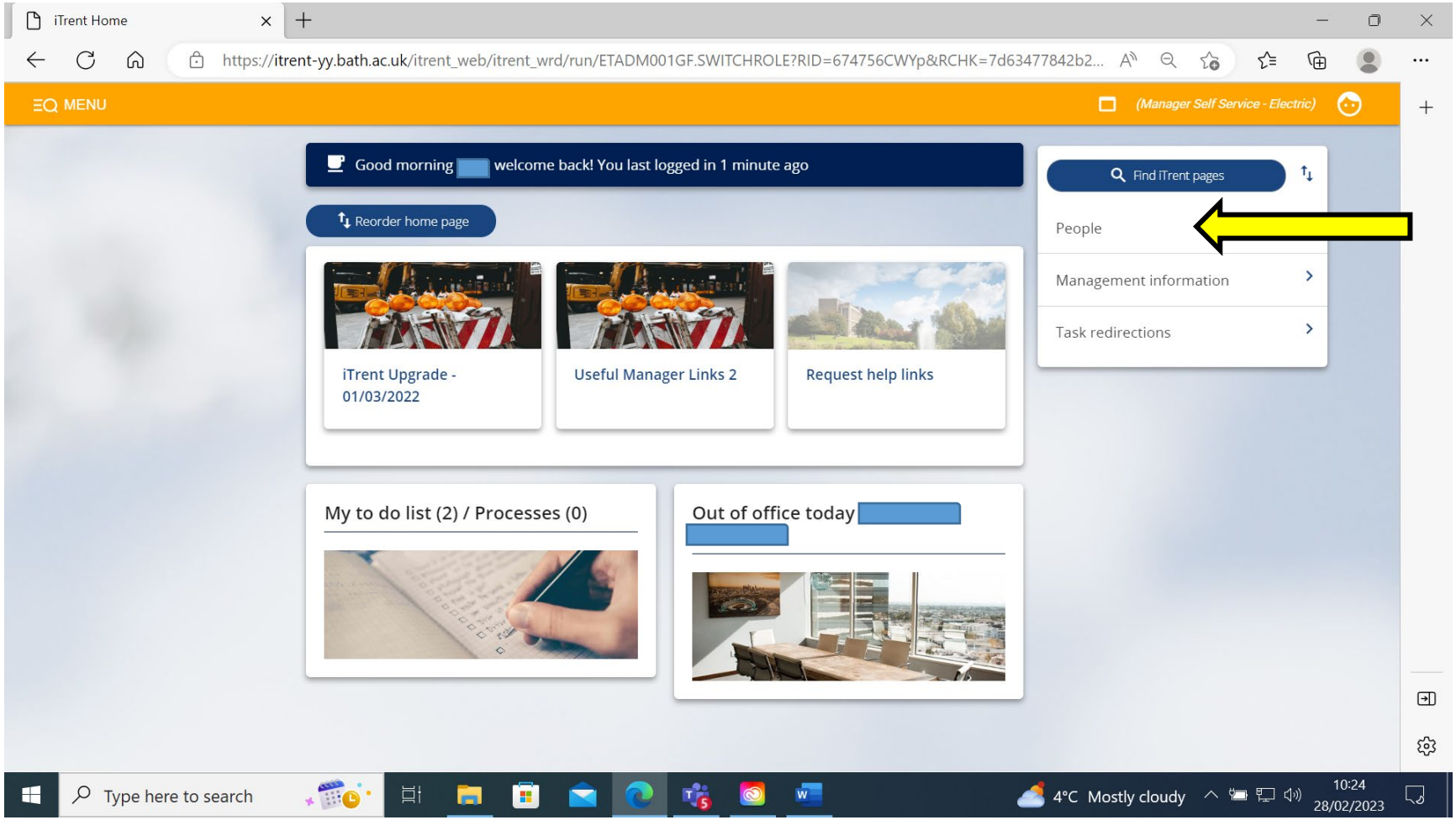
MSS – Line Manager Guidance

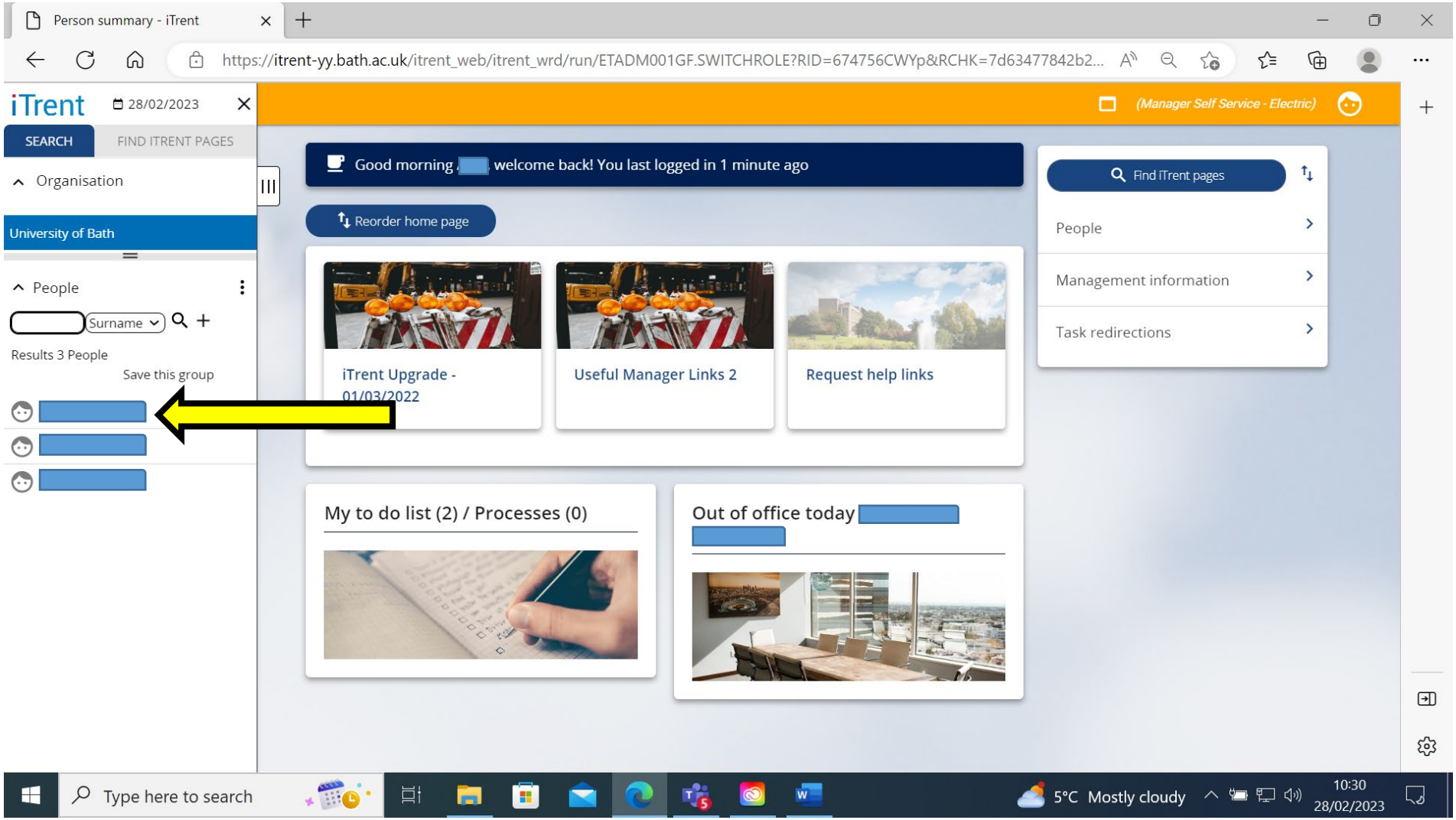
MSS allows you to securely access and update details on your staff via iTrent for MSS.

