

## Logging onto iTrent Self Service

To access Self Service please go to [www.york.gov.uk/iTrent](http://www.york.gov.uk/iTrent) where you will be presented with the log in icon below. You will also find further details on general guidance and frequently asked questions.



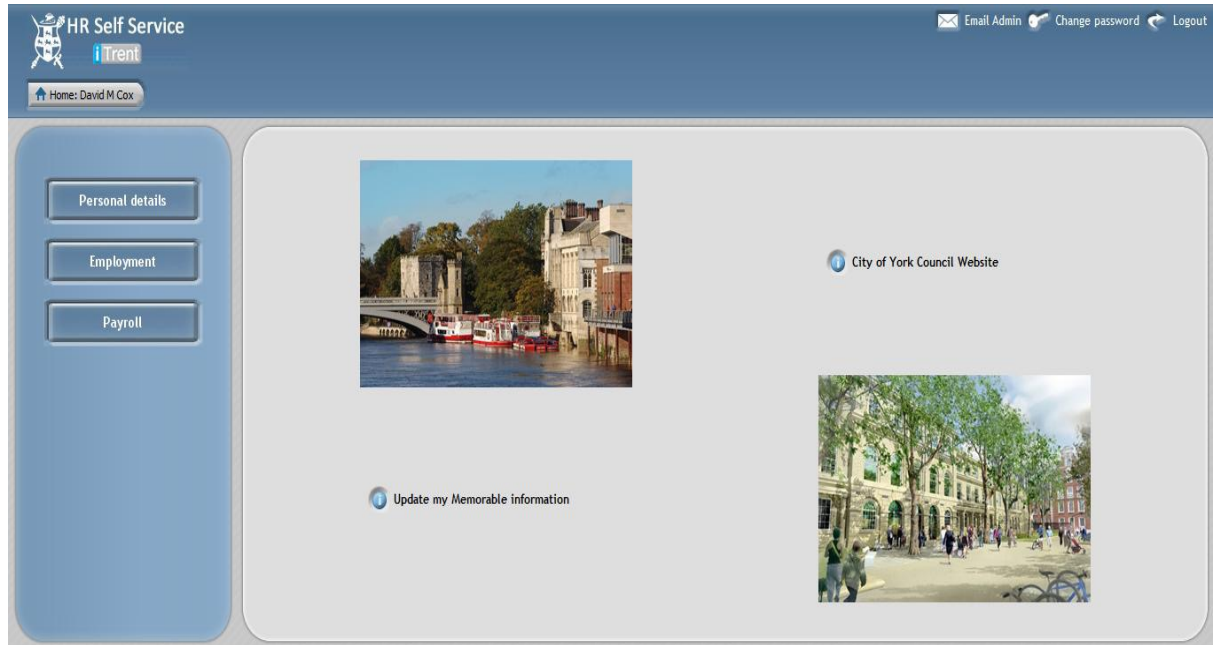
You will have received a User name and an initial temporary password by e-mail to enable you to gain access through the following screen.

The login screen for iTrent Self Service. It has a blue background with rounded corners. At the top left is the "iTrent SELF SERVICE" logo. Below the logo, there are two input fields. The first is labeled "User name" and has a white text box. Below it is the text "Forgotten user name?". The second is labeled "Password" and has a white text box. Below it is the text "Forgotten password?". At the bottom, there is a link that says "Contact administrator" and a blue "Login" button.

When you first log in to iTrent you will be asked to input some memorable information. This will be used to verify your identity if you input an incorrect username or password.

## Main Menu

The iTrent main menu provides you with access to all the sub-menus.



## Personal Details – Personal Information

This page allows you to view your name, title, marital status and date of birth details.

Fields marked with \* should already be completed:

You will be able to amend your marital status and preferred name, but other changes will need to be emailed to the HR team at [j.forde@ebor.academy](mailto:j.forde@ebor.academy)

Important: If you pay into a pension scheme, and have changed your personal information, you may need to advise your pension provider.

