



iTrent Employee Self Service Guidance

Welcome to iTrent Employee Self Service.

This guidance document outlines

- How to navigate iTrent Employee Self Service
- How to view and update personal information including address, contact information, emergency contacts and bank details
- How to view payslips
- How to submit time and expense claims
- How to view your employment details
- How to record and update work objectives

Data Protection

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

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Introduction

Employee Self Service allows employees to view and update information which is held on City of York Council's HR database, iTrent, including:

- Personal data, your address, contact information, emergency contacts, bank details, private vehicles, and sensitive information.
- Your payslips.
- Your employment details.
- Recording and viewing Objectives.

If you need to reset your password, please use the Forgotten Password link on the [login](#) page.

If you do not receive a password reset email, please log a case using the ICT Self Service icon on your desktop and search for 'iTrent'.

Alternatively, please email: ictservicesdesk@york.gov.uk or call 01904 55 2222.

If you have any queries regarding the following, then please inform the Payroll Services team by emailing: payrollservices@york.gov.uk or call 01904 55 1619.

- Setting up an Employee Self Service account.
- If any information is incorrect in such as your job title, pay or manager.
- Making a Time and Expenses claims.

If you require assistance relating to PDR Objectives only, please contact the iTrent Team by emailing itrent@york.gov.uk

Logging into iTrent Employee Self Service

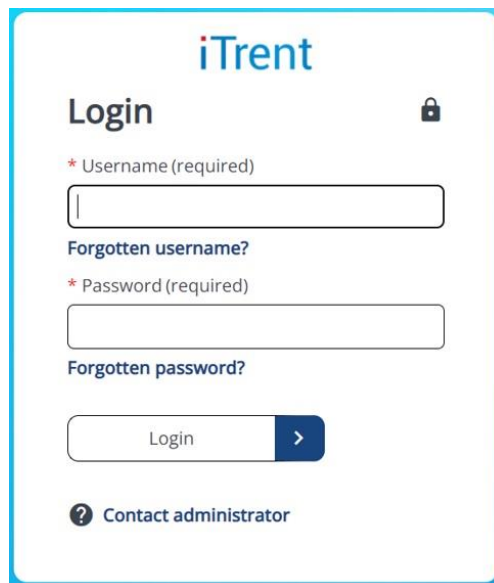
There are a variety of ways in which you can access iTrent Employee Self Service.

- 1) The iTrent Employee Self Service icon on your desktop, which will



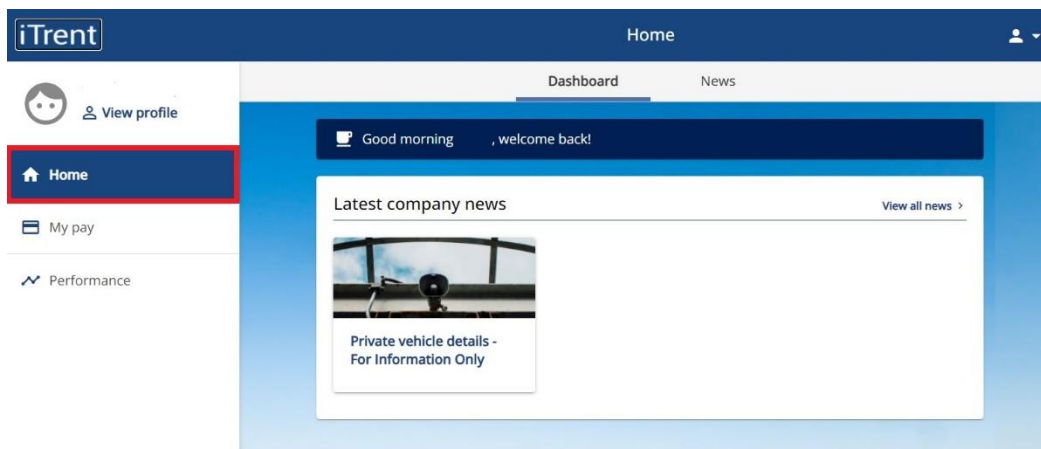
look similar to these:

- 2) City of York Council [Intranet](#). Please search for 'iTrent Employee Self Service'
 - 3) The [City of York Council's iTrent](#) page on the Internet available here www.york.gov.uk/iTrent.
- The Login screen below will appear:



- You should already have been provided with your login details. If you have yet to receive these or you are unable to log into the system, please contact [Payroll services](#)

The Homepage



This is the starting point for access to all your personal information in iTrent.