Accessing Management Information on your Direct Reports

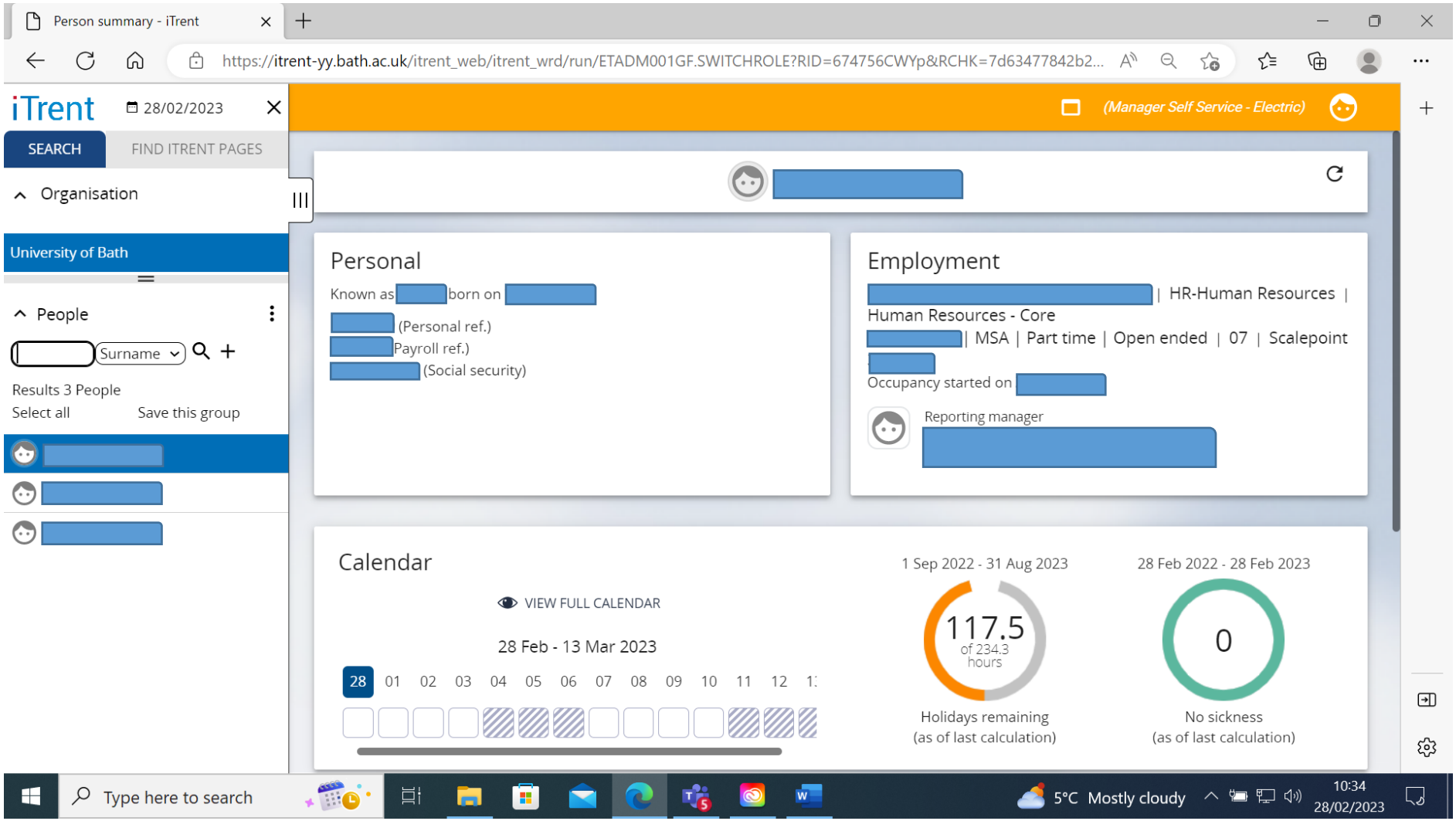
- Log in to MSS - this will take you directly to the MSS Homepage. Click on the 'People' button on the menu on the right-hand side.



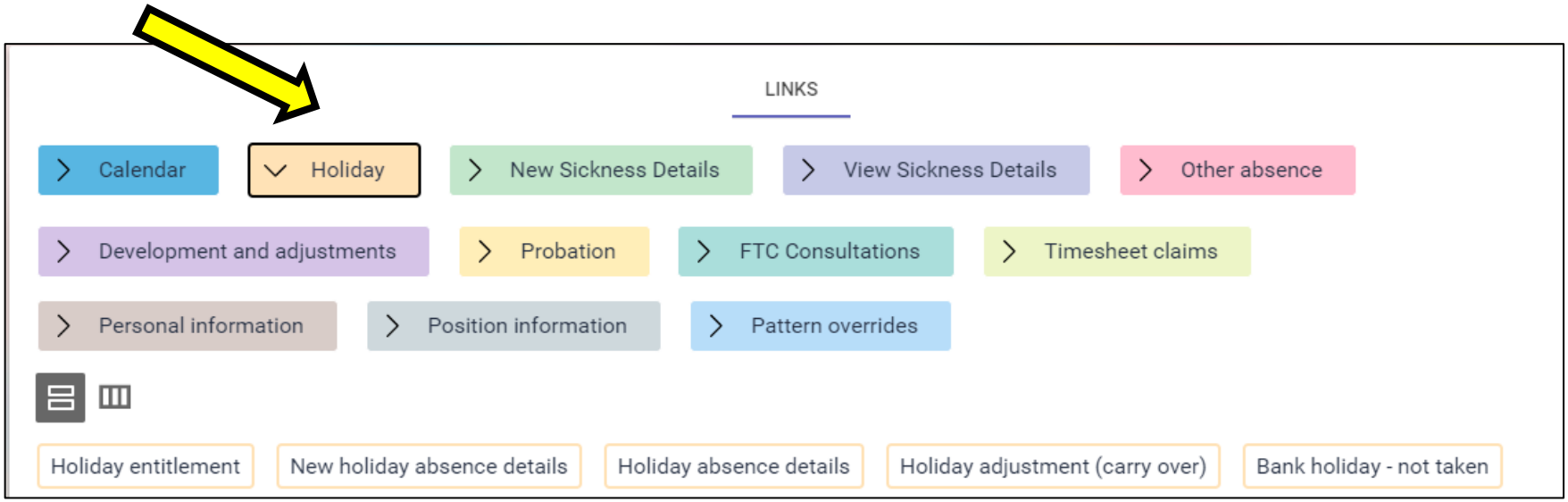
- Your list of direct reports will appear on the left-hand side of the screen. Select the person you wish to view information on.



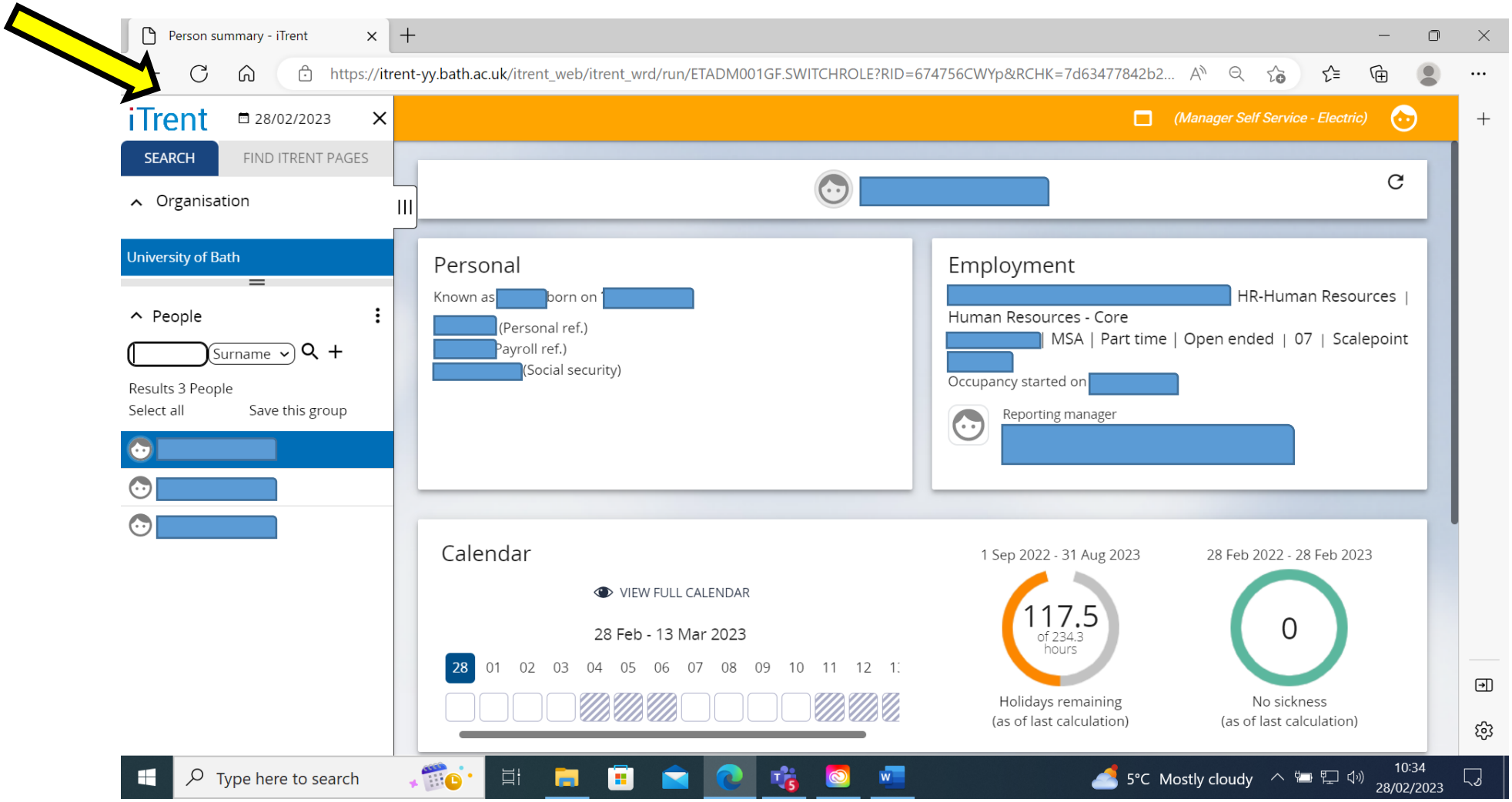
- A mini dashboard of information will show on the top half of the screen which allows you to easily see basic information about your member of staff i.e. Length of Service, Job Title, Holidays Remaining and Sickness Absence. You can click on any of highlighted areas to view more detailed information.



