



# Intrepid: V10

---

## Leave Manager Plus

### Applicant User Guide

**Hicom Technology**  
**Version 1.1**

July 2014

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.

## Table of Contents

---

Introduction.....	3
Leave Application .....	3
Leave Manager.....	8
Entitlement .....	9

## 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.

The screenshot shows the 'Leave Manager - Posts' application interface. On the left, there is a vertical navigation menu with sections: GENERAL (Home, My Account, My Record, Previous Page, Log Off), CPPS, and LEAVE MANAGER (Leave Application, Leave Manager, Leave Entitlement). Below this is the Hicom Technology logo. The main content area has a header 'LEAVE MANAGER - POSTS' with a background image of a medical stethoscope. A sub-header 'POST DETAILS' contains instructions: 'To apply for leave, press the 'Apply' icon against the post to which your proposed leave applies. For posts where online approval is not available, a 'Closed' icon will be displayed.' Below this, there are four listed posts:

Post Details	Action
General Surgery Bedford Hospital SpR	Start date: Tuesday 01 January 13 End date: Thursday 01 January 15 Apply
Anaesthetics West England SpR	Start date: Monday 28 February 11 End date: Friday 28 February 14 Apply
Emergency medicine AMO Site F2	Start date: Tuesday 27 October 09 End date: Thursday 27 October 11 Apply
Paediatrics C50 SITE F2	Start date: Tuesday 09 September 08 End date: Wednesday 09 September 09 Apply

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

### LEAVE MANAGER - APPLICATION

**PERSONAL/POST DETAILS**

**LEAVE DETAILS**

<b>Leave Applicant Guide</b> Leave type: <input type="text" value="Study"/> <input type="button" value="▼"/> Submitted date: <input type="text" value="23/07/2014"/> Person covering: <input type="text"/> Ed. supervisor: <input type="text"/> Rota Manager: <input type="text"/> Comments: <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>	Start date: <input type="text"/> <input type="button" value="▼"/> End date: <input type="text"/> <input type="button" value="▼"/> Number of days: <input type="text"/>
--	---

Have you checked that another member of your department is not on leave?

Course name:

The event I wish to apply for is not on the approved list above. I therefore wish to apply for an Exception Application.

Course topic:

Course venue:

Course website:  e.g. <http://www.intrepidonline.co.uk>

Course provider:

**ENTITLEMENT**

**LEAVE HISTORY**

**DOCUMENTS**

Do you intend to claim any expenses for this period of leave? (Please note that leave and funding is approved based on the information provided within this application. If you intend to claim expenses you MUST include all costs in the Leave section below)

**LEAVE EXPENSES**

No leave expense claims have been made for this application

Cost type: <input type="text"/> <input type="button" value="▼"/> Estimated cost (£): <input type="text"/> Reference: <input type="text"/> Comments: <input type="text"/>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #e0f2f1;">December</th> <th colspan="5" style="background-color: #e0f2f1;">January 2014</th> <th colspan="2" style="background-color: #e0f2f1;">February</th> </tr> <tr> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> <th>Sun</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td style="text-align: right;">30</td> <td style="text-align: right;">31</td> <td style="text-align: right;">1</td> <td style="text-align: right;">2</td> <td style="text-align: right;">3</td> <td style="text-align: right;">4</td> <td style="text-align: right;">5</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">6</td> <td style="text-align: right;">7</td> <td style="text-align: right;">8</td> <td style="text-align: right;">9</td> <td style="text-align: right;">10</td> <td style="text-align: right;">11</td> <td style="text-align: right;">12</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">13</td> <td style="text-align: right;">14</td> <td style="text-align: right;">15</td> <td style="text-align: right;">16</td> <td style="text-align: right;">17</td> <td style="text-align: right;">18</td> <td style="text-align: right;">19</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">20</td> <td style="text-align: right;">21</td> <td style="text-align: right;">22</td> <td style="text-align: right;">23</td> <td style="text-align: right;">24</td> <td style="text-align: right;">25</td> <td style="text-align: right;">26</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">27</td> <td style="text-align: right;">28</td> <td style="text-align: right;">29</td> <td style="text-align: right;">30</td> <td style="text-align: right;">31</td> <td style="text-align: right;">1</td> <td style="text-align: right;">2</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">3</td> <td style="text-align: right;">4</td> <td style="text-align: right;">5</td> <td style="text-align: right;">6</td> <td style="text-align: right;">7</td> <td style="text-align: right;">8</td> <td style="text-align: right;">9</td> <td></td> <td></td> </tr> </tbody> </table>	December		January 2014					February		Mon	Tue	Wed	Thu	Fri	Sat	Sun			30	31	1	2	3	4	5			6	7	8	9	10	11	12			13	14	15	16	17	18	19			20	21	22	23	24	25	26			27	28	29	30	31	1	2			3	4	5	6	7	8	9		
December		January 2014					February																																																																		
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																																																			
30	31	1	2	3	4	5																																																																			
6	7	8	9	10	11	12																																																																			
13	14	15	16	17	18	19																																																																			
20	21	22	23	24	25	26																																																																			
27	28	29	30	31	1	2																																																																			
3	4	5	6	7	8	9																																																																			

National Exam day  
 Public Holidays  
 Approved leave for this doctor

Add

Submit Application

Cancel

**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.

## LEAVE MANAGER - APPLICATION



### PERSONAL/POST DETAILS

#### LEAVE DETAILS

**Leave Applicant Guide**

Leave type:	<input type="text" value="Study"/>	Start date:	<input type="text"/> 
Submitted date:	<input type="text" value="17/07/2014"/>	End date:	<input type="text"/> 
Person covering:	<input type="text"/>		
Ed. supervisor:	<input type="text"/>		
Rota Manager:	<input type="text"/>		
Comments:	<input type="text"/>		

Have you checked that another member of your department is not on leave?  Yes

Course name:

The event I wish to apply for is not on the approved list above. I therefore wish to apply for an Exception Application.

Exception course:

Course topic:

Course venue:

Course website:  e.g. <http://www.intrepidonline.co.uk>

Course provider:

#### APPROVERS

Select leave type and start date to display approvers

#### ENTITLEMENT

#### LEAVE HISTORY

#### DOCUMENTS

Do you intend to claim any expenses for this period of leave? (Please note that leave and funding is approved based on the information provided within this application. If you intend to claim expenses you MUST include all costs in the Leave section below)

#### LEAVE EXPENSES

No leave expense claims have been made for this application.

Cost type:

Estimated cost (£):

Reference:

Comments:

 Add

 Submit Application

 Cancel

December		January 2014					February	
Mon	Tue	Wed	Thu	Fri	Sat	Sun		
30	31	1	2	3	4	5		
6	7	8	9	10	11	12		
13	14	15	16	17	18	19		
20	21	22	23	24	25	26		
27	28	29	30	31	1	2		
3	4	5	6	7	8	9		

 National Exam day  
 Public Holidays  
 Approved leave for this doctor

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.

The screenshot shows a 'DOCUMENTS' section. At the top, there is a 'File location:' input field with a 'Browse...' button and an 'Add' button with a gear icon. Below this, there is a table-like structure showing a single document entry. The first column contains a blue circular icon with a white arrow. The second column contains the 'File Title' 'MJS Document - for a post.txt'. The third column contains a red circular icon with a white 'X' and a blue circular icon with a white edit symbol.

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.