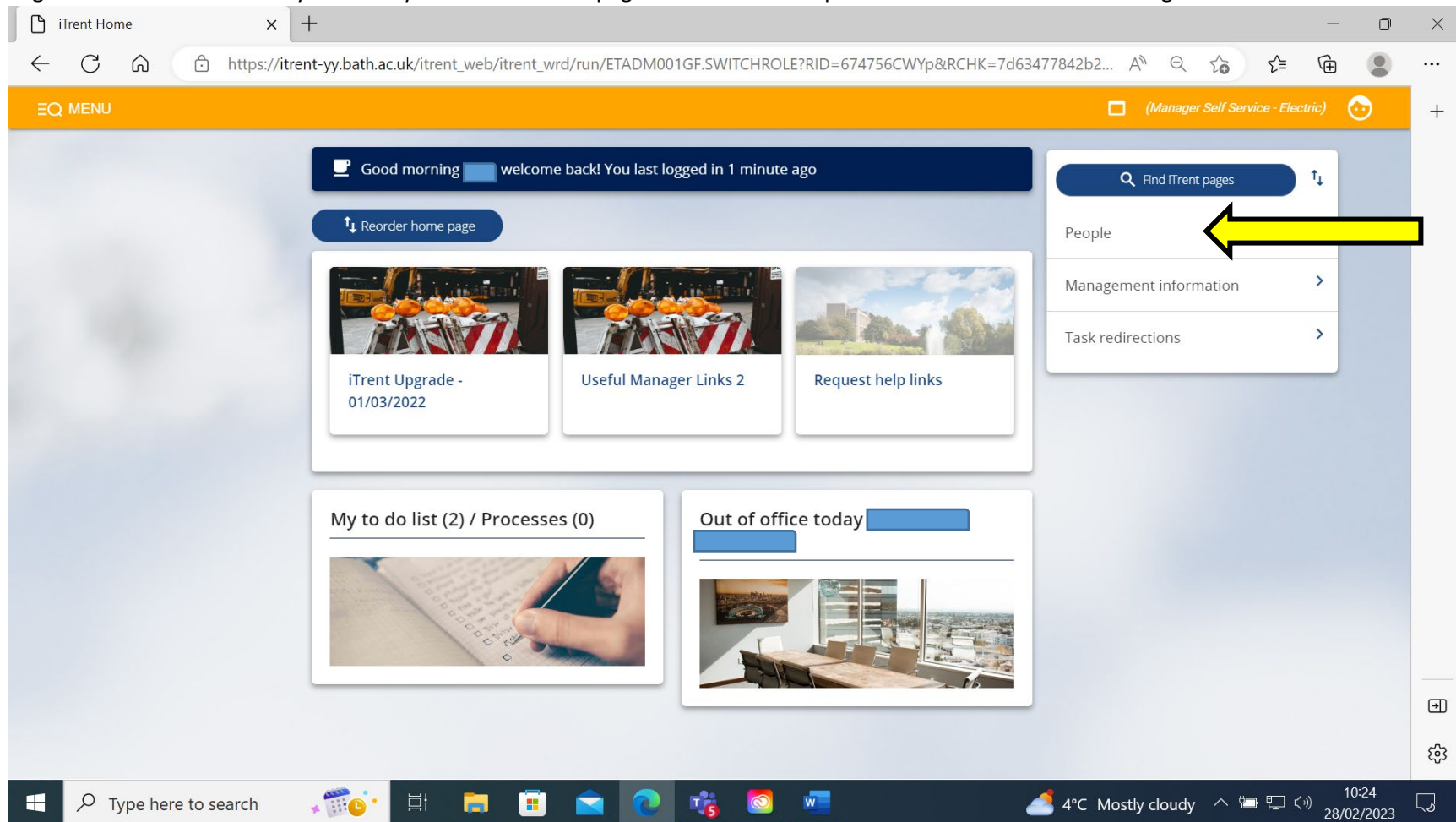


MSS – Line Manager Guidance

MSS allows you to securely access and update details on your staff via iTrent for MSS.

Accessing Management Information on your Direct Reports

- Log in to MSS - this will take you directly to the MSS Homepage. Click on the 'People' button on the menu on the right-hand side.



- Your list of direct reports will appear on the left-hand side of the screen. Select the person you wish to view information on.

The screenshot displays the iTrent web application interface. On the left, a navigation menu is visible with the following sections:

- Organisation
- University of Bath
- People

Under the 'People' section, there is a search bar labeled 'Surname' and a list of three people represented by blue bars. A yellow arrow points to the first person in the list. Below the list is a 'Save this group' button.

