

Manager Self Service: Guidance for Self Service approver

This guide will help you use Manager Self Service to action notifications from your staff, such as approving their claims and expenses.

Please note that claims need to be approved 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.

Worklist:

When a member of your staff submits information in Self Service that requires approval, you will be sent a notification. You will also be sent an e-mail confirming the details of the notification.

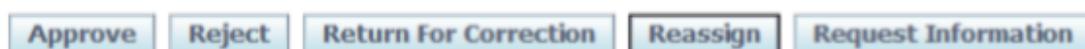
1. When you log into Self Service, you will be taken to the home page.
2. You will be able to view your 'Worklist' which shows the notifications that are awaiting your approval.
3. To open a notification, click on the blue writing under the 'Subject' column.

Note: If you need to search for any previous notifications on the home page, you can click on the 'Full List' button. You will be taken to the Worklist screen. You can use the 'View' drop down list to choose which type of notification you want to see and then click on the 'Go' button. You can also order how the notifications are displayed by clicking on the column headings, for example, 'Subject', 'Sent' or 'From'.

Notification:

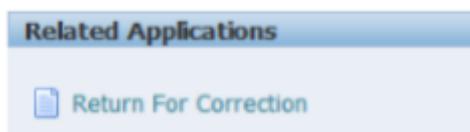
The full details of the notification will be displayed, for example the employee's claim. If the employee has added attachments, an icon will be displayed in the Attachments section, which you will need to click on to view the documents. You should review all the information prior to taking action.

At the top and bottom of the page you will have 5 options;



- **Approve** - if you agree with the details in the notification, when you click on approve the details will be automatically input onto the employee's record and the employee will receive an e-mail to confirm that you have approved it.
- **Reject** - if you reject a notification the employee will receive an e-mail confirming that you have done this, but they will be unable to amend or re-submit the details. We therefore advise that you do not reject a notification unless you are unwilling to sign off the details under any circumstances.
- **Return For Correction*** - if the details needs to be amended you can return it for correction. You should provide the reason why you are returning it in the 'Approval Comments' field and then click on 'Return for Correction'. The employee will receive an e-mail containing your comments and they can then edit and re-submit the details as necessary.
- **Reassign** - if the notification has been sent to you in error you are able to reassign it to another manager to action. You will need to select 'Reassign' and you will be taken to the 'Reassign Notification' screen. In the 'Assignee' field, search for the manager by typing in the surname first, then a percentage sign and then the first name e.g. Smith%John. You then need to select 'Transfer notification ownership'. If required, you can write a message in the 'Comments' field. Then click on the 'Submit' button and the notification will be reassigned to your chosen person.
- **Request Information** - if you are unsure of any details within the notification, you should request information before approving it. In the 'Approval Comments' field at the bottom of the notification you should write your query and then click on 'Request Information'. The employee will receive a notification with your comments, which they can reply to (but they won't be able to edit the details).

*Note: For some notifications, for example, Absence Reporting, the Return For Correction button will not be displayed with the other four buttons. It will instead be displayed towards the bottom of the screen in the 'Related Applications' section.



Once the claim has been actioned you will be taken back to your home page and if there are any other notifications listed you can action these as required. If there are no remaining notifications to action your Worklist will display the message ‘There are no notifications in this view.’

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 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.

