HR Connect Employee Self Service (ESS) Guide: Your Guide to Online Payment Claims

This guide aims to provide you with concise step-by-step instructions for using HR Connect to generate online payment claims, with specific guidance for different types of claims. These currently include:

- **Additional Payments Form** – to be used by Academic employees who are claiming for a Project Disbursement or One-Off Payment.

- **Hourly Paid (Academic)** - to be used by Academic employees who have a Guaranteed Hours or zero hour lecturer contract, e.g. University Tutors; zero hour lecturer.

- **Hourly Paid (Support Staff)** - to be used by Professional Services employees who have a Guaranteed Hours contract. e.g. Student Counsellors.

- **Overtime** – to be used by employees in Grade 2-4 roles, with advance approval by their manager if
  - extra hours which have been worked over and above the normal working week of 35 hours
  - **OR** if you are part time and you have worked your contractual hours in a week, and are claiming for working extra hours at single time up to a maximum of 35 hours.

- **Standby and Callout Payment** – to be used by eligible employees in Information Services who perform standby or callout duties during the week or at the weekend.

- **Student Experience Claim Form** – To be used by employees who have a Student Experience contract.

If you have any questions about online payment claims please contact payroll@napier.ac.uk.

Benefits of Online Payment Claims & Points to Note
- Claims can be created and maintained while carrying out work before submitting at a later date.
- A confirmation e-mail detailing the provisional cash value of your claim will be sent when it has been submitted for authorisation.
- You have visibility of the claim in HR Connect after it is submitted which will allow checking of its status. You will also receive a confirmation e-mail, once the claim has been authorised or rejected by your manager.
- The claim deadline date is always the **10th of the month** (except in December). This is the date that the form must be authorised by, not the date that the form is submitted for authorisation. You need to submit your claim prior to this date, ensuring that you allow your manager adequate time to check and approve the hours worked.
- If your claim has been submitted **and** authorised by the published online payment claims date it will be paid in that pay month. Otherwise, it will be paid in the following pay month assuming that it has been authorised by that month's cut-off date. Aside from following up with your manager you do not need to do anything else once the claim has been authorised. Please note the cut-off date cannot be overridden so **exceptions cannot be made** for late claims.
- If you have more than one position, you **must** base a claim on each specified position to ensure that the claim goes to the correct manager for authorisation.
- You can amend and resubmit claims that have been rejected.
- When work is claimed for, the correct cost code **must** be entered on the claim form. It is the responsibility of your manager to advise you of the cost center, when organising the work.
- To improve budgeting, you should ensure that your hours are claimed on a monthly basis, and not accrued over several months. If a payment claim is made **90 days after the work has been done**, this will be rejected, and you will have to contact payroll@napier.ac.uk for further instructions.

Accessing HR Connect

You will need to login to *HR Connect Employee Self Service* via quick links on the Staff intranet. To maximize security, you will need to be logged into the University network to access Self Service. If it is accessed off campus or at home, it is recommended that Virtual Desktop Services is used. For more information about working off campus please see here.

This means that payments can be submitted and/or authorised if you or your manager are out of the office.

Reporting Manager

Before proceeding with a claim, it is recommended that you check that your "Reporting Manager" is correct, as this is the person that the claim will be sent to for authorisation. See Appendix 1 for details on how to check this.

Creating Your Claim (for accessing an already created claim see Appendix 2)

Using the navigation buttons on the left hand side of the HR Connect Self Service Screen, select at the top of the HR Connect Self Service screen, select **My Pay**:
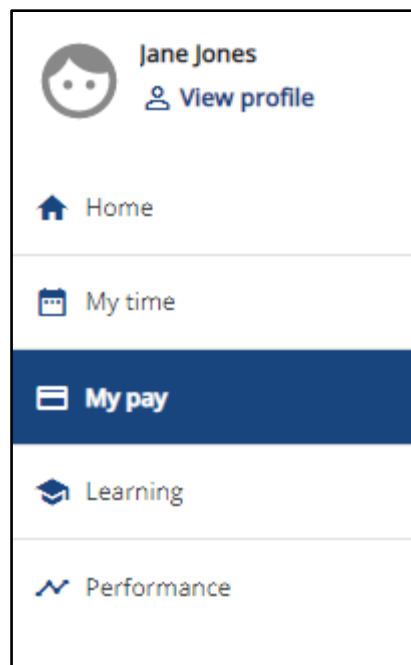
At the top of the **My Pay** screen select the **Time &** Expenses tab.