The North Yorkshire Pension Fund website is <https://www.nypf.org.uk>

The Teachers Pension website is <http://www.teacherspensions.co.uk>

Personal information: John Smith

Surname	Smith *
Forename	John *
Forename 2	
Forename 3	
Title	Mr *
Preferred name	John
Previous surname	
Marital status	Civil Partnership
Date of birth	17/01/1949 *

\* indicates mandatory fields

Save

## Personal Details – Sensitive Information

This page displays and allows you to maintain the sensitive personal details held about you in iTrent. You do not have to provide this information but it is helpful to the Academy in enabling it to fulfil its statutory obligations, understand the profile of the workforce and eliminate unlawful discrimination. Please complete each field by selecting from the drop down menus.

*The information you supply will not be visible to your manager*

Sensitive information: John Smith	
Marital status	Marital status <input type="text" value="Civil Partnership"/>
Religion	Religion <input type="text" value="No Religion"/>
Ethnic origin	Ethnic origin <input type="text" value="Mixed White and Black Caribbean"/>
Nationality	Nationality <input type="text" value="English"/>
Sexual orientation	Sexual orientation <input type="text" value="Gay Man"/>
Disability	Self-certified disabled <input type="text" value="Not disabled"/>
	Description <input type="text"/>
<input type="button" value="Save"/>	

**Under the Disability and Equality Act 2010 a person has a disability if:**

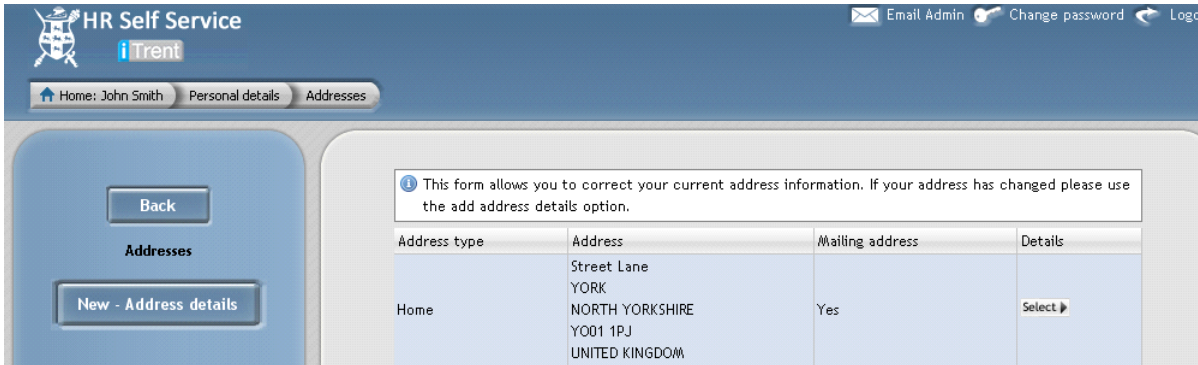
They have a physical or mental impairment

The impairment has a substantial and long-term adverse effect on their ability to perform normal day to day activities.

## Personal Details – Addresses

This page displays and allows you to maintain your home address details held in iTrent.

If you wish to amend your existing address then click the 'Select' button next to the address. The details of your current address will then be displayed for you to amend.