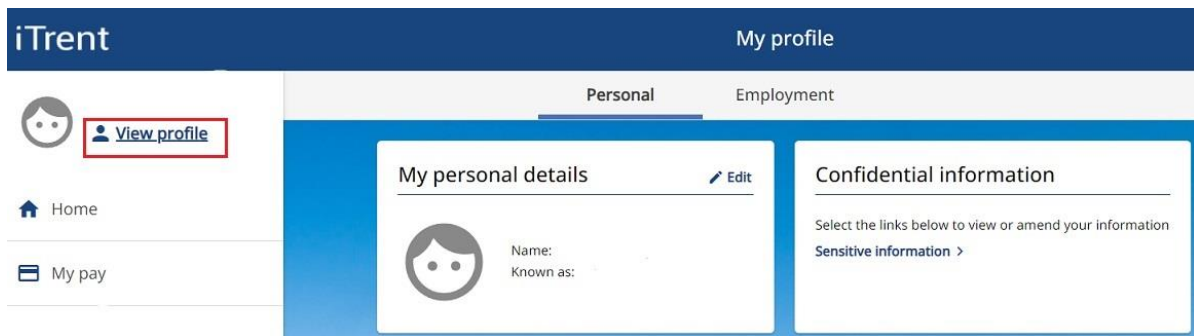
There are four sections:

- 1) Home page
- 2) View Profile
- 3) My Pay
- 4) Performance

The Homepage will contain important information that you need to be aware of so please take care to notice anything that is on this page and check it regularly.

You can select the Homepage section, shown above, at any time to bring you back to this page.

View Profile

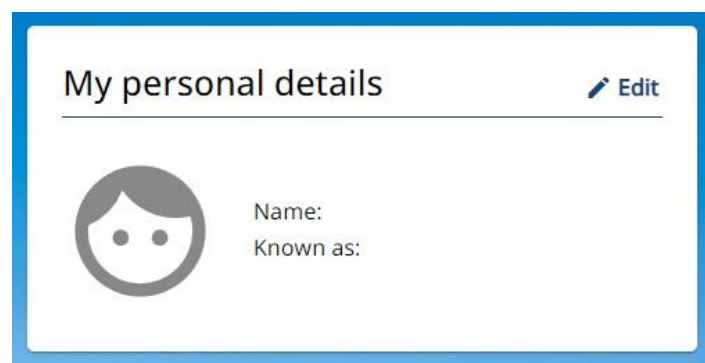


There are two main areas of the View Profile section: **Personal** and **Employment**.

There are six areas of the personal section:

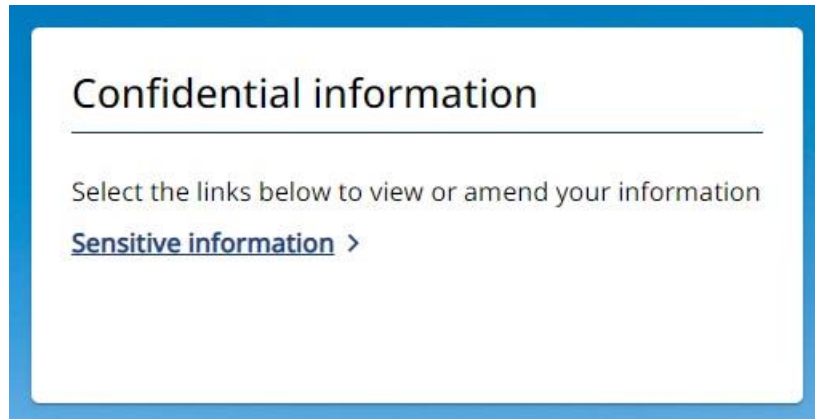
- 1) My Personal details
- 2) Confidential Information
- 3) Contact Information
- 4) Friends and Family
- 5) Bank details
- 6) Private vehicles

My Personal Details



Please click on 'edit' to view your personal details held in the HR database. You won't be able to edit most of these details as they are required to process your pay. However, if you see something that isn't correct, please email [Payroll Services](#).

