

## Manager Self Service: Enter Team Claims

This guide will help you use Manager Self Service to make claims on behalf of your staff for additional hours, overtime and allowances

### Creating a new claim:

1. Click on 'Enter Team Claims' in the Manager Self Service menu.
2. To start a new claim, click on the 'Create New Claim' button.
3. Select the assignment you wish to make the claim against by clicking on the pencil icon.
4. 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:

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 you need to make for your staff 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 contact HR. 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 your team's 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 on or before the 10th of the month to ensure payment in that month's pay. Claims submitted after this date will be automatically paid the following month.

## When you have finished entering your team's claim information you have several options:

1. 'Save for later' button - allows you to save your team claim. You can then make changes or add additional claims for that particular month at a later date. You will be able to find your claim in the table at the bottom of the My Team Claims Home Page.

2. 'Confirm Claim Details' - when you click on this button you will be taken to the 'Review and Submit' screen. 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. As you are the manager, when you submit the claim it will be automatically approved. The status of the claim on the My Team Claims screen will say 'Complete'. Your staff will receive an e-mail to confirm that you have made a claim on their behalf.

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

- The table at the bottom of the My Team Claims Home Page lists your team claim history. The status of the claim will be displayed, for example, 'Complete', '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 of your Self Service team claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a team claim and clicking 'Export Claim Details'.

## Help and Support:

If you have any technical issue, log into Service Now and raise a call by selecting the 'ICT' Service on the left hand side of the screen or alternatively us the 'Chat' function. If you are not able to access Service Now, e-mail [ICTservicedesk@cantium.solutions](mailto:ICTservicedesk@cantium.solutions) and they will raise a request on your behalf.

If you have an HR related query, log into Service Now and raise a call by selecting the 'Human Resources' Service on the left hand side of the screen or alternatively us the 'Chat' function.

