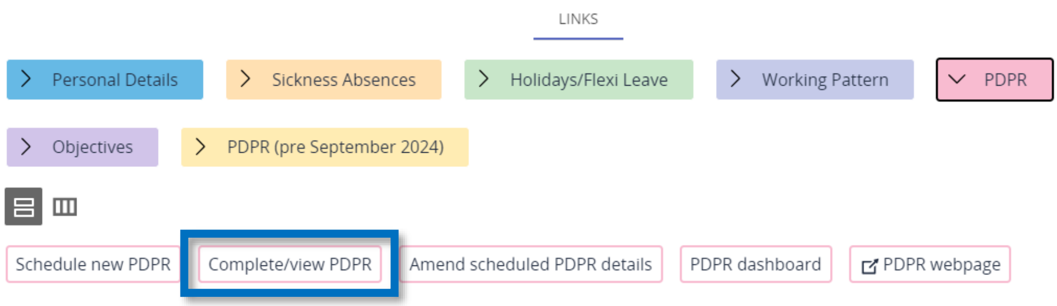
3. Find and select the PDPR review as described in the Finding an Existing PDPR section of this guide.
4. Once selected, you can change any of the details on this page and click **Save**. If you need to delete the PDPR review all together, then click **Delete**. The Save and Delete buttons are only available if the review has a status of "Scheduled".



Abandoning a PDPR Review

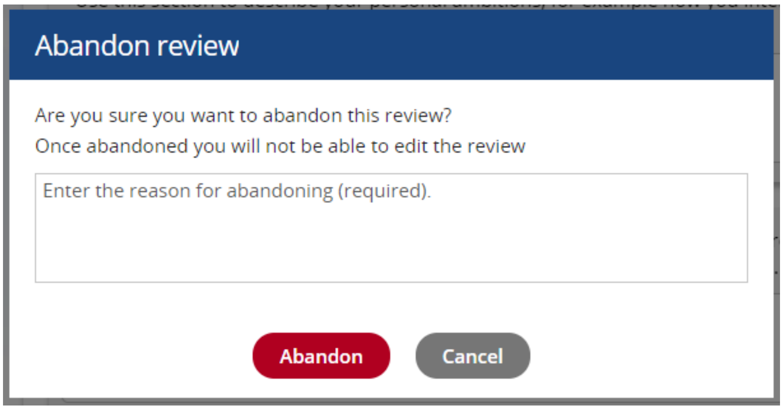
Sometimes a PDPR review may not be completed because it was started in error or cannot be progressed further due to unforeseen circumstances.

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. Click the **"Complete/view PDPR"** option.

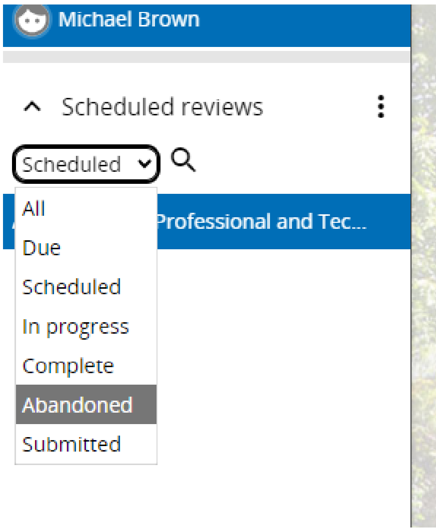


3. Find and select the PDPR as described in the Finding an Existing PDPR section of this guide.
4. Scroll to the bottom and click the **Abandon** button.

5. In the Abandon review prompt, enter a reason for abandoning, this will be saved on the PDPR. Click the **Abandon** button to confirm. Please note this will send an email to the reviewee confirming it has been abandoned which will also include the reason provided by you.



6. Once a review is abandoned, it is still accessible if required via the panel on the left-hand side, you will need to change the drop-down list to "Abandoned" before clicking the magnifying glass icon.

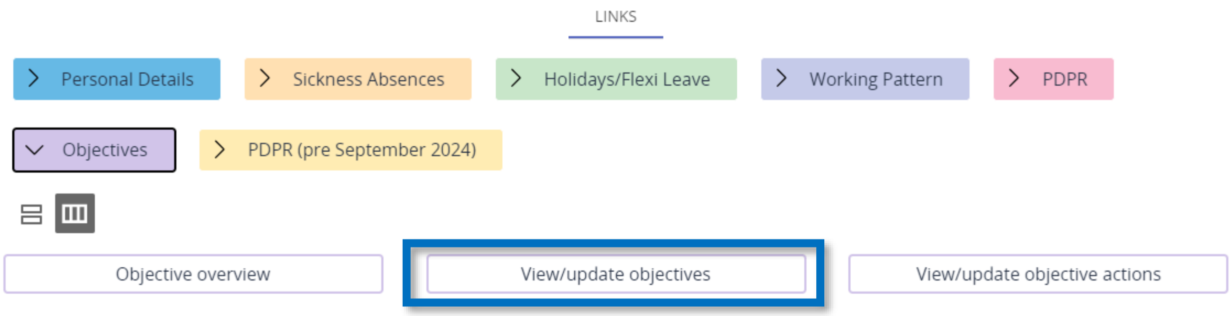


Objectives

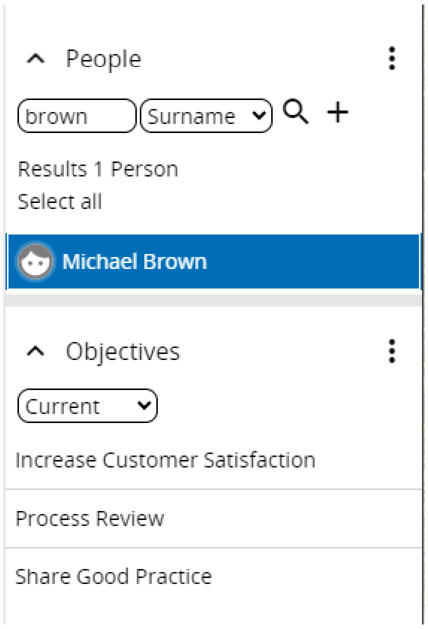
Finding and Reviewing Objectives

You can use iTrent to review your reportee's current and completed objectives at any time of the year and add a comment 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 **"Objectives"** button to expand the Objective options.
3. Click on the **"View/update objectives"** button:



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.