- 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.

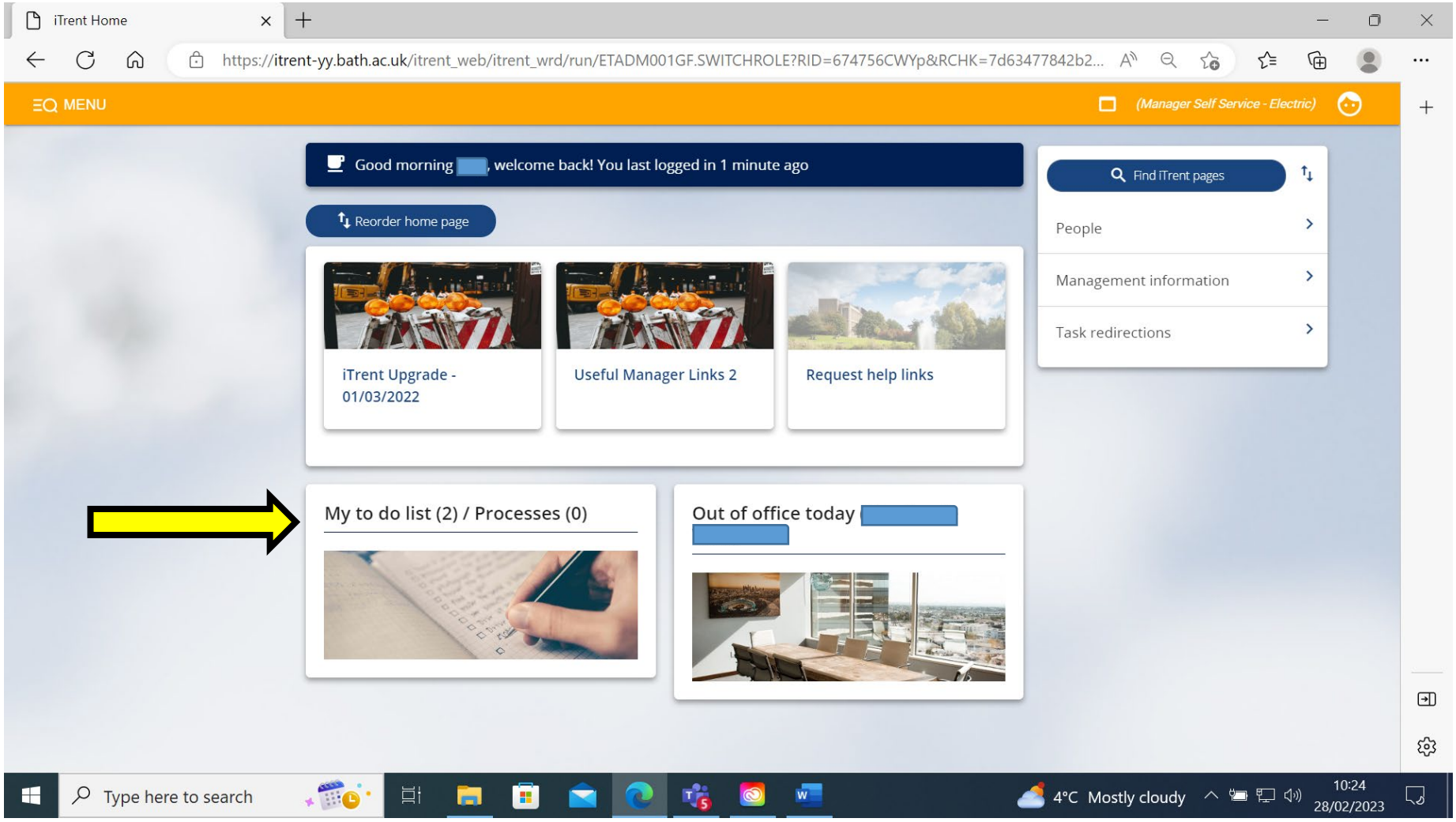


- To go back to your MSS Homepage, you can click on the iTrent button at the top left-hand corner of the page.

