

Manager Self Service Delegated Access: Enter Team Claims

This guide will help you use Manager Self Service Delegated Access to make claims for staff for additional hours, overtime and allowances, on behalf of a delegating manager.

Creating a new claim:

1. Click on 'Enter Team Claims' from the Manager Self Service Delegated Access menu.
2. You will be taken to the 'Delegated Manager Claims' home page. To start a new claim, click on the 'Create New Claim' button.
3. On the 'Choose Assignment screen', the assignment of the manager/s you have been given delegated access for will be displayed. Click on the pencil icon against the relevant assignment.
4. On the 'Choose Claim Period' screen select the month that the claims were incurred - you can claim for the current month or 3 previous months.
5. You will be taken to the 'Enter Claims' screen.

Entering claim information

At the top of the 'Enter Claims' screen the claim reference and claim period will be confirmed. The assignment information of the delegated manager is also displayed.

Note. You can only enter claims for employees that are 1-3 levels down within the supervisor hierarchy of the manager you have delegated access for.

In the 'Claim Details' section the following fields are available for completion on the input row:

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 the claims that need to be made for this period.

Claim validation:

At the point of clicking on the 'Add to Claim' button, the system will validate that the selected claim type is eligible to be claimed. It will refer to the 'Claim From' and 'Claim To' dates for the claim row and check the claimant's assignment details for this period.

If the claim type is invalid, an error message will be displayed at the top of the screen. You will need to determine the correct claim type to be used and amend the claim details accordingly. Please refer to the claim validation example below.

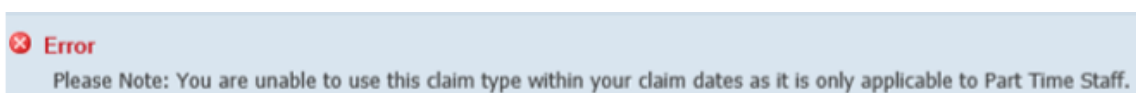
If you are unsure which claim type to use, please speak with the delegating manager in the first instance or contact HR if further advice is required. Please refer to the Help and Support section at the end of this document for contact details.

Claim validation example:

The claim type 'Extra Hours (Non-Contracted)' can only be claimed by part-time staff, i.e. the contracted hours for their assignment are more than 0 but less than full-time.

If a claimant's contracted hours were full-time at any point during the claim from and to dates, when you click on the 'Add to claim' button, the following error message will be displayed:

'Error: Please Note: You are unable to use this claim type within your claim dates as it is only applicable to Part Time Staff.'



If the claimant's hours changed from full-time to part-time mid-month, then provided that the claim from and to dates only cover the period when the assignment was part-time, the claim for Extra Hours will be valid and the claim line will be added.

On-screen buttons to help make entering team 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 by a delegated user and approved by the delegating manager on or before the 10th of the month to ensure payment in that month’s pay. Claims approved after this date will be automatically paid the following month.

When you have finished entering the team claim information you have several options:

1. ‘Save for later’ button - allows you to save the team claim. You can then make changes or add additional claims for that month at a later date. You will be able to find the claim in the table at the bottom of the ‘Delegated Manager Claims’ home page.
2. ‘Confirm Claim Details’ - when you click on this button you will be taken to the ‘Review and Submit’ screen. The approver of the claim will be displayed in the ‘Approvers section’. 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.

Confirmation:

Upon selecting ‘Submit’ a confirmation screen will appear. The team claim will be submitted to the delegating manager for approval. You will receive a confirmation e-mail when it has been approved. The claimants will also be sent an e-mail to advise that a claim has been made on their behalf.

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

- The table at the bottom of the Delegated Manager Claims home page lists your team claim history. The status of the claim will be displayed, for example, ‘Complete’, ‘Submitted for Approval’, ‘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 your Self-Service delegated team claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a delegated team claim and clicking 'Export Claim Details'.

Claims that are returned for correction:

If the claim you submit contains an error, the delegating manager should return it to you for correction. To ensure that the transaction is processed correctly, you **must not** click on the return for correction notification if it is displayed on the Oracle Applications Home Page.

Instead, you must select the 'KCC Manager Self Service Delegated Access' responsibility on the left-hand side of the Oracle home page and then click on 'Enter Team Claims'. You will be taken to the claims home page. The status of the relevant claim will say 'Returned for Correction'. Click in the 'Select' box next to the claim, and then click on the 'View Claim Details' button. The details of the claim will be displayed. If the delegating manager has made any comments about the claim these will not be shown. You will need to refer to the e-mail notification you will have received as this will contain any comments the delegating manager has made.

To amend the claim, click on the 'Edit Claim Details' button. You will be taken through the same screens as when you originally completed the claim. In the top left of the screen it should confirm that you are completing the details under the 'KCC Manager Self Service Delegated Access' responsibility. Input the correct details and click on 'Submit'. The amended claim will be sent to the delegating manager to authorise.

Help and Support:

If you have a technical issue, log into Service Now call and raise a call by selecting the 'Something not working' icon. If you are not able to access Service Now, e-mail ICTservicedesk@cantium.solutions and they will raise a request on your behalf.

If you have an HR related query, for example, you need advice on which claim type to use, log into Service Now. To raise a call, go to the 'Need Something' section, select Human Resources and submit a General Enquiry. If you are not able to access Service Now, e-mail HRConnect@Cantium.solutions