

MSS – Line Manager Guidance

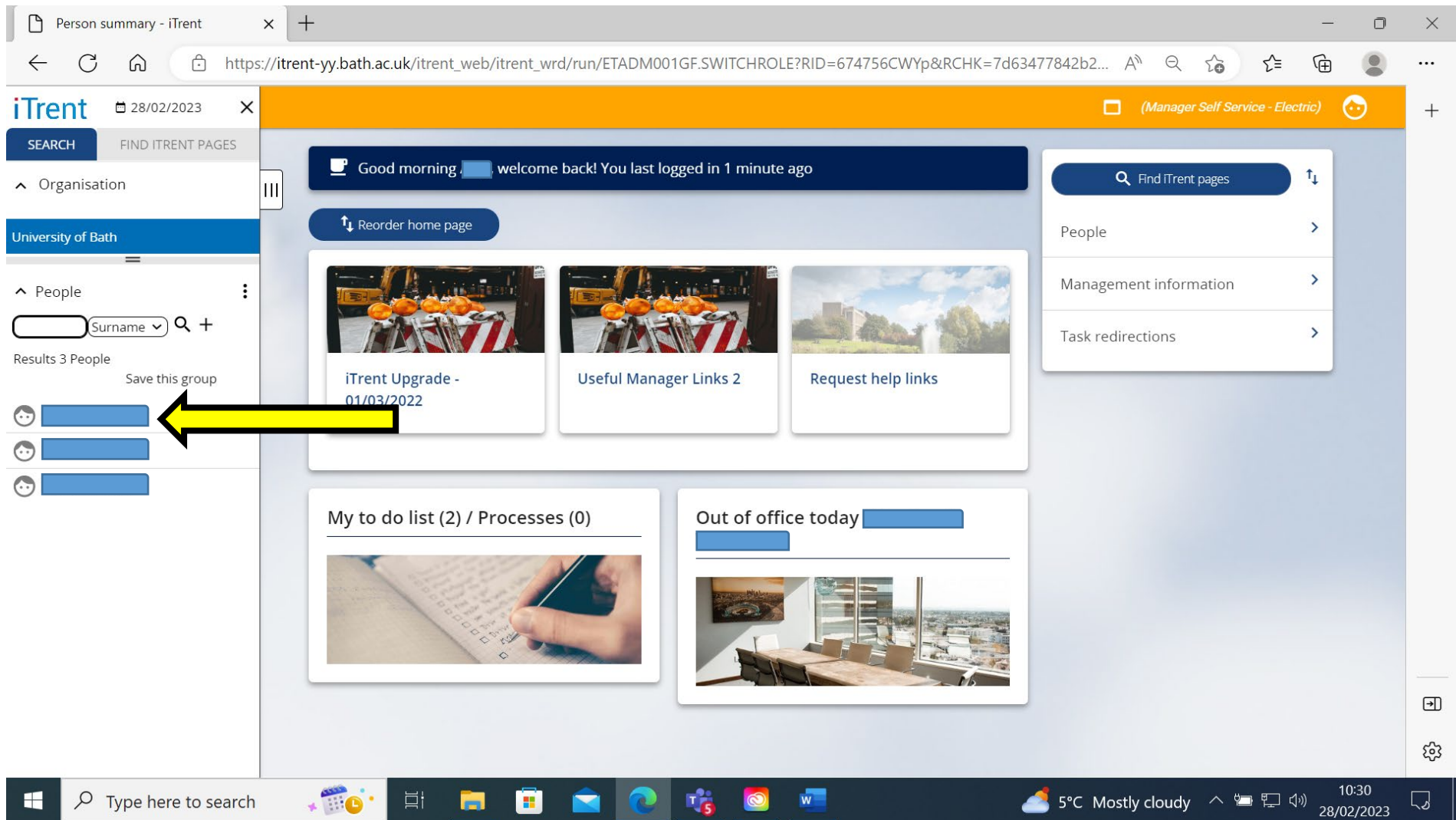
MSS allows you to securely access and update details on your staff via iTrent for MSS.

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.

