



Intrepid: V10

Leave Manager Plus

Approver User Guide

Hicom Technology
Version 1.00

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Intrepid: V10 is an online system designed to manage trainees and their education, and forms part of the Intrepid HR software suite used to administer training, education and career progression in the healthcare sector.

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Distribution

This user guide can be freely distributed to approvers of the Intrepid: Leave manager system.

Introduction

This user guide is intended for users who have responsibility for approving leave applied for via the Intrepid: Leave Manager system.

Approval (or rejection) of leave applications can be managed using two screens within Intrepid – Leave Approval and Trainee Applications

Leave Approval

Once you have logged into Intrepid, click on Leave Approval under the Leave Manager menu on the left hand side. This will display all leave applications awaiting your approval.

LEAVE MANAGER - LEAVE REQUESTS

LEAVE APPLICATIONS - SEARCH CRITERIA

Staff member:

Authorised status: **Requiring Authorisation**

Start date from:

Start date to:

LEAVE REQUESTS

App.	Start Date	End Date	Surname	Forenames	Leave type	Days	Auth.	Retro	Last Minute	Seq
→	25/02/2010	26/02/2010			Study	1	*	✓	0	
→	01/01/2011	02/01/2011			Study	1	*	✓	1	
→	09/02/2011	09/02/2011			Annual	1	*	✓	0	
→	23/03/2011	23/03/2011			Annual	1	*	✓	0	
→	13/04/2011	14/04/2011			Lieu	2	*	✓	0	
→	14/04/2011	15/04/2011			Professional	2	*	✓	0	
→	30/05/2011	31/05/2011			Study	2	*	*	0	
→	26/08/2011	26/08/2011			Annual	1	*	✓	1	
→	27/08/2011	27/08/2011			Annual	1	*	✓	1	
→	29/08/2011	29/08/2011			Annual	1	*	✓	1	
→	29/08/2011	29/08/2011			Study	1	*	✓	1	
→	06/09/2011	06/09/2011			Annual	1	*	✓	1	
→	07/09/2011	15/09/2011			Exam	1	*	*	0	
→	16/09/2011	17/09/2011			Annual	1	*	*	0	
→	29/09/2011	30/09/2011			Annual	1	*	*	0	
→	27/10/2011	27/10/2011			Study	1	*	✓	1	
→	14/01/2012	14/01/2012			Study	1	*	✓	1	
→	29/02/2012	29/02/2012			Lieu	1	*	✓	1	
→	01/03/2012	01/03/2012			Annual	0	*	*	1	
→	06/03/2012	06/03/2012			Study	1	*	✓	1	

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To review an application, select it from the list. The application will open in its entirety for review. The Leave Details section shows the specifics of the leave request as entered by the applicant.

Where an application is an Exception Application, this will be clearly indicated within the Leave Details section. Exception Applications will generally be subject to an additional layer of approval, and this will be visible within the 'Approval Process' section.

The following items are also available within expanding panels to aid in the decision making process for the leave application:

- 'Course List' – displays the history of all courses attended by the applicant
- 'Entitlement' – displays entitlements and budgets for the applicant
- 'Leave History' – displays the history of all leave applied for by the applicant
- 'Documents' - displays any documents uploaded by the leave applicant against this leave application. It may also be possible to upload documents against the application yourself, depending on configuration.

Note that depending on your system configuration, some of the panels listed above may not be visible.

Any expenses applied for as part of the application will be visible beneath the expanding panels. Values shown for expenses will be the estimated expenses at the time of application.

The calendar next to the 'Leave Expenses' section shows approved leave for all relevant trainees/consultants during the time period of the application.

<u>January</u>		February 2010					<u>March</u>
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	<u>29</u>	<u>30</u>	<u>31</u>	
<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	
<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	
<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	
<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>	<u>27</u>	<u>28</u>	
<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	

	Leave booked by this doctor and other staff
	Leave booked by other staff
	Leave booked by this doctor only
	National Exam day

The colour of the day shows if another trainee is on leave. If the day is shown as red or yellow, it can be clicked on to display a list of all trainee's on leave on that day.

Finally, select either Yes or No from the 'Approve' drop down, place a tick in the confirmation box and save the application. If the leave is approved, it will be sent on to the next approver in the chain, or if you were the final approver, the leave will be approved and the trainee emailed to inform them.

If you decline the leave request, the trainee will receive an email declining the leave.

Trainee Applications

All applications your trainees have made both online and offline are available here.

Site Name	Grade	Specialty	Start Date	End Date	Leave type	Course/Exam	Authorised	Online
(other)	ST2	Obstetrics & Gynaecology	01/06/2008	05/06/2008	Annual	-	Yes	✘
(other)	GPST	General Practice	01/10/2009	02/10/2009	Study	hammersmith medicine paces	Yes	✘
(other)	St	Endocrinology	23/08/2010	24/08/2010	Study	Child Health Surveillance	Yes	✔

The filter can be used to reduce the number of applications on the list. Reports are available under the reporting drop down. Simply select the report type and click on Run Report. The report will contain all leave requests present in the Leave Application list.

New leave can be added on behalf of an applicant using the 'Add Leave' option if desired. This will not require additional approval. Depending on the configuration of your Leave Manager system, the option to add leave may not be available.