Within the **Time & Expenses** card select **'Add claim'**.

The below will appear

- **Start Date:** A claim should start with the first day of the calendar month that work was done in (e.g. the 1st), entered as DDMMYYYY or use the calendar button beside to select the date. The same claim should be used for all work undertaken within that calendar month, and a separate claim should be submitted for each calendar month.
- The **Job title field** will automatically populate. If you have more than one position, you will need to choose the position that you are claiming against from the drop-down list. This will ensure that the claim goes to the correct manager for authorisation. This should be the person who approved you to do the work.
- **Claim Template:** Select from the drop down list the appropriate **claim template**. Once you have selected the correct form type, click **New** to commence completing the form.

- The hyperlinked options below correspond to the different types of form available. Clicking on the type of form from the list will take you to a guide associated with the completion of that online form:

  - ➢ **Additional Payments Form**
  - ➢ **Hourly Paid (Academic)**
  - ➢ **Hourly Paid (Support Staff)**
  - ➢ **Overtime**
  - ➢ **Standby and Callout**
  - ➢ **Student Experience Claim Form**

Additional Payments Form (Project Disbursement and Additional Fees)

You will note that there are two pages associated with this payment claim form. If you are a **full-time** employee you must complete **Page 1;** if you are **part-time** you must complete **Page 2**.

Full-Time Employee (Page 1)

Please read **all** instructions at the top of the form before proceeding.

- Choose the correct "Element" that you are claiming for from the drop-down list. Please choose **Project Disbursement** if the budget code on your claim starts with "E" or "N", otherwise choose **Additional Fees** if the budget code on your claim starts with "D" or "R".

- Enter the date worked - entered as DDMMYYYY or use the calendar icon:

- Enter a "Description of Work" which will allow the authoriser to clearly identify what work has been carried out.

- In the "Payment Authorised by" field enter the name of the person who **authorised the work to be done before it commenced.**

- When assigning the work, your manager must confirm with you the cost code that the work is to be charged to. If you are unsure of the cost code, please seek clarification from your manager.

  - ➢ 8 digit codes must be entered as D9999-00 or D999-000 Note the uppercase D
  - ➢ 7 digit codes must be entered as xE789-00. Note the lower case "x" and upper case "E"

- Enter the start and end times of the claim in 24HR clock format e.g. 17:00 to 18:00. If there are unpaid breaks in a day then there would be more than one line input for that day.

- The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission. Please refer to relevant policy re. the time values that can be claimed.

- To add/remove a line on the claim form, click the or buttons.

- You can at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments.

- For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: Appendix 2

<u>Part-Time Employee (Page 2)</u>

- If you are a Part-Time employee and are claiming for Project Disbursement ("E" or "N" codes) or Additional Fees ("D" or "R" codes) the only difference is that you would choose "Casual Project Disbursement", "Casual Additional Fees" or "Specialist Lecturer" from the "Element" dropdown list. All other instructions still apply.

- For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: <u>Appendix 2</u>

Hourly Paid (Academic)

- Choose the correct "Element", that you are claiming for from the drop-down list.
- **Page 1** is to be used for claiming hours for Preparation, Teaching and "Other". **Page 2** is to be used for claiming hours for Marking. To move between the two pages, click on Page 1/Page 2 towards the top of the screen.
- Enter the date worked - entered as DDMMYYYY or use the calendar icon: 📅
- Enter the reason for your claim. This is a mandatory field and should be as descriptive as possible to help your manager correctly authorise the claim and for future reporting of reasons for work.
- When assigning the work, your manager must confirm the cost code that the work is to be charged to. If you are unsure of the cost code, please seek clarification from your manager.
  - ➢ 8 digit codes must be entered as D9999-00 or D999-000 (Note the uppercase D).
  - ➢ 7 digit codes must be entered as xE789-00. (Note the lower case "x" and upper case "E").
- Enter the start and end times of the claim in 24HR clock format e.g. 17:00 to 18:00. Guaranteed Hours cannot claim for unpaid breaks so if necessary you should split your claim for the same day over two lines.
- The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission. Please refer to relevant policy re the time values that can be claimed.
- To add/remove a line on the claim form, click the [+] or [−] buttons.
- You can [Save draft] at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments. Please see an example below of what your claim form may look like:

Page 1

Page 2

For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: Appendix 2

Hourly Paid (Support Staff)

- There is only one element to choose from under the "Element" field. Choose "Daily Hours Worked", this should automatically populate.

- Enter the date worked - entered as DDMMYYYY or use the calendar icon:

- Enter the reason for your claim. This is a mandatory field and should be as descriptive as possible to help your manager correctly authorise the claim and for future reporting of reasons for work.

- When assigning the work, your manager must confirm the cost code that the work is to be charged to. If you are unsure of the cost code, please seek clarification from your manager.
  - ➢ 8 digit codes must be entered as D9999-00 or D999-000 (Note the uppercase D).
  - ➢ 7 digit codes must be entered as xE789-00. (Note the lower case "x" and upper case "E").

- Enter the start and end times of the claim in 24HR clock format e.g. 17:00 to 18:00. Guaranteed Hours cannot claim for unpaid breaks so if necessary you should split your claim for the same day over two lines.

- The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission. Please refer to relevant policy re the time values that can be claimed.

- To add/remove a line on the claim form, click the or buttons.

- You can at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments. See examples on the next page of this guide.

Please see an example below of what your claim form may look like:

- For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: Appendix 2

Overtime

- Choose the correct "Element", that you are claiming for from the drop down list
  - ➢ *Overtime x 1* – paid at hourly rate based on salary on date earned.
  - ➢ *Overtime x 1.25* – paid at 1.25 times hourly rate based on salary on date earned.
  - ➢ *Overtime x 1.5* – paid at 1.5 times hourly rate based on salary on date earned

- Enter the date worked – entered as DDMMYYYY or use the calendar icon: 📅
- Enter the reason for your claim. This is a mandatory field and should be as descriptive as possible to help your manager correctly authorise your claim, and for future reporting of reasons for overtime.
- Your manager must confirm with you, in advance when agreeing overtime, whether this needs to be cross charged.
  - ➢ **Leave the costing field blank** if it is to be costed to the same place as your salary cost center e.g. not to be cross charged
  - ➢ **Include cost centre information** if it is to be cross charged to another department. The cost centre must be entered as 8 digits with the following capitalisation

    - ➢ 8 digit codes must be entered as D9999-00 or D999-000 (Note the uppercase D).
    - ➢ 7 digit codes must be entered as xE789-00. (Note the lower case "x" and upper case "E").

- Enter the start and end times of the claim in 24HR clock format e.g. 17:00 to 18:00. Overtime cannot be claimed for unpaid breaks so if necessary, you should split claims for overtime on the same day over two lines.
- The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission. Please refer to relevant policy re the time values that can be claimed.
- To add/remove a line on the claim form, click the ➕ or ➖ buttons.
- You can **Save draft** at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments.

Please see an example below of what your claim form may look like:

For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: Appendix 2

Standby and Callout Form

- Choose the correct "Element" that you are claiming for from the drop-down list.
    - *Standby x25% Weekday/Saturday* – paid at 0.25 times hourly rate based on salary as at date earned.
    - *Standby x35% Weekday/Saturday* – paid at 0.35 times hourly rate based on salary as at date earned.
    - *Callout x 1.5 Sunday/PH* – paid at 1.5 times hourly rate based on salary as at date earned.
    - *Callout x1.25 Weekday/Saturday* – paid at 1.25 times hourly rate based on salary as at date earned.
- Enter the date worked – entered as DDMMYYYY or use the calendar icon: 🗓
- Enter the reason for your claim. This is not required for standby but needs to be completed for callout. It is not shown as a mandatory field but the claim will be rejected by your manager if a reason for callout is not included.
- Costing defaults to xD710-00 and should be left as is. The format including capitalization must be consistent.
- Enter the start and end times of the claim in the 24HR clock format e.g. 17:00 to 18:00. The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission.
- To add/remove a line on the claim form, click the ➕ or ➖ buttons.
- You can **Save draft** at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments.