The main dashboard area contains several widgets:

- A top navigation bar with the iTrent logo, the date '28/02/2023', and a user profile icon labeled '(Manager Self Service - Electric)'.
- A dark blue banner with the text: 'Good morning, [redacted] welcome back! You last logged in 1 minute ago'.
- A 'Reorder home page' button.
- A 'Find iTrent pages' search bar.
- Three main content cards: 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', and 'Request help links'.
- A 'My to do list (2) / Processes (0)' widget with a calendar icon.
- An 'Out of office today' widget with a calendar icon.
- A right-hand sidebar with a search bar and three menu items: 'People', 'Management information', and 'Task redirections'.

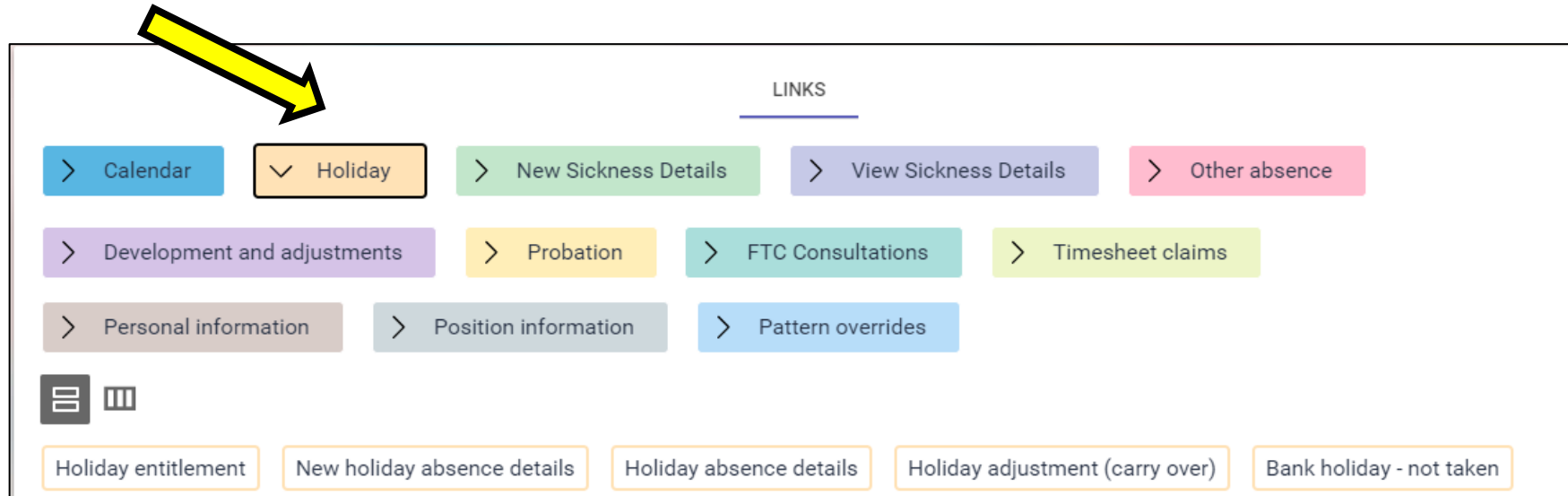
The Windows taskbar at the bottom shows the search bar, task view, and various application icons. The system tray on the right indicates a temperature of 5°C, 'Mostly cloudy' weather, and the time 10:30 on 28/02/2023.

- A mini dashboard of information will show on the top half of the screen which allows you to easily see basic information about your member of staff i.e. Length of Service, Job Title, Holidays Remaining and Sickness Absence. You can click on any of highlighted areas to view more detailed information.

The screenshot shows the iTrent 'Person summary' page for a staff member. The page is divided into several sections:

- Top Navigation:** iTrent logo, date 28/02/2023, and a search bar.
- Left Hand Navigation:** Organisation (University of Bath) and People (Results 3 People).
- Main Content Area:**
 - Personal:** Known as [redacted] born on [redacted]. Includes fields for Personal ref., Payroll ref., and Social security.
 - Employment:** HR-Human Resources | Human Resources - Core. Includes MSA, Part time, Open ended, 07 | Scalepoint. Occupancy started on [redacted]. Reporting manager [redacted].
- Bottom Section:**
 - Calendar:** View Full Calendar. 28 Feb - 13 Mar 2023. Shows a calendar grid with the 28th highlighted.
 - Holidays remaining:** 117.5 of 234.3 hours (as of last calculation).
 - Sickness absence:** 0 (as of last calculation).