The screenshot displays the iTrent Home interface. At the top, there is a navigation bar with 'EQ MENU' on the left and '(Manager Self Service - Electric)' on the right. A welcome message reads: 'Good morning [user] welcome back! You last logged in 1 minute ago'. Below this is a 'Reorder home page' button. The main content area features three cards: 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', and 'Request help links'. Further down, there are sections for 'My to do list (2) / Processes (0)' and 'Out of office today'. On the right side, a search bar labeled 'Find iTrent pages' is present, with a dropdown menu open. The 'People' option in the menu is highlighted with a yellow arrow. Other menu items include 'Management information' and 'Task redirections'. The Windows taskbar at the bottom shows the search bar, various application icons, and system information including '4°C Mostly cloudy' and the date '28/02/2023'.

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

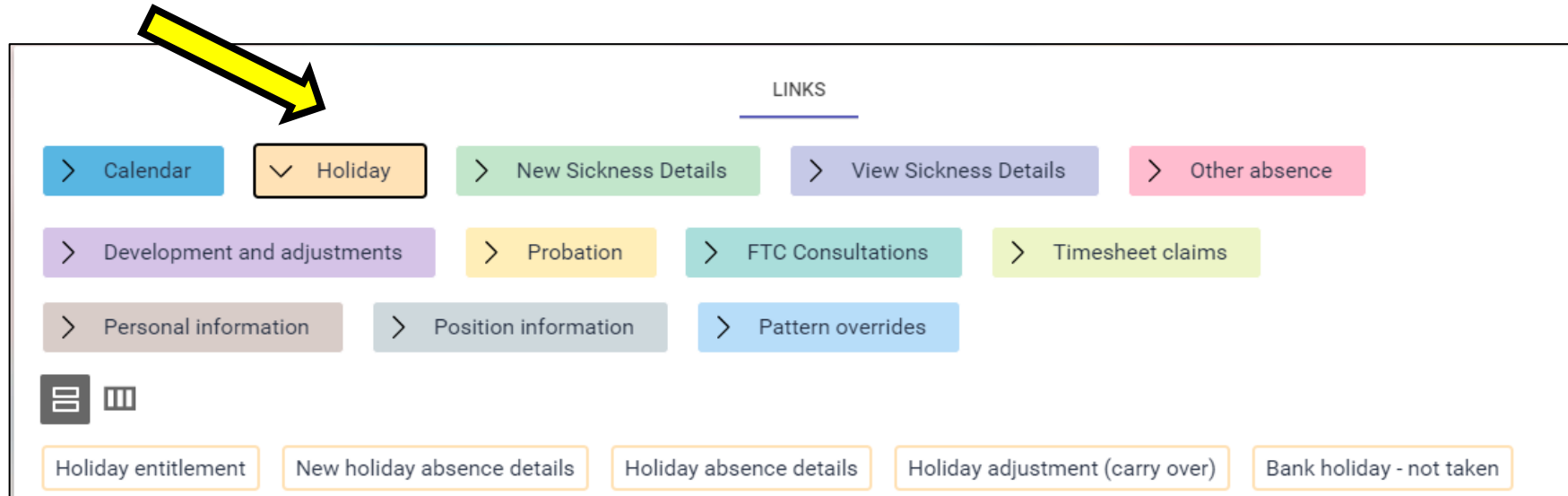


- A mini dashboard of information will show on the top half of the screen which allows you to easily see basic information about your member of staff i.e. Length of Service, Job Title, Holidays Remaining and Sickness Absence. You can click on any of highlighted areas to view more detailed information.

