

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.

NCG	Then search for the colleague you would like to view:
 ∧ People Surname → Q + Results 4 People Save this group 	You can also change the drop down box here to search by Forename, lob Title, Previous Surname,
Ms Test User 10	Personal Reference number etc.
Miss Test User 3	
💿 Mr Test User 6	
Miss Test User7	



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

Holiday entitlement adjustment

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	LINKS			
✓ Absence > Employment	> Personal information	> Profile	> Payroll	> Reviews
> UDF Details				
You need to check the balance of adjuctments. To do this, select the	the colleagues Holiday entit	lement before	making any	
Absence calendar Absence details Absence details	e Holiday Entitlement Sumr	nary option:	option absence details	5
Authorization datails				·

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

Maternity absence details

New Holiday Absence

Holiday entitlement summary

Period details			
	Holiday period dates	29/04/2019 - 31/07/2019 (P	art) 🗸
Lengtl	n of service at relevant date	Not started	
	Scheme name	GS/NCL/NSFC - Personal Ho	liday - S 🗸
	Membership dates	29/04/2019 -	
	Entitlement for period	73 hours (281.2 hours Pr	
From	То	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:

(Absence calendar	Absence details	Absence history	Additional paternity absence details	s Adoption absence details
(Authorisation details	Certification de	etails Company/Ba	ank holiday/NWP details	ondence details Holiday absence details
(Holiday entitlement a	adjustment Holi	day entitlement sumr	mary Maternity absence details	New Holiday Absence



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.

Holiday entitlement adjustme	✓ MENU	G	ē	Û	
Employment details					
Position	Test user 10 🗸				
Period details					
Holiday period dates	~				
Scheme name	~				
Entitlement for period					
Brought forward					
Brought forward not used (lost)					
Adjustment details					
Adjustment type	~				

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

		rt) 💙	- 31/07/2019 (Part)	29/04/2019	period dates	Holiday p			
		day - S 🗸	SFC - Personal Holida	GS/NCL/NS	Scheme name				
			81.2 hours Pr	73 hours (2	nt for period	Entitlemer	I		
				-	ight forward	Brou			
					t used (lost)	orward not	Brought fo	i	
							details	djustment	
			~	Adjust	stment type	Adju			
emove	ntitlement Add		End date		Reason	Value	User name	Date entered	
	+	<u> </u>	31/07/2019		2019				
e	intitlement Add	Ö	End date 31/07/2019	Adjust	stment type Reason	Adju Value	details User name	Adjustment Date entered	

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

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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.



		Holiday p	eriod dates	29/04/2019	9 - 31/07/2019 (Part				
		Sc	heme name	GS/NCL/NS	SFC - Personal Holid	ay - S 🗸			
		Entitlemer	nt for period	73 hours (2	81.2 hours Pr				
		Brou	ght forward						
	Brought fo	orward not	used (lost)						
Adjustment	details								
		Adju	stment type	Adjust	~				
Date entered	User name	Value	Reason		End date		Entitlement	Add	Remov
		8.4	Carried Fe	orward	31/07/2020	× 🖽		+	-

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

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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.



