Our People

Itrent – Self Service (ESS) -User Guide for Members

March 2023
Version 1.00.05

Epping Forest
District Council

Our People

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INTRODUCTION

Welcome to Itrent Employee Self Service (ESS).

ESS allows you to electronically view and update personal data that is held for you on Itrent, the new HR and Payroll system.

ESS can be accessed from anywhere and is not limited to an EFDC device. As long as you have appropriate equipment and an internet connection you can access ESS.

Important Security Advice

As ESS holds sensitive information about you, it is important that you use it responsibly to maintain the security of your personal information.

You should always log out of ESS once you have finished using it and you should never let anyone know your login details. Failure to adhere to these guidelines could allow people to access information about you (such as contact and pay details) and potentially expose you to the risk of identity fraud.

Data Protection

By using ESS you will only have access to your own details, you cannot view other Members details and they cannot view yours. There are some areas within the Council who have access to your information and who treat your information confidentially and in accordance with data protection requirements, i.e. Staff in HR, Payroll, Accountancy and Audit have certain access to your data in order to carry out their specific roles.

All users must comply with Data Protection legislation and relevant Epping Forest District Council policies.

Workflow E-mails

Please note that certain changes made to your personal details will trigger a Workflow email confirming that a change has been made, this is necessary for security reasons and may also provide you with advice on what to do next.

In order to receive these e-mails, a User e-mail address needs to be registered within the system. If you have an EFDC account then a User email address has already been set up for you, this is your @eppingforestdc.gov.uk address. If you do not have an EFDC account then your publicly available e-mail has been used as your User email address. Please check this information carefully and ensure that it is recorded as you wish.

ACCESSING THE SYSTEM

To access the system, please type the following:-

https://ce0144li.webitrent.com/ce0144li_lss

into your preferred Internet search engine address bar, see image below:-
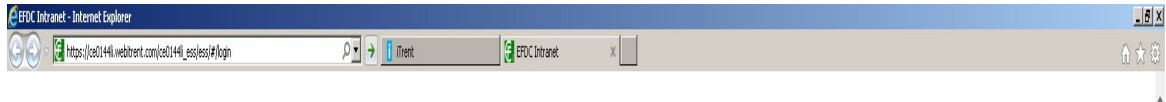
We recommend using Chrome, Edge or Safari as your browser.

You can also press ctrl on your keyboard and click on the link above and you'll be taken to the log in screen.

You may find it easier to copy and paste the website address from this document.

We recommend that you create a link to the above web address on your ipad by following the steps set out below:-

1. Enter https://ce0144li.webitrent.com/ce0144li_lss into your browser

2. When the log in screen appears click on the symbol at the bottom of your screen

3. Scroll down and select "Add to home screen"

4. Press Add or re-name to something of you own choice and then press Add.

You will now have a link on your home screen which will take you straight to the Itrent login screen.

Logging In

IMPORTANT: Please click the second option "A different account" and then enter your username and password.
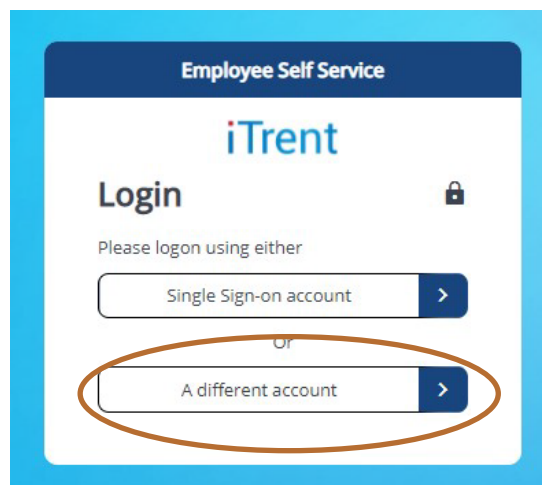
Please then enter your username and password, if you do not know these details then please contract hradmin@eppingforestdc.gov.uk