    Please see an example below of what your claim form may look like:

- For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: [Appendix 2](#)

Student Experience Claim Form

- Choose the correct "Element" that you are claiming for from the drop-down list. Please note that different hourly rates of pay are applicable for the different types of work.
- Enter the date worked - entered as DDMMYYYY or use the calendar icon:
- Enter the reason for your claim. This is a mandatory field and should be as descriptive as possible to help your manager correctly authorise the claim, and for future reporting of reasons for overtime.
- When assigning the work, your manager must confirm the cost code that the work is to be charged to. If you are unsure of the cost code, please seek clarification from your manager.
    - ➢ 8 digit codes must be entered as D9999-00 or D999-000 (Note the uppercase D).
    - ➢ 7 digit codes must be entered as xE789-00. (Note the lower case "x" and upper case "E").

- Enter the start and end times of the claim in 24HR clock format e.g. 17:00 to 18:00. Student Experience cannot claim for unpaid breaks so if necessary you should split a claim for the same day over two lines.
- The hours are automatically calculated from the start and end times and the total hours are shown either, after you save as draft and re-open, OR after submission. Please refer to relevant policy re the time values that can be claimed.
- To add/remove a line on the claim form, click the ➕ or ➖ buttons.
- You can **Save draft** at any time and return to the claim later if you have further claims to make for the same month or if you need to make any amendments. See examples on the next page of this guide.

Please see an example below of what your claim form may look like:
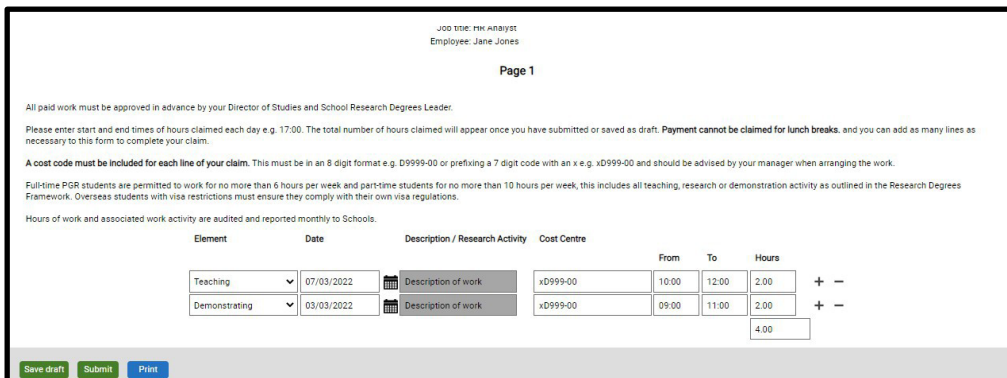

For instructions regarding how to return to a draft claim or for how to submit a claim please click on the following link: Appendix 2

Appendix 1 – Check your Reporting Manager

This is done by clicking on **View profile** at the top left-hand side of the screen and then selecting the **Employment** tab at the top of the screen.
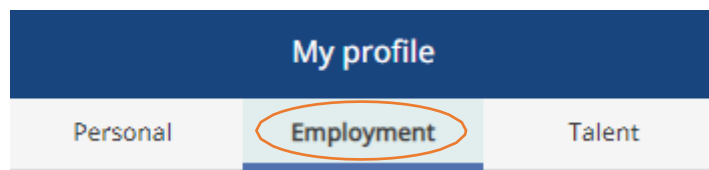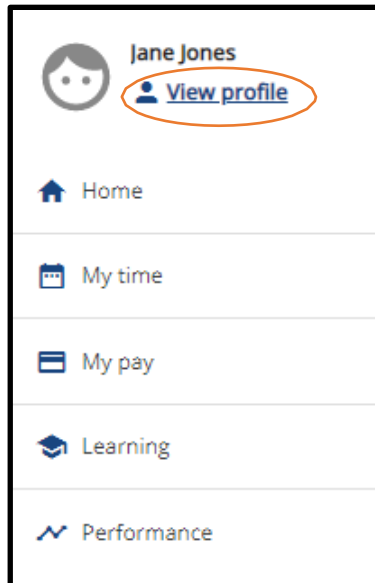
With the **My employment** card, click on your employment details.