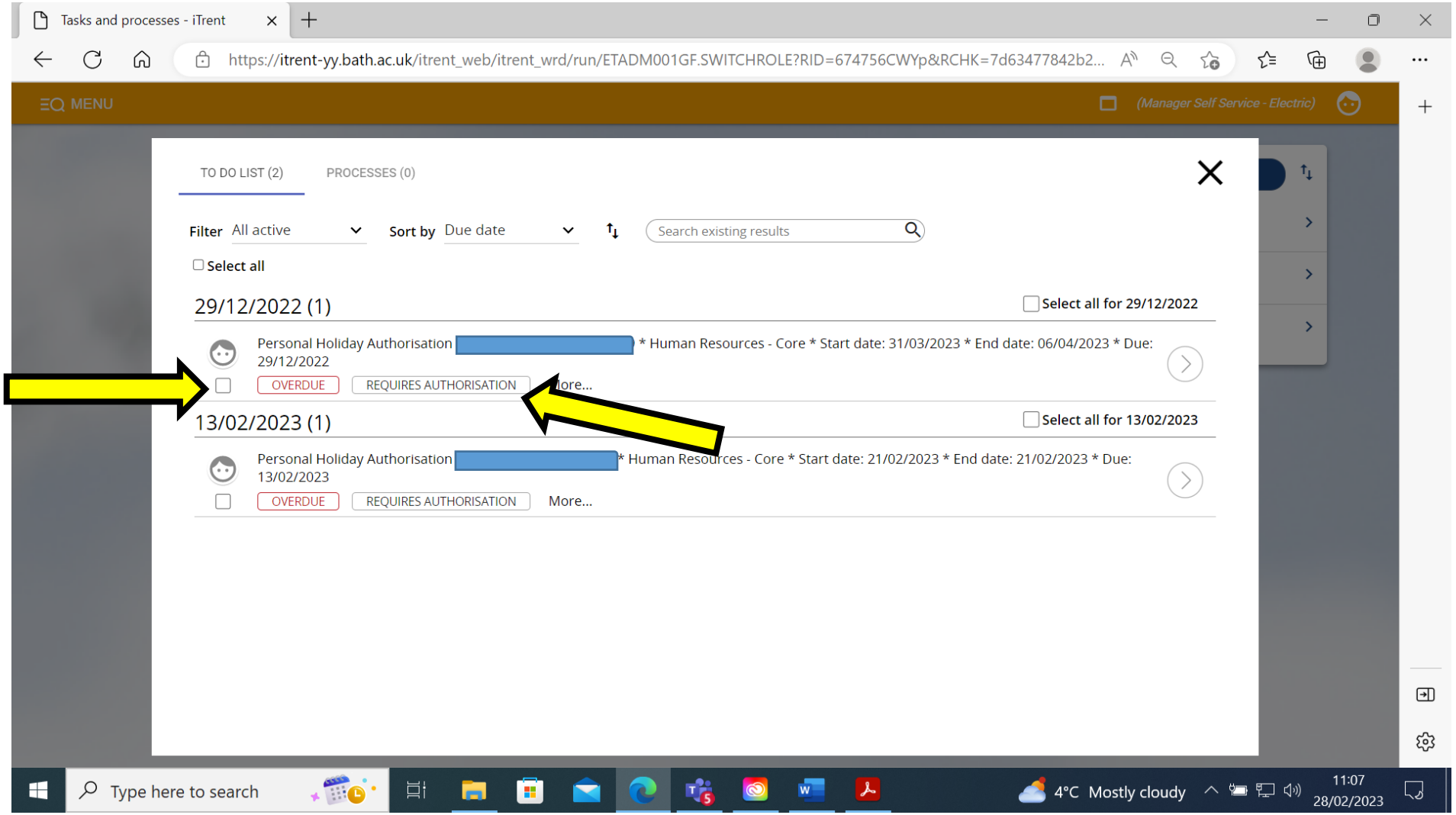


Leave Requests

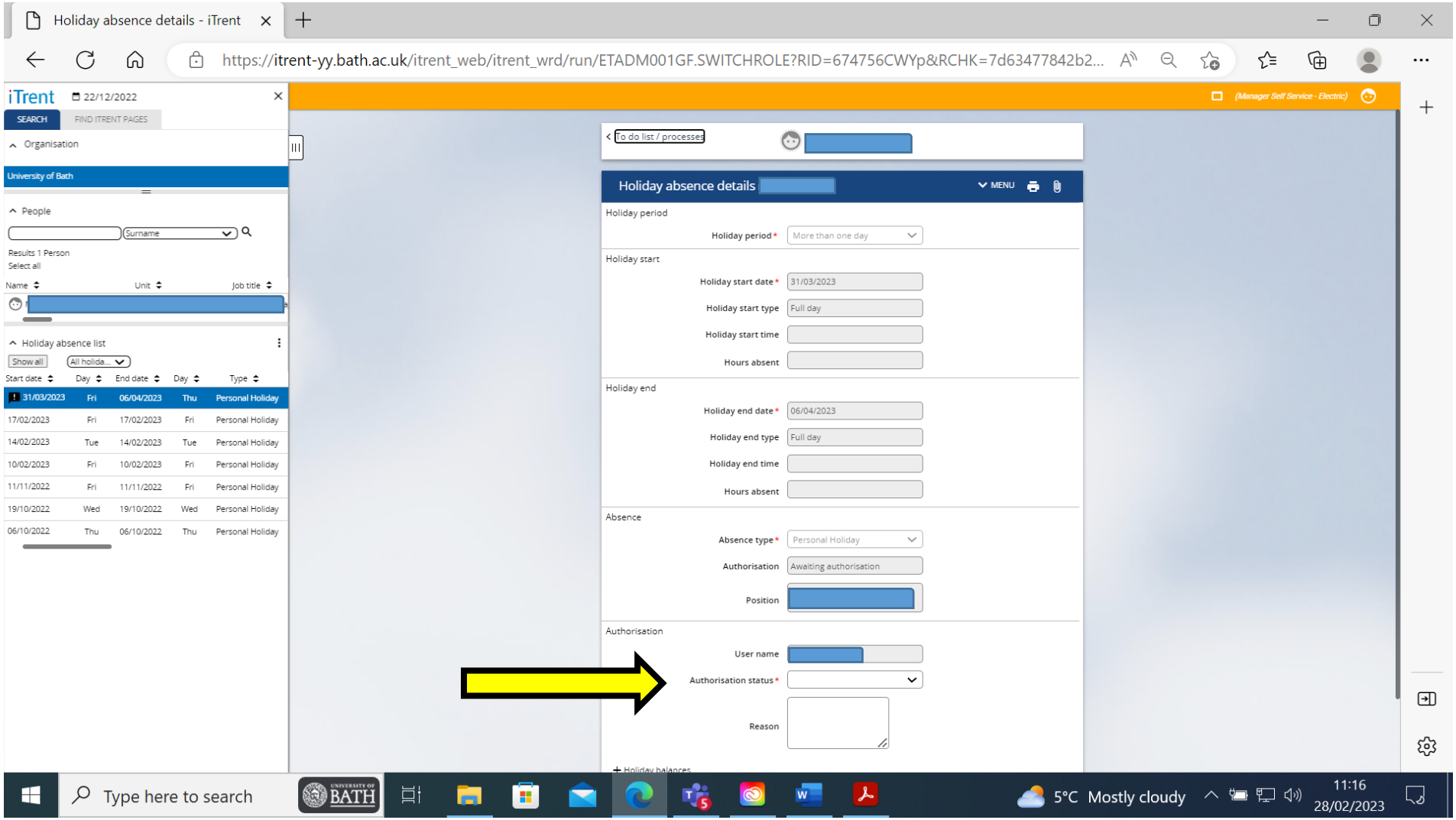
- You will receive an email to notify you when a member of your staff has requested annual leave.
- Log in to MSS.
- Click on ‘My to do list’ which can be found in the left-hand box at the bottom of the MSS Homepage.



- 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 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'.



- 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

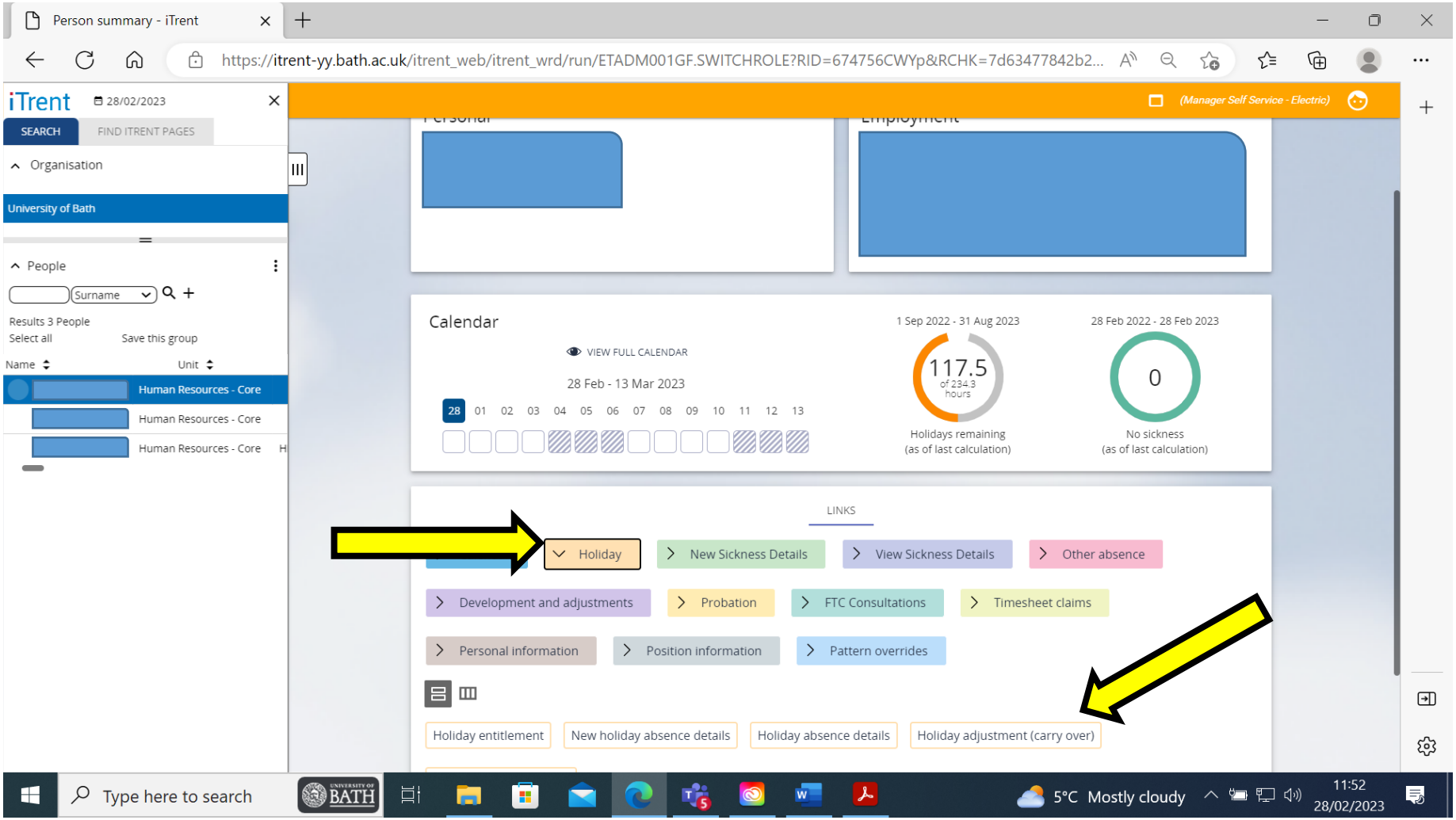
- In exceptional circumstances e.g. an exceptional additional work commitment etc, where a staff member has not been able to take their full leave allowance within the leave year, as a line manager, you are able to use your absolute discretion to allow staff to carry over up to a maximum of 73 hours (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.