HR Self Service  
iTrent

Home: John Smith Personal details Addresses

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Addresses

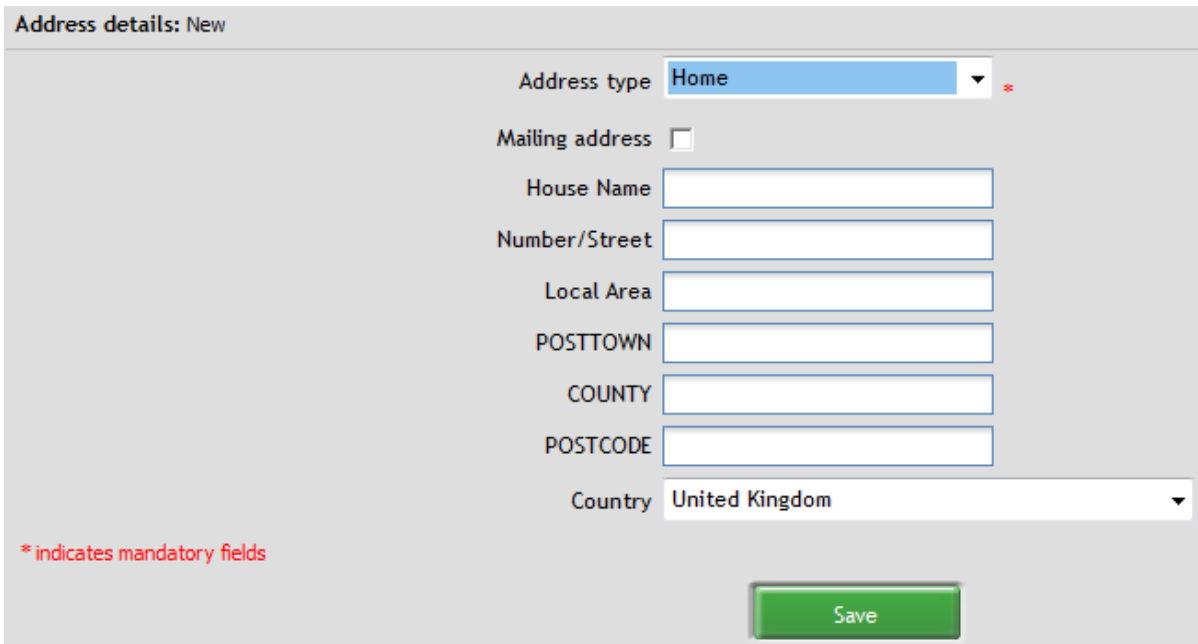
New - Address details

This form allows you to correct your current address information. If your address has changed please use the add address details option.

Address type	Address	Mailing address	Details
Home	Street Lane YORK NORTH YORKSHIRE YO01 1PJ UNITED KINGDOM	Yes	Select

If you have changed your address, add new address details by clicking the 'New – Address detail' button on the navigation side of the page. This will keep a history on the main iTrent system of your previous address details.

If you have more than one address, please ensure the Mailing address is selected for the appropriate one, see below.



Address details: New

Address type Home \*

Mailing address

House Name

Number/Street

Local Area

POSTTOWN

COUNTY

POSTCODE

Country United Kingdom

\* indicates mandatory fields

Save

## Personal Details – Your Contact Details

This page allows you to maintain your contact details held in iTrent. If you wish to amend a displayed means of contact, click the 'Select' button next to the contact.

Means of contact	Contact at	Details
Home telephone	01977 123456	Select ▶
Personal e-mail address	johnsmith@yawho.co.uk	Select ▶

If you wish to add new phone or email details, select 'New – Contact Details' and use the drop down menu to choose the means of contact – the list will only show those not yet used

Contact details: New

Means of contact  \*

Contact at  \*

\* indicates mandatory fields

Ensure your home and mobile telephone numbers are up to date. Personal email address is not required for the running of the system, but it will enable the school or your Manager to contact you in an emergency.

## Personal Details - Emergency Contacts

This page allows you to maintain your emergency contact details held in iTrent.

If you wish to amend or delete a displayed emergency contact, click the 'Select' button next to the contact.

Contact name	Primary contact	Relationship to me	Contact at	Details
Samuel Smith	Yes	Father	01977 987654	Select ▶

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Emergency contacts

New - Emergency contacts details

If you wish to add a new emergency contact select, 'New – Emergency Contact Details' and complete the fields as instructed.

Please ensure if you have more than one emergency contact, your primary contact is ticked. As only one contact can be ticked at once, previously ticked boxes will become unticked.