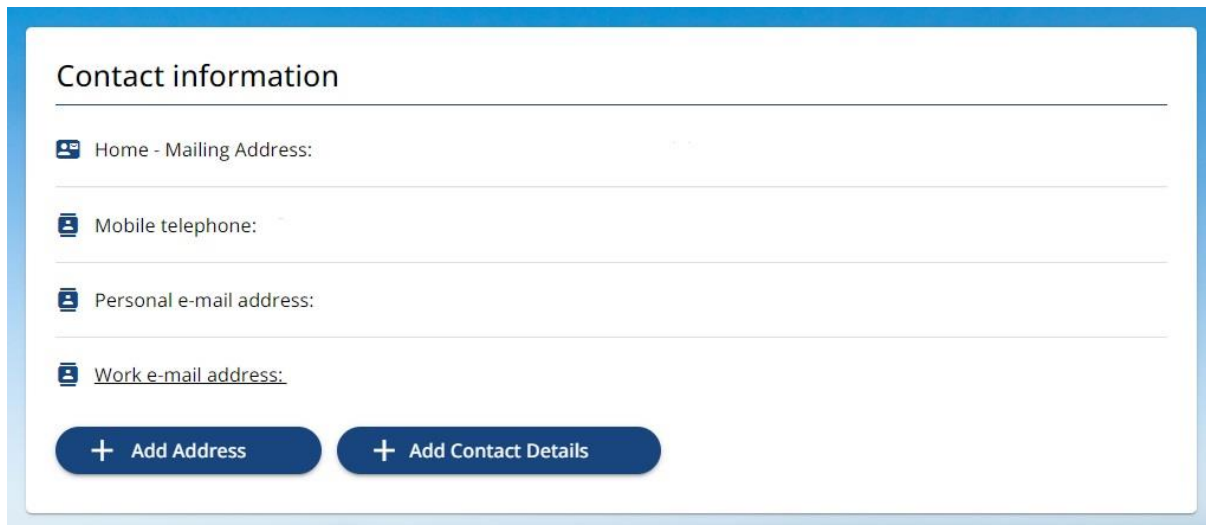
Confidential Information



We encourage all staff to complete this sensitive information section as much as you wish to. If you do not wish to complete a section, then please use the 'Prefer not to say' option.

Any information provided here is confidential and secure. It is only used in an anonymised format and helps the council understand its workforce as a whole.

Contact Information



The screenshot shows a web form titled "Contact information" with a blue border. It contains four input fields, each with a person icon on the left and a label: "Home - Mailing Address:", "Mobile telephone:", "Personal e-mail address:", and "Work e-mail address:". Below the fields are two blue buttons with white text: "+ Add Address" and "+ Add Contact Details".

The contact information screen is where you can view existing methods of contact and add new ones. This is how the council and/or your manager will contact you if they need to. Please keep it up to date.

Use the 'Add Address' option to update your home address. Adding an address means your address history is retained rather than replaced.

Changes made here will take immediate effect.

Friends and Family

Type	Contact name	Relationship	Contact number	Primary contact
Emergency contact				

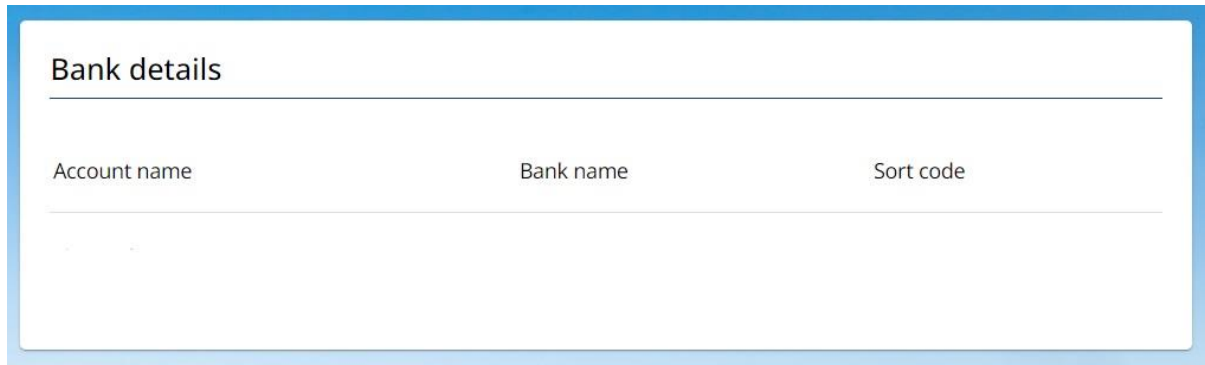
[+ Add Emergency Contact](#)

The friends and family section is where you need to tell us who to contact in an emergency. Your manager will also have access to the information held in this section. Please keep this up to date as it may be required at short notice.

You will be able to make one of these contacts the 'primary contact' and this person will be the first choice in an emergency.

You can add as many contacts as you wish, and changes/additions made here will take immediate effect.

Bank Details



The screenshot shows a form titled "Bank details" with a blue border. Below the title is a horizontal line. Underneath, there are three columns: "Account name", "Bank name", and "Sort code". A second horizontal line is positioned below these labels. The form is currently empty of data.

This screen will be prepopulated with the bank details you provided when you started your employment or from the last time you updated them.

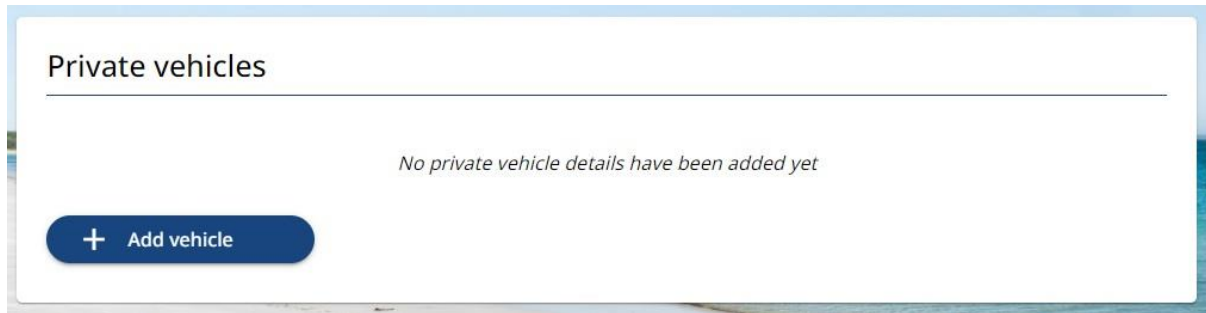
To change your bank details please click on the account name. You can then change your sort code, bank name and account number. If you are unable to complete any of these fields, please contact Payroll Services as soon as possible.

