Liberata @ Payroll Services

Working with Schools

Employee Self Service User Guide

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Contents:

INTRODUCTION TO EMPLOYEE SELF SERVICE

iTrent Employee Self Service (ESS) is a web-based application that provides a user-friendly interface between employees and their information held in the iTrent database. ESS is designed to scale from small smartphone screens to large desktop monitors, with no loss of features or functionality and with no additional learning curve.

ESS will provide the user with the ability to view and download their pay documents, to view personal and employment details and to view sickness and absence history.

In addition users have the ability to update or add addresses, contact details, emergency contact details and bank details.

GETTING STARTED - EMAIL NOTIFICATION FROM PAYROLL

After starting your employment and before your first pay day you should have received an email (to your school email address) containing your log in details for Employee Self Service (ESS) and the link to the website. Please check your Junk/Spam mail box as unfortunately the email may have been redirected there. The email will look something like this:

Our Ref: Pay Team 11/Self Service
Your Ref: 999999
Date:

Dear Mrs

Please find below a username, a password and a link to enable you to access Employee Self Service (ESS) and on line payslips. The web address cannot be googled.

Web link: https://ce0138li.webitrent.com/ce0138li_ess
Username: 999999
Password: AB123456d

It will provide you with the ability to view payslips, P60's and your P45 on leaving and to administer some of your personal data online. At your first time of logging in you will be prompted to change your password so please remember your new password for the next time you need to log in. We recommend that you log in to check your payslip every month.
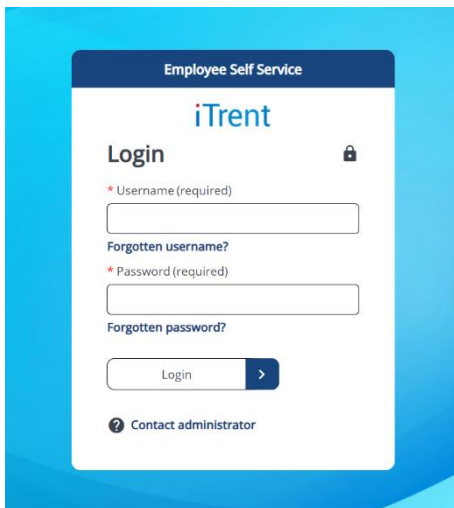
If you do not have this email it may be because we have not yet been given your school email address. We use your school e mail address for security reasons and this is the email address that you should use to contact us is at all possible – it helps us to verify your identity. In this instance you should ask the Finance Officer/School Business Manager at your school to check that we have been give your school email address.

LOGGING IN

Enter the ESS website address into your browser:

https://ce0138li.webitrent.com/ce0138li_ess
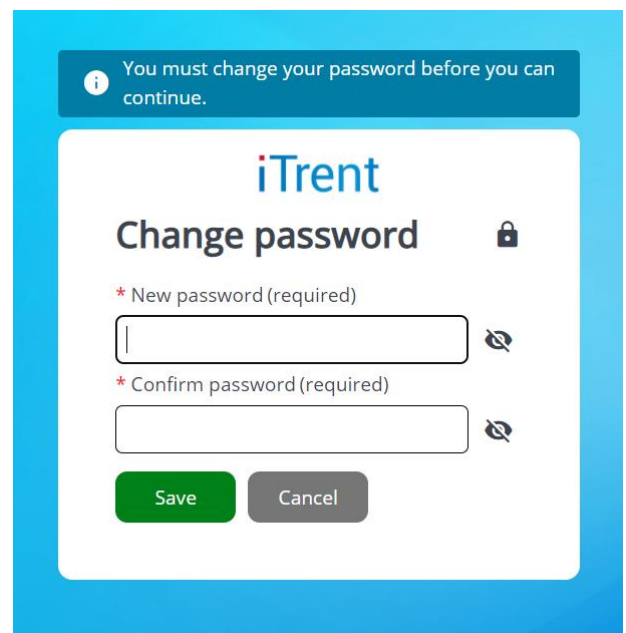
This address cannot be Googled. It is specific to the payroll that you are on.

When you see the log in screen enter your user name and the temporary password provided by Liberata and select "Login".

If you enter your password incorrectly 3 times your account will be locked and you will need to contact us to unlock it.