Alternatively, to review completed objectives, change the drop-down option for the filter from **"Current"** to **"Completed"** as shown in the image below:

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.

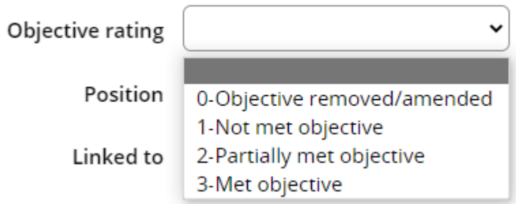
Marking Objectives as Complete

Once a reportee has achieved their objective you should mark this as complete in iTrent. Only you can mark an objective as complete. This can be done at any time throughout the PDPR year, but you may choose to do this as part of the review process.

Objectives should be specific to the PDPR year in which it was set, if an objective was not met, or was partially met, during the PDPR year, it should be ended and re-added (if required) in the next PDPR year.

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. Find and open the objective details as described in steps 2 to 5 of the Finding and Reviewing Objectives section of this guide.
3. If required, on the objective details you can add a comment to the *Additional information* field.
4. Add the completion date to the *Completion Date* field.
5. Select the appropriate value from the *Objective rating* field:



Objective Rating	Summary
0 – Objective removed/amended	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.
1-Not met objective	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.
2-Partially met objective	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.
3-Met objective	This rating should be selected if an objective has been completed in its entirety.

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.

6. Click the **Save** button and the objective will be saved.

Adding New Objectives

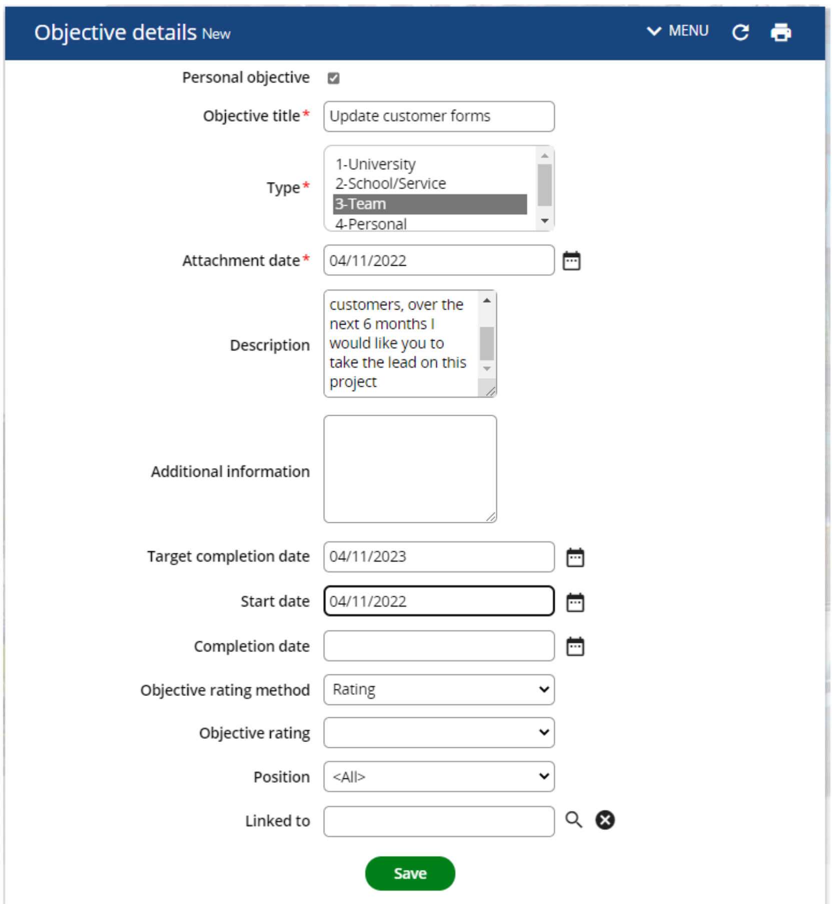
You can use iTrent to add new objectives for your reportees at any point during the year. To do this you should follow the steps below:

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) Find and open the objective details as described in steps 2 to 5 of the Finding and Reviewing Objectives section of this guide.

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

4)

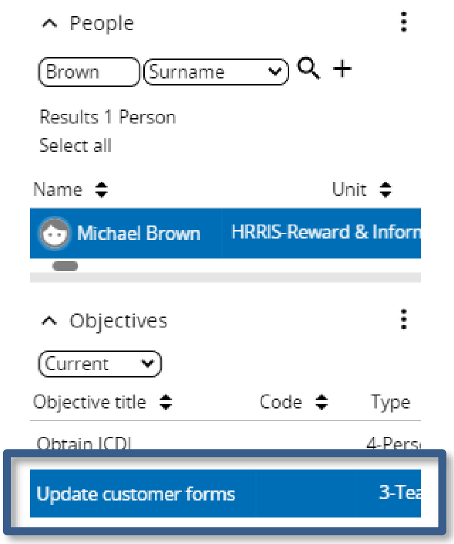
a) To add a personal objective, tick the box at the top and complete the form with the details. The *Completion date* and *Completion rating* fields are added later which will record the objective as complete.



b) To add a catalogued objective, untick the personal objective box. Click the magnifying glass icon that appears after the *Objective title* field

Select an objective from the list and this will populate the *Objective Title*, *Type* and *Description* fields for you. The *Target completion date* and *Start date* fields still need to be entered by you.