- You can also access information through the links at the bottom of the page. Each link opens a menu once you click on it. For example, when you click on the 'Holiday' link it opens up a menu at the bottom of the page, you can click on any of these links e.g. 'Holiday entitlement', 'New holiday absence details' etc on the menu to view detailed information.



The screenshot shows a 'LINKS' section with a yellow arrow pointing to the 'Holiday' link. The 'LINKS' section contains several buttons with right-pointing chevrons: 'Calendar', 'Holiday', 'New Sickness Details', 'View Sickness Details', 'Other absence', 'Development and adjustments', 'Probation', 'FTC Consultations', 'Timesheet claims', 'Personal information', 'Position information', and 'Pattern overrides'. Below these is a hamburger menu icon and a list of five links: 'Holiday entitlement', 'New holiday absence details', 'Holiday absence details', 'Holiday adjustment (carry over)', and 'Bank holiday - not taken'.

- To go back to your MSS Homepage, you can click on the iTrent button at the top left-hand corner of the page.

The screenshot displays the iTrent web application interface. A yellow arrow points to the iTrent logo in the top left corner. The page shows a user profile with personal and employment details, a calendar, and two circular progress indicators for holidays and sickness.

Personal Information:

- Known as [redacted] born on [redacted]
- [redacted] (Personal ref.)
- [redacted] (Payroll ref.)
- [redacted] (Social security)

Employment Information:

- [redacted] HR-Human Resources | Human Resources - Core
- [redacted] MSA | Part time | Open ended | 07 | Scalepoint
- Occupancy started on [redacted]
- Reporting manager: [redacted]

Calendar:

- VIEW FULL CALENDAR
- 28 Feb - 13 Mar 2023
- Calendar view showing days 01 to 13, with 28 highlighted.

Holidays and Sickness Summary:

- Holidays remaining:** 117.5 of 234.3 hours (as of last calculation)
- No sickness:** 0 (as of last calculation)

System Information:

- Top right: (Manager Self Service - Electric)
- Bottom right: 5°C Mostly cloudy, 10:34, 28/02/2023

Leave Requests

- You will receive an email to notify you when a member of your staff has requested annual leave.
- Log in to MSS.
- Click on 'My to do list' which can be found in the left-hand box at the bottom of the MSS Homepage.

The screenshot displays the iTrent Home dashboard. At the top, there is a navigation bar with a 'MENU' icon on the left and '(Manager Self Service - Electric)' on the right. Below the navigation bar, a dark blue banner displays a welcome message: 'Good morning [user], welcome back! You last logged in 1 minute ago'. To the right of this banner is a search bar labeled 'Find iTrent pages' and a list of navigation options: 'People', 'Management information', and 'Task redirections'. The main content area features several widgets. A 'Reorder home page' button is located above a row of three widgets: 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', and 'Request help links'. Below these, there are two more widgets: 'My to do list (2) / Processes (0)' and 'Out of office today'. A large yellow arrow points to the 'My to do list' widget. The bottom of the screen shows the Windows taskbar with various application icons and system information including the date and time (10:24, 28/02/2023) and weather (4°C Mostly cloudy).

- You will see any requests for annual leave from your direct reports in the list. Click on the small box next to the request and then click on 'Requires Authorisation'.

The screenshot shows a web browser window with the URL https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETADM001GF.SWITCHROLE?RID=674756CWyp&RCHK=7d63477842b2.... The page title is 'Tasks and processes - iTrent'. The main content area is titled 'TO DO LIST (2) PROCESSES (0)'. It features a filter set to 'All active' and is sorted by 'Due date'. There are two entries in the list:

- 29/12/2022 (1)**: Personal Holiday Authorisation [redacted] * Human Resources - Core * Start date: 31/03/2023 * End date: 06/04/2023 * Due: 29/12/2022. This entry is marked as **OVERDUE** and **REQUIRES AUTHORISATION**. A yellow arrow points to the checkbox on the left, and another yellow arrow points to the 'REQUIRES AUTHORISATION' button.
- 13/02/2023 (1)**: Personal Holiday Authorisation [redacted] * Human Resources - Core * Start date: 21/02/2023 * End date: 21/02/2023 * Due: 13/02/2023. This entry is also marked as **OVERDUE** and **REQUIRES AUTHORISATION**.

The Windows taskbar at the bottom shows the system tray with a temperature of 4°C, weather 'Mostly cloudy', and the date 28/02/2023 at 11:07.

- The holiday absence details page will pop up with the details of the annual leave request. Go to the 'Authorisation' section at the bottom of the page and click on the drop-down menu under 'Authorisation Status' and choose either 'Authorised' or 'Not Authorised'.