You will be prompted to change your password on the first log in. New passwords should be a minimum of 6 characters long and should include a mixture of upper and lower case letters and at least 1 number. Save your new password and be sure to remember it for the next time that you log in

If you forget your password please select the forgotten password link and enter the details required when prompted. When requested to enter an email address this should be your business e mail as this is the one held on the ESS account in most cases.
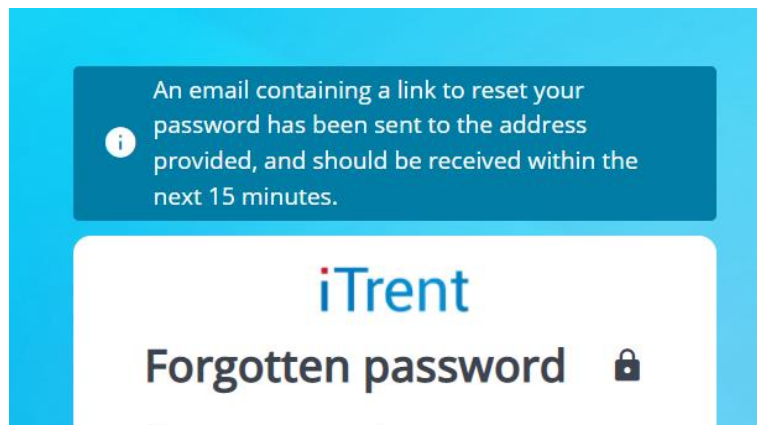
You will then receive an email which will allow you to reset your password. The password reset link in this email is only valid for one hour

If at any time you are unable to reset your password then please email the Technical Support Team at LiberataSchoolsTechnicalSupport@liberata.com quoting your user name or your National Insurance number and date of birth and a short message. A member of the team will be able to reset your password. **If you do not include any identification details in your email we will be unable to help you**. Password resets can take up to 12 hours to be actioned.
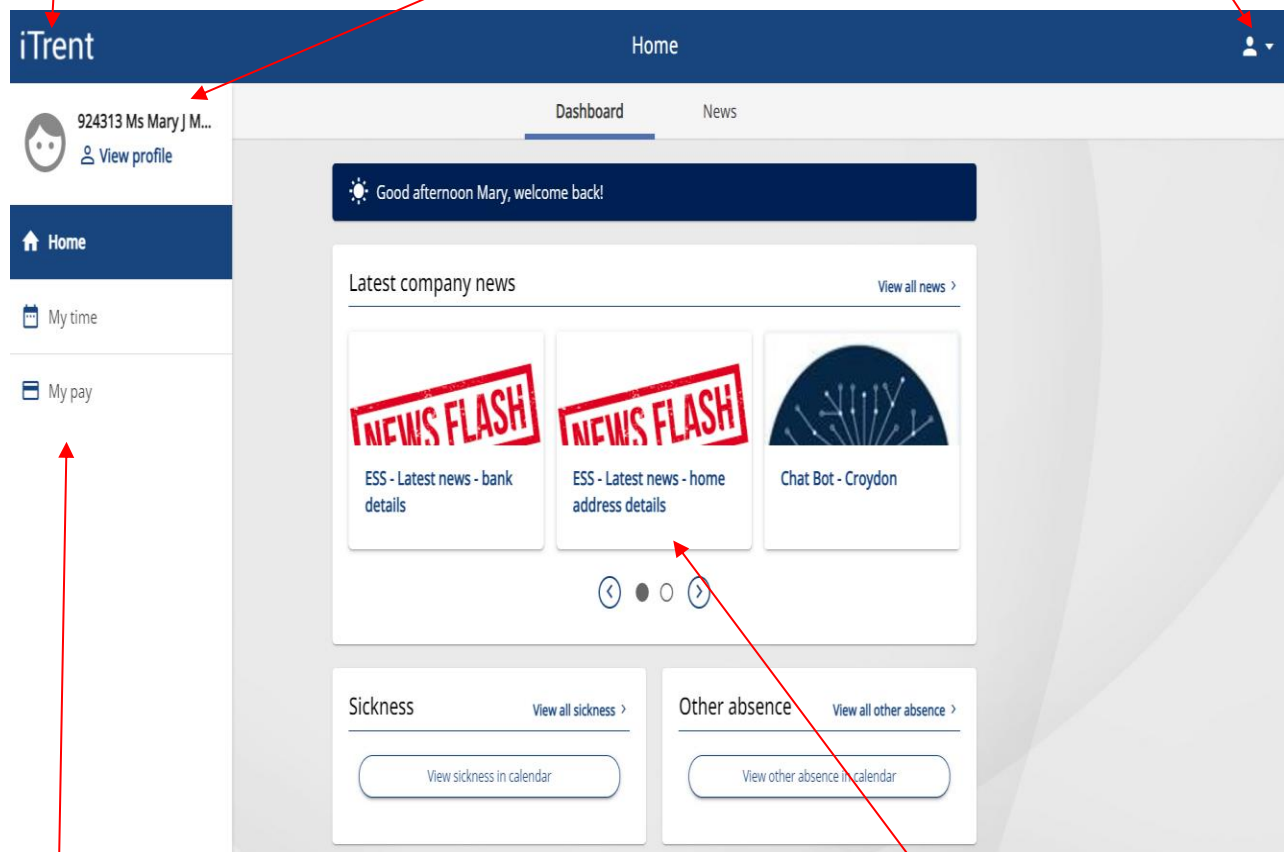
HOME

The home page is the first screen that you will see once you have logged in to ESS.