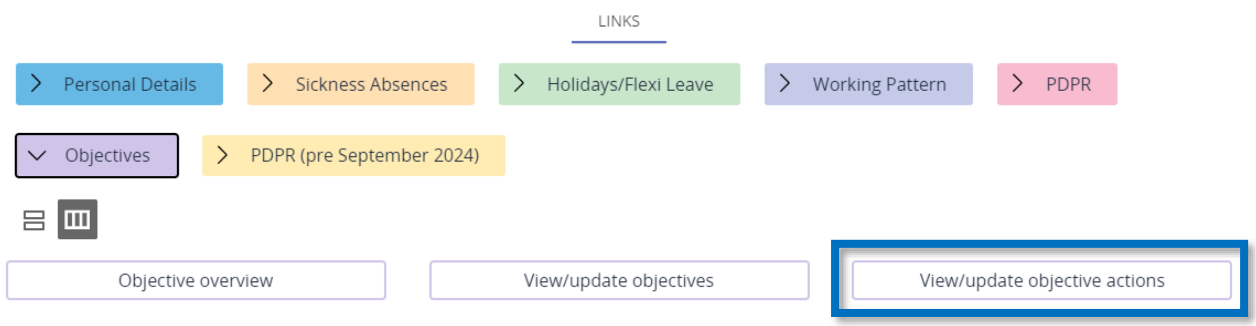
5) Click the **Save** button and the objective will be added to the list of current objectives.



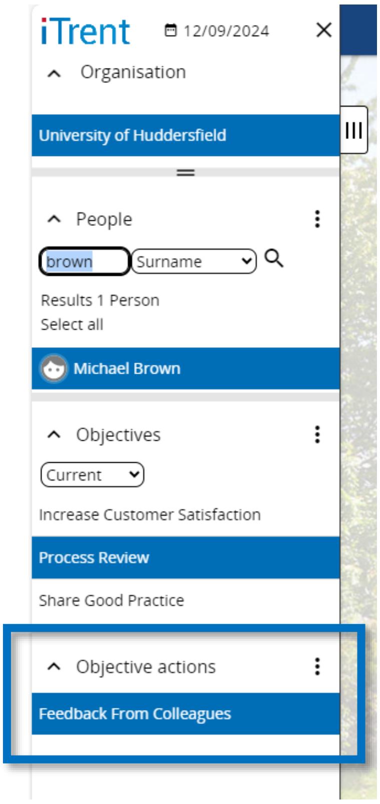
Adding and Updating Objective Actions

Objective actions are linked to an individual objective and are a way of breaking it down into more specific and detailed steps and tasks. They can help to plan and track progress towards completing the overall objective. To add or view actions:

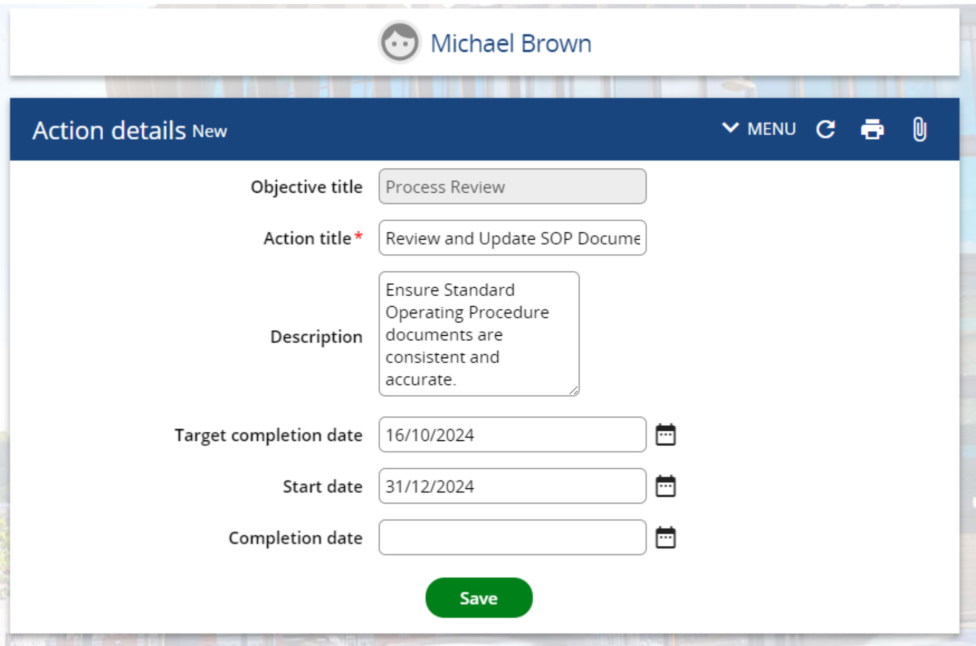
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.
2. In the "**Links**" section, click on the "**Objectives**" button to expand this section.
3. Click on the **"View/update objective actions"** button



4. Your reportee's current objectives will then be listed on the left-hand side of the screen. Select the objective you want to add actions for.
5. If your reportee does not have any actions for the selected objective, this will open a **New Action Details** page and you can proceed to step 7. If they do have existing actions, these will be listed on the left-hand side of the screen under "Objective actions".



6. Select one of the actions from the list. This will open the **Actions details** page for that objective.
7. From here you can update the action. To mark an action as complete, enter a *Completion date*. Click the **Save** button to save your changes.
8. To create a new action, click on the **New** button. This will open a **New Action details** page.
9. Enter the action details and click the **Save** button.