You will be able to view who your current reporting manager is within the **Manager** section.
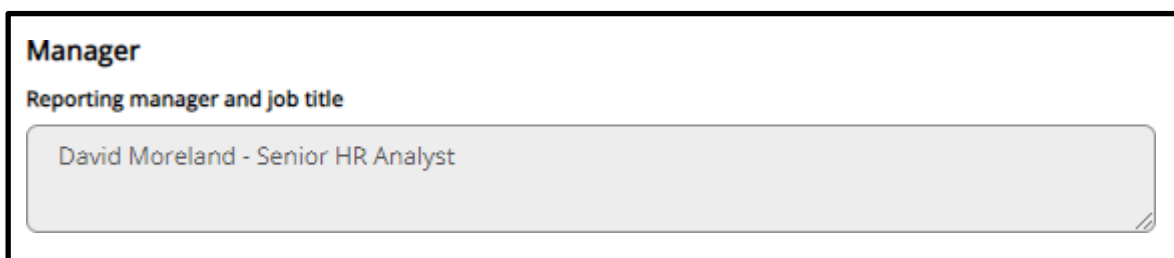
In principle, your manager will always be the person to authorise a claim. However, if your manager receives a claim that they would prefer another person (e.g. a budget holder) to authorise then your manager can redirect the request for authorisation to that person.

Appendix 2 - Return to a Draft Claim and Submitting a Claim

To return to a draft claim you should click on **My Pay** on the left-hand side of the screen and the on the **Time & Expenses** tab at the top of the page. Alternatively on the home page, within the **Time & Expenses** card you can click on **View all time & expenses.**
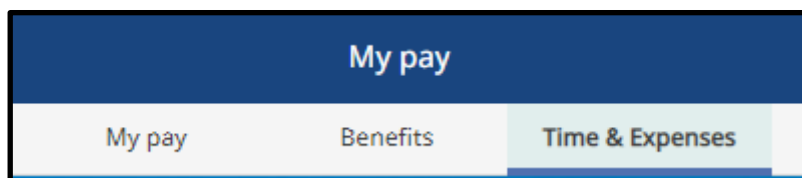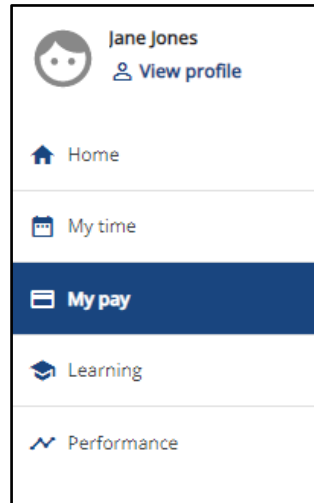
Within the **Time &** Expenses card you will be able to see a list of your claims. Any draft claims will be **Provisional.** To enter the draft claim, click on the details as shown below.
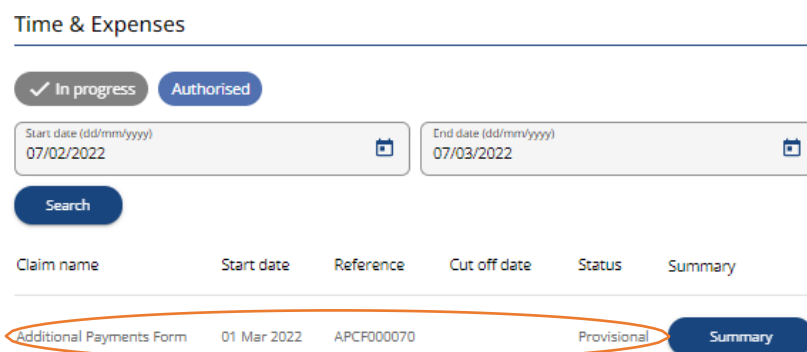
If you click on the summary link, you will see this - this includes **provisional** cash values and a **summary** of hours per element type. The values are provisional as it may be affected by other variables in the final pay run (e.g. a pay award or a pay scale increment).

