



## How To... Create a new time and expenses claim

### Purpose:

This guide will show you how to **create a new time & expenses claim** in the **Your HR** People Manager system.

### Notes:

If your employees have access to Employee Self-Service (ESS) then they are required to enter and submit time and expense claims. You can, however, enter a claim on behalf of employees who do not have ESS by following this guide.

To enter a mileage claim on behalf of an employee, the employee must have entered a private vehicle in ESS.

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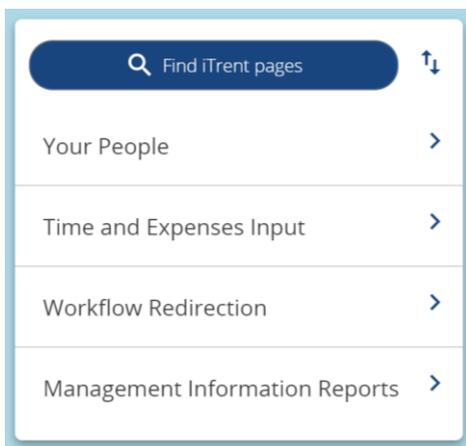
### Logging in to Your HR:

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**

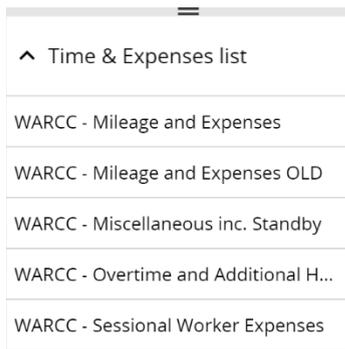
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### Enter a Time & Expenses Claim

- Click on **Times and Expenses Input** from the menu:



- This will take you to the next page where a list of claim templates will be shown to the left of the screen:



- Click on the relevant template but please note the following:
  - For overtime and additional hours worked from 1 April 2019 onwards, you must select a template containing reference to '2019' to ensure the claim is paid at the correct rate
  - You must not select one that has a prefix of 'XXX – DO NOT USE'
- Click on **Batch Time & Expenses**



- This will bring up the effective date box as shown below; you need to set this to earliest date of the claim e.g. date worked. Click on **OK**. If this doesn't come up, you can click the date at the top of the screen next to



- You can search for an individual employee or by entering the employee's personal reference number (or search for all employees by a specific unit i.e. team, job title or use the smart group to return all employees including leavers within the last 30 days)

- Click on **Search**. If searching for a specific employee, their details will appear in the 'Time & Expenses claim' section at the bottom of the screen. If the employee has more than one position, select the relevant one for the claim. If you use any of the other search options, click on the relevant employee's name. To use a smartgroup, you have the option to enter a claim for the first employee on the list and then use the skip option to move to the next one in the list to complete your input. If an employee has more than one position, you can only use a smartgroup to enter claims for one of these and will then have to start a new claim for any additional positions

Time & Expenses claim

Claim template

Person name\*

Job title\*

Start date\*

**New**

- Click **New** and the below screen will then be shown:

Time & Expenses claim (as of 01/02/2023) New ▼ MENU

Employee:

Job title:

Page 1 | Page 2

[Page 1 - Mileage Claims](#), Page 2 - Expenses

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

[Mileage and Expenses - Mileage 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.

Please complete all fields unless specified as optional.

Vehicle	Scheme	Cost Centre Override (Optional)	
<input type="text" value="Error - no vehicles are availab"/>	<input type="text" value="4 - Interview Mileage Scheme"/>	<input type="text"/>	
Date	Journey (Optional)	Miles claimed	From
<input type="text"/>	<input type="text" value="&lt;No Journeys Found&gt;"/>	<input type="text"/>	<input type="text"/>

**Save** **Skip**

- You can then go the relevant page you require.
- Complete the relevant information for the employee. All fields are mandatory unless otherwise stated as (Optional). Once you have completed all of the input for the claim, click **Save** at the bottom of the page and this will authorise the claim.

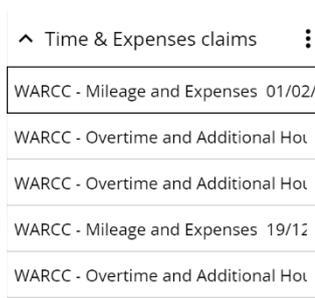
**To confirm that the claim has been submitted and authorised:**

- From the People Manager homepage, click on **Your People** and search for the employee

- From the Links section, 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 left hand side of the screen.



### For example, to view a mileage claim

- Click on the relevant mileage claim
- If you hover over the claim, brief details about the claims will be shown including the date submitted, authorised and the status as shown below. Check that the status appears as 'Authorised':

Claim : **WARCC - Mileage and Expenses**

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Reference : **TE6000025526**

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Payroll : **WCC Monthly**

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Job title : **HR Administration Officer**

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Start date : **01/02/2023**

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Submitted date : **09/02/2023**

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Authorised date : **09/02/2023**

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Cut off date : **16/02/2023**

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Authorisation status : **Authorised**

- To view more information click on the claim to be viewed.

The next pop up screen will show you the details in this example, the **mileage** being claimed (Page 1). If there are multiple pages on the claim template click on the relevant page

Employee:

Job title:

Reference:

Payroll:

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[Page 1 - Mileage Claims](#), Page 2 - Expenses

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

[Mileage and Expenses - Mileage Claims](#)

for Warwickshire County Council

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Please complete all fields unless specified as optional.

	Vehicle	Scheme	Cost Centre Override (Optional)		
	WV9 WV10	1 - Casual Mileage Scheme			
Date	Journey (Optional)	Miles claimed	From	To	Claim Reason
01/02/2023		5	wcc	pound lane	hosting a course

- View details of mileage journeys claimed

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## To view an expenses claim

- Click on Page 2 of the Mileage and Expenses template and the next pop up screen will show you the **expenses**.

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## Returning to People Manager Homepage

- Click the Your HR Logo in the top left hand corner of the screen.
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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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