Once logged in, you will land on the ESS home screen:-
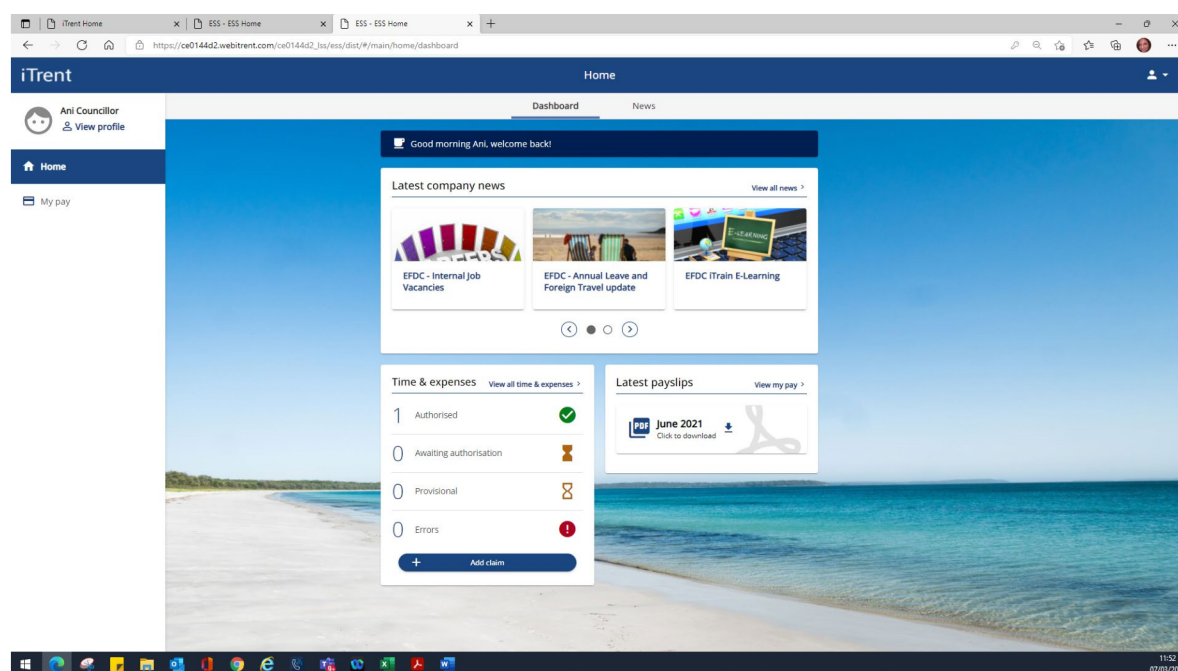
The Home screen gives you access to the:-

- Company News carousel – this is used to host links to the Intranet, job opportunities and as a wider communications channel.

- Time and Expenses quick link – enables you to submit a claim or view a claims status. You also have a link to search for previously submitted claims.

- Latest Payslip – you can view and download payslips from the home screen and search for previously issues payslips and P60's.

View Profile

Your personal information can be accessed under the "View Profile" link which sits under your name in the top left hand corner of your screen.

This section allows you to **view/update**:-

| Personal details:	please check these are accurate and up to date
Confidential Information:	we would be grateful if you would complete these details
Next of Kin:	please check these are accurate and up to date
Bank details:	before changing these details, check with the epping.payroll@braintree.gov.uk team to ensure that there is enough time for the change to be picked up in time for pay processing.
Private Vehicles:	**this information must be completed in order for you to be able to submit a mileage claim**

How to enter Private Vehicle details:-

1. Go to View Profile
2. Scroll down to Private Vehicles
3. Select **+ Add vehicle**
4. Enter vehicle type – choices are car, van, motorcycle, bicycle
5. Enter the vehicle registration details (if applicable)
6. **Enter the start date** – **this date must predate the date of your first claim using this vehicle**
7. Enter the engine size if applicable
8. Fuel type – please enter "not applicable"
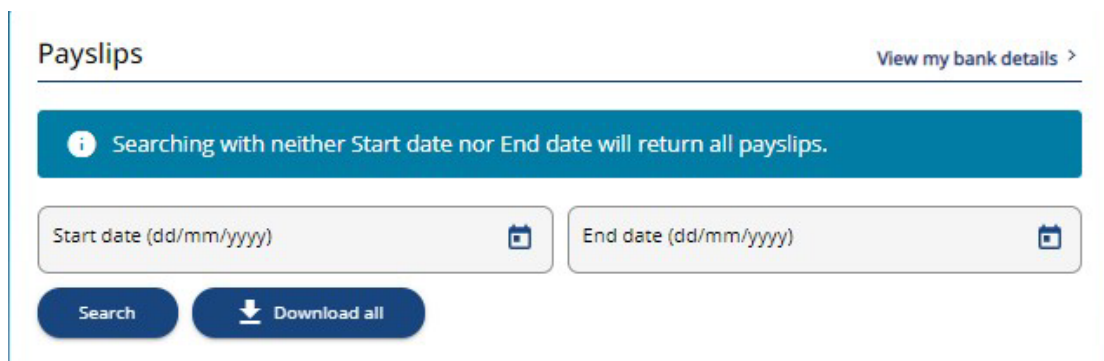9. Please tick the "Default vehicle for expenses" check box
10. Click Save

Payslips and P60's

Your latest payslips will be available for you to view and download on the home screen.

