

# 2-Step Authorisation Process for Children's Sessional Worker Time & Expense Claims

# Purpose:

This guide will show:

- a Sessional Worker how to enter and submit a Children's Sessional Worker Time & Expense Claim
- the actions required by the Sessional Worker Administration Team to review the claim
- the action required by the Sessional Worker's reporting manager to approve the claim.

# Please Note:

- If your claim date is over 90 days, you will need to submit a travel and expense form via email to hrandpayroll@warwickshire.gov.uk, this must be authorised by the Head of Service
- When entering a claim, hours need to be entered as decimal minutes

# Step 1 - Sessional Worker Completes and Submits Claim

Log in to Employee Self-Service (ESS) and from the homepage, at the top of the screen click on **Pay & Benefits**:



- Within this section will be your **Payslips**, **P60**, **Time and Expenses** and **Saved journeys**
- Scroll down to the Time & Expenses section
- To submit a new claim you will need to click on the Add claim button, to the right of Time & Expenses





A new screen will appear for you to enter in the **Start date**. Either enter the date in the format stated below; this date must be the earliest date of the claim and it is advised you select the first of that month

1	Start date 📍	
	17/10/2017	

• Or click on the black and white calendar and then click on the date you wish to select

•		Oc	tober	•	20	17	X
Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
39							1
40	2	3	4	5	6	7	8
41	9	10	11	12	13	14	15
42	16	17	18	19	20	21	22
43	23	24	25	26	27	28	29
44	30	31					
	Tod	ay is	Tue,	17 0	ct 20	)17	

• You will only need to change the **Job title** if you have more than one job. To do this you will need to click anywhere in the box and highlight the **Job title** you wish to claim for

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200	uue	

Test i ostion - Employee - 50504 170001
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- You will then need to click on the Claim template box to then choose which Claim Template you wish to claim on. Select 'WARCC – Sessional Worker Expenses'. If you see a template with this name but with a prefix of 'XXX' you must NOT select it as it will have been superseded by a newer version.
- Click on **New**. A blank template is displayed as shown below:



Time & Expenses claim entry: (New)

		Job title: L000 Employee: Mrs	)7 Sessional V Mary Test	Vorker			
		Page 1	Page 2   P	Page 3			
Page 1 - Mileage Claims, Page 2 - Sessional Relief Hours, Page 3 - Expenses Reimbursement Click Here to view the Reimbursement of Expenses Guide							
	Time and Expenses - Mileage Claims for Sessional Workers						
lf a	cost centre override is input this	needs to contain both t	he cost centre and	the cost centre details as a	single string i.e. AA001B0011.		
	Plea	se complete all fi	ields unless s	pecified as optional.			
	Vehicle Sch	eme		Cost Centre Overri	de (Optional)		
	ABC D01 🗸 1 - C	asual <mark>M</mark> ileage Sc	heme 🗸				
Date	Journey (Optional)	Miles claimed	From	То	Claim Reason		
	<b>•</b>					₿ +	

- There are 3 pages on this template; the first will default to the mileage claims. Ensure you complete the relevant(s) pages as required.
- If you have more than one entry e.g. multiple mileage lines you can click on the + button to add another row.
- Once done you are then given the action to **Save draft, Submit** or **Print.** If you click 'Save draft' this will allow you to come back to the claim and submit it at a later date. To submit the claim for approval, click on **Submit**.
- Once submitted, you will see the claim with a status of 'Awaiting authorisation':



• You will then receive an email to confirm your claim has been sent for approval. Your Sessional Worker Administration Team will receive an email and a task to review this:



You have submitted Expense claim: TE4000000159	ē i	2
no-reply@yourhrtest.com     13:48 (2 minutes ago) ☆	*	•
Time & Expense Claim Request		
Dear Mary		
Your expense claim TE4000000159 has been forwarded for approval.		
Kind Regards, YourHR		
This e-mail has been generated by Your HR - Warwickshire County Council		

• If your claim is rejected, then you will receive an email to this effect and will have to amend and re-submit the claim.

# Step 2 - Sessional Worker Administrator Receives Claim

• The Sessional Worker Administration Team for the employee will receive an email and a task informing them a claim has been submitted.

	Grann relevence. Terrorovov rov na	s open positiops inv	inviary rest					1
7 no.e	eply@yourhitest.com t =					13;47 (5 minutes ago) 🔅	*	•
	Time & Expense C	laim Request						
	Mrs Rebecca Notman has submitted a Reference: TE4000000159 Start date: 30/08/2018 Position: Sessional Worker (Position Payroll: WOC Monthly	Time & Expense claim wh () • Occupant(s) MrS N	ich requires your authorisation. Mary Test					
		32600	and a second second second	Cash	and the second second			
	Element	Туре	Time/Units/Miles	amount				
	Element Sessional Relef including Holiday Pay	Type Units	Time/Units/Miles	amount 26.76	View Details			
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	Element Sessional Relet including Holiday Pay Total These values are pro-	Type Units risionar. The finar values of	10 de anoum on the paysip.	amount 26.75 26.78	View Details Place use the View Details button to view details of the request and approve II.			
	Element Sessional Reter Including Holiday Pay Total These values are pro-	Type Units visional: The final values of	all de anown on the paysip.	amount 26.75 26.78	View Datasis Picase use the View Datasis Button to view details of the request and approve it.			

