



iTrent Holiday Adjustments User Guide

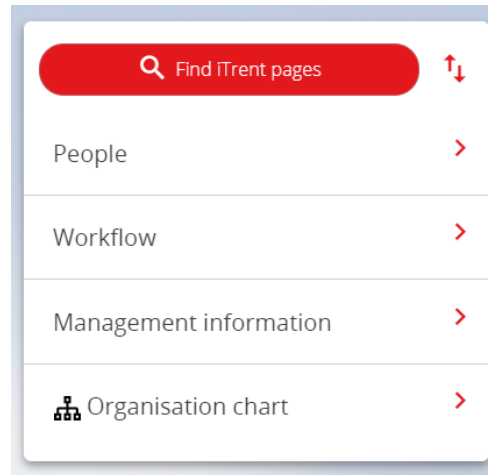
Updated 31/10/2022



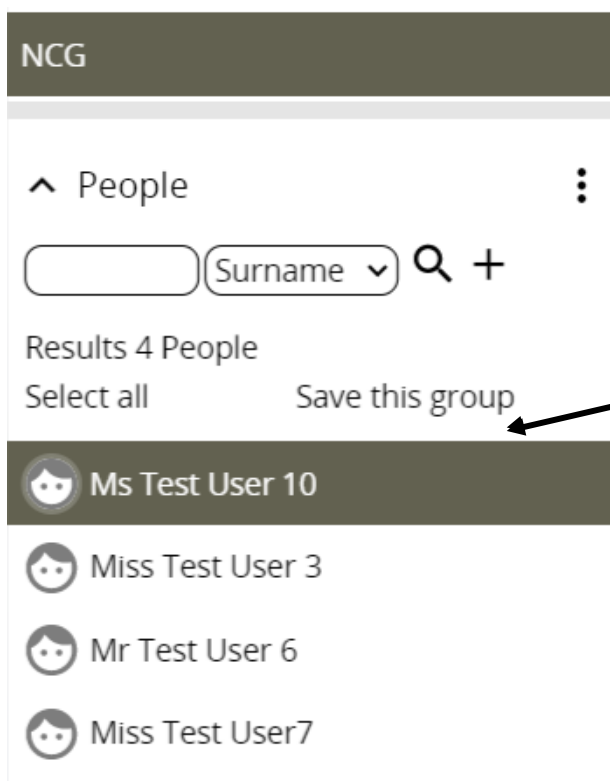
If a colleague requires an adjustment made on their holiday allowance, for example if they have holidays to carry over to the next year, you should follow this process.

Please Note: Colleagues can only carry over up to one weeks holiday in exceptional circumstances with line manger approval.

Select People from the front screen



Click on People in the main menu.

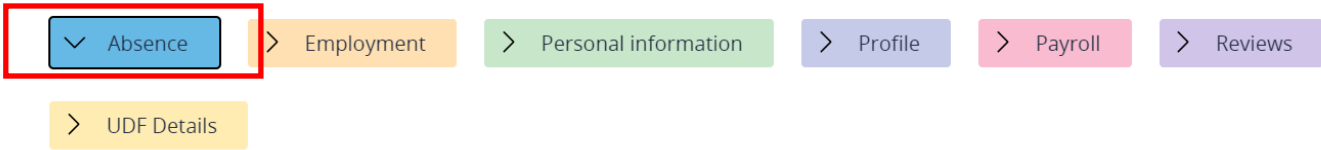


Then search for the colleague you would like to view:

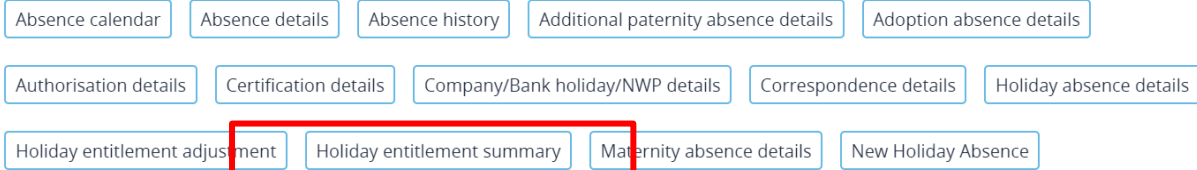
You can also change the drop down box here to search by Forename, Job Title, Previous Surname, Personal Reference number etc.