If you need to look for an older payslip please click on the "View my Pay" link.
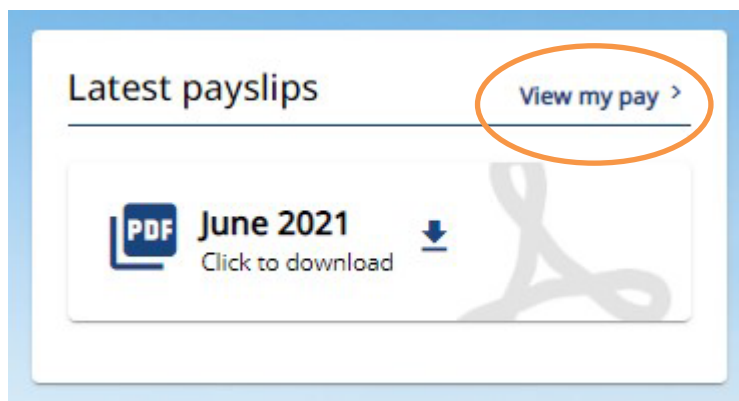
A new page will open up for you which will enable you to search, using date fields, for the payslip you are looking for.

Using the View my pay link will also give you access to your P60 information. Click on the download arrow to view your P60 and if you wish, print or save to your own files.

P60

ℹ️ Your P60 for the tax year 2019/20 is now available. Please remember the 'Pay' figure is your TAXABLE pay not total pay or salary. If you require a paper copy please download and print this version.

Tax year	Employment period	
2020/2021	06 Apr 2020 - 05 Apr 2021 (Epping Forest District Council) (McKeon)	⬇️

Important – Troubleshooting information

If you are using an Apple device to download your P60, you will need to enable "pop-ups" in your Settings app before the P60 will download.

SUBMIT AN EXPENSE CLAIM

Members must now submit expenses via ESS which will be paid through Payroll.

To submit a claim, from the home screen scroll to Time & Expenses and then click on the "Add Claim" link.

A form will open for you and you must:-

1. Enter the start date of your claim – this date **MUST** be on or before the date of the first claim on your submission

2. Select the "EFM Members Mileage & Expenses claim" from the drop down menu

3. Press "New" in the bottom right hand corner of your screen

The expense claim consists of three pages:-

1st Page	Gives instructions on how to complete the claim
2nd Page	Enter your mileage claim details
3rd Page	Enter details of any Carers Allowance claim and/or Travel or Subsistence claims

Example mileage claim:-

In the Reasons for Journey and route taken text box, please enter:-

1. The name of the meeting attended or reason for claim if not attending a meeting
2. Brief details of the route taken
3. Name of any passenger's being claimed for.

The Reasons for Journey box can be expanded by double clicking in the box:-

Reason for Journey and route taken

Attendance at Full Council; Passenger: Another
Councillor; A121 and back

| Update | Clear | Close | 183 |

If you wish to submit multiple mileage claims then click on the plus sign and a new blank line will be provided for you to complete:-

Vehicle   Scheme

COUNCIL1 HMRC Rate Only ⌄

Date	Miles claimed	No of Passengers (Enter 0 if N/A)	Start Postcode	End Postcode	Reason for Journey and route taken			
01/03/2022 📅	10	1	EN9 1HP	EN9 1HP	Attendance at Full Co	⊗	+	−
📅						⊗	+	−

Important – Troubleshooting information

Your claim will error if there isn't a vehicle recorded for mileage so please ensure that you enter your private vehicle details into the system, prior to completing a claims template.

Example carer allowance or travel claim:-

Enter details of any expenses on this page.

Receipts can be attached after submission.

Element	Date	Details of Meeting attended	No of Hours claimed (Max 4 per meeting)		
EFM Carers Allowance 2021	02/03/2022 📅	Overview and Scrutiny	1.00	+	−
EFM Carers Allowance 2021	📅			+	−

Element	Date	Details of expenditure	Amount to be claimed		
EFM Travel and Subsistence	05/03/2022 📅	Train ticket to visit the LGA	10.00	+	−
EFM Travel and Subsistence	📅			+	−

Saving and/or submitting your claim

Once you've started a claim you can either "Save draft" or "Submit" your claim.

If you are going to add further details to your claim then select the "save draft" button.