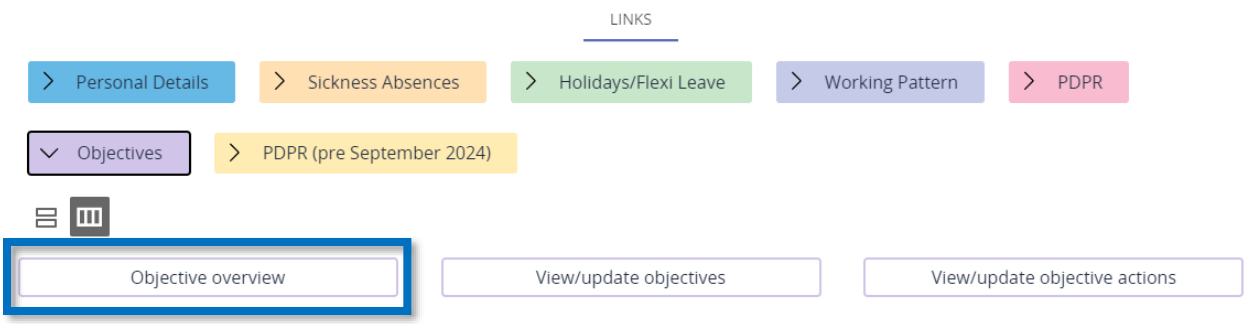


10. Once an action is saved, the **Delete** and **New** buttons will appear next to the **Save** button at the bottom. The action should also be listed in the panel on the left-hand side under “Objective actions”.

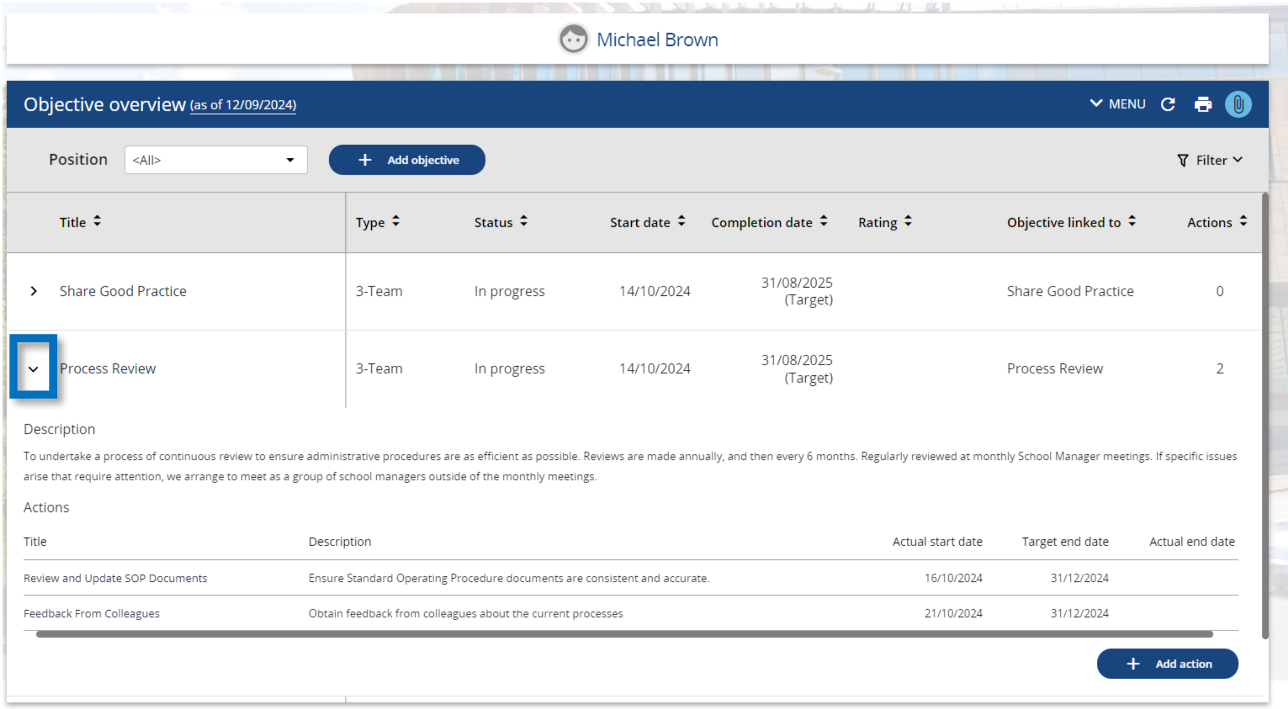
Objective Overview

You can see details of all current objectives and actions for your reportee using the Objective Overview. Through this screen you can also add new objectives and actions.

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 "**Objectives**" button to expand this section.
3. Click on the "Objective overview" button:



4. To see more details about an Objective including any associated actions, click the arrow next to the objective title this will open and close the details.



5. To edit an objective, click on the objective title which will take you to the **Objective details** page. Make your changes and click **Save**. See also steps 3-6 of the Marking an Objective as Complete section of this guide. To return to the Overview click the "Objective overview" link in the top left-hand corner of the Objective details page.
6. To add a new objective, click the **Add objective** button and follow steps 7-8 of the Adding New Objectives section of this guide.
7. To edit an action, click on the action title which will take you to the Action details page. Make your changes and click Save. To return to the Overview click the "Objective overview" link in the top left-hand corner of the Action details page.

To add a new action, click the **Add action** button, enter the details and click **Save**. To return to the Overview click the “Objective overview” link in the top left-hand corner of the Action details page.

Personal Development and Performance Reviews/Appraisals (Pre-September 2024)

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

Please note that lifecycles can no longer be attached to conduct PDPRs and instead this has been replaced with the new review form functionality, for more information see this section of this guide. The instructions below should only be followed for PDPR reviews which have already been attached and are in-progress.