Important!

Please check with [Payroll Services](#) first if you wish to change your bank account. Payroll calculates at different times every month and your pay may not reach your desired account if the date you change it misses the cut off for that month.

We recommend keeping your old bank account open until you have received your pay into your new account.

Private Vehicles



Private vehicles

No private vehicle details have been added yet

+ Add vehicle

If you wish to claim mileage expenses you will need to register your vehicle here.

You will be asked to provide the make and model. If details for your vehicle are not available for selection, please email [Payroll Services](#) and they can make these available to you.

Important!

If your car is Electric, please select the 'Electric' fuel type. If your car is a Hybrid, please select either petrol or diesel.

Engine size is a mandatory field. For Electric vehicles only, please enter a '1' as shown below:



* Engine size (cc) (required)

1

CO2 Emission

* Fuel type (required)

Electric

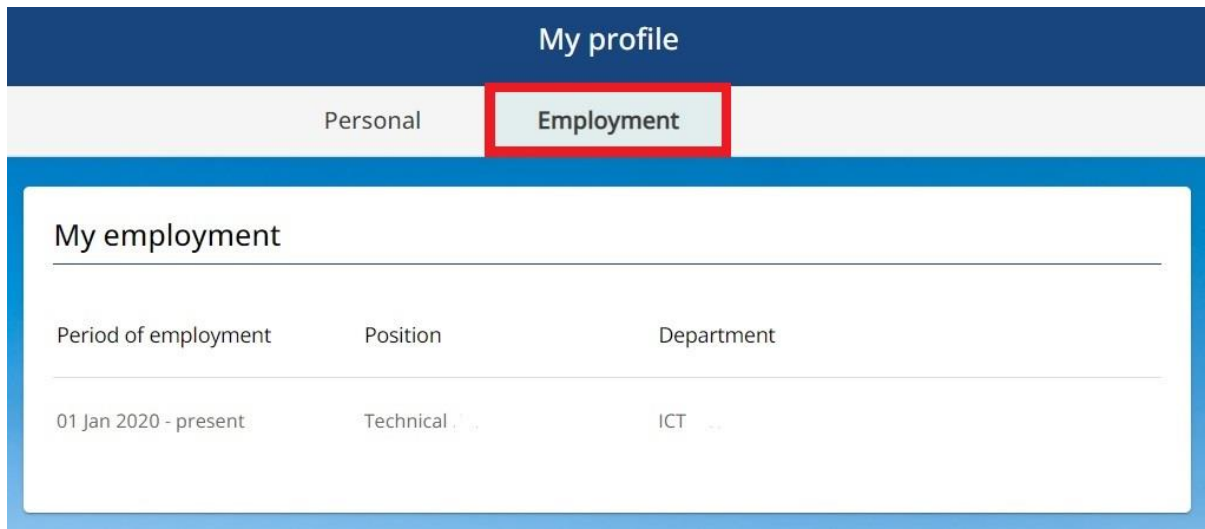
You manager will receive an email that you have added a vehicle and they will discuss your insurance documents with you and make a record that it is valid using People Manager.

If you wish to change your car, please first select your existing vehicle, which will be listed above, and put in an end date. Then click 'Add vehicle' to create a new one.

You are required to enter the CO2 emission of your vehicle if it is petrol or diesel. This can be found by using the [Government website for car fuel and CO2 emissions data](#). For more information, please visit: <https://www.gov.uk/co2-and-vehicle-tax-tools>

Please note that the start date of your vehicle will be the earliest start date you can use when making a claim against that vehicle.

Employment



The screenshot shows a user interface for 'My profile'. At the top, there is a dark blue header with the text 'My profile'. Below this, there are two tabs: 'Personal' and 'Employment'. The 'Employment' tab is highlighted with a red border. Below the tabs, there is a section titled 'My employment' with a horizontal line underneath. Below this line is a table with three columns: 'Period of employment', 'Position', and 'Department'. The first row of the table contains the following data: '01 Jan 2020 - present', 'Technical', and 'ICT'.