Logo also doubles as a link
back to the home page

Utility menu with quick links
to sign out and settings

Profile area

Navigation items available
for your use

News items

The home page opens by default on the dashboard. At the top of the dashboard you will find the Company News Carousel for 'Latest company news' Articles and information can be posted here for your information - a maximum of three articles will be displayed at a time but you can scroll through to other articles by using the left and right arrows or by clicking on "view all news"

Also on the home page are quick links or "summary cards" which will navigate you quickly to other areas of ESS that are frequently used.
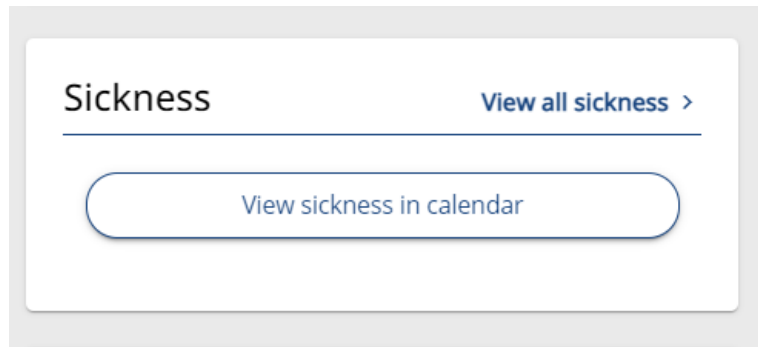
This card will take you to your sickness records either in calendar view or as a list. Please refer to the section in this guide called "My Time"

This card will take you to your "other absence" records either in calendar view or as a list. Typically this would be unpaid leave, compassionate leave. Please refer to the section in this guide called "My Time"
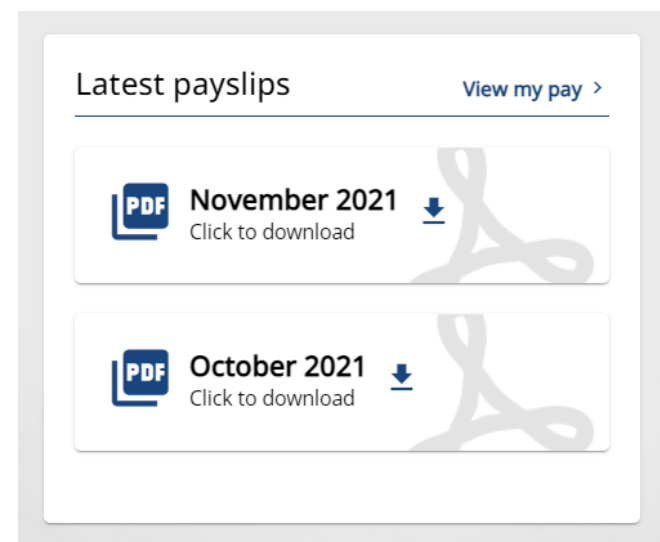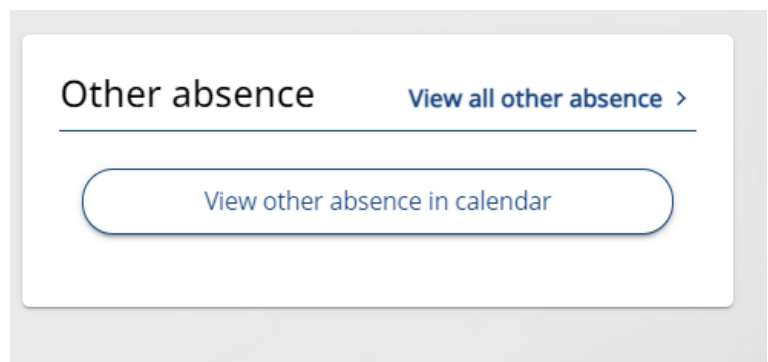

This card will allow you to download your most recent payslips or to follow the "view my pay" link to the pay area of Employee Self Service where all pay documents can be found. Please refer to the section in this guide called "My Pay"

PROFILE AREA – HOME ADDRESS

In the profile area you will be able to view certain personal details and employment details held in your payroll record. The Personal details are shown first but to switch between them and the employment details you will need to click the sub headings as shown below.
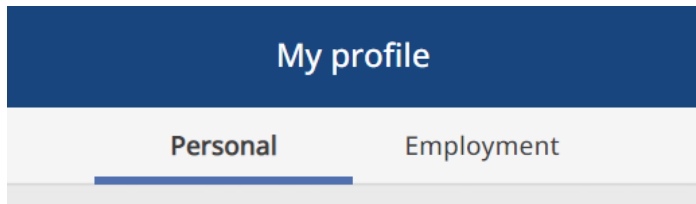
Most of the data held in these areas are on a "read only" basis for your information. However there are some areas that are available for you to update when necessary and it is important that these are kept up to date:

Home address

To update Home Address click on the existing address

Home - Mailing Address: 199 Imberhorne Lane, East Grinstead, RH19 8BA, United Kingdom

And then the "Add address" button at the bottom of the screen

Complete the form with the new details and click

There are five types of contact details that can be held in the system as show below:

The "Email address work" and "User email address" should always be up to date. In most cases the email address held on the Employee self-service user account is the same as the work email address and should remain this way. Once an employee has left the email address on the user account can be changed to a personal one of your choice.

Existing contact details can be overwritten if they change. For instance if your work email address changes and you want to update it click on the existing address

Type in the new address

And click **Save**

You can add new details to keep your record up to date if they aren't already held. For instance if you want to add your phone number or personal email address.

Click on **+ Add Contact Details**

Select the relevant contact type using the drop down arrow

*Contact type (required)

Please choose ▼

*Contact at (required)

Type in the details and click **Save**
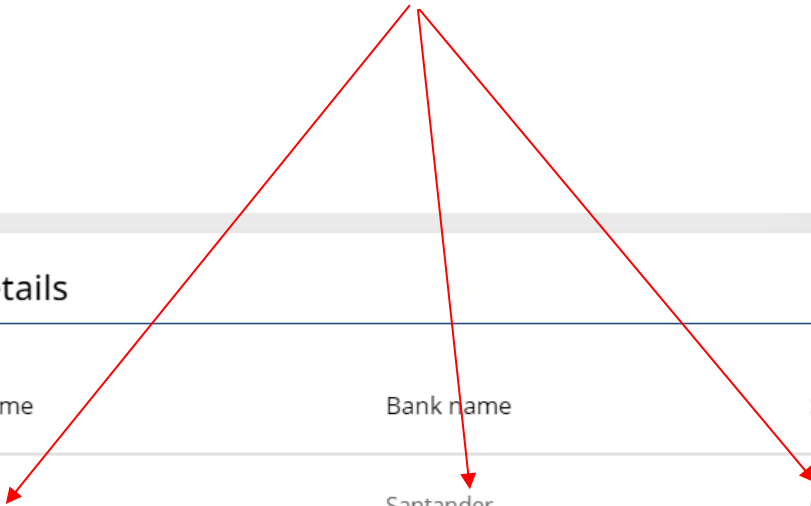
PFOFILE AREA – BANK DETAILS

Bank details can be changed at any time in Employee Self Service. However if you change them after the current month payroll has been calculated the new details will not be effective until the following month.

The payroll is calculated on a different date each month so it is not possible to specify when this is in advance and can sometimes be subject to change.

We advise that old bank accounts are kept open until after the next pay day to avoid salary credits being returned to us in the event that we have tried to credit an old account.

For any questions regarding this process please contact liberataschoolstechnicalsupport@liberata.com

To change the bank account details for payment of your salary click on either the account name or the bank name/sort code

Bank details

Account name	Bank name	Sort code
K Johnston	Santander	090126

On the next screen you will see you current bank details.

To change them just over write the details held by entering the new sort code (6 numbers), the new account number (8 numbers) and the new account name and then click

The bank name will automatically populate once you have saved.

Please ensure that the bank details you have entered are correct as failure to do so may cause issues with receiving your pay at the end of the month

If you receive the following error message firstly double check that what you have entered for the sort code is correct.
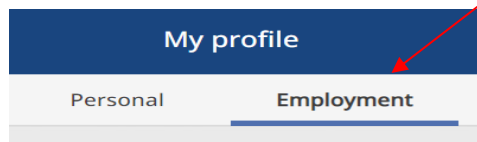

If your entry is correct and you are still receiving the error message please contact us immediately at liberataschoolstechnicalsupport@liberata.com.