The screenshot displays the iTrent web interface. On the left, a sidebar shows the 'University of Bath' logo and a search bar. Below it, a 'People' section lists search results, and a 'Holiday absence list' table is visible. The main content area is titled 'Holiday absence details' and contains the following sections:

- Holiday period:** Holiday period* (More than one day)
- Holiday start:** Holiday start date* (31/03/2023), Holiday start type (Full day), Holiday start time, Hours absent
- Holiday end:** Holiday end date* (06/04/2023), Holiday end type (Full day), Holiday end time, Hours absent
- Absence:** Absence type* (Personal Holiday), Authorisation (Awaiting authorisation), Position
- Authorisation:** User name, Authorisation status* (dropdown menu), Reason (text box)

A large yellow arrow points to the 'Authorisation status*' dropdown menu in the 'Authorisation' section.

The Windows taskbar at the bottom shows the date as 28/02/2023 and the time as 11:16.

- There is a 'Reason' box underneath which you should complete if you do not authorise the request.

- Press the 'Save' button.
- The employee will be notified via email whether their holiday request has been authorised or not and the amount of annual leave booked will be deducted from their total allowance, shown on their 'Holidays remaining' infographic on their dashboard.

Holiday Adjustment (Carry-Over)

Automatic carry-over

- The University's policy is that the number of hours of annual leave staff can carry over to the next leave year is a maximum of 36.5 hours (5-days), pro-rated for part-time staff.
- The process is managed centrally so that iTrent will adjust the leave balance after the end of the leave year (e.g. from 1 September) for any carry-over up to the maximum allowed. As a line manager, you do not need to do anything, the balance for each eligible member of staff will be adjusted early September so the updated figure should show in your staff member's iTrent record shortly after.

Exceptional carry-over

- In exceptional circumstances e.g. an exceptional additional work commitment etc, where a staff member has not been able to take their full leave allowance within the leave year, as a line manager, you are able to use your absolute discretion to allow staff to carry over up to a maximum of 73 hours (10 days) in total i.e. an additional 36.5 hours (five days) into the next leave year, pro-rated for part-time staff.
- There may be other circumstances where additional carry-over of leave above this maximum can be granted e.g. maternity leave, shared parental leave, adoption leave or long-term sickness due to an underlying health condition, but we would encourage you to discuss these with your [HR Business Partner or Advisor](#) in the first instance.
- This provision should only be used in genuinely exceptional circumstances.
- **Please note** - The adjustment for the carry-over of annual leave which is over and above 36.5 hours (or the pro-rata equivalent if part-time) which remains outstanding at the end of the leave year must be actioned no earlier than 5 September and as soon as possible thereafter. If it is actioned before September, the carry-over will be added as additional leave to the current leave year so will not be applied correctly.

- To adjust a staff member's carry-over, click on 'Holiday' and 'Holiday adjustment (carry-over)'.

The screenshot displays the iTrent web application interface. On the left is a navigation sidebar with sections for 'Organisation' (University of Bath) and 'People' (listing three staff members in 'Human Resources - Core'). The main content area is titled 'Person summary - iTrent' and includes a 'Person' and 'Employment' section at the top. Below these is a 'Calendar' section for the period '28 Feb - 13 Mar 2023', showing a calendar grid and summary statistics: '117.5 of 234.3 hours' for 'Holidays remaining' and '0' for 'No sickness'. A 'LINKS' section contains several buttons: 'Holiday', 'New Sickness Details', 'View Sickness Details', 'Other absence', 'Development and adjustments', 'Probation', 'FTC Consultations', 'Timesheet claims', 'Personal information', 'Position information', and 'Pattern overrides'. At the bottom of the page, there are four buttons: 'Holiday entitlement', 'New holiday absence details', 'Holiday absence details', and 'Holiday adjustment (carry over)'. Two yellow arrows are overlaid on the image: one points to the 'Holiday' button in the LINKS section, and the other points to the 'Holiday adjustment (carry over)' button at the bottom of the page.

- Under 'Adjustment Details', click on the drop-down menu under 'Adjustment Type' and select 'Adjust'. Enter a 'Value' (the number of hours you want to carry over) in the relevant box, a 'Reason' (e.g. Adoption Leave, Maternity Leave, Long-Term Sickness etc) and include an 'End Date' (e.g. for carry-over from 2023-2024, include an end date of 31/08/2025), then click 'Save'. Use the '+' or '-' symbol to add or remove carry-over.