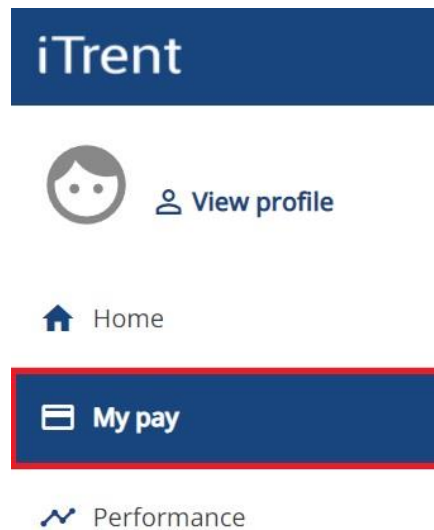
Period of employment	Position	Department
01 Jan 2020 - present	Technical	ICT

The employment section will show you a history of all your roles. By selecting one you will find useful details including your payroll number, your current reporting manager, and your contractual hours.

Important!

Please consult this screen before making a time and expenses claim as it will show you who your claim will go to. If anything on this screen is incorrect, please email [Payroll Services](#) before you submit a claim.

My Pay



My Pay is where you can find your payslips, P60's and submit Time and Expenses claims.

Payslips are made available on this page close to month end. They can be viewed on screen or downloaded as a PDF file.

It is very important to check your payslips every month. This is the best way to see if there has been a mistake with your pay and have it rectified as soon as possible. Please make yourself aware of your salary as well as any deductions you may be expecting such as student loans.

Your payslip is also the best place to view your tax code, national insurance category and your pension scheme.



Payslips

Payslips View my bank details >

i Searching with neither Start date nor End date will return all payslips.

Start date (dd/mm/yyyy) End date (dd/mm/yyyy)

Search **Download all**

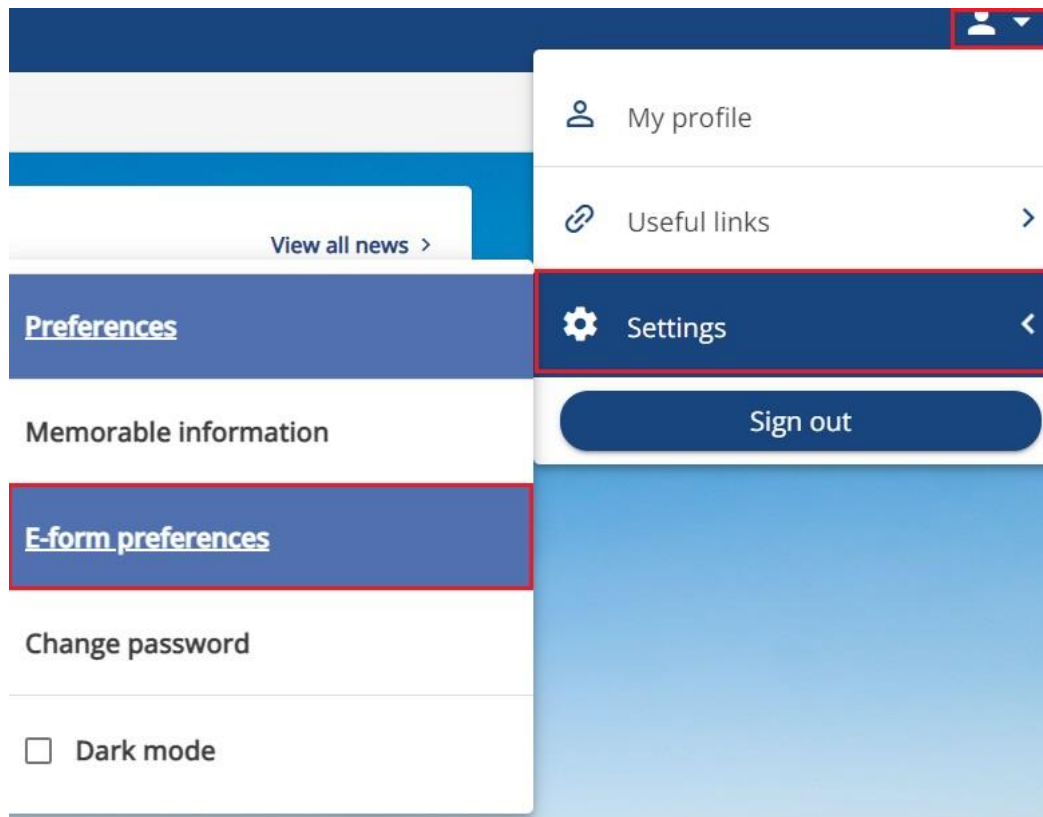
Pay date	Net pay	Download
28 May 2021		
30 Apr 2021		

Clicking on the pay date, as shown above, will load your payslip on screen for you to view.

You can also click on the download arrow shown on the right-hand side. This will download a pdf to your device.

This page will display a maximum of 12 payslips. If you wish to view a payslip beyond the previous 12 months, please enter relevant dates in the boxes as shown above and click 'Search'. These can then be viewed on screen or downloaded.

E-form Preferences



You have the option to receive an emailed payslip to an email address of your choice. You can choose this email address by going to the Homepage and selecting the icon of a person in the top right of the page.

Please then select Settings > E-form preferences.

These payslips are protected with a password and can only be opened with the password you choose on this screen. If you change this password, it will affect any subsequent payslips emailed from that date.