Time & Expenses claim summary: Additional Payments Form

Time and expenses claim reference
APCF000070

Start date
01/03/2022

Name
Jane Jones

HR Analyst Position

Payroll
Monthly

Element	Type	Time/ Units/ Miles	Cash amount
Total			

These cash values are provisional. If you would like to receive e-payslips, please sign up via HR Connect Self Service.

When you are ready to send the claim to your Manager for authorisation click on the claim form.

Time & Expenses claim entry: Additional Payments Form

Job title: HR Analyst
Employee: Jane Jones
Reference: APCF000070
Payroll: Monthly

Page 1 | Page 2

This page is for full-time staff only, if you are part-time, please complete Page 2. All additional payments **must** be approved in advance by the Dean of School/Director of Service and submitted via this form for approval. Claims must be submitted in a timely manner, and no later than the month following the completion of the work.

By submitting a claim you are confirming that authorisation has been given and that this work is over and above your contracted hours.

A full cost code must be included for each line of your claim. This must be in an 8 digit format e.g. D9999-00 or prefixing a 7 digit code with an x e.g. xD999-00 and you should be advised of this, in advance of completing the work. **Project Disbursement** payments should always have a cost centre beginning with E or N, all other payment cost centre should begin with D or R.

If you are a Tier 4 Visa holder you are limited to the number of hours you may work in any given week, by submitting this claim you are confirming your compliance with your visa regulations.

Element	Date	Description of Work	Work Authorised By	Budget code	Payment	
Project Disbursement ▾	07/03/2022	project work	john smith	xD999-00	25.00	+ −
					25.00	

Save draft   Delete   Submit   Print

Then choose **Submit**. You will see this submission summary. This clarifies next steps. If you submit at this point you are confirming that your claim is in line with the relevant Policy. If you have already missed the cut off date you will be notified at this point. You need to choose **Submit** once more at the bottom of the screen.

Time & Expenses claim submission:

Claim template
Additional Payments Form

Job title
HR Analyst

Time and expenses claim reference
APCF000070

Payroll
Monthly

Start date
01/03/2022

Cut off date
10/01/2022 - This claim will not now be paid until 28/02/2022.

Comments
Your claim is now ready to submit. Please click the green submit button below to send this to your manager for approval.

Submit

Your Manager will receive an e-mail notification to log into **People Manager** to authorise the claim. You will also receive this email confirming submission at this point. Note that this includes **provisional gross pay** values not actuals. The values are provisional as it may be affected by other variables in the final pay run (e.g. a pay award or a pay scale increment).
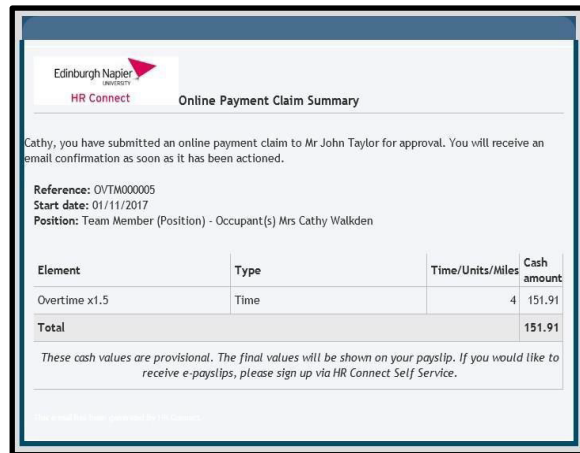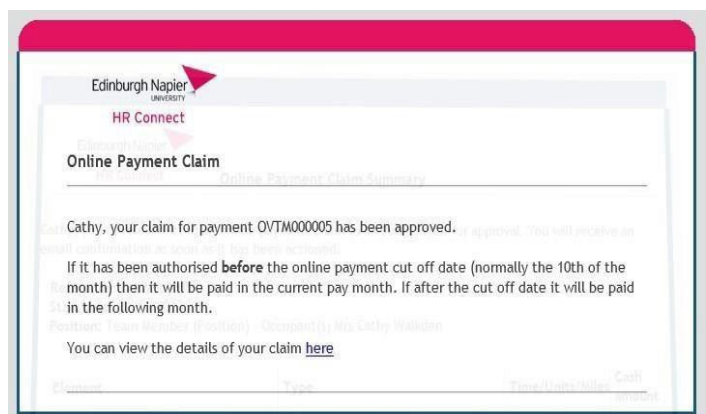

