

## Manager Self Service: Enter Team Claims

This guide will help you use Manager Self Service to make claims on behalf of your staff for additional hours, overtime and allowances

### Creating a new claim:

1. Click on 'Enter Team Claims' in the Manager Self Service menu.
2. To start a new claim, click on the 'Create New Claim' button.
3. Select the assignment you wish to make the claim against by clicking on the pencil icon.
4. Select the month that the claims were incurred
5. You will be taken to the 'Enter Claims' screen.

### Entering claim information

1. Claimant – from the drop down list select the relevant employee.
2. Asg. No. – the claimant's assignment number will automatically populate. However, if they have multiple assignments you will need to use the 'Asg. No.' drop down list to select the correct assignment.
3. Claim Type – choose from the claim types displayed in the drop down list.
4. 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.
5. Once you have selected the 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'.
6. Comments - if you wish to add information about the claim, add this to the 'Comments' box.
7. Cost Code (Non-Default) - this should be left blank unless the claim needs to be paid from a cost code other than the default cost code
8. 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.
9. Repeat these steps for all of the claims that you need to make for your staff for this period.

## On-screen buttons to help make entering your team's 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 but for a different claimant.
- '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 team claims must be submitted on or before the 10<sup>th</sup> of the month to ensure payment in that month's pay. Claims submitted after this date will be automatically paid the following month.

## When you have finished entering your team's claim information you have a number of options:

1. 'Save for later' button - allows you to save your team claim. 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 My Team 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. As you are the manager, when you submit the claim it will be automatically approved. The status of the claim on the My Team Claims screen will say 'Complete'. Your staff will receive an e-mail to confirm that you have made a claim on their behalf.

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

- The table at the bottom of the My Team Claims Home Page lists your team claim history. The status of the claim will be displayed, for example, 'Complete', 'In Progress', 'Saved for Later', or 'Error' if there is a problem with the claim.
- 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 team claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a team claim and clicking 'Export Claim Details'.