Holiday entitlement adjustment

Buttons: Holiday entitlement, New holiday absence details, Holiday absence details, **Holiday adjustment (carry over)**, Bank holiday - not taken

Employment details
Position: [Dropdown]

Period details
 Holiday period dates: 01/09/2022 - 31/08/2023
 Scheme name: Personal Annual Leave (Sept)
 Entitlement for period: 222.4 hours (320 hours Pro Rata)
 Brought forward: 11.9
 Brought forward not used (lost): [Input]

Adjustment details
 Adjustment type: Adjust
 Table:

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
28/02/2023	[Blue Box]	7.300	Maternity Leave	31/08/2023	241.6 hours	+	-

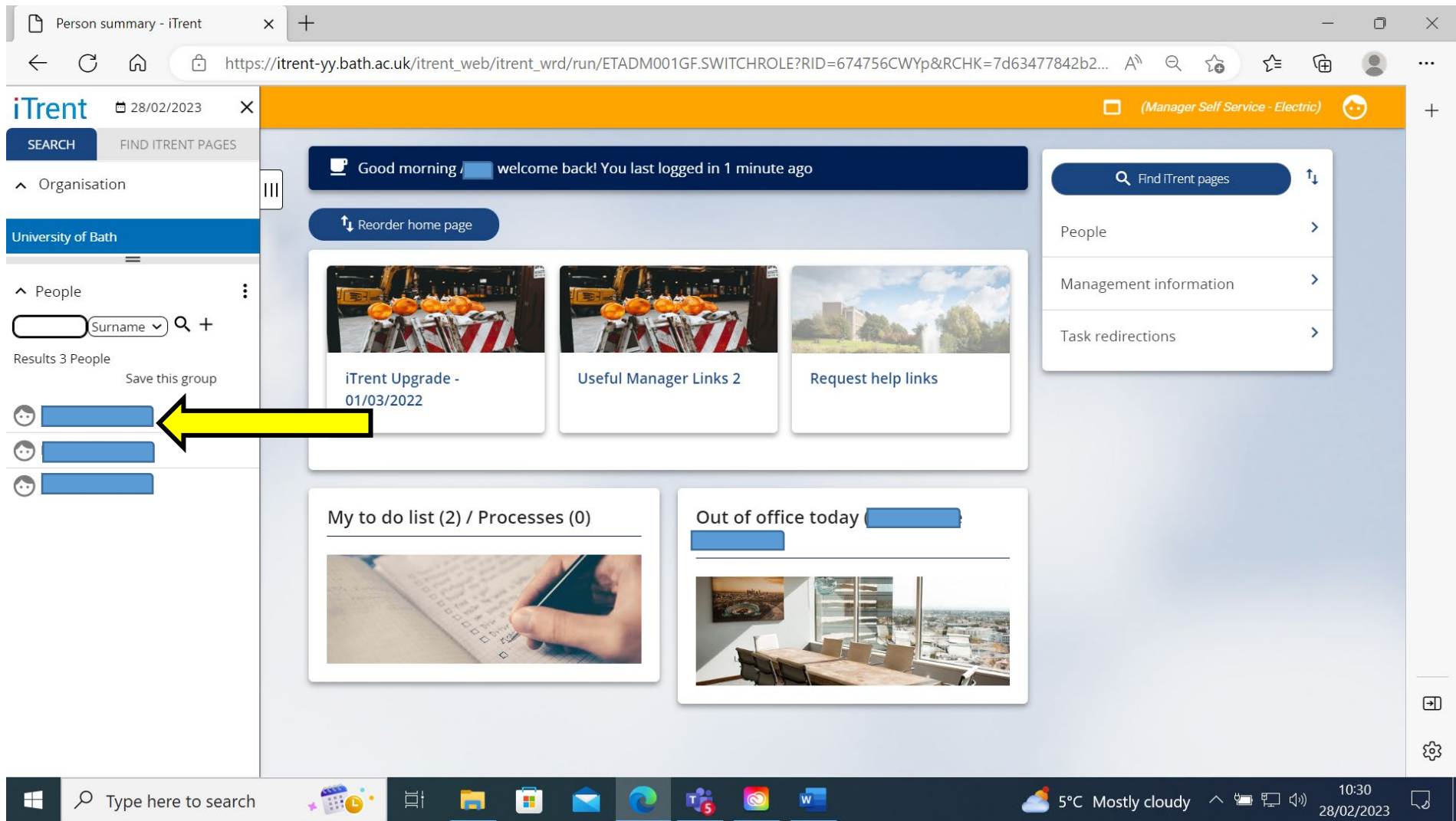
 Save

Adding a Sickness Record

- As a line manager, you will need to enter the sickness absence details of your direct reports to start the absence on iTrent. Click on 'People' on the menu box on the Homepage of MSS.