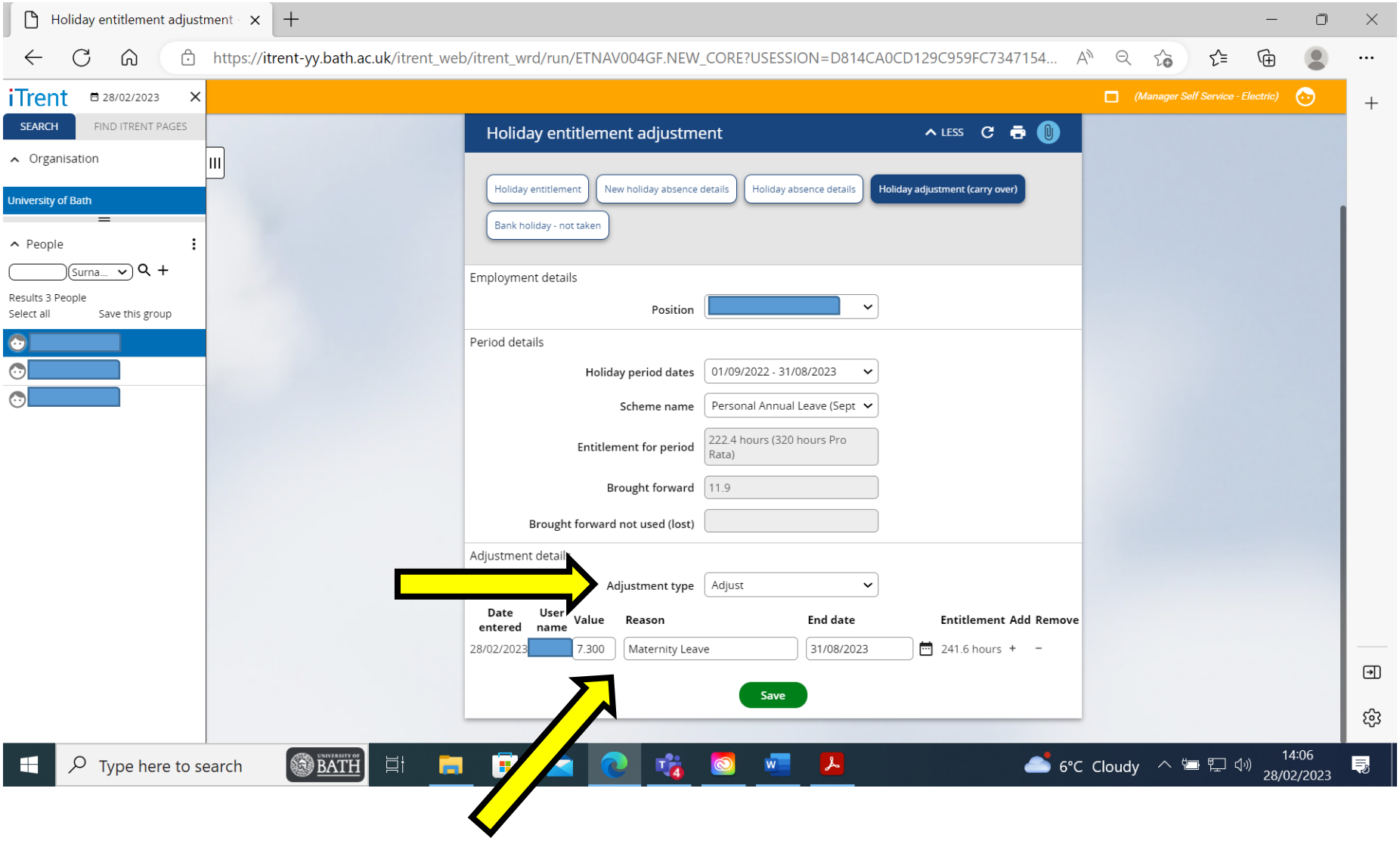
- This provision should only be used in genuinely exceptional circumstances.

- **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)'.

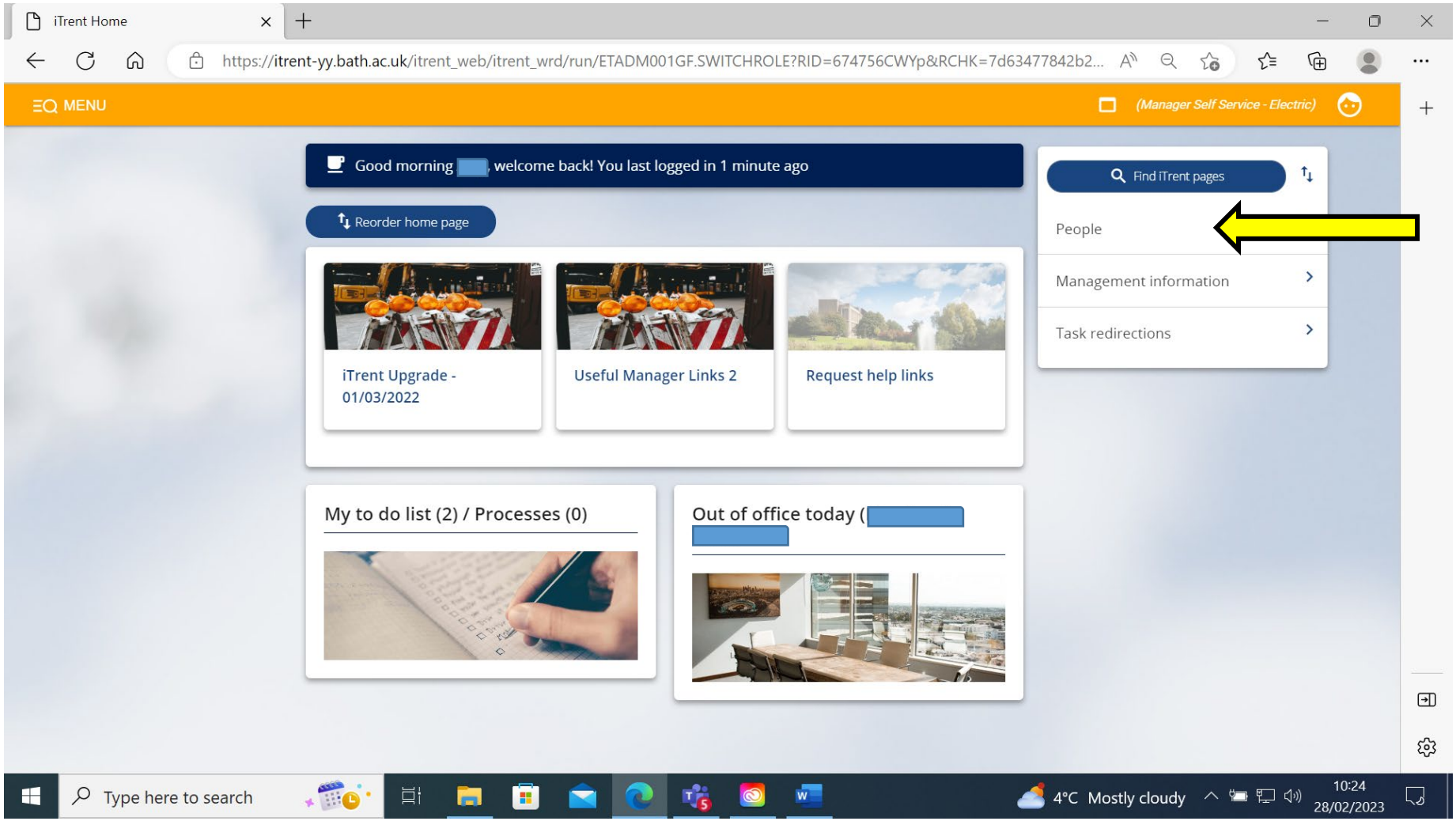


- Under ‘Adjustment Details’, click on the drop-down menu under ‘Adjustment Type’ and select ‘Adjust’. Enter a ‘Value’ (the number of hours you want to carry over) in the relevant box, a ‘Reason’ (e.g. Adoption Leave, Maternity Leave, Long-Term Sickness etc) and include an ‘End Date’ (e.g. for carry-over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