The screenshot displays the iTrent 'Person summary' page for a staff member. The page is organized as follows:

- Navigation:** A sidebar on the left includes 'Organisation' (University of Bath) and 'People' (Results 3 People).
- Header:** iTrent logo, date 28/02/2023, and a search bar.
- Personal Information:**
 - Known as [redacted] born on [redacted]
 - [redacted] (Personal ref.)
 - [redacted] (Payroll ref.)
 - [redacted] (Social security)
- Employment Information:**
 - HR-Human Resources | Human Resources - Core
 - [redacted] | MSA | Part time | Open ended | 07 | Scalepoint
 - Occupancy started on [redacted]
 - Reporting manager: [redacted]
- Calendar:** View for 28 Feb - 13 Mar 2023. Includes a 'VIEW FULL CALENDAR' link and a grid of days.
- Summary Metrics:**
 - Holidays remaining:** 117.5 of 234.3 hours (as of last calculation).
 - Sickness:** 0 hours (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 navigation menu titled "LINKS" with a yellow arrow pointing to the "Holiday" link. The menu consists of several colored buttons with right-pointing chevrons. Below the main menu, a sub-menu is displayed for the "Holiday" link, containing five white buttons with orange borders.

LINKS

- > Calendar
- ▼ Holiday
- > New Sickness Details
- > View Sickness Details
- > Other absence
- > Development and adjustments
- > Probation
- > FTC Consultations
- > Timesheet claims
- > Personal information
- > Position information
- > Pattern overrides

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- Holiday entitlement
- New holiday absence details
- Holiday absence details
- Holiday adjustment (carry over)
- 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 interface includes a navigation menu on the left with 'Organisation' and 'People' sections. The main content area displays 'Personal' and 'Employment' details, a 'Calendar' view for 28 Feb - 13 Mar 2023, and two circular progress indicators: 'Holidays remaining' at 117.5 of 234.3 hours and 'No sickness' at 0. The bottom of the screen shows the Windows taskbar with the search bar and system tray.

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 reads '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 three widgets: 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', and 'Request help links'. Below these 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 Windows taskbar is visible at the bottom, showing the search bar, task view, and various application icons. The system tray on the right indicates a temperature of 4°C, mostly cloudy weather, and the time 10:24 on 28/02/2023.

- 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 application interface includes a 'MENU' icon, a user profile '(Manager Self Service - Electric)', and a 'TO DO LIST (2)' section. The list is filtered by 'All active' and sorted by 'Due date'. It contains two entries:

- 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. Status: **OVERDUE** (red box), **REQUIRES AUTHORISATION** (button), and **More...** (link). A yellow arrow points to the 'OVERDUE' status.
- 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. Status: **OVERDUE** (red box), **REQUIRES AUTHORISATION** (button), and **More...** (link). A yellow arrow points to the 'REQUIRES AUTHORISATION' button.

The Windows taskbar at the bottom shows the system tray with a search bar, task icons, and system information: 4°C Mostly cloudy, 11:07, 28/02/2023.

- 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 'People' search section with a table of results. The main content area is titled 'Holiday absence details' and contains several sections: 'Holiday period' (More than one day), 'Holiday start' (31/03/2023, Full day), 'Holiday end' (06/04/2023, Full day), 'Absence' (Personal Holiday, Awaiting authorisation), and 'Authorisation' (User name, Authorisation status, Reason). A yellow arrow points to the 'Authorisation status' dropdown menu. The Windows taskbar at the bottom shows the date as 28/02/2023 and the time as 11:16.

Start date	Day	End date	Day	Type
31/03/2023	Fri	06/04/2023	Thu	Personal Holiday
17/02/2023	Fri	17/02/2023	Fri	Personal Holiday
14/02/2023	Tue	14/02/2023	Tue	Personal Holiday
10/02/2023	Fri	10/02/2023	Fri	Personal Holiday
11/11/2022	Fri	11/11/2022	Fri	Personal Holiday
19/10/2022	Wed	19/10/2022	Wed	Personal Holiday
06/10/2022	Thu	06/10/2022	Thu	Personal Holiday

- 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)

- 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 within the first 10 days of September so the updated figure should show in your staff member's iTrent record from 10 September onwards.
- In exceptional circumstances (e.g. maternity leave, shared parental leave, adoption leave or long-term sickness etc), where a staff member has not been able to take their full leave allowance (over and above the 36.5 hours employees can carry over, pro-rated for part time staff), within the leave year, the University devolves responsibility to Line Managers to use their absolute discretion to allow staff to carry over up to a maximum of 73 hours (10 days) (i.e. an additional 5 days / 36.5 hours pro-rata) into the next year of holiday entitlement, pro-rated for part time staff. Please note this provision should only be used in exceptional circumstances and if you wish to seek advice, please contact your HR Operations Co-ordinator via hr-operations@bath.ac.uk.

