

## HR Connect People Manager Guide: Managing Online Payment Claims

This guide aims to provide you with concise step-by-step instructions for using HR Connect to *authorise* online payment 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 us at [payroll@napier.ac.uk](mailto:payroll@napier.ac.uk)

### Benefits of Online Payment Claims & Points to Note

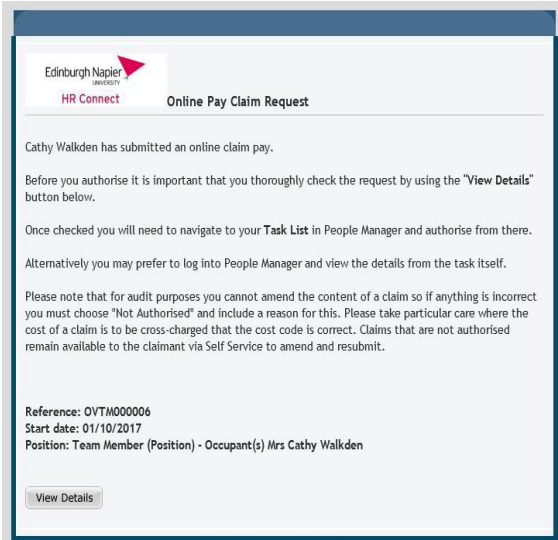
- Your team can create claims and maintain their claim forms as they work submitting it to you for authorisation.
- You will be notified by email once the claim has been submitted and can view the full content of the claim before authorising it.
- You will be able to see your employee's current and historical claims along with the status of the claims.
- Multi position staff can select the appropriate role and hence the appropriate manager to authorise the claim.
- The claim deadline date is always the **10<sup>th</sup> 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 will receive reminders to authorise claims if outstanding after 3 days (as will the employee, just in case there is an issue with your availability). This is designed to ensure payment is made in a timely manner wherever possible.
- You can arrange for claims to be authorised in your absence by re-directing tasks through [HR Connect](#).
- In order to meet audit requirements, we have implemented a process whereby only the employee can create or modify a claim form and their manager can only accept or reject. A manager cannot create or modify as part of the process.
- Any claims over 90 days will be rejected and you should contact [payroll@napier.ac.uk](mailto:payroll@napier.ac.uk) for guidance.
- There is a monthly audit process that enables checking of claims by senior team prior to payment. This includes the ability to check and feedback on costing issues and fix at source if needs be.

### Accessing HR Connect

You will need to login to [HR Connect People Manager](#) via [quicklinks](#) on the Staff intranet. To maximise 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](#).

## Authorisation of Claims

You will receive an email notification of the claim.



Edinburgh Napier  
UNIVERSITY  
HR Connect Online Pay Claim Request

Cathy Walkden has submitted an online claim pay.

Before you authorise it is important that you thoroughly check the request by using the "View Details" button below.

Once checked you will need to navigate to your **Task List** in People Manager and authorise from there.

Alternatively you may prefer to log into People Manager and view the details from the task itself.

Please note that for audit purposes you cannot amend the content of a claim so if anything is incorrect you must choose "Not Authorised" and include a reason for this. Please take particular care where the cost of a claim is to be cross-charged that the cost code is correct. Claims that are not authorised remain available to the claimant via Self Service to amend and resubmit.

Reference: OVTM000006  
Start date: 01/10/2017  
Position: Team Member (Position) - Occupant(s) Mrs Cathy Walkden

[View Details](#)

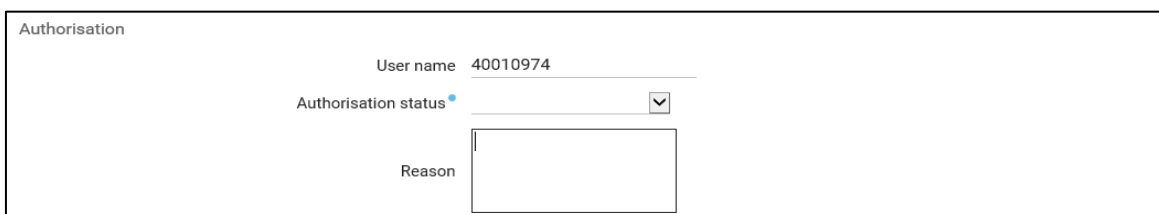
It is important to ensure that you have viewed and checked the detail of the claim before approving. You need to check the dates that the work was completed are accurate; the correct/payment has been claimed (at the appropriate rate) and the cost code is correct. Cost codes must be entered as follows:

- 8 digit codes must be entered like this e.g. D9999-00. Note the uppercase D
- 7 digit codes must be entered like this e.g. xE789-00. Note the lower case "x" and upper case "E"

The view details link will take you directly to the claim in People Manager. You will find it helpful to note the claim reference numbers at this point, if you are dealing with multiple requests.

The link takes you to the complete detail of the claim, from here you can review to ensure everything is correct.

To approve, you need to update the authorisation section:



Authorisation

User name 40010974

Authorisation status

Reason

If the claim has to be approved, select Authorised from the dropdown list and click Save. The employee will receive a notification that their claim has been authorised.

If you are unable to authorise due to an error or other reason, select not authorised from the dropdown list, input a message so that the employee knows why you are unable to authorise, then click Save. The employee will receive an email notification and will be able to amend the claim before re-submitting.

Please note, the claim authorisation deadline date is always the **10<sup>th</sup> of the month** (except in December).

## Reminders

You will receive a reminder 3 working days after the claim has been submitted if it has not been authorised. Your manager will receive a notification at the same time.

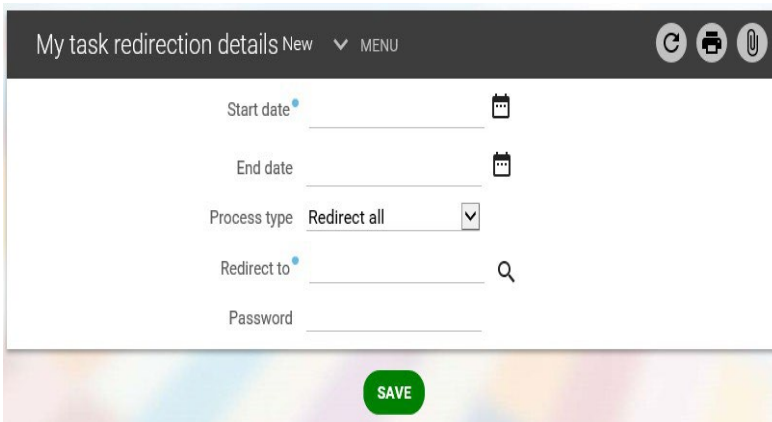
If you are the manager of a manager who has not actioned the task you should establish why it has not been authorised. If there is an issue, for instance unforeseen absence, you will need to liaise with HR Services to have the task redirected to you for authorisation as well as set up a task redirection as appropriate to prevent future recurrences.

### Out of Office

If you are going to be out of office and unable to authorise claims by the 10<sup>th</sup>, you must redirect your tasks to your manager so that they can be actioned in your absence. This is important to ensure that the employee receives payment for completed work.

To apply a redirection, click on Task Redirection, then select **New Task Redirection**.

This will open the following People Manager page:



The screenshot shows a web form titled "My task redirection details" with a "New" indicator and a "MENU" dropdown. The form contains the following fields:

- Start date: A text input field with a calendar icon to its right.
- End date: A text input field with a calendar icon to its right.
- Process type: A dropdown menu currently showing "Redirect all".
- Redirect to: A text input field with a magnifying glass search icon to its right.
- Password: A text input field.

At the bottom of the form is a prominent green "SAVE" button.

1. Input the start and end date of the task redirection
2. Change process type to **Redirect all**
3. Click the search icon to locate your manager (you can search by Surname)
4. Input your password

Once the above has been completed, click Save to store this information.

The redirection will be applied until the end date, or if opened ended until you remove it.

### When Will The Claim Be Paid?

If you have received and authorised by the published online payment claims date (normally the 10<sup>th</sup> of the month), 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.

You do not need to do anything else to ensure payment is made following authorisation.

### Audit

After the online payment cut-off date 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.

### Viewing Historical Claims

You can view historical claims via [People Manager](#). Navigate to the person's record via my team drop down > select the persons record>select online pay claims link.