Intrepid: V10

Leave Manager Plus

Applicant User Guide

Hicom Technology
Version 1.1

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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 users of the Intrepid: Leave Manager system.

Introduction

This user guide is intended for applicants who are applying for leave using the Intrepid: Leave Manager system.

For applicants, Leave Manager is broken down into three menu items – Leave Application, Leave Manager and Leave Entitlement.

Leave Application

Once you have logged into Intrepid, click on the Leave Manager menu on the left hand side and then on 'Leave Application'. This will display the screen below and allow you to select the post against which you wish to apply for leave.

Click 'Apply' next to the post and you will be presented with the leave application form.

Application Fig.1: Applying for leave for an approved event

Personal/Post Details

By clicking the 'Personal/Post Details' bar you can view a summary of your own record, and the post you are applying for leave against.

Leave Details

Select the Leave Type you are applying for, along with the start and end dates and the total number of days you will be on leave for. Depending on the configuration of your system, you may not be allowed to submit your application if the number of days will take you over your entitlement for the current period (as displayed within the 'Entitlements' section).

If required, enter the following details:

- The person who will be covering you whilst you are on leave

- The name of the Educational Supervisor who has approved this leave episode

- The name of the Clinical Supervisor who has approved this leave episode

- Any comments you have

- Confirmation that you have checked that another member of your department is not on leave.

Depending on the Leave Type you select, you will then be required to enter the details of the Course and/or Exam you require leave for.

A list of your approved Courses/Exams will be displayed on selecting Leave Type. If the Course/Exam you wish to attend is not displayed on this list you may tick the Exception Application tick box. This will give you a further choice of all Courses/Exams available in the system. If your Course/Exam is still not available in the list, you may select 'Other', and enter the Course/Exam title as free-text.

Note 1: Exception Applications will be subject to an additional layer of approval, and may not be available for all applicants.

Note 2: The fields available for a leave application can be configured by a system administrator, so the precise fields available may differ to those shown above.

Application Fig.2: Applying for leave for an exceptional event

Approvers

The list of approvers who will receive your application are listed here. This will only be displayed once a 'Leave type' and 'Start date' have been selected. Note that if the leave application is an Exception Application, any additional approvers required will be displayed here.

Entitlement

By clicking the 'Entitlements' bar you can view a summary of your leave entitlements and budgets. Depending on your system configuration this section may not be visible.

Note that information displayed here is identical to that displayed on the 'Leave Entitlement' screen.

Leave History

By clicking the 'Leave History' bar you can view a summary of previous leave taken. A filter is available so you can select the leave type (e.g. study, annual etc.) that you are interested in.

Documents

By clicking the 'Documents' bar you can access a control allowing you to upload files from your machine against this leave application.
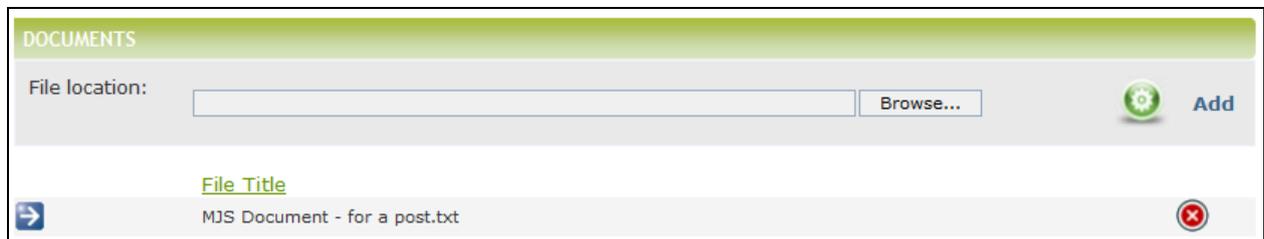
Once uploaded documents will be available to review and delete in a list beneath the control. All documents will be made available for review by the leave approver(s).

Note 1: Intrepid requires the Document Manager module for Leave Manager Documents to work. Therefore depending on your system configuration, this section may not be available.

Note 2: On some client systems it will be possible to add documents after a leave application has been submitted and/or approved. This is dependant on your system configuration.

Expenses

Anticipated expenses can be added here. Select the expense type, cost and any comments and then click the 'Add' button. You can add multiple expenses to your application. You will also be required to confirm whether or not you are submitting expenses for this leave application.

If the leave is approved, you can re-enter the leave application after you have taken the leave, and update the expenses with the actual amount spent. The amounts entered represent the amount you intend to claim for your expenses, but do not necessarily reflect the amount that will be paid.

Depending on the configuration of your system, you may not be allowed to submit your application if the estimated expenses will take you over your budget for the current period (as displayed within the 'Entitlements' section).

Warning: Do not attempt to claim expenses in this way unless this is the official policy of your organisation.

Calendar

The calendar shows the dates of public holidays, as well as previously approved leave for the current user and other relevant trainees during the time period of the application.

Submitting

Once you have completed all fields, click on the submit button to submit your leave request. Note that the system will require an extra confirmation if your leave application is being submitted close to your leave start date.

Leave Manager

All your previous leave applications are available to view in this section. Any comments made by leave approvers are available to view by clicking on the request and scrolling to the Approvers section of the application. If a leave request is still in progress, it can be amended and re-submitted or cancelled.

Re-submitting an application will require it to be authorised by all approvers from the beginning of the leave approval chain.

Entitlement

Your entitlement is shown here. You can check your remaining entitlement before submitting a leave request.

Depending on the configuration of your Leave Manager system, the Entitlement screen may not be available.

Entitlement