



How to...submit a Time & Expenses Claim

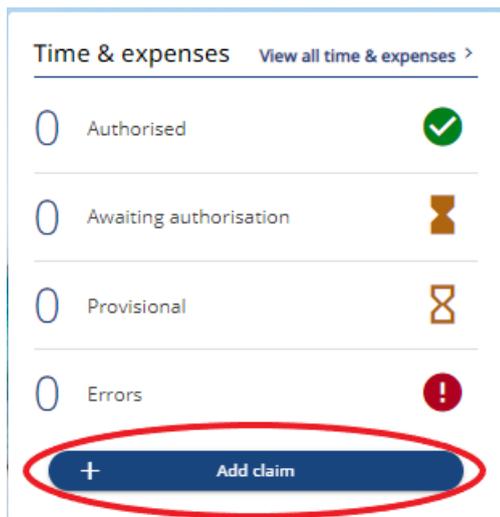
This guide will show you how to submit Time and expenses claims which include mileage and expenses, overtime and additional hours. You will also be guided on how to view previously submitted claims. An explanation on error messages which you may be receiving is given towards the bottom of the guide.

Please Note:

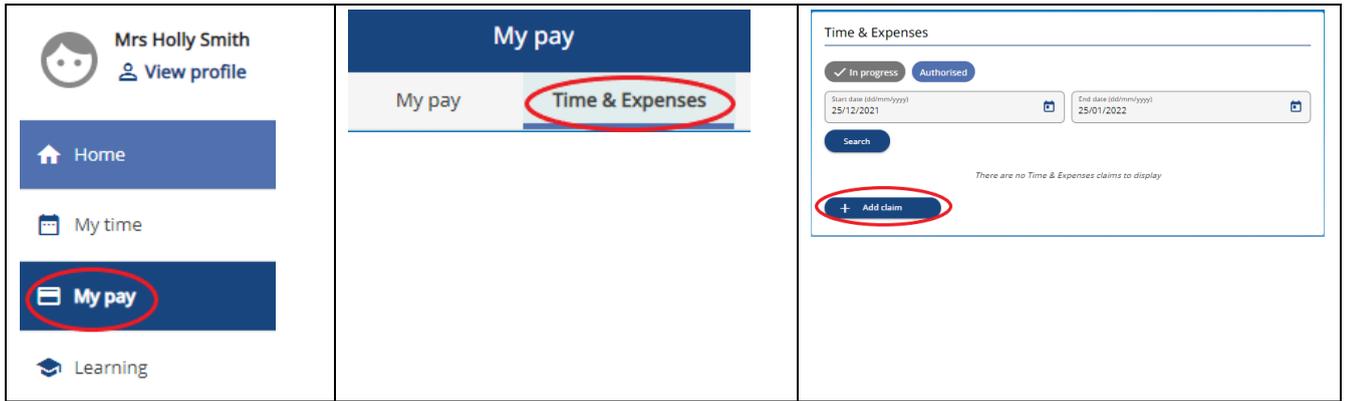
- If your claim date is **over 90 days**, you will need to submit a [travel and expense form](#) via [HR Service Desk](#). **This must be authorised by the Head of Service.**
- Claims must be submitted, as a minimum, on a monthly basis to prevent system issues with the submission process
- When entering a claim, **hours need to be entered as decimal minutes**
- Please do not enter long descriptions and special characters in the fields as these can cause error messages and prevent claims from being submitted to your manager. You can attach any supporting documentation to provide more detailed information to your manager.

Step 1 - Create a new claim

- The quickest way is from the ESS dashboard; click on **Add claim** as shown below:



Alternatively, click on **My pay** from the left hand side of the screen > **Time & Expenses** > **Add claim**:



Step 2 - Select the type of claim you wish to raise

Enter in the following details and click on **New**

- **Start date:** this must be a date in the past and not the future. It is advised you enter this as the 1st of the month to which the claim relates
- **Job title:** if you have more than one role then select the role that this claim relates to
- **Claim template:** select the relevant claim template for your claim

Time & Expenses claim entry: New

Start date (required)



Job title (required)

Claim template (required)

New

Step 3 - Enter the claim details

- **Pages** - Please select the relevant page for your claim. The page that you are currently on will be highlighted in bold and a description of each page will be detailed underneath.
- To move to a different page, select the relevant page number from the options at the top, e.g. Page 2. You do not need to complete every page if it is not relevant to your claim. Below is an example of an overtime and additional hours claim template:

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Time & Expenses claim entry: (New)

Job title: Administration Officer
Employee: Mrs Holly Smith

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[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
[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 Override (Optional)	Claim Hours/Units	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+ -

[Save draft](#) [Submit](#) [Print](#)

- **Mandatory fields** - fields highlighted in **GREY** are mandatory fields that must be completed in order to submit a claim as shown in the example below:

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Time & Expenses claim entry: (New)

Job title: Administration Officer
Employee: Mrs Holly Smith

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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 Override (Optional)	Claim Hours/Units	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+ -

[Save draft](#) [Submit](#) [Print](#)

Important notes for mileage claims

In order to submit a claim for mileage, you must have a vehicle recorded under **Private Vehicles**. You must also have a vehicle that is set to be the default vehicle for expense claims and this box must be ticked. Refer to [ESS 8 How to Update your Private Vehicles](#) for further information. You may change the vehicle for a specific claim if you have set up more than one private vehicle.

