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Key Line Manager Actions

As a line manager, there are many key things you need to know and do in order to effectively manage people, including various processes and policies you are required to follow. This guide outlines some of the most common topics that line managers need help and guidance with, indicating why it so important to carry out these actions and where to go for further information.

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|  | | What? | | Why? | How? |
|  | | **Familiarise yourself with the resources**  and support available to help you:  ► Resolve HR, Pay and Organisational Development (OD) queries.  ► Use People Manager for your key tasks as a line manager. | | ► If you know where to source help with carrying out your key tasks, and the quickest route to resolving queries, this will save you and your employees’ time and effort. Quite often you will find the answer to queries without having to contact HR. | ► HR, Pay and OD Guidance can be accessed via the University homepage.  ► Check out the Line Manager hub. |
|  | | **Know the cut off dates for pay**  **affecting changes**  ► All forms and processes have specific cut off dates to enable them to be processed within the current months’ payroll.  ► Managers need to ensure all authorisations and approvals happen within payroll cut off dates. | | ► If you approve your employees’ claims after the cut off dates, or do not leave enough time it could result in your employee being paid incorrectly. | ► Forthcoming pay deadlines are listed in the  Guidance and forms/HR section of the University website: <https://www.stmarys.ac.uk/hr/payroll-information/payroll-deadline-dates.aspx>.  ► The cut off dates are generally on 4th of each month. Why not set up a shortcut or save to your favourites? |
|  | | **Use People Manager to:**  ► Approve expense or overtime claims.  ► Record sickness  ► Approve leave and other absences  ► View team annual leave  ► Record appraisals  ► Process resignations.  ► Run a selection of basic reports  ► Re-direct tasks if you are absent from the office | | ► Carrying out manager actions  yourself on People Manager instantly updates your employee record without the need for contacting HR, therefore saving you time and creating a faster turnaround. | ► Guidance on how to use People Manager, including step-by-step walkthroughs, is available on the University’s website <https://www.stmarys.ac.uk/hr/peoplenet/peoplenet.aspx>  . |
|  | | **Update your hierarchy**  ► As a line manager, you are responsible for ensuring your hierarchy on People Manager is up to date and contains all employees reporting to you. | | ► In order to access your  employee’s HR record and for HR to  make any amendments, they need to be listed in your hierarchy on the system. | ► In People Manager - the current manager needs to look at the list in their hierarchy by clicking on ‘people’ in the drop down menu.  ► The manager then needs to contact the HR Helpdesk to ensure that staff members are moved to the right manager. |
|  | | **Understand employee leave**  ► There are a number of reasons your employees may request time off, both paid and unpaid. This includes annual leave, special leave, maternity/ paternity leave, adoption leave, parental leave and sabbatical.  ► As a line manager, you need to be aware of the different types of leave and understand your responsibilities. | | ► To ensure you make the  relevant approvals, arrangements and calculations to support your employee and the organisation. This includes informing HR to ensure your employees’ pay is correct. | ► Comprehensive guidance, toolkits, process and  policy information for the different types of leave  is available on the University Intranet in the Guidance and forms/HR section. |
|  | | **Record maternity leave**  ► It is important that you close an employee’s period of maternity leave when they have informed you of their intention to return to work.  ► If your employee plans to start their maternity leave early, you need to change their start date. | | ► To ensure your employee is back on payroll and gets paid correctly when they return to work.  ► To ensure your employee’s maternity pay is calculated correctly. | ► You need to inform HR by emailing by the pay cut-off date.  ► Forms, comprehensive guidance and toolkit can be accessed in the Guidance and forms/HR section of the MoJ intranet. |
|  | | **Exit management**  ► Your employee may decide to leave St Mary’s for a number of reasons. As their line manager, there are actions you need to take, including:  ► You must action the resignation on People Manager in good time when an employee resigns. | | A delay could lead to an overpayment and affect your budget.  ► To ensure the employee is paid by the correct department.  ► To ensure the employee receives any outstanding payments owed to them. | ► Use People Manager to notify HR that a member of your team has resigned.  ► Employee will also enter the information onto their own self service portal. |
|  | | **Vacation rules**  ► As a Line manager, if you are scheduled to be away from work for a day or more during the normal working week (Monday to Friday) you should:  ► Temporarily delegate approver rights in People  Manager. | | ► To ensure another manager can  deal with important  notifications in  your absence. This will avoid authorisation failures which could result in staff not being paid correctly. | ►Instructions and walkthroughs detailing how to set these up can be found in the Guidance and  Forms/HR section of the intranet. |
|  | | **Tips for accurately recording sick**  **absence**  ► Open new sickness absence on the first day of employee being off.  ► Close sickness absence immediately when the employee returns to work.  ► If you have submitted the employee’s return to work paperwork and you need to make a correction e.g. a change to absence open date or absence reason, you need to submit new revised paperwork.  ► Make sure medical evidence information is updated correctly; there shouldn’t be any gaps between  medical certificates and the end date of the last certificate should match the end date of the sick absence.  ► Absence details can’t easily be changed once approved on the system, so don’t input an end date until the employee has returned to work. | | ► It is important that sick absences are recorded timely and accurately to ensure employees get paid correctly.  ► For audit purposes, any  amendments need to be  recorded in return to work  paperwork and re-submitted to  HR. | | ►Guidance on the sick absence process, including  the relevant paperwork that needs to be  completed and step-by-step walkthroughs (e.g.  how to open an absence  is available in the Guidance and forms/HR section of the intranet. |
|  | | **Performance matters**  ► You only need to open one appraisal for each employee every year..  ► If you have a complex issue with an employee’s performance that needs to be resolved, you can request the help of an HR Business Parner. | | ► An appraisal needs to be closed off to allow it to be opened the following year.  ► To ensure you are taking the correct action/s as a line manager. | | ► You need to email HR Systems if part of the form isn’t working. |

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|  | **Contract variation**  ► If there has been a variation to the employee’s contract like salary, FTE, additional responsibility etc.  . | To ensure the employee’s salary is paid from the correct budget.  ► To ensure the employee gets  paid the correct amount, their assignment needs to be holding correctly on the system. | ► The employee’s new line manager needs to inform  HR by completing and submitting a Status Change form. |
|  | **Recruitment Manager tool on People Manager**  As a Recruiting Manager, Recruitment Managers allows you to:  ► Easily print application forms direct from the HR System en masse.  ► Enter and manage interviews set up  ► View the status of your campaign including applicant  volumes  ► Add or remove additional participants to a campaign  you are managing to assist workload/ annual leave  etc.  ► Copy previous vacancies therefore saving time on vacancy creation. |  |  |