This is likely because the bank that you want to enter is not already held in our data base bank list and will need to be added
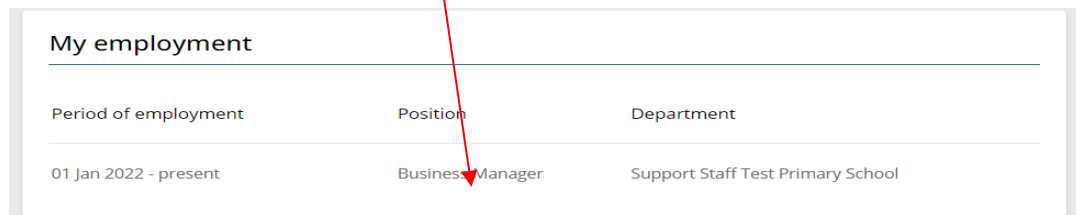
PROFILE AREA – EMPLOYMENT

In the profile area if you switch to employment you will be able to see the details of your current position(s)

If you click on the position a new window will open to show you the current terms and conditions of this employment

Current job details

Job details

Department

Support Staff Test Primary School

Position reference

1000008708

Position name

Business Manager

Personal reference

005872

Start date (dd/mm/yyyy)

01/01/2022

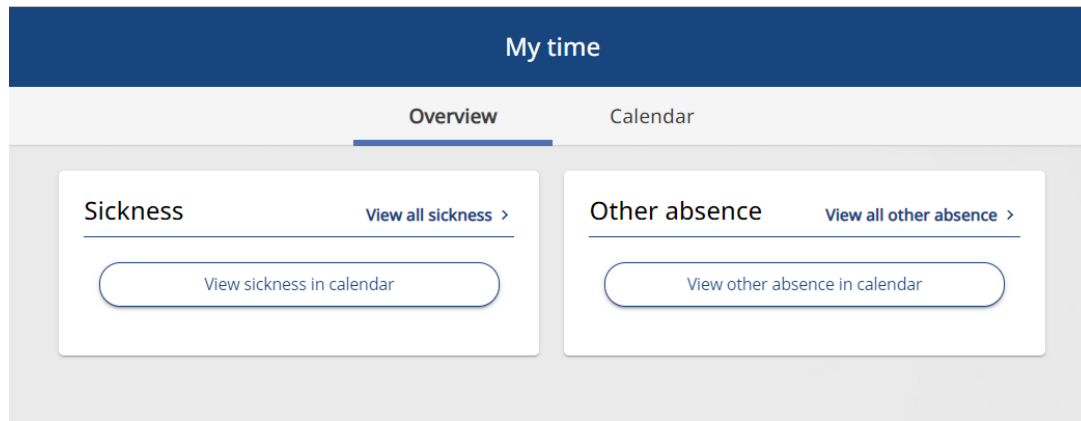**Payroll reference**

005872

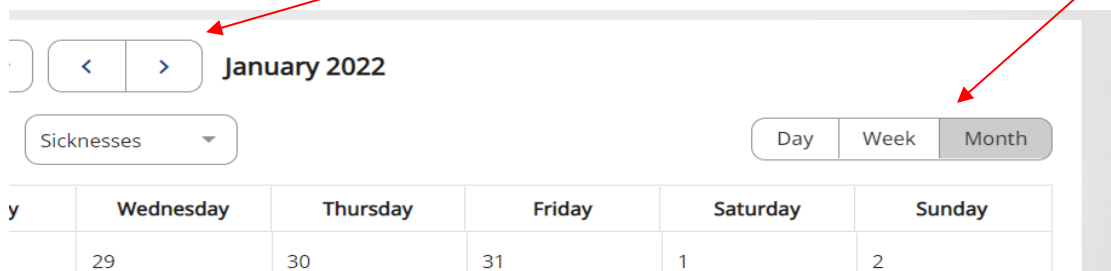**Contractual hours**

36.00

Work pattern

5 day 36H

MY TIME

Clicking on "My Time" will navigate you to the overview section for absence where there are two summary cards as shown below.