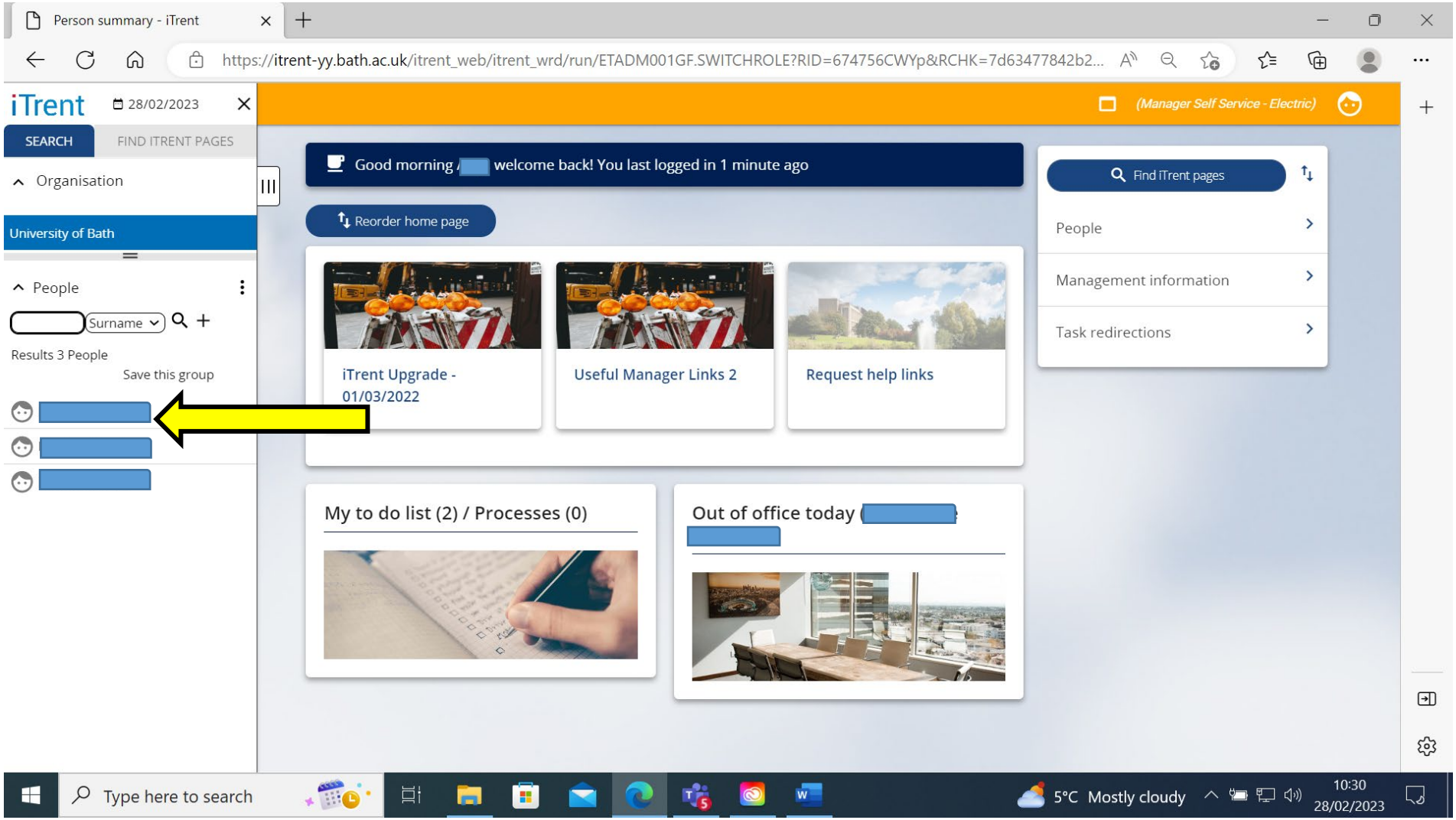


Adding a Sickness Record

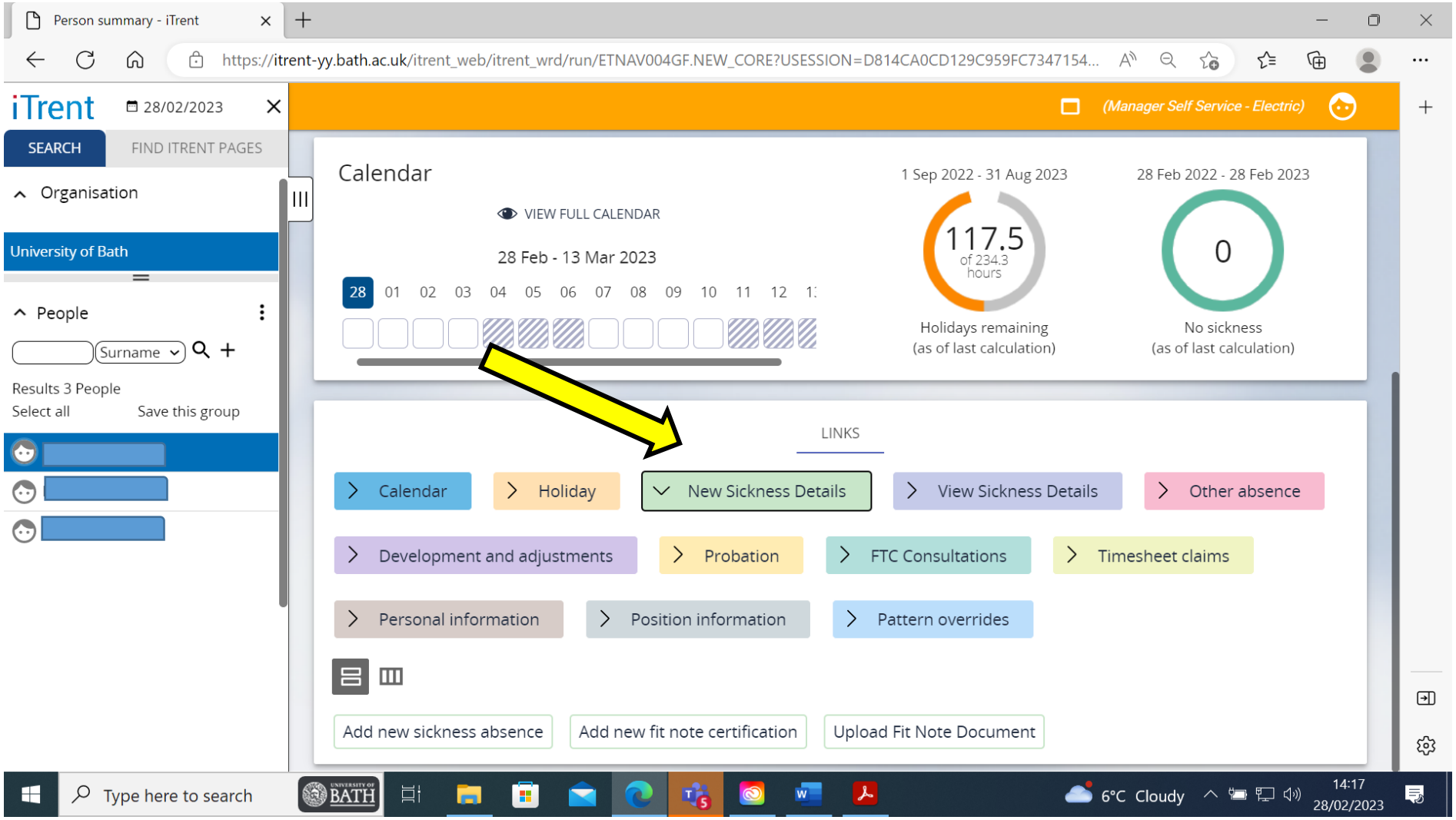
- As a line manager, you will need to enter the sickness absence details of your direct reports to start the absence on iTrent. Click on ‘People’ on the menu box on the Homepage of MSS.



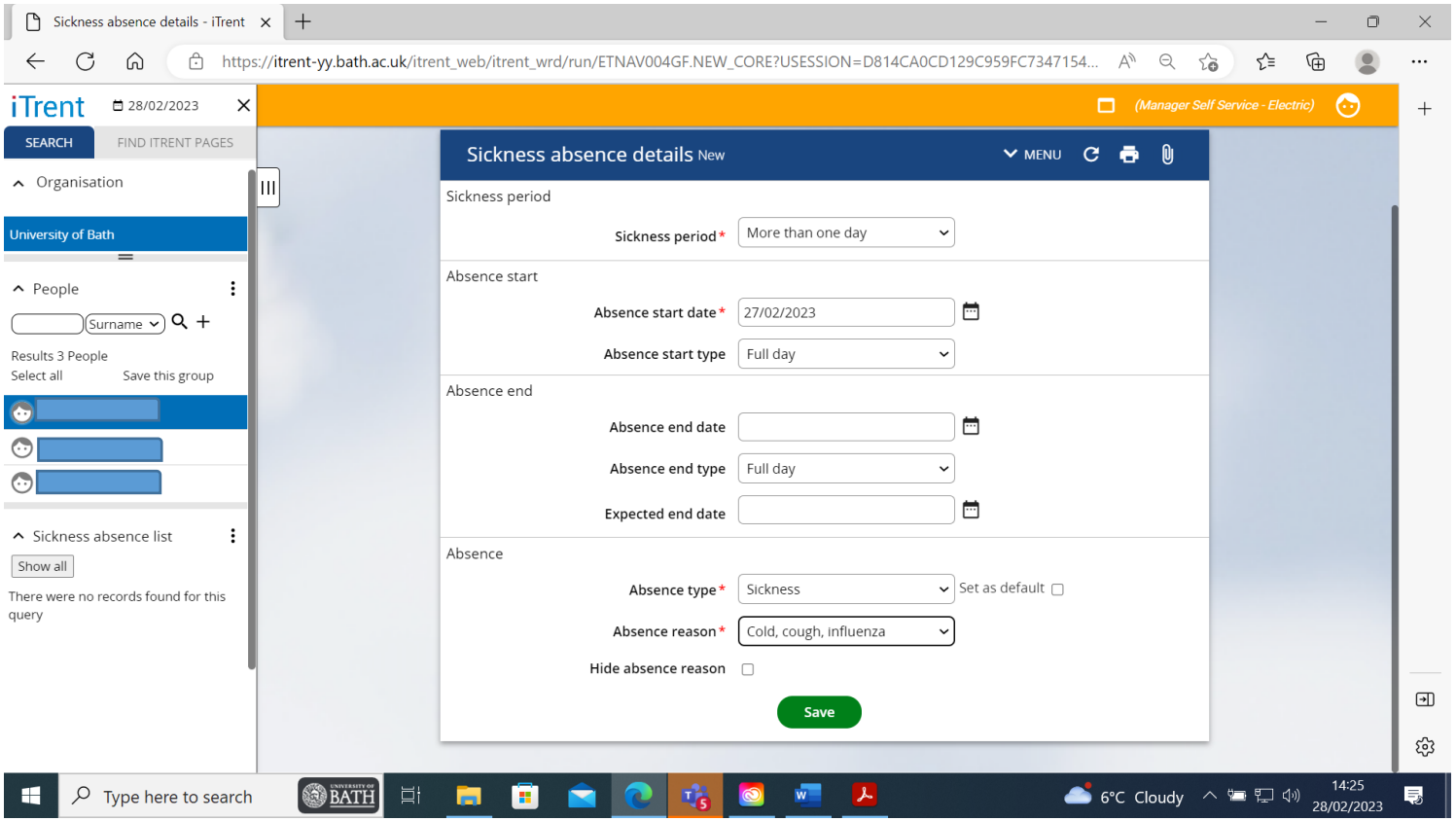
- A list of your direct reports will appear on the left-hand side of the screen, select the member of staff you wish to add a sickness record to.