The screenshot shows the iTrent Home page in a web browser. The browser's address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETADM001GF.SWITCHROLE?RID=674756CWYp&RCHK=7d63477842b2.... The page features a dark blue header with a 'MENU' icon on the left and user information '(Manager Self Service - Electric)' on the right. A dark blue notification bar at the top reads: 'Good morning [redacted], welcome back! You last logged in 1 minute ago'. Below this is a 'Reorder home page' button. The main content area contains several widgets: 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', 'Request help links', 'My to do list (2) / Processes (0)', and 'Out of office today ([redacted])'. On the right side, there is a search bar labeled 'Find iTrent pages' and a dropdown menu with the following items: 'People', 'Management information', and 'Task redirections'. A large yellow arrow points to the 'People' option in the dropdown menu. The Windows taskbar at the bottom shows the search bar, various application icons, and system tray information including '4°C Mostly cloudy' and the date '28/02/2023'.

- A list of your direct reports will appear on the left-hand side of the screen, select the member of staff you wish to add a sickness record to.



- Click on the 'New Sickness Details' link, this will bring up a menu at the bottom of the page, click on 'Add a new sickness absence'.

The screenshot shows the iTrent web application interface. The browser address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=D814CA0CD129C959FC7347154...

The page header includes the iTrent logo, the date 28/02/2023, and the user role (Manager Self Service - Electric).

The main content area features a calendar for the period 28 Feb - 13 Mar 2023. The calendar shows a grid of days with some days shaded. A yellow arrow points from the calendar area down to the 'New Sickness Details' button in the 'LINKS' section.

The 'LINKS' section contains several buttons:

- Calendar
- Holiday
- New Sickness Details** (highlighted with a yellow arrow)
- View Sickness Details
- Other absence
- Development and adjustments
- Probation
- FTC Consultations
- Timesheet claims
- Personal information
- Position information
- Pattern overrides

At the bottom of the page, there are three buttons: 'Add new sickness absence', 'Add new fit note certification', and 'Upload Fit Note Document'.

The left sidebar shows the 'Organisation' section with 'University of Bath' and the 'People' section with a search bar and three results.

The Windows taskbar at the bottom shows the search bar, the University of Bath logo, and various application icons. The system tray shows the date and time: 14:17, 28/02/2023, and the weather: 6°C Cloudy.

- Enter the following information:
 - 'Sickness period'
 - 'Absence start date'
 - 'Absence type'
 - 'Absence reason'
 - Press 'Save'