All types of absences can be viewed on a calendar that can be set to day, week or month view and left and right arrows can then be used to scroll forwards and backwards.
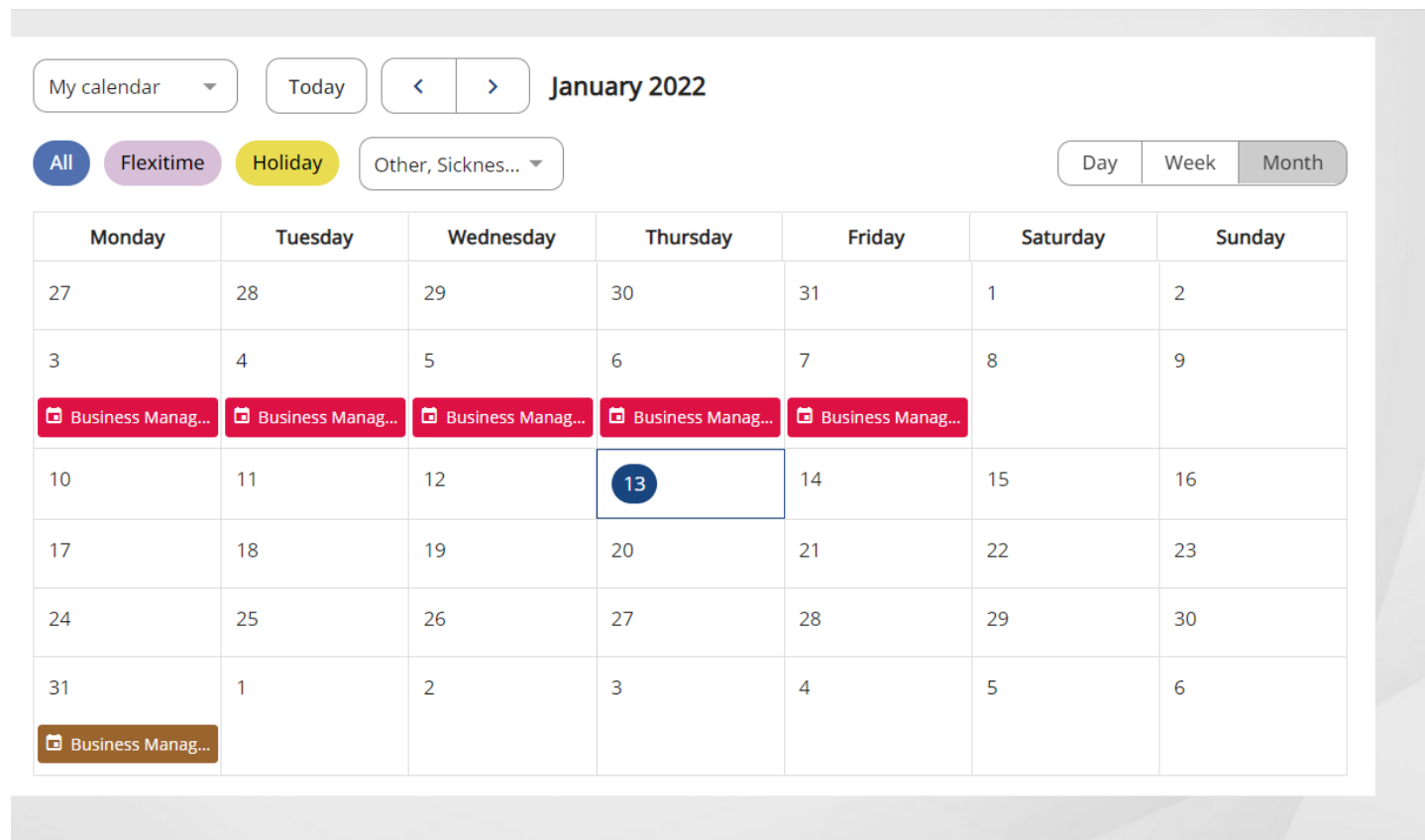

The types of absences displayed in the calendar will depend upon your selection. By using the drop down arrow at the top of the screen you can choose the type to be displayed in the calendar
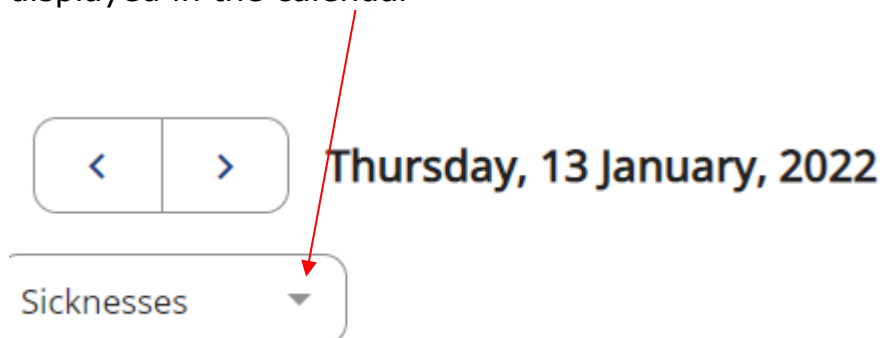
In the example below sickness and other has been selected and a "month to view"

The red and brown highlighted days indicate where there has been sickness absence and other leave

From the summary cards by selecting "view all sickness" you will be able to conduct a search for any sickness or other absence between your chosen dates or if the date fields are left empty all sickness or other absence will be shown in list format

See example below

Absence records

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

✓ All   Sickness   Other

Type	Status
All	Not refused

Start date (dd/mm/yyyy)	End date (dd/mm/yyyy)
14/12/2021	

Search

Start date ↓	End Date	Duration	Type	Position	Status	Attachments
31 Jan 2022	31 Jan 2022		Unpaid Leave	Business Manager	Not applicable	📎
03 Jan 2022	07 Jan 2022		Sickness Absence	Business Manager	Not applicable	📎

From "My Time" you can also switch straight to "calendar" view

MY PAY

Clicking on "My Pay" will navigate you to the pay documents area where there will be summary cards for payslips P60's and P45's (where applicable)

The 'Payslips' card contains a table listing the users payslip history. The default order is from newest to oldest – but this can be changed by changing the sort order of the 'Pay date' heading. The top right corner of the card also contains a quick link to the users' bank details should they wish to review / update the details.