- 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’.



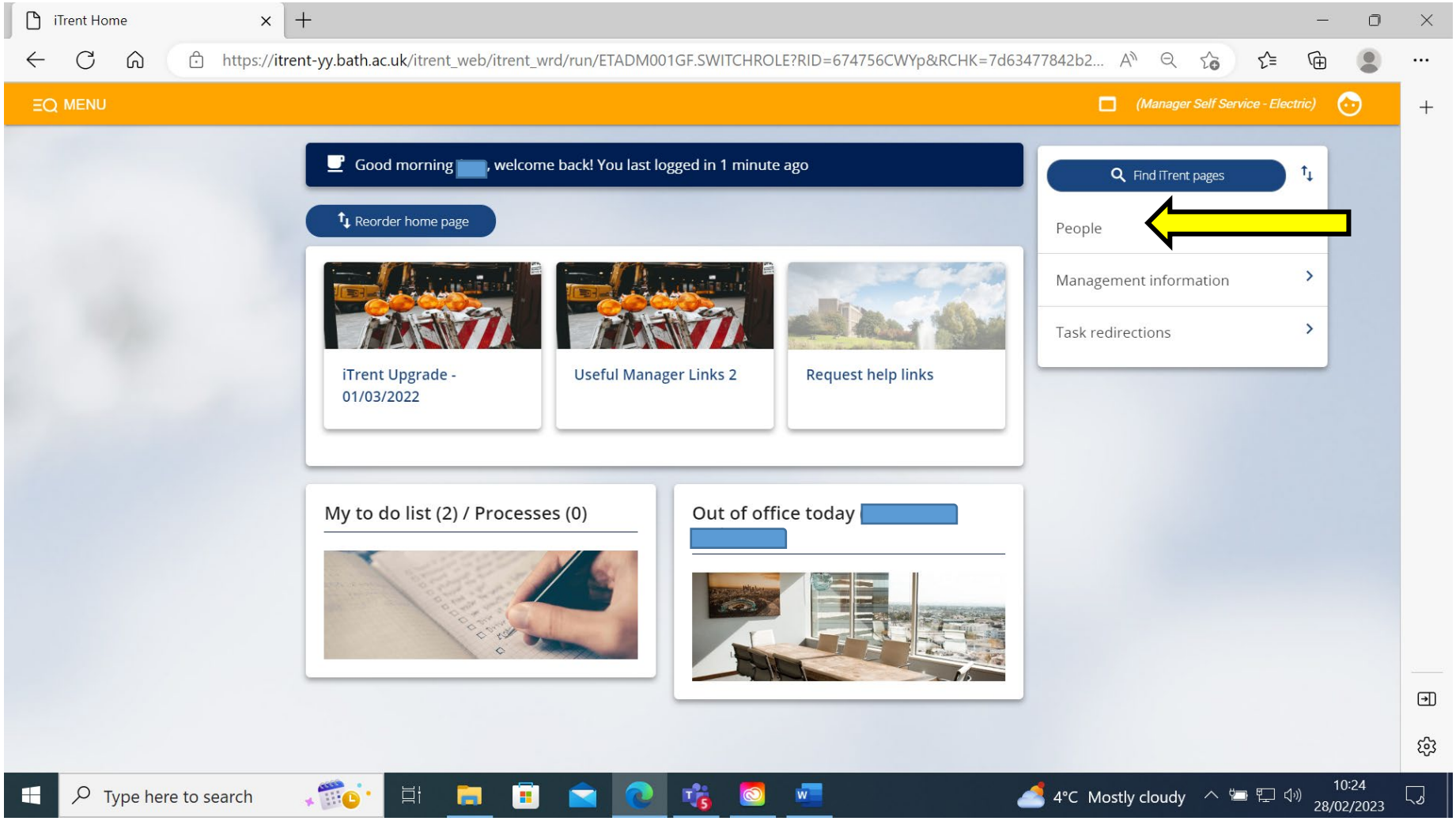
- Enter the following information:
  - ‘Sickness period’
  - ‘Absence start date’
  - ‘Absence type’
  - ‘Absence reason’
  - Press ‘Save’



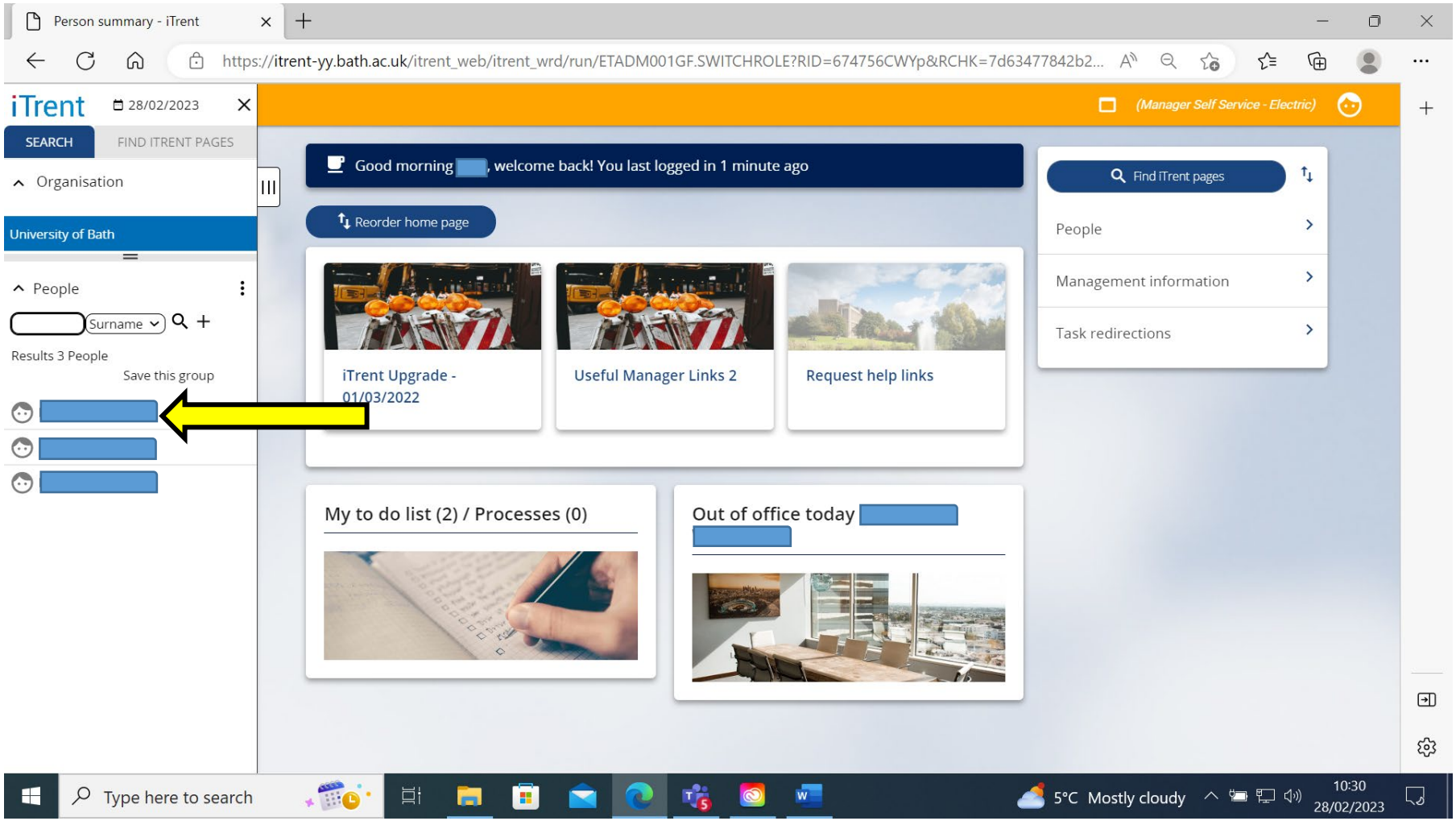
- If the absence is for more than 7 calendar days a fit note is required. To upload a fit note, click on the link ‘Add new fit note certification’ and enter the type of certificate and certificate dates.
- Once this has been done click on the link ‘Upload Fit Note Document’. Your direct report will be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