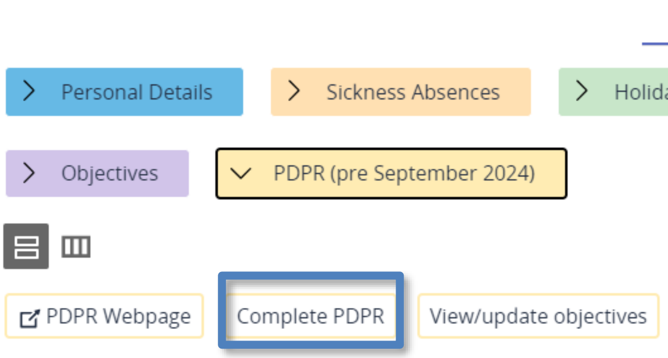
Prior to Meeting - Reviewing PDPR Form

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:

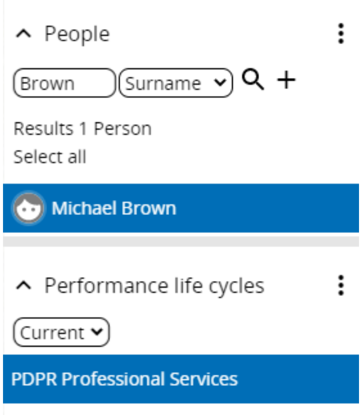
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

3. Click on the "**Complete PDPR**" option.

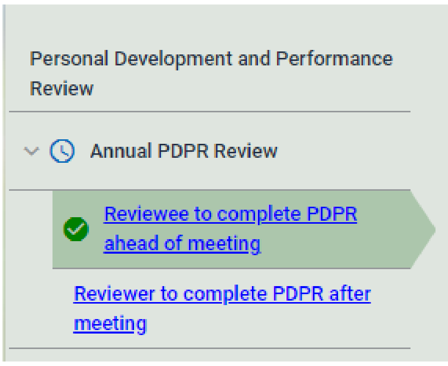


4. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.



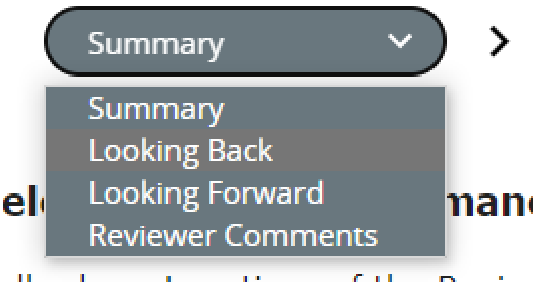
Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

5. You will see that the "**Reviewee to complete PDPR ahead of meeting**" 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. 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.



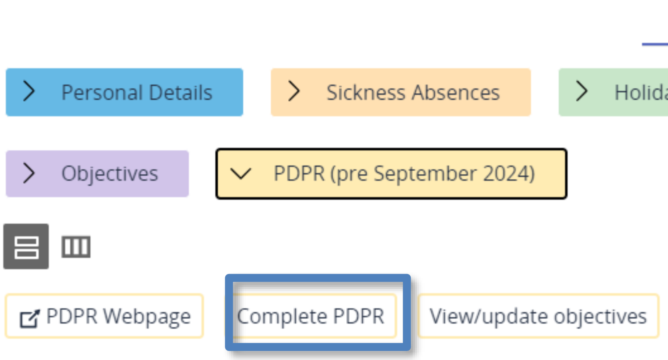
Following Meeting - Adding Your Comments

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:

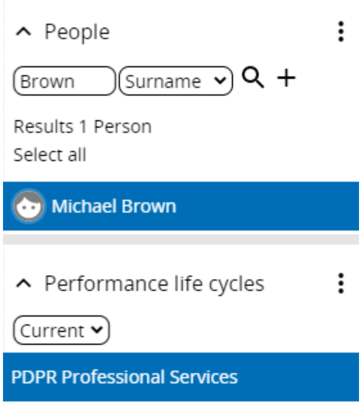
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

3. Click on the "**Complete PDPR**" option.

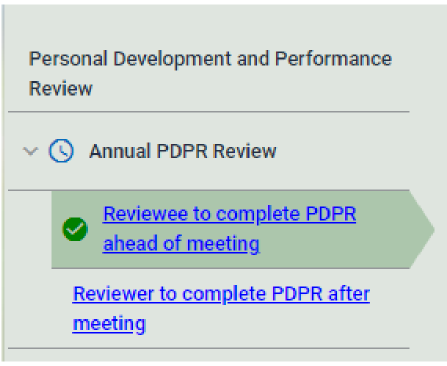


4. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.



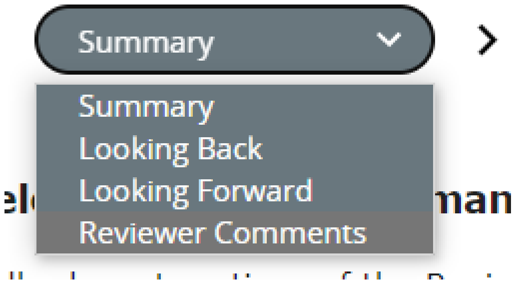
Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