My pay

Payslips   View my bank details >

ⓘ 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
24 Jul 2021	4,727.43	⬇
24 Nov 2021	3,764.97	⬇
24 Aug 2021	3,491.98	⬇

The contents of the list of payslips can be restricted by using the search functionality if a specific periods' payslips are needed – just enter to and from dates. If wanting to download a PDF copy of a specific payslip, without viewing first, the download icon at the end of the row can be selected, which will trigger the file to download onto the user's local machine. Downloading may take several seconds. Alternatively, if a set of payslips need to be downloaded, there is a 'Download all' button available at the top of the list. Selecting this button will trigger a file to be downloaded to the user's local machine, containing all payslips listed in the table at the time of selecting the button.

PLEASE NOTE: When viewing a payslip the format will be of a basic payslip and will not contain details of job title and employer. To be able to view the full payslip with this detail it should be downloaded.

The 'P60' card contains a table listing the user's end of year P60 certificates starting with the most recent. These can be downloaded and viewed in the same way as payslips

The 'P45' card will only display for a leaver. Leavers still have access to ESS and will be able to log in and download their P45 to pass to their new employer.

Please note: It is the employees' responsibility to take care of their tax affairs. Please do not give your P45 to more than one employer.
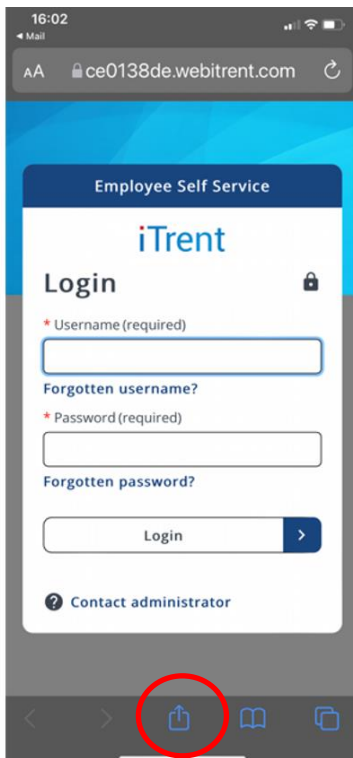
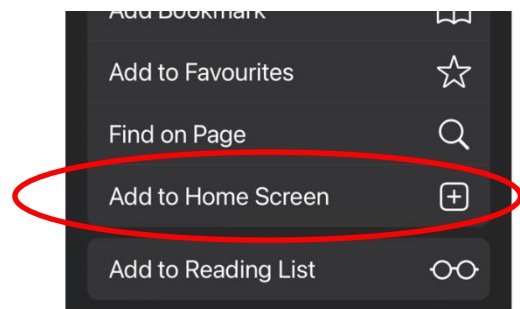ESS can be accessed easily on mobile devices using the same weblink.

FOR IOS

Enter the URL into the Safari browser and click on the share icon when you see the log in screen
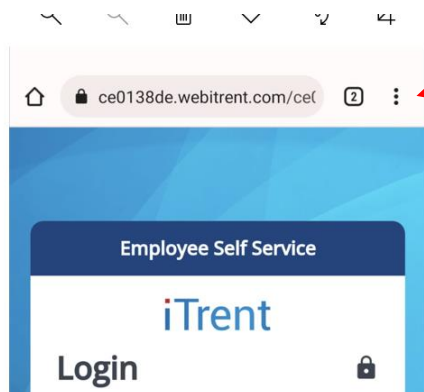