- The Administrator is required to review the claim by clicking on the 'View Details' button from their email then action the task from their 'to do list' by selecting either 'Authorise' or 'Not Authorise' it:
  - If the claim is 'Not authorised', the employee will receive an email and they must review and amend the claim then re-submit it.
  - The employee will not receive a claim if the Administrator authorises the claim at this stage, however, an email and a task will be sent to the employee's reporting manager.



# Step 3 – Manager Views and Approves Time & Expenses Claim

• Only when a claim is '**Authorised**' by a Sessional Worker Administrator will the employee's reporting manager receive an email and task to approve the claim:

These Stoppense Claim Request           Mrs Respecce Homma has solventized a Time & Expense claim which requires your authorisation.           Reference: T600000189 Band date: 30000018 Tester date: 30000018 Payreti: WCO Monthly Band date: 30000018 Payreti: WCO Monthly Tester inCluding Holday Pay           Time Units Mains Band date: inCluding Holday Pay         Time Units Mains Andourt 2 82,78           These values are provisional. The final values will be anown on the paysip.         Were Details Button to view details of the approve R.	no rep to ma	Ay@yourhrtest.com					53:47 (5 minutes ago)	*
Mits Rebecca Hotman has submitted a Time & Expense claim which requires your authorisation. Reference: T6400000159 Possion: Essional Worker (Position) - Occupant(s) Mrs Mary Test Payrol: WCD Monthly Eliminent Sessional Relef including Hotday Pay Units Total Total These values are provisional. The final values will be anown on the paysip. These values are provisional. The final values will be anown on the paysip.		Time & Expense C	laim Request					
Element         Type         TimeAUnits/Males         Cash Boots           Sessional Relet including Holday Pay         Units         2         26.76         Were Datails           Total         28.78         Sector Participation of the paysity         28.78         Sector Participation of the paysity           These values are provisional. The final values will be shown on the paysity.         48.78         Sector Participation of the paysity.		Mrs Rebecca Notman has submitted a Reference: TE4000000159 Start date: 30/08/2018 Position: Sessional Worker (Position	Time & Expense claim w	nch requires your authorisation. Mary Test				
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		Payroll: WCC Monthly Element Sessional Relet including Holiday Pay Total	Type Units	Time/Units/Miles	Cash amount 26.75 28.78	View Details Please use the View Details button to view		
		Payroll: WCC Monthly Element Sessional Relief including Holiday Pay Total These values are pro	Type Units visional. The final values	Time/Units/Miles 2 will be shown on the paysip.	Cash amount 26.76 26.78	View Details Please use the view Cetails butten to view details of the request and approve it.		

• Details of the claim can be viewed by clicking on the '**View Details**' button from the email. The claim can be approved from the manager's 'to do' list by clicking on the check box against the relevant claim as shown below:

TO DO LIST (3) PROCESSES (0)	×
Filter All active V Sort by Doe date V 1	
Select all REDIRECT ACTIONS	
Time & Expenses claim: TE6000008349 (WCC Monthly) * Family Focus Nuneaton * WCC Mileage and Expenses * Due: 20/04/2018     REQUIRES AUTHORISATION More	$\bigcirc$
Time & Expenses claim:	$\bigcirc$
Time & Expenses claim Mrs Mary Test: - TE4000000159 (WCC Monthly) * Family Focus Nuneaton * Sessional Worker Expenses * Due: 03/09/2018     REGURES AUTHORISATION More	$\bigcirc$

• Then, click on Actions and select 'Authorised':



• The Sessional Worker will receive an email confirming that the claim has been authorised.



#### Step 4 – Employee Notified When Claim Authorised

• When the claim has been authorised by **both** the Sessional Worker Administration Team and the Sessional Worker's reporting manager, the employee will receive an email to confirm this:

Your Expense Claim TE4000000159 has been authorised by your Manager Index x	- B
? no-reply@yourhrtest.com to me 🕤	14:11 (5 minutes ago) 📩 🔸 💌
Time & Expense Claim Request	
Dear Mary	
Your expense claim TE4000000159 has been authorised.	
The claim will be paid in the next available payrun 31/05/2018.	
Kind Regards, YourHR	
This e-mail has been generated by Your HR - Warwickshire County Council	

• When you search for the claim in ESS, the status will now show as 'Authorised':



For further information or support please refer to Your HR on the Intranet <u>https://i.warwickshire.gov.uk/content/access-your-hr/access-your-hr</u> or contact via email: hrandpayroll@warwickshire.gov.uk or phone on 01926 738444.

Creation Date	02/11/18
Author	AA
Review Date	