



How to...approve a new time & expense claim

Purpose:

This guide will show you how to **approve a new time & expense claim** in the **Your HR** people manager self-service system.

Logging in to Your HR:

To log into Your HR, please refer to the **How to...Log in to Your HR Guide (ESS 1)**. After login you will be presented with the **People Manager Self Service Homepage**.


Important Notes:

- There is no automatic escalation in the Your HR system if you do not approve a task from your employee(s).
- Time and expenses will be paid in the pay period depending on when the claim is authorised (not when it is submitted by the employee). If it is authorised after the manager's deadline, it will be paid in the next pay period.
- Managers cannot amend claims submitted via Employee Self-Service. If there are any inaccuracies with a claim, you must 'Not authorise' it and the employee is required to amend and resubmit it for your review.

There are two ways you can authorise a time & expenses request:-

The quickest and recommended way:

- When an employee submits a claim, you will receive an email notification (a task will also appear in your 'to do list' in People Manager). The email will contain provisional values for the claim.
- Open the email **Time & Expenses Claim request** and click on **View Details** as shown below at the bottom left of the email:



Your HR Time & Expense Claim Request

Mr Joe Test has submitted a Time & Expense claim which requires your authorisation.

Reference: TE7000146916
Start date: 31/01/2023
Position: Test Team Lead (Position) - Occupant(s) Mr Joe Test
Payroll: WCC Monthly

Element	Type	Time/Units/Miles	Cash amount
Overtime Plain	Units	5	112.78
Total			112.78

These values are provisional. The final values will be shown on the payslip.





View Details
 Please use the **View Details** button to view details of the request and approve it.

This e-mail has been generated by Your HR - Warwickshire County Council

- If you are prompted to select in Role at the Your HR login screen, select **People Manager** and click on **Login**
- If you aren't immediately taken to the time and expense claim, you will now want to select **Your People** and then click on the correct employee on the left, if you are then please see the claim details section at start of the next page

Your People >

Time and Expenses Input >
 Workflow Redirection >
 Management Information Reports >

 **Mr Joe Test**
 Mrs Poppy Tests
 Miss Samantha Tests

- Now you will want to select **Time and Expenses** from links and then **View Previous Time and Expense Claims**

> Personal Information

> Employment Details

> Pre Employment Checks

> Time and Expenses

> Leave and Absence

> Appraisal Records

> Learning, Qualifications & Memberships

> Disciplinary/Capability & Grievance

> Process Chains

> Make your Employee a Leaver




View Previous Time and Expenses C...

Summary View Time and Expenses ...

View Temporary Payments

- Now select the correct time and expense claim from the drop-down menu on the left

^ Time & Expenses claims ⋮

WARCC - Overtime and Additional I

- The claim details, as entered by the employee, are now displayed:

Time & Expenses claim
WARCC - Overtime and Additional Hours Post April 2019
MENU

Employee: Mr Joe Test
Job title: Test Team Lead
Reference: TE7000146916
Payroll: WCC Monthly

Page 1 | Page 2 | Page 3 | Page 4 | Page 5 | Page 6

Page 1 - Overtime and Additional Hours, Page 2 - Pay the Difference and Overtime at a Different SCP, Page 3 - Teachers and Youth Worker Overtime, Page 4 - Non Teaching Supply Hours, Page 5 - Weekend Enhancement, Page 6 - Teachers Overtime and Supply Hours with SNA

[Click Here to view the Reimbursement of Expenses Guide](#)

Time and Expenses - Overtime and Additional Hours

for WCC Staff

If a cost centre override is input this needs to contain both the cost centre and the cost centre details as a single string i.e. AA001B0011.

Please complete all fields unless specified as optional.