When entering mileage, you may enter the total mileage for a claim as a single line but you must attach a breakdown of each journey showing the start and end post codes and the reason for each journey for your manager's review.

Step 4 - Submitting the claim

- Once you have entered all the information, click on the **Submit** button
- If you click on **Save draft**, you can come back to it at a later time to complete and submit it.

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Time & Expenses claim entry: (New)

Job title: Administration Officer
Employee: Mrs Holly Smith

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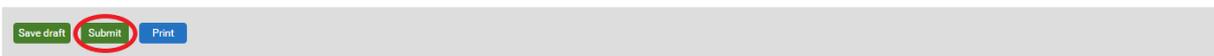
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Time and Expenses - Overtime and Additional Hours for WCC Staff

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 Override (Optional)	Claim Hours/Units
Overtime Plain	24/01/2022	 Project work		1.00 + -



- The Time & Expenses claim submission screen will be displayed. This will show you the '**Cut off date**' so if you submit your claim after this date, your claim will be paid in the following pay period as long as it has been authorised by your manager.
- **Attaching receipts** - If you need to attach a receipt(s), scroll down and click on **Choose File** to browse for and attach the file(s). Alternatively, once you have clicked Submit, you will also be given the option to attach receipts by finding the relevant claim and clicking on the paper clip icon.

– Receipt attachments

Attach receipt

Choose File THIS IS A TEST.docx 

Submit

- When you are ready to submit the claim to your manager, click on **Submit**.

Claims will need to be approved by your line manager before they are paid. If they are approved by the cut off date for that month then they will be paid in the same month.

If they are approved after the deadline date for that month then they will be paid in the following month. The deadline dates can be found on the [HR Service Desk](#) by **searching for payroll deadlines**.

How to view previously submitted claims

- From the ESS dashboard, click on **View all time & expenses**
- As a default, claims '**In progress**' for the last month will be displayed as the default. To view an authorised claim, claim on the **Authorised** button. You can amend the start and end date parameters to view in progress or authorised claims within a specific time period using the calendar and then clicking on **Search**

Time & Expenses

In progress
 Authorised

Start date (dd/mm/yyyy)  25/12/2021
 End date (dd/mm/yyyy)  25/01/2022

Search

Claim name	Start date	Reference	Cut off date	Status	
WARCC - Overtime and Additional Hours Post April...	01 Jan 2022	TE7000134132	19 Jan 2022	Awaiting authorisation	<input type="button" value="Summary"/> 

- Click on the claim you want to view and the details will be displayed on the screen.
- You can also view provisional values for a claim by clicking on the Summary button next to the claim as shown below. The actual amount you will receive will be shown on your payslip:

Claim name	Start date	Reference	Cut off date	Status
WARCC - Mileage and Expenses	24 Jan 2022	TE6000030385	19 Jan 2022	Authorise Summary

- An example of the summary screen is shown below:

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Time & Expenses claim summary: WARCC - Mileage and Expenses

Time and expenses claim reference
TE6000030385

Start date
24/01/2022

Name
Mrs Holly Smith

Administration Officer Position

Payroll
WCC Monthly

Element	Type	Time/ Units/ Miles	Cash amount
+ Mileage	Miles	10	4.50
Total			4.50

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

Notifications

- When you submit a **Time & Expense Claim** you and your manager will receive an email notification.
- You will receive an email notification when your manager authorizes or rejects the claim.

Error Messages

- Claims cannot be submitted in ESS using a date in the future. Managers would receive a similar message if they tried to enter a payment on behalf of a direct report.



* E1792INVFUTDATEYou have entered a date in the future that is not allowed (page 1, row 1).

(E1792INVFUTDATEYou have entered a date in the future that is not allowed (page 1, row 1).*

- The following message occurs when an employee does not have a private vehicle set up against their record. In ESS, mileage claims can only be submitted if a vehicle has been entered. This can be done by the employee if they have ESS or by their manager. The manager will also get the same message if they try and enter a mileage claim via People Manager for one of their reportees.

“There are no vehicle details available for this claim”



There are no vehicle details available for this claim (page 1).
Changes have been saved.

For further information or support please refer to Your HR on the [Intranet](#) or please raise a request through the [HR Service Desk](#).

Version	Date	Document History
1.0	2017	
1.1	30/07/19	Updated for mileage totals and guidance on submitting timely
1.2 AA	16/11/21	Updated for private vehicles
1.3 AA	25/01/22	Updated for 10.42 ESS