This password is not your password for iTrent self-service although they can be the same if you wish. Only you can change the password that opens your emailed payslips.

Time and Expenses Claims

The screenshot shows a user interface for 'My pay' with three tabs: 'My pay', 'Benefits', and 'Time & Expenses'. The 'Time & Expenses' tab is highlighted with a red border. Below the tabs, the 'Time & Expenses' section contains a filter bar with 'In progress' (checked) and 'Authorised'. There are two date input fields: 'Start date (dd/mm/yyyy)' and 'End date (dd/mm/yyyy)', each with a calendar icon. A 'Search' button is located below the date fields. A message in the center reads 'There are no Time & Expenses claims to display'. At the bottom, there is a '+ Add claim' button.

In the 'My Pay' section on the Homepage you will also find the Time and Expenses tab as shown above.

Here you will be able to submit expenses for Overtime, Additional hours, Mileage, and other expenses specific to your role.

Making a Claim

Please click the 'Add Claim' button to begin a claim and you will be presented with the screen shown below:


Time & Expenses claim entry: New

Start date



Job title

Claim template

Please choose 

Please choose

- 1. CYC Basic/Casual Claim Form
- 12. Home to Work Expenses when on standby (taxable)
- 2. CYC Additional Hours Claim Form
- 3. CYC Overtime Claim Form
- 4. CYC Travel and Expenses Claim Form
- 5. CYC Bank Holiday Auto paid staff ONLY
- 7. CYC BI Assessment

The 'start date' field is the date the claim begins. You can add more dates in the claim form itself if you need to. This date will also determine which manager your claim goes to. If you have recently changed managers, please check that the correct manager is showing in your Employment section before you submit a claim.

If you have more than one role, please select the correct one on this screen.

You can then select the pay element you wish to claim against.

If you are unsure what pay element to select, please check with your manager first and then Payroll Services who can provide further advice if necessary.

Please note that all positions are treated separately and as such you are required to exceed 37 hours in any one position before being able to claim overtime, in which case a separate overtime claim is required for these hours.

Saving a claim

We advise that if you are doing regular overtime or additional hours that you save your claim as a draft after each occurrence. New lines can be created for different days in a month.

Important!

Claims over 90 days old cannot be authorised by your manager so please ensure that you submit them with regularity to ensure payment.

Cut off dates

All expenses to be paid the same month must be authorised by your manager on or before the 9th of that month. This is to ensure timely running of the payroll. Claims that are not authorised by this date will be paid the following month.

Your manager may take a few days to authorise claims so please submit as soon as it is reasonable to do so.

Hours-Based Claims and enhancements

All hours being claimed must be entered in a decimal format e.g. 1hour 30mins would be entered as 1.5

A table converting all minutes to decimal is provided in Appendix 2.

Enhancements are available for claiming where the hours worked fall on a weekend or evenings. Further details regarding these can be found in Appendix 1.

Travel based claims – Mileage

Important!

You need to have registered a vehicle via the View Profile > Private Vehicles section shown on page 12. A mileage scheme will have been attached by the payroll department but please contact [Payroll Services](#) if your scheme is not showing.

You can have more than one vehicle attached to your profile so please select the appropriate one here.

For each date, if commuting distance is to be deducted, first enter that mileage as a Negative (-) with the reason 'Commute', followed by as many rows as necessary for each of the day's business journeys.

Subsistence Claims

If you have incurred expenses due to travel, then please use page 2 of the CYC Travel and Expenses claim form. Travel claims will be for expenses such as train tickets, bus tickets or parking charges. Subsistence claims will include meals. Guidance on what can be claimed is available on the [Travel and Subsistence rates](#) page on the Intranet.

Page 1 **Page 2**

This page is for all subsistence and travel related expense claims.

Please enter claim details and the cash amount being claimed.

Any tickets/receipts must be kept and be available on request.

Element	Date	Details	Reason	Amount	Total	
<input type="text" value="Subsistence Travel Expenses"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	+ -

Appendix 1 - Claim Form Elements

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

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

Element (page 1 of claim form unless stated)	Description
Bank Holiday Hours Pensionable	Paid at normal hourly rate for number of hours worked and is in addition to the normal pay an employee would have received. As this is additional, this is claimed on top of their casual hours.
Callout claiming	Starts from the time of the request to attend work and ends at the time the employee returns home
Casual Pay	All hours claimed for by Casual staff.
Night Enhancement Claiming (Pens)	Paid for hours worked between 7pm and 7am (additional 10% on top of hourly rate)
Normal Pay	Normal pay claimed by contracted staff who are not currently auto paid as they work non-standard shifts. Not to be used by Casual staff
Weekend Pay Claiming	Paid for hours worked between midnight on Friday and midnight on Sunday (additional 10% on top of hourly rate)

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

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

3. Overtime Claims – Elements in the drop-down list

Element (page 1 of claim form unless stated)	Description
Bank Holiday Hours	Paid at normal hourly rate for number of hours worked and is in addition to the normal pay an employee would have received. As this is additional, this is claimed on top of their overtime hours.
Night Enhancement claiming	Paid for overtime worked between 7pm and 7am (additional 10% on top of hourly rate)
Overtime Claiming	Paid to all employees after they have worked 37 hours
Standby	Standby allowance paid to staff on a claiming basis that is not part of their contracted rota
Weekend Enhancement	Paid for overtime worked between 12pm on Friday and 12pm on Sunday (additional 10% on top of hourly rate)

4. Travel and subsistence claims

Element name	Description
Subsistence	This is a cash element. Please input the correct cash amount.
Travel Expenses	This is a cash element. Please input the correct cash amount.