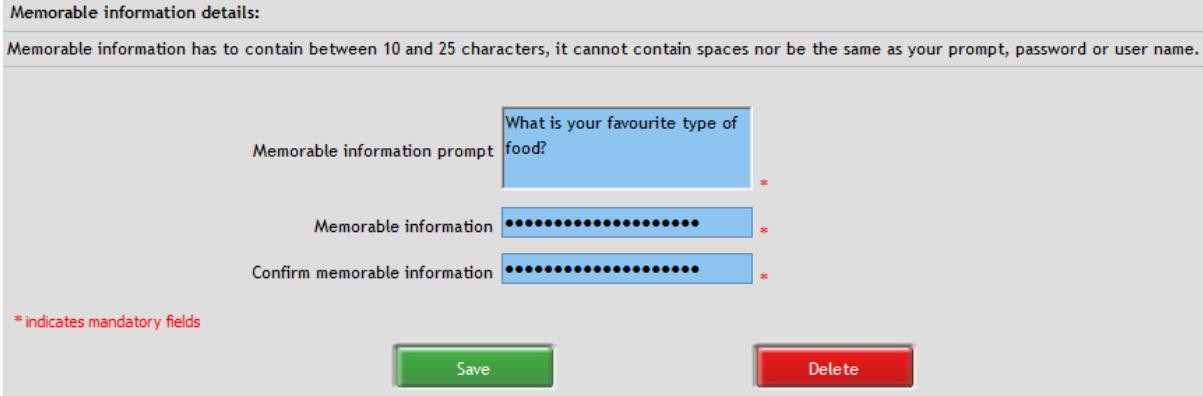
If your emergency contact resides at the same address as yourself, you can use the 'Use my home address' box to automatically fill in the address.

## Personal Details – Memorable Information

When you log into Self Service for the first time you will be requested to enter your memorable information. This will be used if you forget your user name or password in the login screen.

The standard initial login page is presented. Enter your Username and Password. iTrent then will prompt you to fill in your memorable information. To enter details, go to the Memorable Information button in the Personal Information menu. The memorable information needs to be between 10 and 25 characters with no spaces.

Eg Fishandchips



Memorable information details:

Memorable information has to contain between 10 and 25 characters, it cannot contain spaces nor be the same as your prompt, password or user name.

Memorable information prompt: What is your favourite type of food? \*

Memorable information: ..... \*

Confirm memorable information: ..... \*

\* indicates mandatory fields

Save Delete

Suggestions for memorable information prompt:

1. The make and model of your first car?
2. The name of your primary school and year you started?
3. The name and colour of your pet?
4. Your favourite meal?
5. Your mother's maiden name and her year of birth?

For security reasons, memorable information is displayed as encrypted code and therefore if you change your memorable information, it will automatically display as encrypted code when you save.

## Employment Details

Everything under the employment section of Self Service is read only and therefore cannot be amended. If you believe that any of the information held in this section is incorrect please ask your manager to send an email to [j.forde@ebor.academy](mailto:j.forde@ebor.academy)

All employment information relates to your current employment within the organisation.



### Employment - Current Jobs

This page displays the details for your current job. If you have more than one job you will be able to see details for all of them.

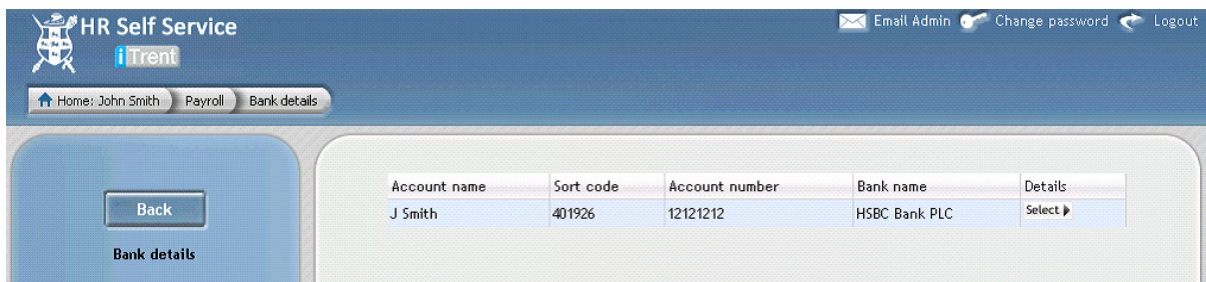


## Payroll Details - Menu

This page allows you to view your payroll details including your bank details and payslip history.



## Payroll Details – Bank Details



This page shows your bank details.

You can change the details by clicking the 'Select' button.

**Any update will take immediate effect.**

**Bank details**

Sort code  \*

Bank name Halifax

**Account details**

Roll number

Account number  \*

Account name  \*

\* indicates mandatory fields

**NOTE: Be aware of the date you make the change** – if you change your bank details after the 10<sup>th</sup> of the month, the change may not take effect until the following month.