You can return to your claim via the "View all time and expenses" link and select the claim you wish to update:-
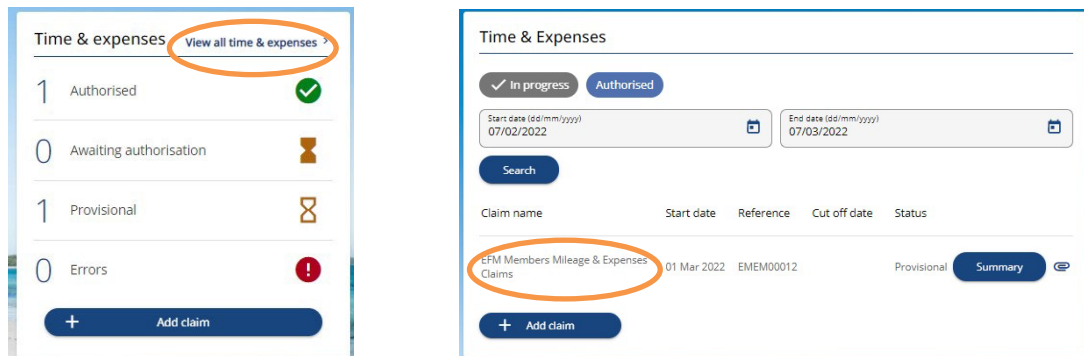
Click on the claim and the form will open for you, ready to make changes.

When you are ready to **Submit** your claim, press the submit button. A declaration page will open asking you to confirm that the claim detailles s are true and necessarily incurred. You will agree to this by entering your ESS password to submit your claim.

At this point you can attach copies of receipts (if appropriate) to support your claim. Please click on the **+ Receipt attachments** link.

Click on the drop down box against Receipt type and select the most relevant option for your claim and then click on choose file to select the saved receipt.

If Members are using their ipads, you will be prompted to choose from an already saved photo or to take a photo. We recommend that you use the second option and take one photo of all the relevant receipts, i.e. put them all on one picture. You can then select "choose file" and the photo will upload.

If you are using a different device. then navigate to your save receipt, click open and then click on the paperclip icon to attach your receipt to your claim.

Once you've attached the receipt and entered your password you can select "submit" and your claim will be sent to the relevant officer for approval.

You should submit your claim by the end of each month for payment in the following month.

Expense submission deadlines can be found on the Company News carousel.

SETTINGS OPTIONS

There are a number of options in the Settings menu which allows you to personalise ESS.
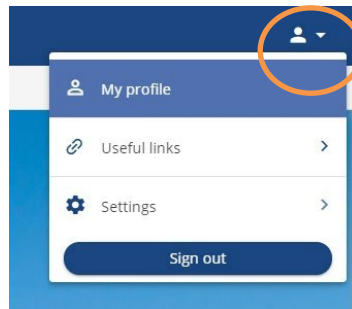
Preferences:	You can change the date format and upload a new background image
Memorable Information:	You can set up a prompt which will allow you to reset your password if you forget it – see example below
E-form preferences:	Enter an email address for your payslips to be emailed to you NB this **cannot** be your EFDC email address
Change password:	Allows you to update your password
Dark Mode:	Darkens your screen
Sign Out:	Please use the sign out link to log out from the system

Example of Memorable Information:

DO'S AND DON'TS

DO

- Read and follow the advice and guidance in this guide.
- Check that all the information recorded is accurate.
- Add Memorable Information to prompt you if you forget your password.
- Inform the People Team of any errors/changes.
- Check with Payroll before making any amendments to your banking details.
- Consider regularly changing your password.
- If required, supply documentary evidence to support change of name details.
- Sign Out of ESS after every session.

DON'T

- Walk away from your device and leave ESS open.
- Change your personal details without having a valid reason to do so.
- Change your banking information without checking with Payroll beforehand.

HINTS AND TROUBLESHOOTING

On any screen you can click on the Itrent image and this will take you back to the "home" page.

By right clicking on the "Itrent" image and select "copy shortcut", you can paste this to your desktop and it will provide you with a link straight to the ESS login page.

USEFUL CONTACTS:

People Team (HR)	Ellie Stone	4291
	Samantha Sutton	4752
	Rhiannah McDonnell	01992 564000 Ext. 2021
	Hradmin@eppingforestdc.gov.uk	
Member Support Services:	Kim Partridge	4443
	Louis Walton	01992 564000 Ext. 2113
	Lisa Bannister-Wood	4147
Shared Payroll Service	01376 557728	
	epping.payroll@braintree.gov.uk	

REVIEW DATES

This Guide will be updated on a regular basis in line with the roll out of further ESS functionality.

This review: March 2023