5. Click on "**Reviewer to complete PDPR after meeting**"



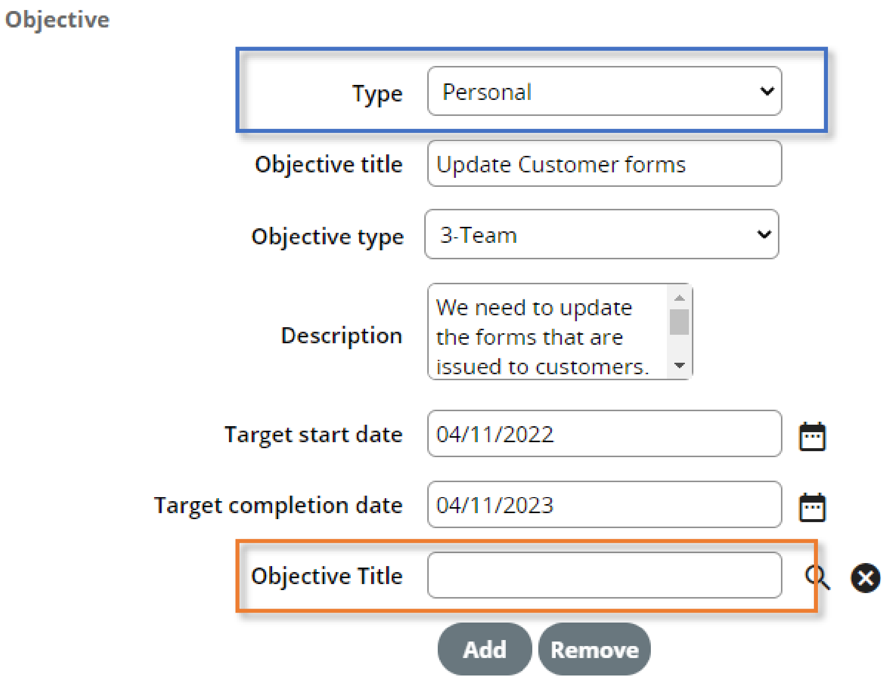
6. Click the **Start** button, this will take you to the first page of the PDPR form.

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.

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.

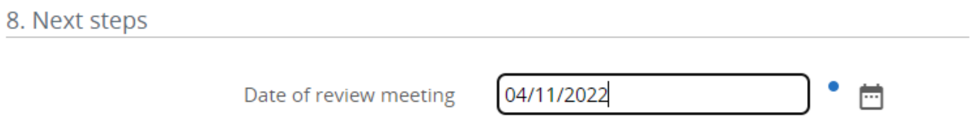


NB: The **Type** field (shown in the blue square) should be set to “**Personal**”, and the second **Objective Title** field (shown in the orange square) should be left blank

10. After clicking the **Add** button, the objective will be added to this section.

Objective title	Objective type
Update Customer forms	3-Team

11. Complete the reviewer comments section of the PDPR form and add the date that the meeting took place.



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

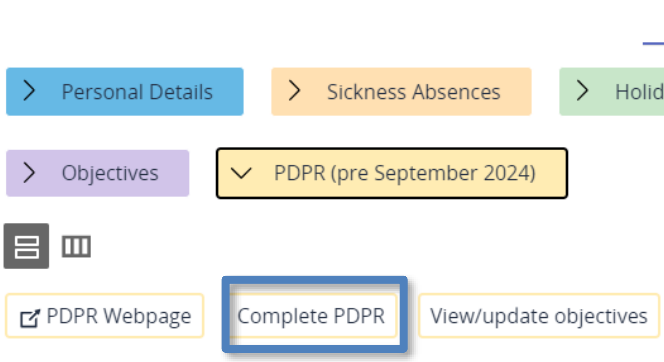
After 6 months has passed you should hold a short mid-year review meeting with your reportees. This is intended as a catch up and does not need to be as in depth as the annual review meeting.

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:

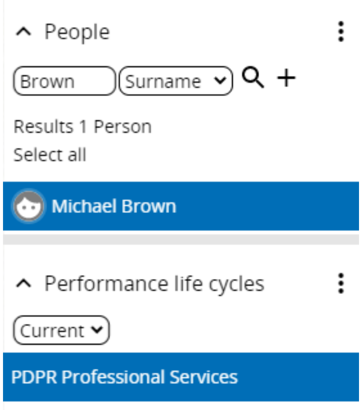
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

3. Click on the "**Complete PDPR**" option.

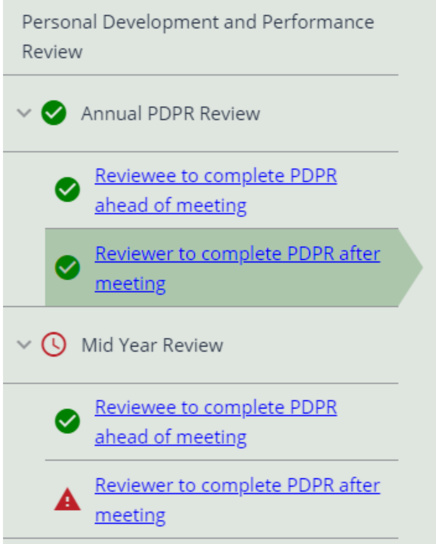


4. A list of their PDPR lifecycles (including completed PDPR lifecycles) will appear on the left-hand side of the screen.

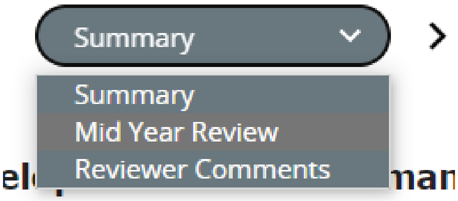


Select the correct lifecycle from this list and the PDPR lifecycle will be displayed.