Then select "Add to home screen" Then ESS will display on your device screen as an app. Before selecting add to home screen you can change the name of the link if you want to.
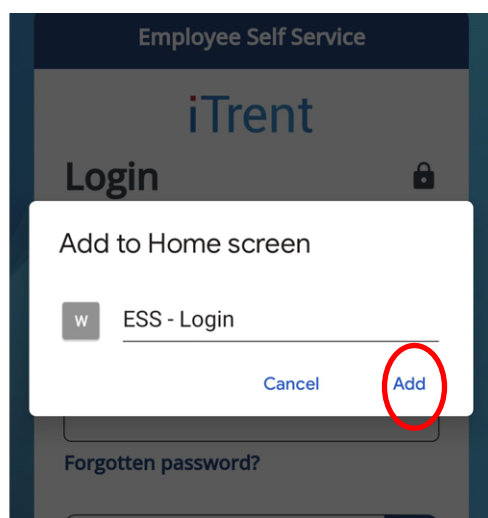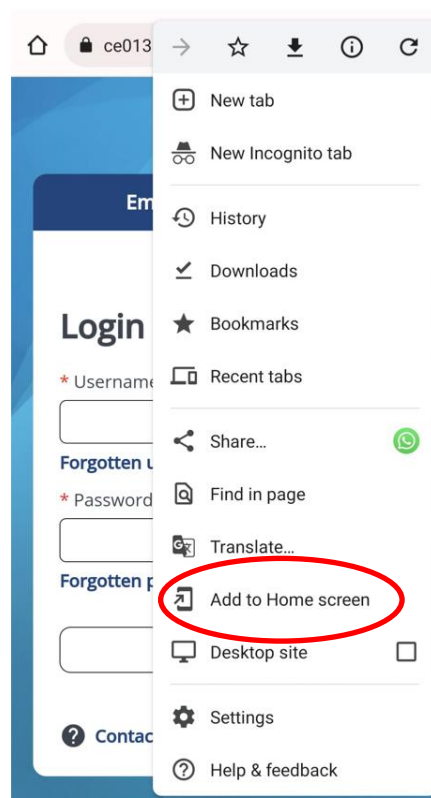
FOR ANDROID

Enter the URL into the Chrome for Android browser and tap on the three dots for menu options.

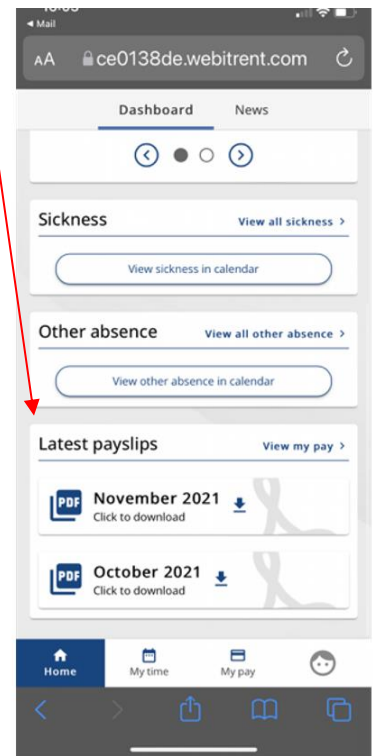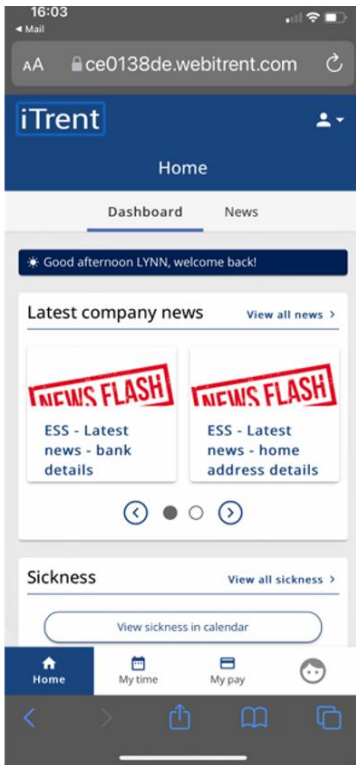Select the "Add to home screen" option from the menu


Then select "Add"

The shortcut link will be created on the home screen of your Android phone. Before selecting add you can change the name of the link if you want to.

ONCE YOU ARE LOGGED IN ON YOUR MOBILE DEVICE

The dashboard will show once you have logged in and by scrolling down you will find the payslips

And the navigation options can be found at the bottom of the screen
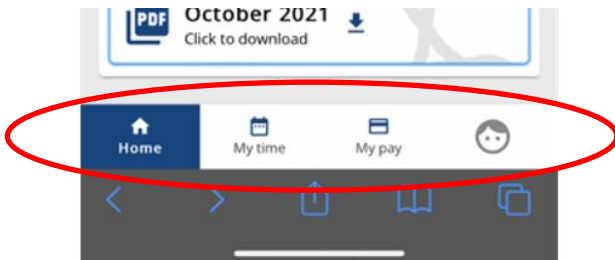
PAYROLL CONTACT DETAILS

All Employee Self Service issues should be sent to the Liberata Technical Support Team for a specialist team member to investigate.

All issues should be sent by email to:

LiberataSchoolsTechnicalSupport@liberata.com

Please be sure to include your username as well as your forename and surname in order for us to deal with your query efficiently. If you cannot supply your user name we will need your date of birth and National Insurance number in order verify your identity.

All emails to this address will send an "automatic response" to you. The information in this response may help you to resolve any issues that you have with logging in so please have a look.

This email box is monitored on a daily basis but you should not expect an immediate reply. We will respond within 48 hours, but usually on the same day.