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

Element (single element only)	Description
Bank Holiday Hours – pens	Paid at normal hourly rate for number of hours worked and is in addition to the normal pay an employee would have received. This is for staff who are contracted to work these shifts and not eligible to claim additional / overtime on top.

Appendix 2 - Converting minutes into decimal.

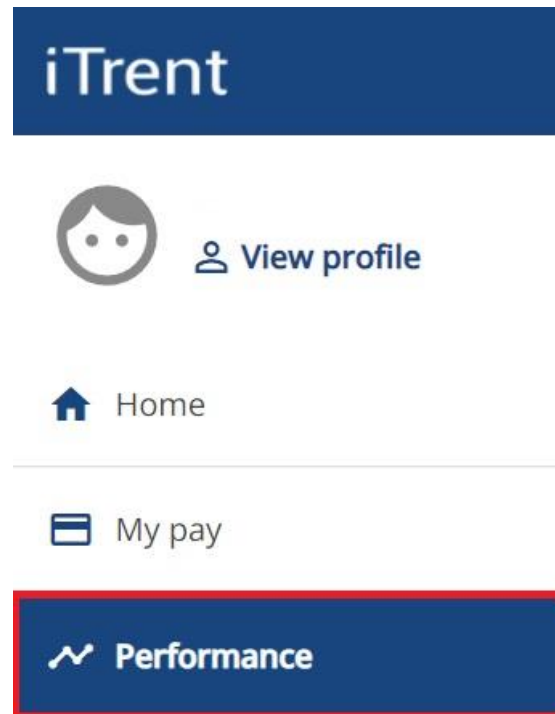
When completing your Time and Expenses Claim Forms using iTrent ESS, you will need to record the number of hours being claimed in decimal hours.

For example, if you are claiming for **2hrs 30mins** overtime, this would be **2.5**. Claiming 2.30 instead of 2.5 will result in underpayment.

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

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

Performance



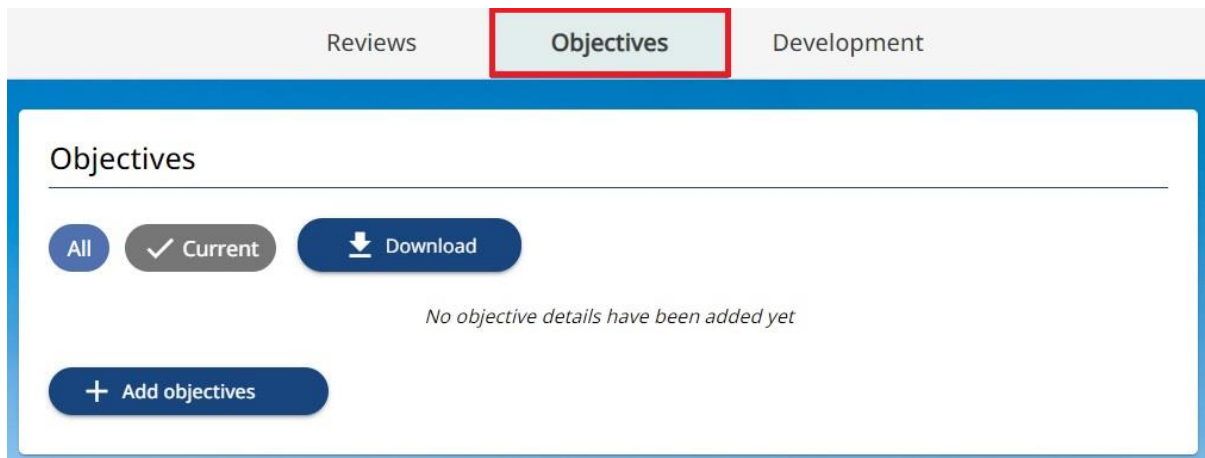
The performance section allows you create objectives that you and your manager can monitor and maintain.

This is part of the council's current performance development review process – PDRs. The options available on these pages may change over time but you will be notified via self-service if this happens.

The current PDR process can be found on the intranet [here](#)

Setting objectives is an important part of this process so please update them regularly as advised by your manager.

Objectives



The first screen you see will show current objectives you have made. These are objectives that do not have an end date.