- To adjust a staff member's carry over up to an additional 36.5 hours (5-days), pro-rated for part-time staff click on 'Holiday' and 'Holiday adjustment (carry over)'.

The screenshot displays the iTrent web application interface. On the left is a navigation sidebar with 'Organisation' (University of Bath) and 'People' sections. The main content area shows a 'Person summary' for a staff member, including a 'Calendar' for the period 28 Feb - 13 Mar 2023. The calendar shows 117.5 hours of holidays remaining and 0 hours of sickness. Below the calendar is a 'LINKS' section with buttons for '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 are buttons for '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 2022-2023, include an end date of 31/08/2024), then click 'Save'. Use the '+' or '-' symbol to add or remove carry-over.

Holiday entitlement adjustment

Employment details

Position:

Period details

Holiday period dates:

Scheme name:

Entitlement for period:

Brought forward:

Brought forward not used (lost):

Adjustment details

Adjustment type:

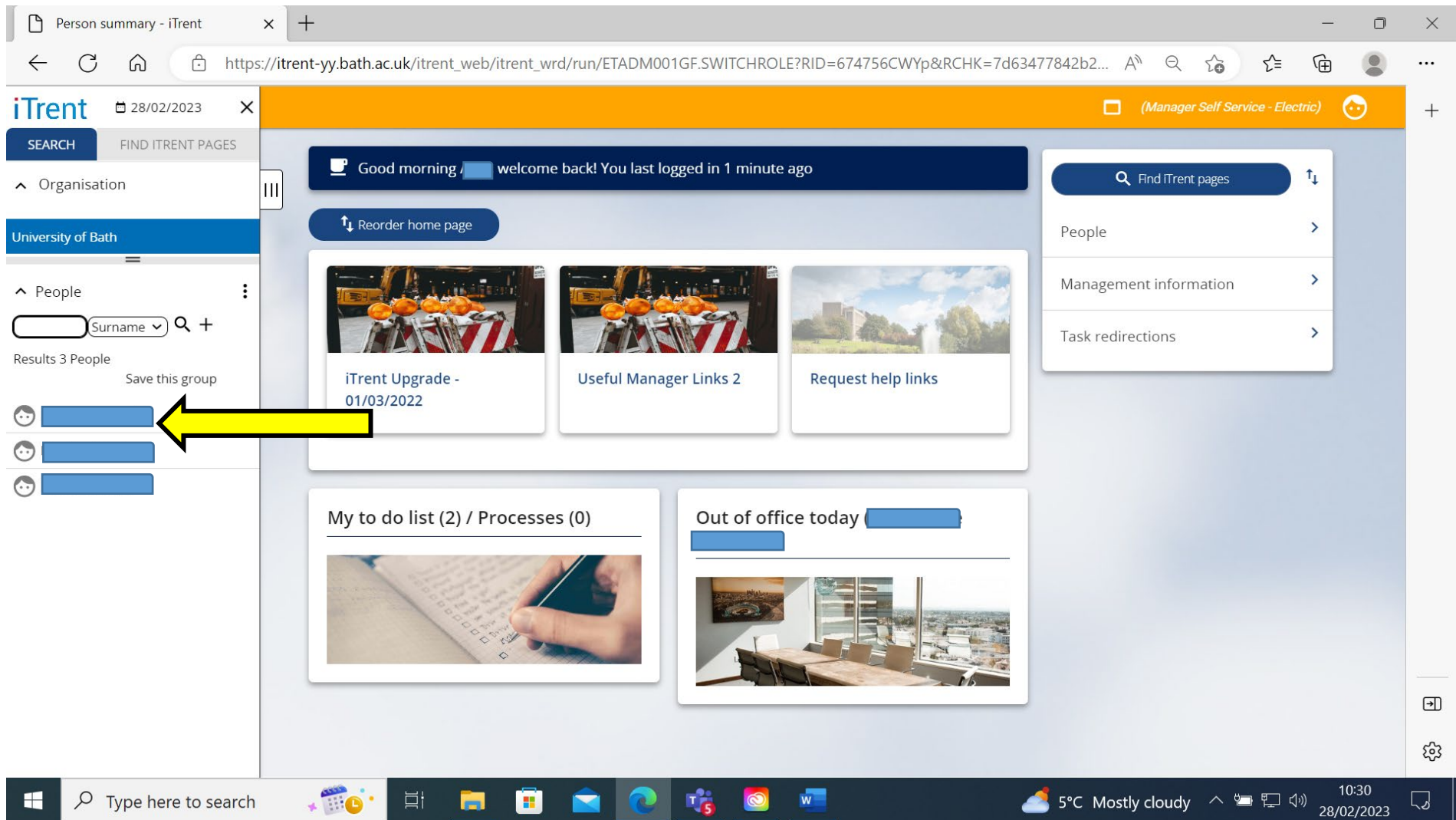
Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
28/02/2023	[redacted]	7.300	Maternity Leave	31/08/2023	241.6 hours	+	-