Element	Date	Description*	Cost Centre O
Overtime Plain	31/01/2023	TEST	

Save

- You are responsible for ensuring that the employee has attached all relevant documents to support the claim e.g., claim details and receipts. If these are not attached, you must select **'Not authorised'** from the drop-down list next to the **Authorisation status** field and enter a reason for this. If documents have been attached, the paperclip icon will be highlighted in blue in the top right of the claim. Click on the icon and then on Document attachments and they will be flashing in the left-hand side of the screen. To view them, click on the attachment name and then on the Download option

Document attachments

Test png file attachment.png

Document attachment details Test png file attachment.png



Document * Test png file attachment.png

Link

Visible in Self Service ☒

Last updated date 02/02/2023

Last updated time 13:40

Filename TEST.docx

Replace by ... No file chosen

- To return to the claim click on the Time & Expenses claim link on the left to the employee's name as shown above
- If the claim details are accurate and all relevant documents are attached, click on the drop-down arrow next to the **Authorisation status** field and select '**Authorise**' and then click **Save**

Authorisation

User name AATW

Authorisation status *

Reason

Authorised
Not authorised

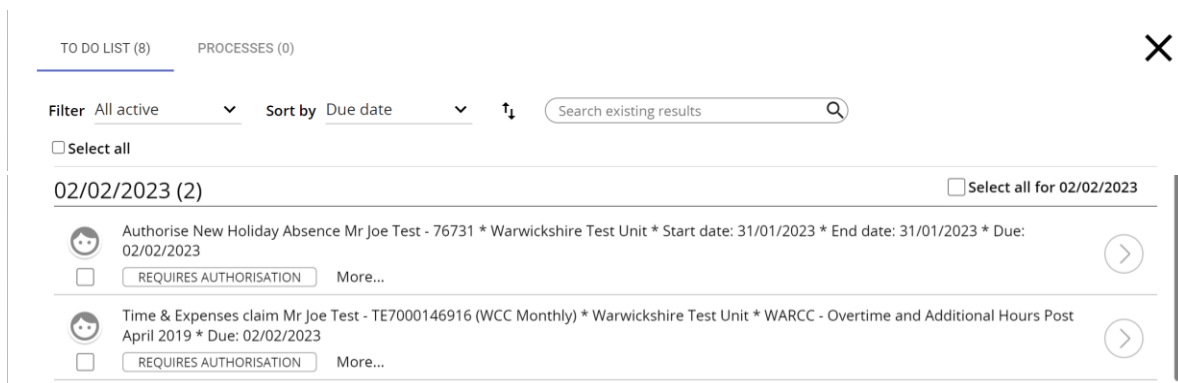
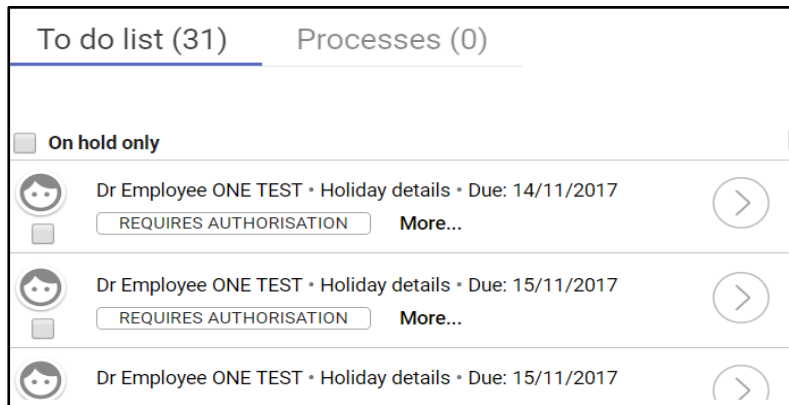
You can also authorise a mileage and expenses claim from the 'to do list'

Note: this method assumes you have already viewed the claim details and ensured that all required documents are attached.

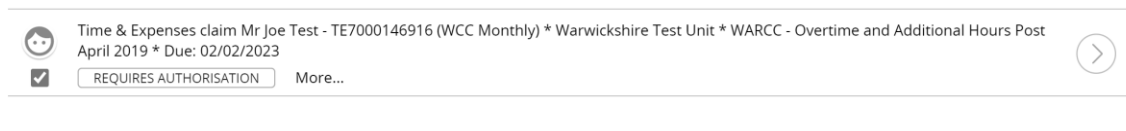
My to do list (8) / Processes (0)



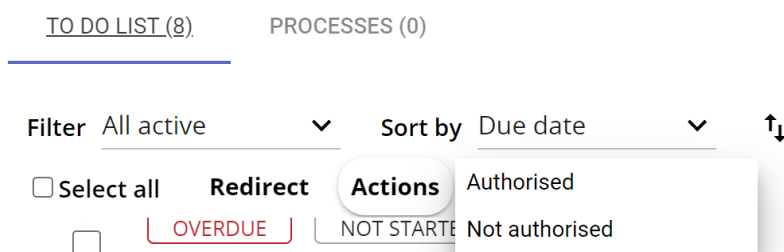
- On the Homepage, you will see your **To do List** along the bottom of the page.
- When clicked, the below screen will appear, highlighting your tasks.