Adding an Other Absence e.g. TOIL

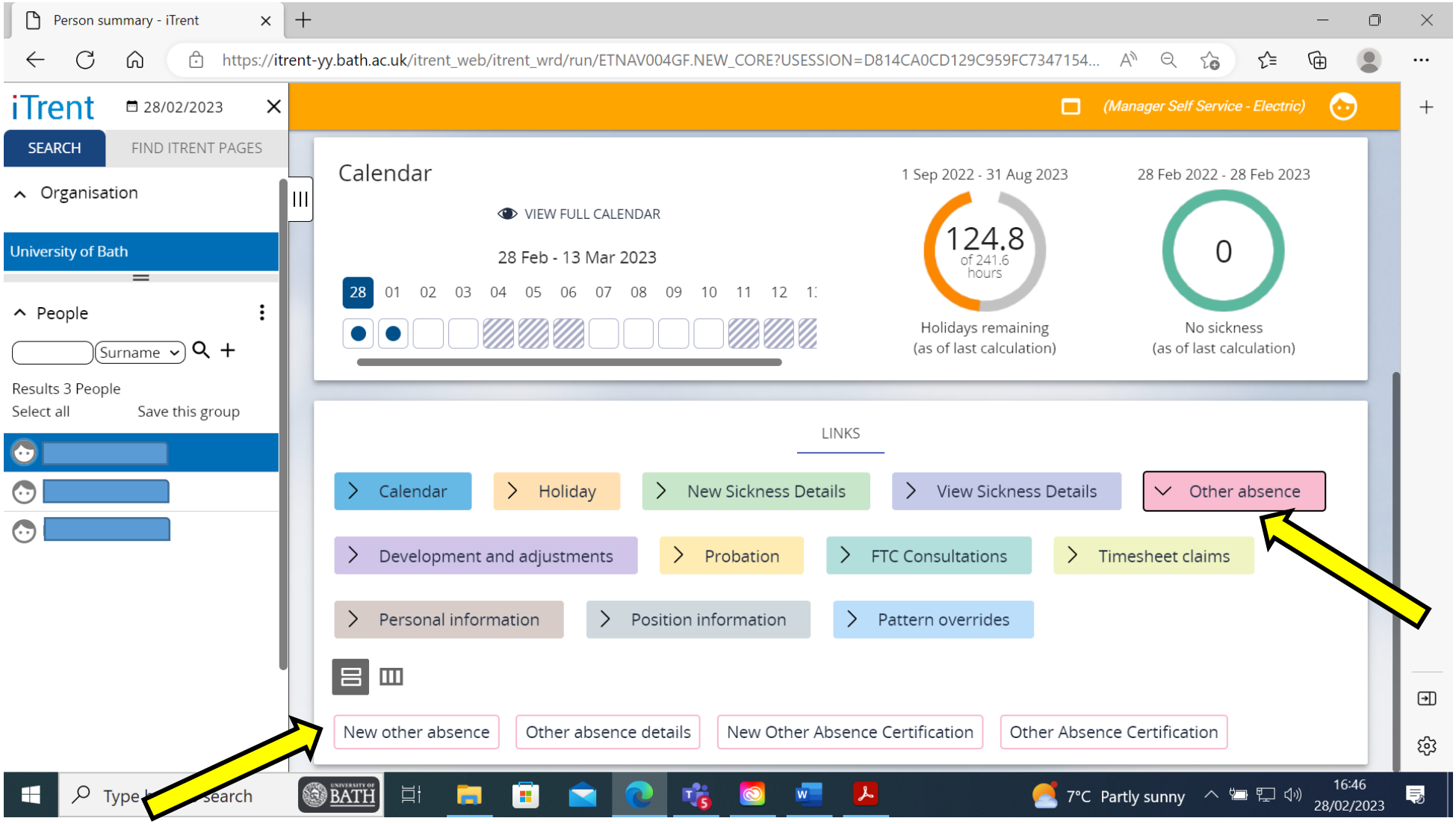
- Click on ‘People’ on the menu box on the Homepage of MSS.



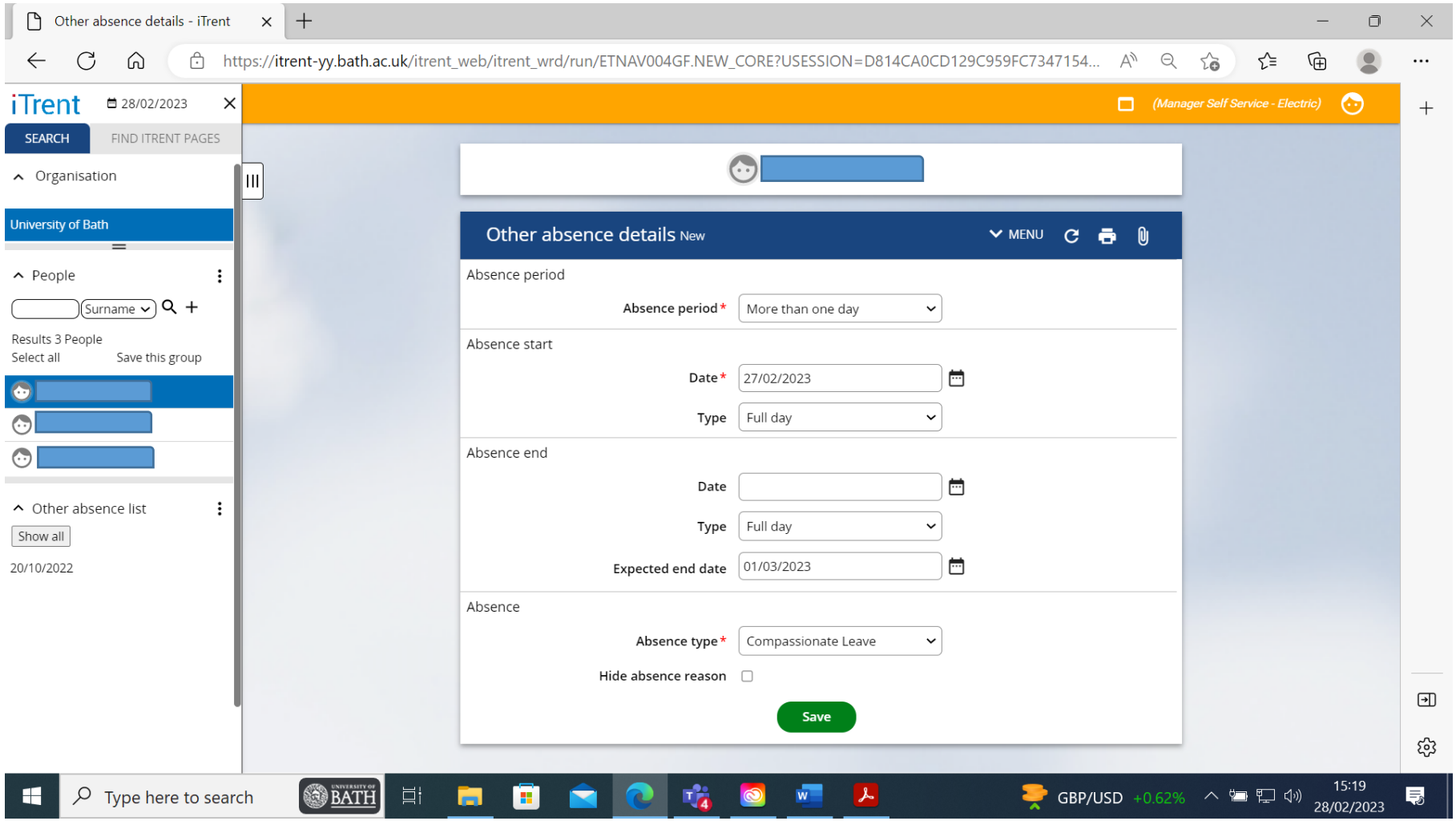
- A list of your direct reports will appear on the left-hand side of the screen, select the member of staff you wish to add an ‘Other absence details’ record to.



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



- 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).