If you do not receive this email within 60 minutes please contact payroll@napier.ac.uk as it may indicate a technical issue. Likewise if the manager name is not included you should contact the team.

In HR Connect Self Service you will see this – note the change to the status to say **Awaiting Authorisation**
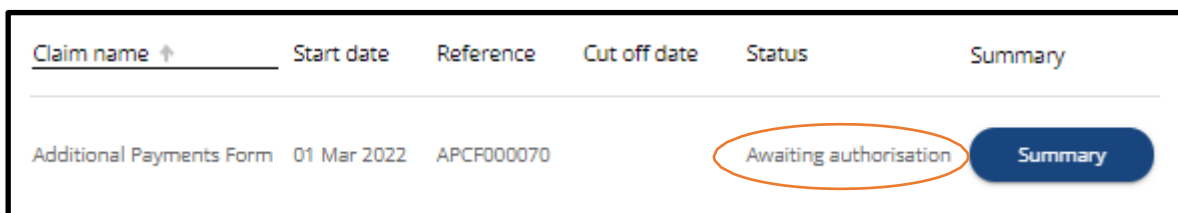
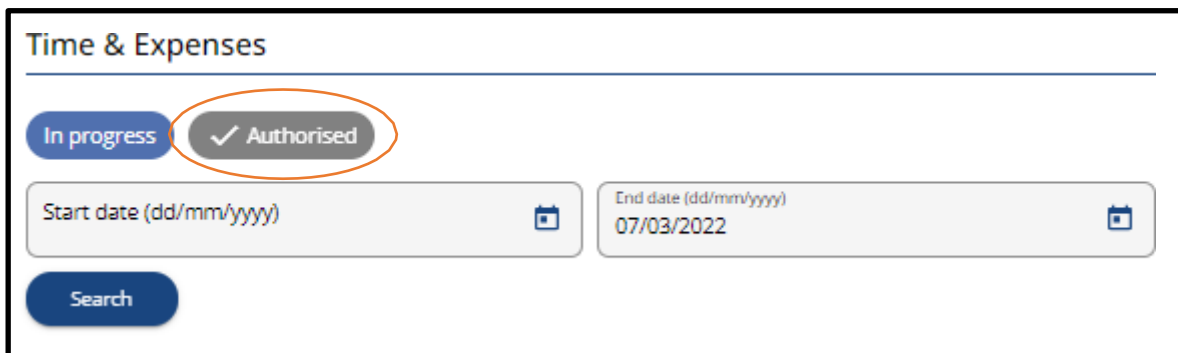After authorisation you will receive this:

Your manager cannot adjust a claim on your behalf, even if it is only the cost code information that is wrong. If your claim is not authorised, you will receive an email in which your manager should include a note about why it was rejected and/or discuss this with you. Your claim is still available for you to open, amend and resubmit.

You are also able to cancel a claim at any point that has not been submitted or authorised.

You can search for previously authorised claims by click on the search button and using the calendar to search between two dates (ensure that the **Authorised** button is ticked). If you leave the date field blank, all authorised claims will be listed.

Time & Expenses

In progress | ✓ Authorised

Start date (dd/mm/yyyy)

End date (dd/mm/yyyy)
07/03/2022

Search

Audit

After the online payment cut off date of the 10th of the month, an audit report will be sent to the senior management team for your area to perform checks and feedback to Payroll if there are any issues prior to payroll being finalised for the month.