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 the user's name '(Manager Self Service - Electric)' on the right. Below the header, a dark blue banner displays a welcome message: 'Good morning [redacted], welcome back! You last logged in 1 minute ago'. A 'Reorder home page' button is located below the banner. The main content area is divided into several sections: a row of three cards for 'iTrent Upgrade - 01/03/2022', 'Useful Manager Links 2', and 'Request help links'; a 'My to do list (2) / Processes (0)' section with a calendar icon; and an 'Out of office today' section with a calendar icon. On the right side, a search bar labeled 'Find iTrent pages' is positioned above a vertical menu. The menu items are 'People', 'Management information', and 'Task redirections'. A prominent yellow arrow points to the 'People' menu item. The Windows taskbar at the bottom shows the search bar, various application icons, and system 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 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, with a 'VIEW FULL CALENDAR' link. To the right of the calendar are two circular gauges: one for 'Holidays remaining (as of last calculation)' showing 117.5 of 234.3 hours, and another for 'No sickness (as of last calculation)' showing 0. Below the calendar is a 'LINKS' section with several buttons: 'Calendar', 'Holiday', 'New Sickness Details' (highlighted with a yellow arrow), 'View Sickness Details', and 'Other absence'. Other buttons include 'Development and adjustments', 'Probation', 'FTC Consultations', 'Timesheet claims', 'Personal information', 'Position information', and '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 Windows taskbar at the bottom shows the search bar, the University of Bath logo, and various application icons, along with the system tray displaying the date and time (14:17, 28/02/2023).

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

The screenshot displays the iTrent 'Sickness absence details' form. The form is titled 'Sickness absence details New' and contains several sections:

- Sickness period:** A dropdown menu is set to 'More than one day'.
- Absence start:** 'Absence start date' is set to '27/02/2023' and 'Absence start type' is set to 'Full day'.
- Absence end:** 'Absence end date' is empty, 'Absence end type' is set to 'Full day', and 'Expected end date' is empty.
- Absence:** 'Absence type' is set to 'Sickness' and 'Absence reason' is set to 'Cold, cough, influenza'. There is a 'Hide absence reason' checkbox which is currently unchecked.

A green 'Save' button is located at the bottom of the form. The left sidebar shows the 'University of Bath' organization and a search for 'People' with 3 results. The bottom of the screen shows a Windows taskbar with the date '28/02/2023' and time '14:25'.