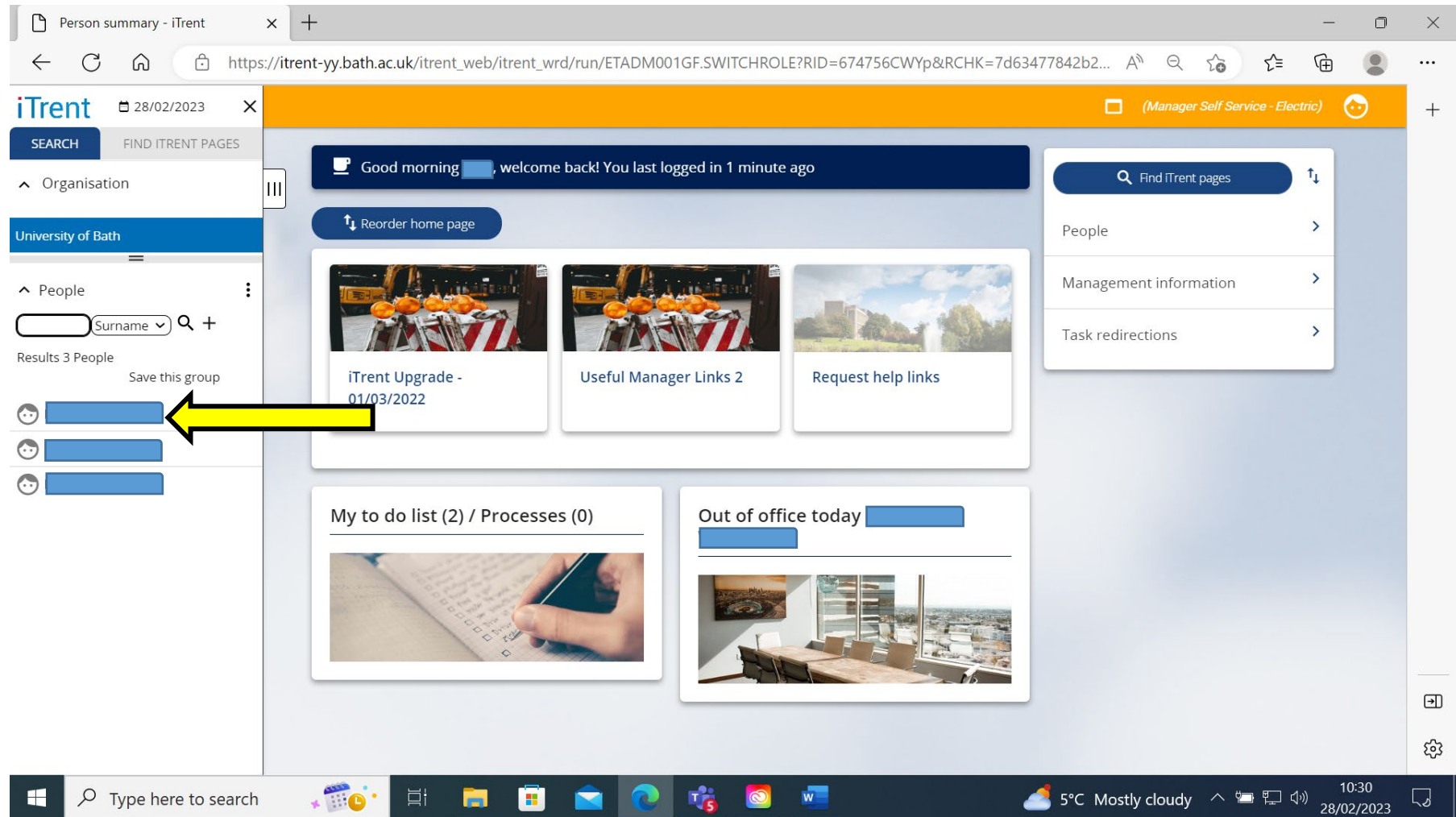
- If the absence is for more than 7 calendar days a fit note is required. To upload a fit note, click on the link 'Add new fit note certification' and enter the type of certificate and certificate dates.
- Once this has been done click on the link 'Upload Fit Note Document'. Your direct report will be responsible for ending their absence on Employee Self-Service (ESS).

Adding an Other Absence e.g. TOIL

- Click on 'People' on the menu box on the Homepage of MSS.

The screenshot displays the iTrent Home page in a web browser. The browser's address bar shows the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETADM001GF.SWITCHROLE?RID=674756CWYp&RCHK=7d63477842b2.... The page features a blue header with the text "iTrent Home" and a search bar containing "Find iTrent pages". Below the header, a dark blue banner displays a welcome message: "Good morning [user], welcome back! You last logged in 1 minute ago". A "Reorder home page" button is visible below the banner. The main content area is divided into several sections: "iTrent Upgrade - 01/03/2022", "Useful Manager Links 2", "Request help links", "My to do list (2) / Processes (0)", and "Out of office today [user]". On the right side, a vertical menu is open, showing options: "People", "Management information", and "Task redirections". A prominent yellow arrow points to the "People" option. The Windows taskbar at the bottom shows the search bar, task view, and various application icons, along with system tray information including the date and time (10:24, 28/02/2023) and weather (4°C Mostly cloudy).

- A list of your direct reports will appear on the left-hand side of the screen, select the member of staff you wish to add an 'Other absence details' record to.



- Click on the 'Other absence' link, this will bring up a menu at the bottom of the page, click on 'New other absence'.

The screenshot shows the iTrent Manager Self Service - Electric interface. The browser address bar displays the URL: https://itrent-yy.bath.ac.uk/itrent_web/itrent_wrd/run/ETNAV004GF.NEW_CORE?USESSION=D814CA0CD129C959FC7347154...

The interface includes a sidebar on the left with the following sections:

- SEARCH: FIND ITRENT PAGES
- Organisation: University of Bath
- People: Results 3 People, Select all, Save this group

The main content area features a Calendar for the period 28 Feb - 13 Mar 2023. It includes a 'VIEW FULL CALENDAR' link and a calendar grid. To the right of the calendar are two circular gauges:

- Holidays remaining (as of last calculation): 124.8 of 241.6 hours
- No sickness (as of last calculation): 0

Below the calendar is a 'LINKS' section with several buttons:

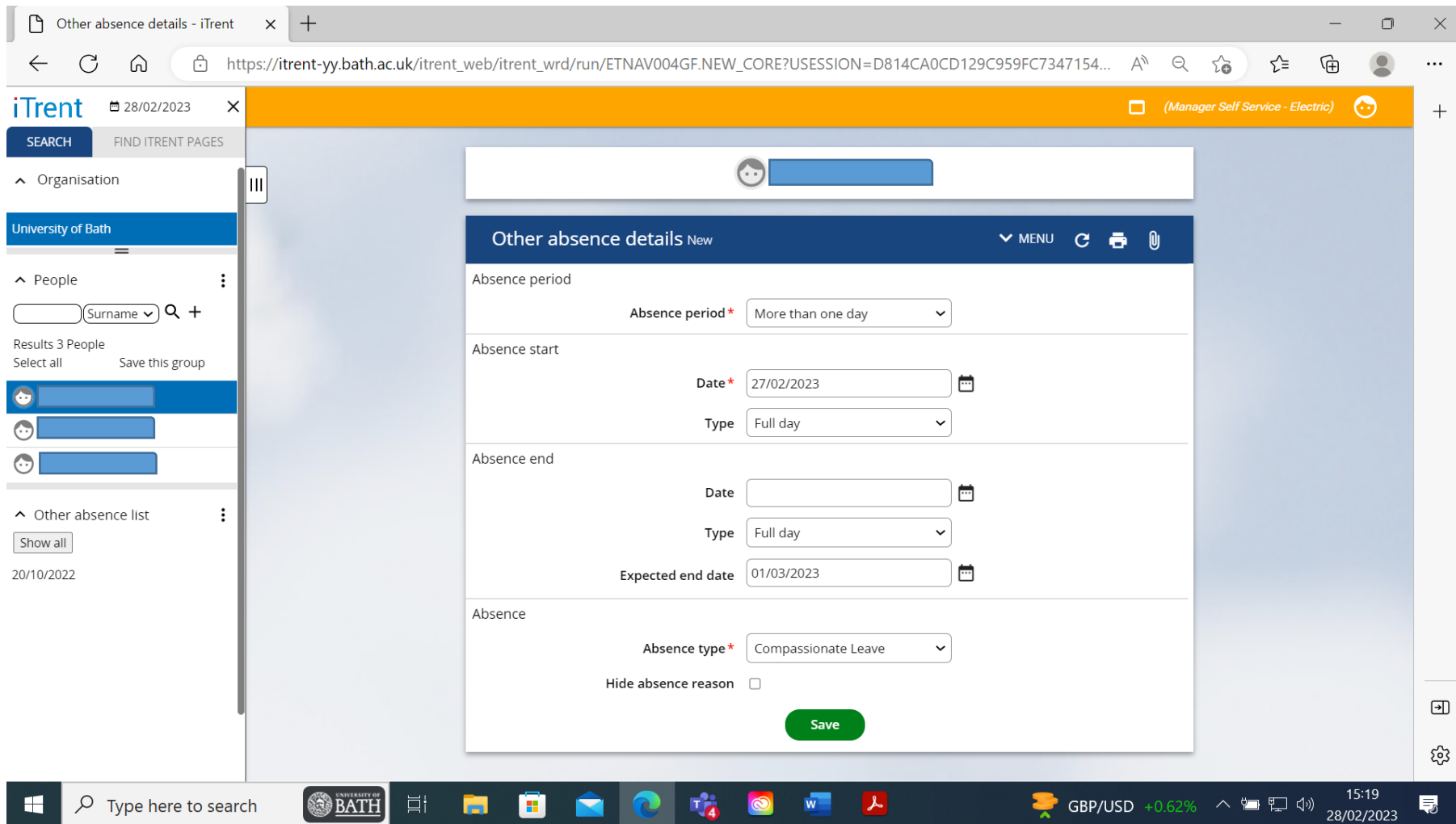
- Calendar
- Holiday
- New Sickness Details
- View Sickness Details
- Other absence (highlighted with a yellow arrow)
- Development and adjustments
- Probation
- FTC Consultations
- Timesheet claims
- Personal information
- Position information
- Pattern overrides

At the bottom of the page, a menu is displayed with the following options:

- New other absence (highlighted with a yellow arrow)
- Other absence details
- New Other Absence Certification
- Other Absence Certification

The Windows taskbar at the bottom shows the system tray with the date 28/02/2023, time 16:46, and weather 7°C Partly sunny.

- Enter the 'Absence period', 'Absence start date' and 'Absence Type'. If there is an expected end date to the absence, enter this under 'Expected end date'. Click 'Save'.



- Similar to the uploading of a fit note for sickness absence, to upload a certificate for an 'other absence' (if applicable), click on the link 'New other absence certification' and enter the type of certificate and certificate dates.
- Your direct report will be responsible for ending their absence on Employee Self-Service (ESS).