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

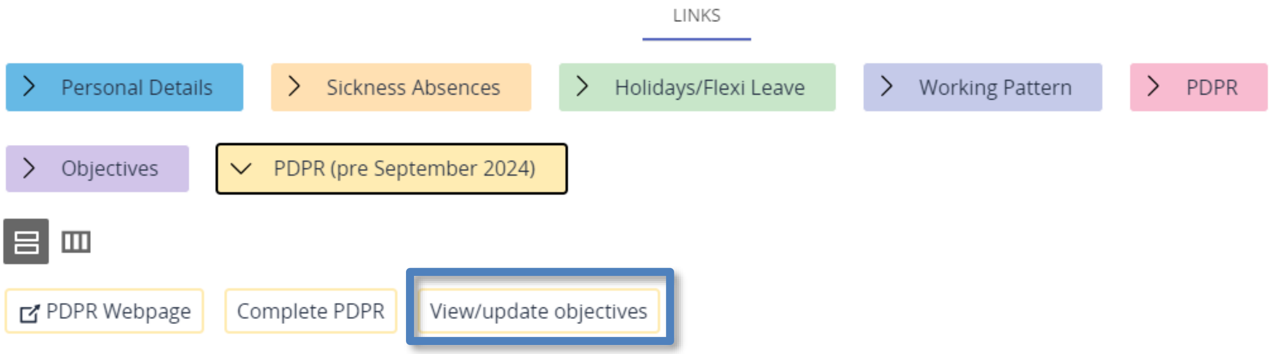
Reviewing objectives

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:

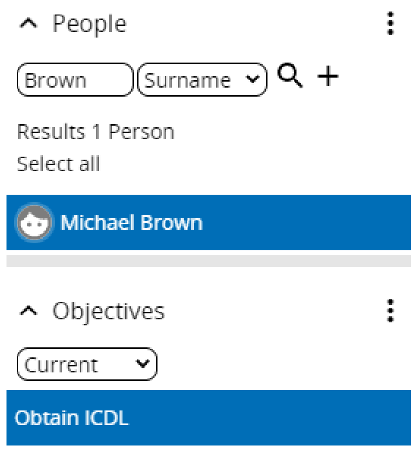
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

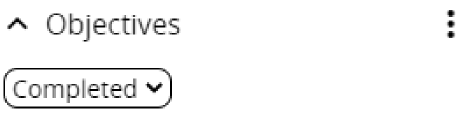
3. Click on the "**View/Update objectives**" option.



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.



To review completed objectives, change the drop-down option for the filter from "Current" to "Completed" as shown in the image below:



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.

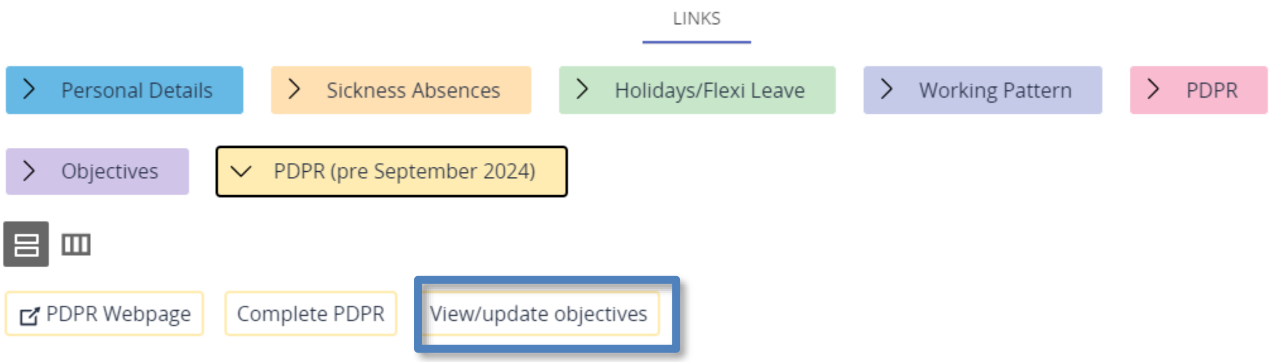
Objectives should be specific to the lifecycle in which it was set, if an objective was not met, or was partially met, during the PDPR lifecycle, it should be ended and re-added (if required) in the next PDPR lifecycle.

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

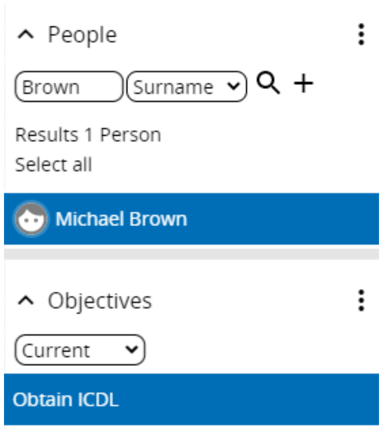
7. Sign in to iTrent and click on the “**My Staff**” button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

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



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

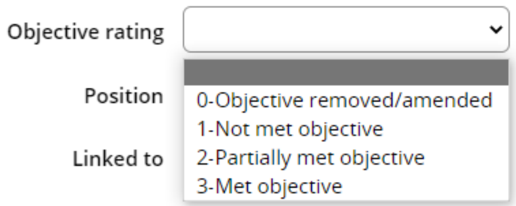


5. Click on the objective in this list to open the objective details page.

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

11. Add the completion date to the *Completion Date* field.

12. Select the appropriate value from the *Objective rating* field:



Objective Rating	Summary

0 – Objective removed/amended	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.
1-Not met objective	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.
2-Partially met objective	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.
3-Met objective	This rating should be selected if an objective has been completed in its entirety.

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.