Therefore, it is recommended that you keep your existing bank account open until you have received your salary in the new bank account given.

### **Payroll Details - Latest Payslip (pdf)**

This page displays your latest payslip details. Payments, Deductions and Net Pay totals are shown for the current month.

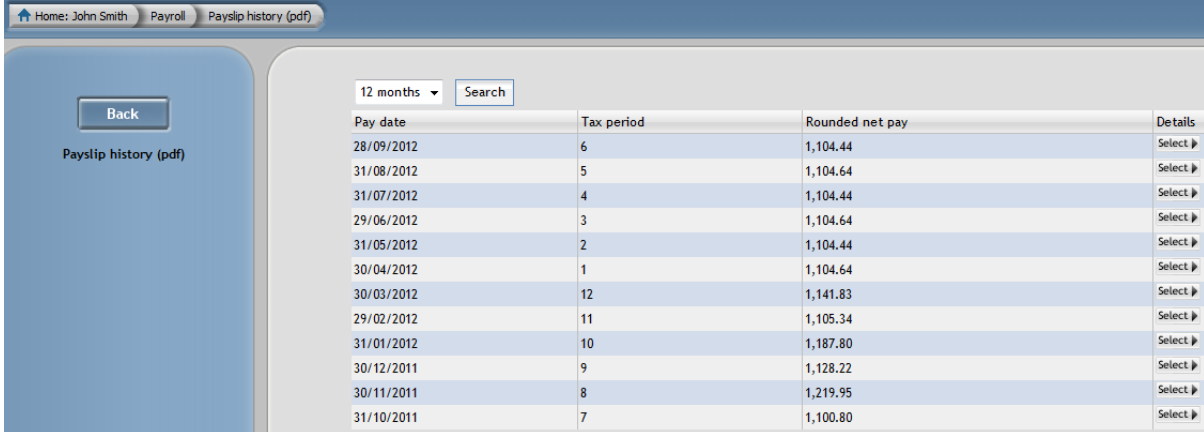
You can print the displayed details by clicking the 'Download' button and then print the PDF.

Or you can email the payslip to yourself by clicking the E-slip button. The displayed payslip will be sent to the Email address you have specified on the e-form preferences page.

If, when receiving the email, you are unable to remember your password, go to e-form preferences to change it, you will then need to resend the e-slip to yourself by clicking on the e-slip button again.

## Payroll Details – Payslip history (pdf)

To view details of a previous payslip click the 'Select' button next to the payslip you wish to view. You can then select 'Download' to view/print a pdf, or 'E-Slip' email it to yourself.



Pay date	Tax period	Rounded net pay	Details
28/09/2012	6	1,104.44	Select ▶
31/08/2012	5	1,104.64	Select ▶
31/07/2012	4	1,104.44	Select ▶
29/06/2012	3	1,104.64	Select ▶
31/05/2012	2	1,104.44	Select ▶
30/04/2012	1	1,104.64	Select ▶
30/03/2012	12	1,141.83	Select ▶
29/02/2012	11	1,105.34	Select ▶
31/01/2012	10	1,187.80	Select ▶
30/12/2011	9	1,128.22	Select ▶
30/11/2011	8	1,219.95	Select ▶
31/10/2011	7	1,100.80	Select ▶

## Payroll Details - E-FORM PREFERENCES for receipt of payslip by e-mail

This page allows you to provide an email address where your electronic payslip will be sent, you will also need to set up a secure password to enable you to open the payslip from the email you receive.

### E-slip options

Complete to receive your payslip direct to a chosen email account

- Input the email address to which you want your payslip sent
- Input and confirm your password, this is required to enable you to open the PDF securely from your email
- Tick the email payslip box to automatically receive your e-slip in an email.

**E-form preferences:**

E-slip options

Email address  \*

Password  \*

Confirm password  \*

E-slip delivery options

Email payslip

E-P60 options

Email address  \*

Password  \*

Confirm password  \*

E-P60 delivery options

Print P60 Yes

Email P60 Yes

\* indicates mandatory fields

Save