- You can use the 'Search existing results' option to search for tasks from a specific employee by entering their first name or surname and clicking on the magnifying glass
- Any tasks that need authorising will say **Requires Authorisation** as above
- Click on the box just below the person icon and a tick will appear



- Click onto **Actions** which gives two options **Authorised** or **not authorised**

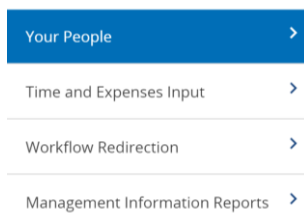


- Managers will be able to “select all” and authorise all tasks if required. Once selected, users will need to click on “Actions” then either “Authorised” or “Not authorised”.
- Click onto the action you require
- Once actioned, the task is removed from your ‘to do list’. If you do not action a task within the required period, then an ‘overdue’ message will be displayed against the task and you will also receive an email reminder
- You are also able to click on to the task which takes you to the details screen and you are then able to authorise the claim there.

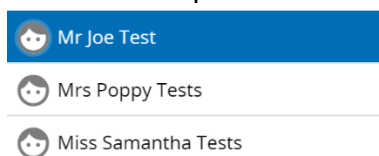
Please note: there is no automatic escalation within Your HR to your manager if you do not action requests.

Viewing Time & Expenses Claims

- Click on **Your People** in the top right menu



- Select the required employee from your list of direct reports which will be presented on the pane on the left-hand side of the screen:



- Click **Time and Expenses** and then **View Previous Time and Expenses claims**



- The next pop-up screen will list the **Travel & Expenses Claims** being claimed on the pane on the left-hand side of the screen.

^ Time & Expenses claims ⋮

! WARCC - Overtime and Additional I

- If you hover over the time & expenses claims, brief details about the claims will be shown. To view more information, click on the claim to be viewed - use the claim reference number to ensure you select the correct one.

To view an expenses claim

- Click on Page 2 and the next pop-up screen will show you the **expenses** being claimed

Employee: Dr Adam Cook

Job title: HR Administration Officer

Reference: TE6000025520

Payroll: WCC Monthly

Page 1 | **Page 2**

Page 1 - Mileage Claims, **Page 2 - Expenses**

[Click Here to view the Reimbursement of Expenses Guide](#)

[Mileage and Expenses - Expense Claims](#)
for Warwickshire County Council

If a cost centre override is input this needs to contain both the cost centre and the cost centre details as a single string i.e. AA001B0011.

If when entering an expense claim there is a VAT option and a non VAT option, please use the VAT selection if you have a VAT receipt.

Please complete all fields unless specified as optional.


Element	Date	Description *	Cost Centre Overri
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



Save


Returning to People Manager Homepage

- Click the Logo in the top left hand corner of the screen
-

Redirecting claims

- If you wish to redirect the task then click **Redirect** in the to-do-list and then type in the cost centre manager ID (Recipient) you wish to redirect to.
- Alternatively click **search**  and select ID name and click green **Save** button.

Redirect task Time & Expenses claim - Mr Joe Test - TE7000146916 (WCC Monthly)  

Recipient* 

Save

- You have now completed the task.
-

Returning to People Manager Homepage

- Click the Logo in the top left hand corner of the screen
-

Notifications

- When you have approved a claim, the employee will receive an email notification. This will notify them which pay period the claim will be paid in and is dependant upon the approval (not employee submission) date.
 - If you 'Not authorise' a claim, the employee will receive an email notification. They must amend and resubmit it for your approval.
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For further information or support please refer to Your HR on the [Intranet](#) or please raise a request through the [HR Service Desk](#) or phone on 01926 738444

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