Within the links sections please select the **Absence** option:

LINKS



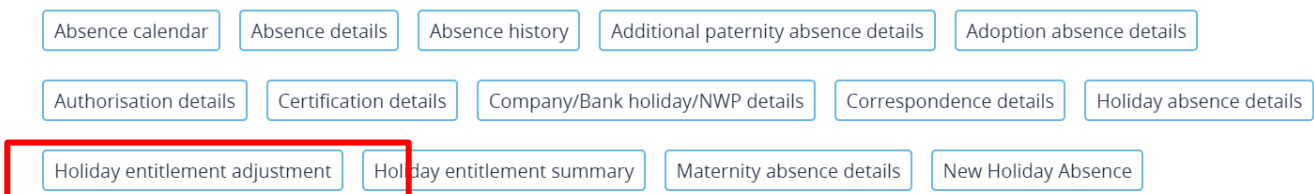
You need to check the balance of the colleagues Holiday entitlement before making any adjustments. To do this, select the **Holiday Entitlement Summary** option:



Make sure the holiday period dates show the year that you wish to check the balance for (if not, select the relevant year).

Period details			
Holiday period dates		29/04/2019 - 31/07/2019 (Part) ▼	
Length of service at relevant date		Not started	
Scheme name		GS/NCL/NSFC - Personal Holiday - S ▼	
Membership dates		29/04/2019 -	
Entitlement for period		73 hours (281.2 hours Pr	
From	To	Duration	Remaining entitlement
06/05/2019	06/05/2019	7.4	65.6
27/05/2019	27/05/2019	7.4	58.2
18/07/2019	19/07/2019	14.8	43.4
26/07/2019	26/07/2019	7.4	36

To adjust a colleague's holiday, click on the Holiday Adjustment link on the iTrent People Manager home page:



You will see the holiday entitlement adjustment screen; ensure you select the correct year for the adjustment. The NCG holiday year runs from August to July. To carry forward holiday to be used in the 2019/20 year select the period 01/08/2019 – 31/07/2020.

In Adjustment Type choose **Adjust**. This will bring up the following section

Date entered	User name	Value	Reason	End date	Entitlement Add Remove
				31/07/2019	+ -

Position Choose the position that relates to the holiday scheme you wish to adjust.

Holiday Period Dates If adjusting to carry forward dates, choose next year's period dates; to carry forward holiday to be used in the 2019/20 year select the period 01/08/2019 – 31/07/2020.

Value Enter the number of hours

Reason Free text (max characters 200) for example Leave carried forward

End Date End date of Holiday Period date as chosen above. I.e. 31/07/2020 for the 19/20 leave year.

Period details

Holiday period dates ▼

Scheme name ▼

Entitlement for period

Brought forward

Brought forward not used (lost)

Adjustment details

Adjustment type ▼

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
		<input type="text" value="8.4"/>	<input type="text" value="Carried Forward"/>	<input type="text" value="31/07/2020"/> x		<input type="text" value="+"/> +	<input type="text" value="-"/> -

SAVE

Click **Save**. This will update the entitlement for the chosen member of staff and they will be able to see their new holiday balance in iTrent self-service immediately.

Any queries please contact the HRMIS team at NCGRP.HRMIS@ncgrp.co.uk

Frequently Asked Questions

Q: Will iTrent automatically carry forward unused holiday entitlement into the next holiday year?

A: iTrent will not automatically carry forward unused holiday entitlement, in accordance with NCG policy unused leave is not automatically carried forward and any adjustment should follow discussion with the line manager. NCG policy is to allow up to a week's annual leave to be carried forward.

Q: A colleague has booked all the bank holidays and their full annual leave entitlement and still has 0.8 hours left – why is this and does it need to be carried forward?

A: To ensure no colleague is worse off we have rounded the holiday allocation up to the nearest hour. For full time colleagues on a 37 hour week this will leave 0.8 hours unused in a year – this can just be ignored and does not need to be carried forward.

Q: What happens if a colleague has booked more holiday than they are entitled to?

A: Only in exceptional circumstances should this happen. If this does happen then the holiday should be deducted from the following holiday year entitlement.

Q: Can I remove holidays that were booked but not taken?

A: You can delete or change holidays in iTrent People Manager.

Q: A Colleague has been awarded additional holiday as part of a local incentive, how do I reflect this in their leave balance?

A: You should enter it as an adjustment to the holiday balance for the relevant year.