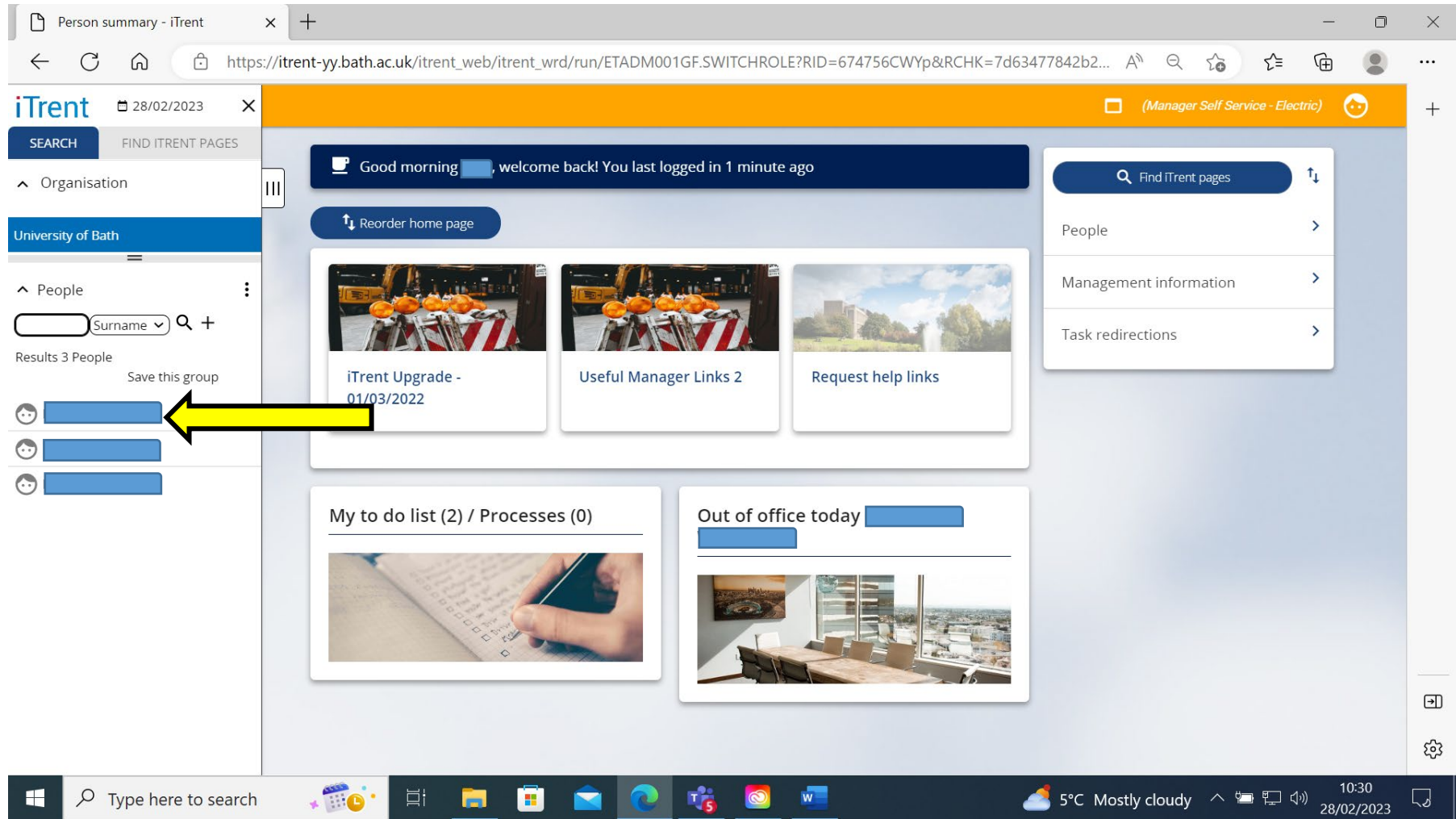
- If the absence is for more than 7 calendar days a fit note is required. To upload a fit note, click on the link 'Add new fit note certification' and enter the type of certificate and certificate dates.
- Once this has been done click on the link 'Upload Fit Note Document'. Your direct report will be 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 [redacted], 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 [redacted]". 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.