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

Adding New Objectives

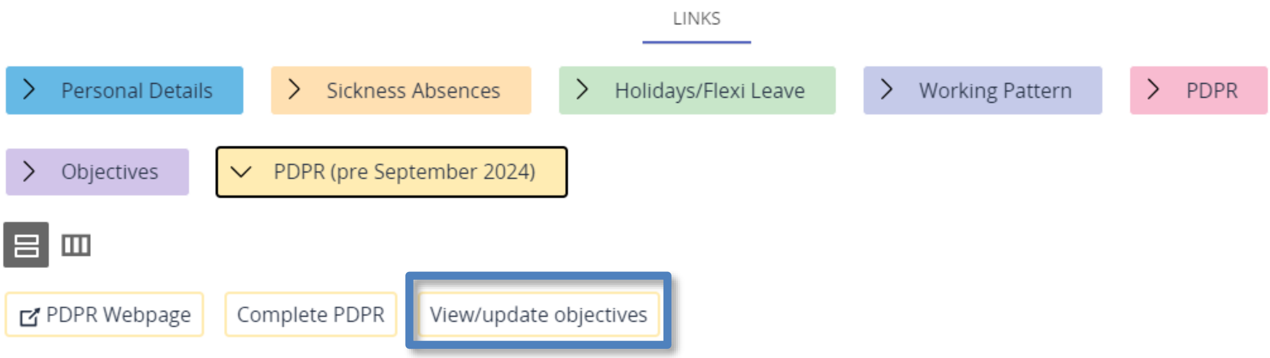
You can use iTrent to add new objectives for your reportees. This should be done if an objective from the previous PDPR lifecycle was not met and needs to be re-added for the following year.

To do this you should follow the steps below:

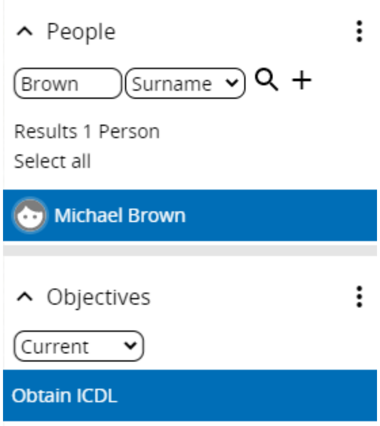
1. Sign in to iTrent and click on the "**My Staff**" button on the iTrent home page and search for the staff member as described in the Searching My Staff section of this guide. This will open the summary page for that person.

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

3. Click on the "**View/Update objectives**" option.



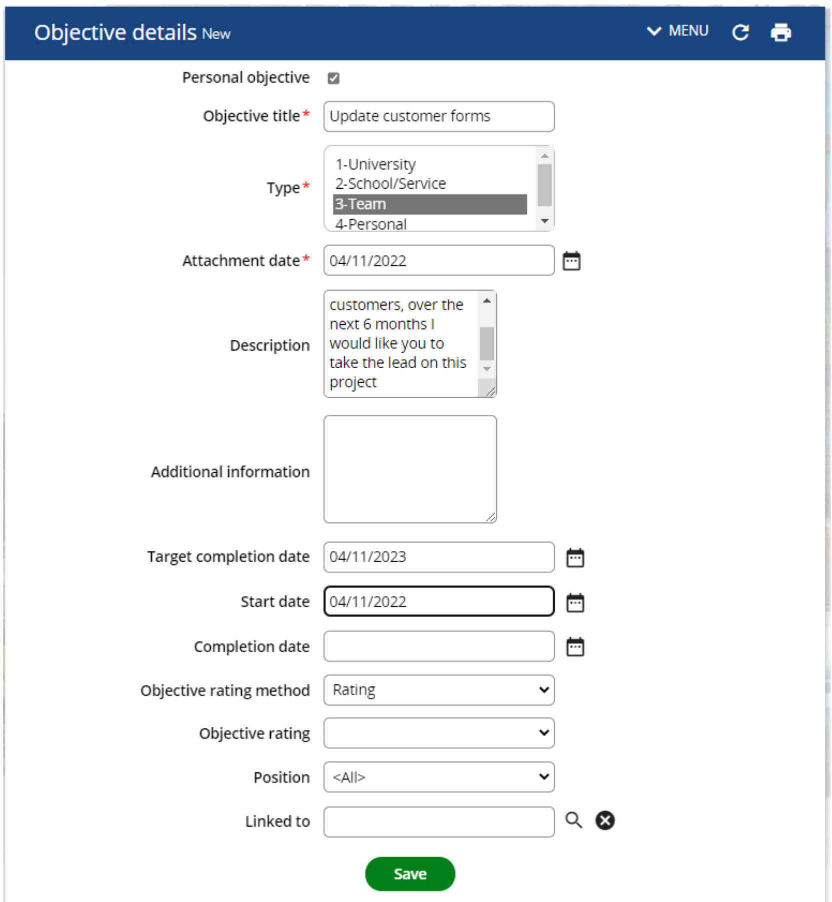
11. Your reportee's current objectives will then be listed on the left-hand side of the screen. If your reportee does not have any current objectives, this will open the New Objective Details page and you can proceed to step 7. If they do have current objectives, these will be listed on the left-hand side of the screen.



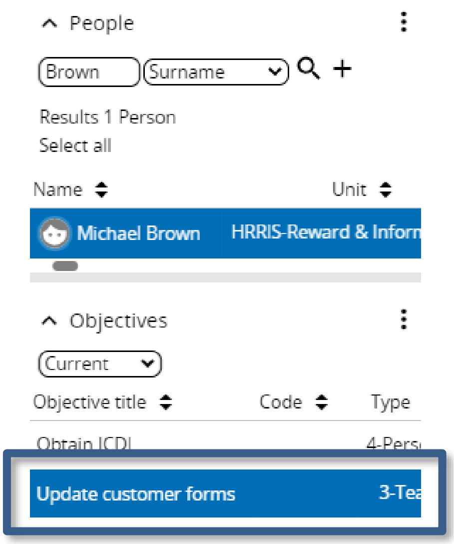
5. Select one of the current objectives from the list. This will open the Objective details page for that objective.

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:



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


People
Brown
Surname
Results 1 Person
Select all
Name
Unit
Michael Brown
HRRIS-Reward & Inforn
Objectives
Current
Objective title
Code
Type
Obtain ICDL
4-Pers
Update customer forms
3-Tea