To see only all objectives, those with an end date, please click on the 'All' button shown above.

You can download all your objectives to a PDF document if you wish. Please use the Download button as shown in the picture above. This can be useful to send to your manager or for your own records.

Adding an Objective

The 'add objective' button will allow you to create a new objective that will be viewable by yourself and your manager.

Objective details: New

Objective Title (required)

Type (required)

Personal

Team

Attachment date (required)

Please choose a title for your objective; something that clearly defines the overall theme of the area of interest.

The 'Type' will normally be Personal or Team based the discussions you have with your manager. Please select the appropriate choice here.

The attachment date is a mandatory field. This date must be on or before the Start Date of the objective. This date signifies the date the objective is decided upon and attached to you as an employee. It is not necessary to start the objective on the same date, but it is best practice to make this date the same as the start date further down.

Description

Target completion date

Start date

Please enter a description of the objective. This should give an overview of the main objective, stating its aim and method. You can change the size of this text box by dragging the bottom right corner.

Please enter a Target completion date. This is the date you and your manager decide is the reasonable length of time needed to complete the objective. This field is not the same as the Completion date lower down.

Please enter the start date of the objective. This can be in the future but will not show under Current Objectives on the main page until that date comes about. All objectives, regardless of their attachment date, can be viewed by selecting 'All' objectives on the previous page.

Important!

Only enter a completion date when the objective is ended or completed. An end date will mean the objective no longer appears on the current objectives page. However, all objectives can be viewed by selecting 'All' on the Performance homepage.

Completion date

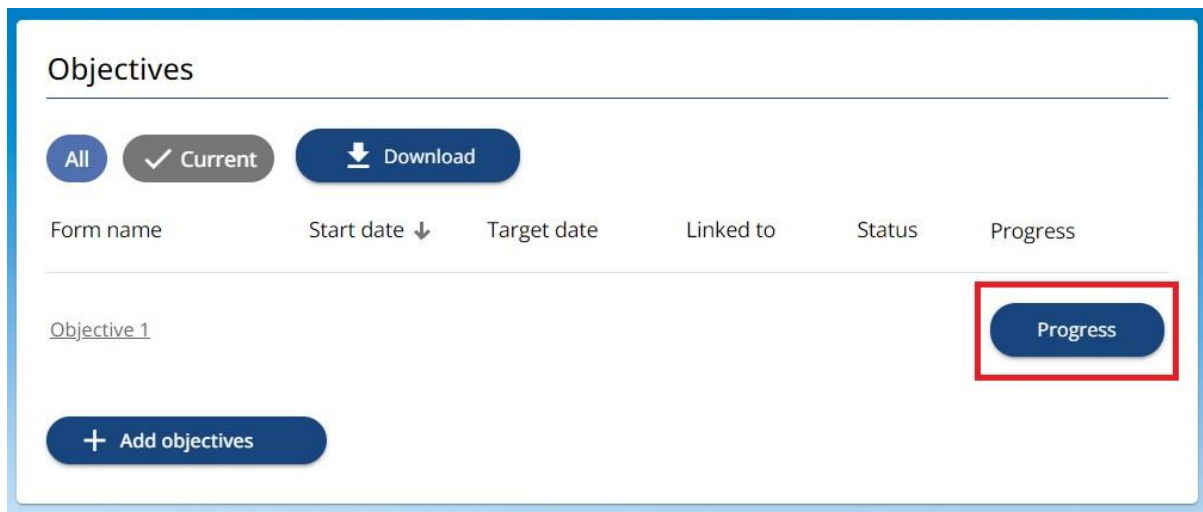
Position

<All> ▼

Lastly, if you have more than one position, please select the appropriate one here. This will record the objective against that position so please ensure this is correct.

Please remember to click the save button when complete.

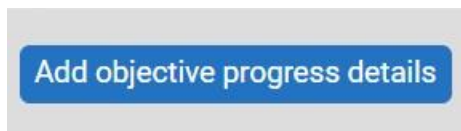
Progress an existing objective.



When an objective has been saved it will then be possible to periodically update this objective so your manager can see its progress.

Please click on the progress button as shown above.

You will then be shown the button below:



Please complete the options as required. The status drop down box will allow you to select an option that will best describe the current status of an objective:

Status

▼

- Cancelled
- Deferred
- In progress
- Not started

Remember to click save at the bottom of the screen when completed.

Further Information and Support

Forgotten Password

If you need to reset your password, please use the Forgotten Password link on the [login](#) page.

If you do not receive a password reset email, please log a case using the ICT Self Service icon on your desktop and search for 'iTrent'.

Alternatively, please email: ictservicedesk@york.gov.uk or call 01904 55 2222.

General Self Service queries

Should you have any queries regarding the following, then please ask the Payroll Services team by emailing: payrollservices@york.gov.uk

Or call 01904 55 1619

- Setting up an Employee Self Service account.
- If any information is incorrect in Self Service, such as you job title, manager or pay.
- Time and Expenses claims.