

Employee Self Service: Enter Claims

This guide will help you use Employee Self Service to make claims for additional hours, overtime and allowances

Creating a new claim:

1. Click on 'Enter Claims' in the Employee Self Service menu.
2. To start a new claim, click on the 'Create New Claim' button.
3. Select the assignment the claim is for by clicking on the pencil icon.
4. Choose the month the claim was incurred – you can claim for the current month or 3 previous months.
5. You will be taken to the 'Enter Claims' screen.

Entering claim information

1. Claim Type – choose from the claim types displayed in the drop down list.
2. Claim From and Claim To – the dates will automatically default to the first and last available day of the month. These can be over-typed with the relevant dates that the claim was incurred. You can do this by using the calendar icon.
3. Once you have selected your claim type, 'Info1'/'Info2' boxes will change to the appropriate unit. Fill in this information accordingly; for example, when 'Overtime x 1.3' is selected, 'Info1' box will update to ask for the number of 'Hours'.
4. Comments - if you wish to provide your manager with information about your claim, add this to the 'Comments' box.
5. Cost Code (Non-Default) - this should be left blank unless the claim needs to be paid from a cost code other than your default cost code
6. When you have entered the claim details, click on the 'Add to Claim' button. The claim details will be recorded and will appear at the bottom of the screen. The input row will now be clear for you to input a new claim line if required.
7. Repeat these steps for all of the claims that you need to make for this period.

On-screen buttons to help make entering your claim information quick and easy

To use the following buttons, you will need to click the 'Select' box on the relevant row:

- 'Copy Row' – copies the information in the selected row and displays it in the claim input row. This is useful if you need to make a similar claim more than once in a month, as you can then just change the relevant field, for example the date or amount.
- 'Delete Row' – will remove the selected row altogether
- 'Update Row' – allows you to update the selected row and make any required changes. You will need to click on the 'Update Claim' button for your amendments to take effect.
- 'Clear Input Row' button – if you have started to enter a claim line but do not wish to continue, clicking this button will make the input row blank.

Remember, all claims must be submitted and approved on, or before the 10th of the month to ensure payment in that month's pay. Claims submitted or approved after this date will be automatically paid the following month.

When you have finished entering your claim information you have a number of options:

1. 'Save for later' button - allows you to save your claims. You can then make changes or add additional claims for that particular month at a later date. You will be able to find your claim in the table at the bottom of the Claims Home Page.
2. 'Confirm Claim Details' – when you click on this button you will be taken to the 'Review and Submit' screen. You should check the information you have input. If you need to make any amendments to the claim, select 'Edit Claim Details', which will take you back to the previous screen. If the details are correct, click on the 'Submit Claim' button. The claim will be submitted to your line manager for approval. You will receive a confirmation e-mail when it has been approved.

To check or update an existing claim or view your claim history

- The table at the bottom of the Claims Home Page lists your claim history. The status of the claim will be displayed, for example, 'Complete', 'In Progress', 'Saved for Later', 'Submitted for Approval', 'Returned for Correction', 'Rejected' or 'Error'.
- To access a claim, click in the 'Select' box next to the appropriate claim, and then click on the 'View Claim Details' button.
- For claims that have not yet been submitted for approval, you can click on the 'Edit Claim Details' button and make changes/add claim rows as necessary.
- If required you can export a summary of all of your Self Service claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a claim and clicking 'Export Claim Details'.