- 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. The calendar shows days 01 through 13, with some days marked with blue or hatched patterns. 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:

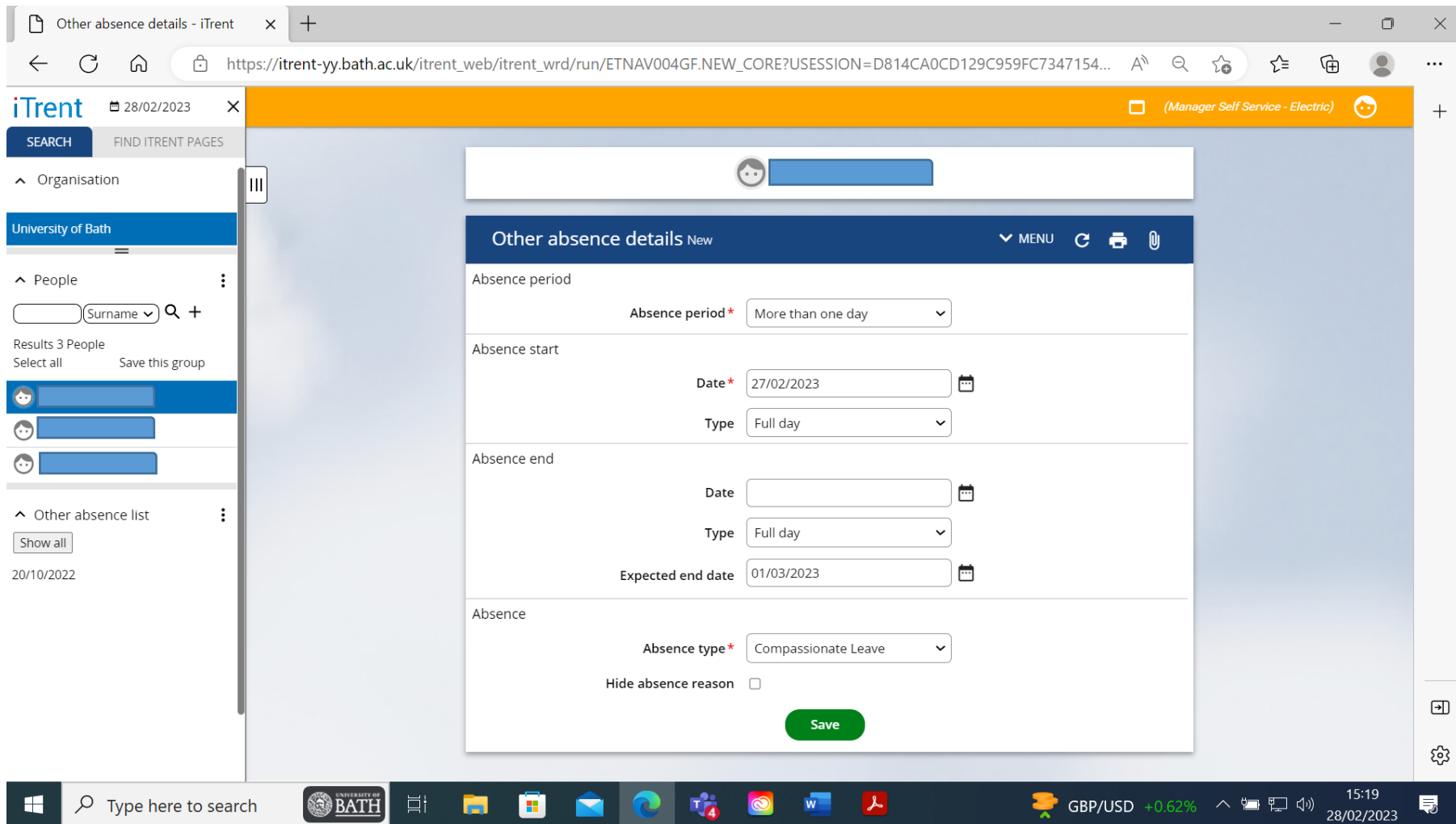
- Calendar
- Holiday
- New Sickness Details
- View Sickness Details
- Other absence (highlighted with a yellow arrow)
- Development and adjustments
- Probation
- FTC Consultations
- Timesheet claims
- Personal information
- Position information
- Pattern overrides

At the bottom of the page, a menu is open, showing 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).