YourHR Self-Service System User Guide

Submit Time and Expenses Claims



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1 Introduction

1.1 General

You can claim additional hours and expenses from the short cut on the Home screen or by selecting the Time and Expenses tab under the My Pay menu option.





Note: This document is updated regularly. Always refer to the latest version available from the User Guide section of the YourHR news carousel.

2 General Guidance

•	If a field is marked with a blue dot, it means it is a required field. The page will not save unless you complete all fields marked with a blue dot.
…	If a field has a small calendar button next to it, click this to enter the relevant date.
~	This icon shows that there is a picklist from which you should make your selection. You cannot add data to the picklist.
Save	Select to submit a record or booking.
+ Add	Action button will open a new blank page to enable you to enter details of a new request / record. + Add will be suffixed by the name of the function displayed within.

If you do not use the YourHR system for 60 minutes, the system will time out for security reasons.



Note: Do not use web browser navigation buttons.

3 Frequently Asked Questions

Click here to view frequently asked questions relating to the YourHR system.

4 Time & Expenses

This tile provides an overview of the status of your claims which will be either:

Authorised	Your claim has been authorised by your manager.
Awaiting Authorisation	Your claim has been submitted to your manager for them to review and authorise/reject.
Provisional	You have started and saved a claim template but have not submitted it.
Errors	You have tried to submit a claim, but errors exist on the claim, and it has not been successfully submitted.

Tim	ne & expenses View all ti	ime & expenses >
0	Authorised	
1	Awaiting authorisation	X
1	Provisional	Β
1	Error	0
	+ Add claim	

4.1 View All Time & Expenses

View the Time & Expenses screen by selecting the View All Time & Expenses button.



This will display a list of your outstanding claims, including claims awaiting authorisation, provisional claims and claims that contain errors. It also displays any Saved Journeys which you can use if you make the same trip on a regular basis.



To view details of any of the claims on the Time & Expenses page, select the required claim to display information previously entered. You can edit or correct any provisional claims or those containing errors and then submit these once complete.

You can filter the page to only show authorised claims and then select the relevant claim from the list.

5 Add Claim

Select the Add Claim button to create a new Time & Expenses claim.



Enter the Start Date of the claim (this is the date you worked the additional hours or the date the expense occurred). You cannot add any claim details for a date before the Start Date of your claim as it will error.

Select the Job Title (position) to which the claim relates. Most people only have one position but if you have multiple positions, select the position that relates to the claim. If you need to make claims against multiple positions, you need to submit separate claims for each position.

Select the appropriate option from the Claim Template drop-down list and click New to create your claim.

Time & Expenses claim entry: New	
Start date (required)	
Job title (required) Business Support Officer - 10499540001 🗸	
Claim template (required)	
Please choose 🗸	
	New

5.1 Additional Payment Claim

The claim template is split into multiple pages, each relating to a different type of additional payment. The purpose of each page is explained on screen.

Select the relevant emboldened page number underneath the Job Title and Employee information. You can submit a claim for multiple types of additional payment on the same claim form.

			Job title:	Rusiness Support Officer					10
		_	Employee:	Tess Smith					
			Page 1 Page 2 Page 3	∣Page 4∣Page 5∣Page	6 Page 7 Page 8				I.
			Additional Payment	Claim - Page 1					
			Page 1 - Non-Contractual Ho	urs and Enhancements	Page 5 - Registrars				I.
			Page 2 - Contractual Hours a	and Enhancements	Page 6 - Temporary U	ograde			
			Page 3 - Schools and Youth	Workers	Page 7 - Cash Paymer	nts			
			Page 4 - Streetpride Call Out		Page 8 - Other Payme	nts			ł
Element	Date	Reason	Start Time	Finish Time	Cost Code (Optional)	Hourly Rate Override (O	otional) Hours		1
	~	#						+ -	

To successfully complete a claim you will need to select an Element and complete the associated mandatory fields (coloured in grey). You may also need to fill in some of the non-mandatory fields to ensure correct payment.

Below is a list of all the possible fields you may need to complete for your claim and what to enter in each field:

Element	Select the type of additional payment to be claimed (e.g. Additional Hours).
Date	Enter the date the additional payment was worked.
Reason	Enter the reason for the additional payment.
Start Time	Enter the start time of the hours worked.
Finish Time	Enter the finish time of the hours worked.
Cost Code (Optional)	Your claim will automatically be costed to the cost code associated with your position. If the claim needs to be costed to another department, enter the code in this field. Your manager or other team manager will provide you with the cost centre.
Hourly Rate Override (Optional)	If you should be paid a different hourly rate for this additional payment, enter the hourly rate payable. This needs to be in decimal format with no currency symbol.
Hours	Enter the number of hours worked.
Hours/Sessions	Enter the number of hours or sessions worked. Check with your manager if you are unsure.
Sessions	Enter the number of sessions worked.
Acting Up Rate	Enter the hourly acting up rate for the additional hours. This needs to be in decimal format with no
	currency symbol.

Once complete, you can either select the Save Draft button to create a Provisional claim to submit later or click the Submit button to submit the claim to your manager for authorisation now.

If you select the Submit button, this will take you to a new page which shows an overview of the claim and when it will be paid. Enter your password in the Password box and click Submit to initiate the authorisation process.

Back to Dashboard		
Changes have been saved.		
Time & Expenses claim submission:		
ilaim template IMBC - Additional Payments		
lob title Business Support Officer		
ime and expenses claim reference IMBC0ADD0000023476		
^a ayroll MBC Dirc PD 18th		
tart date 12/02/2022		
tut off date 15/02/2022 - This claim will not now be paid Intil 18/03/2022.		
Comments		
e my war ons is a ube and conect camin. assword + Receipt attachments		
Submit		

After submitting your claim, you will be taken back to the YourHR Home page.

5.2 Mileage & Expenses Claim

The claim template is split into multiple pages, each relating to a different type of mileage or expense. The purpose of each page is explained on screen.

Select the relevant emboldened page number underneath the Job Title and Employee information. You can submit a claim for multiple types of mileage or expense on the same form.

Time & Expenses claim entry: (New)							•
		Ja Emp	ob title: Busines: ployee: Tess Sm	s Support Officer ith			i.
		Page 1 Pa	age 2 Page	3 Page 4 Page 5	5 Page 6		
		Mileage & F	Expense Cla	aim - Page 1			
	Page 1 - Mileage Claims				Page 4 - Highways	Delivery	
		Page 2 - Saved Journeys			Page 5 - Phone Expenses Page 6 - Other Expenses	enses	
		Page 3 - Travel E	xpenses			inses	
							L
			Vehicle	Scheme			
	and an opposite from the		YR22 TST 🗸	Casual - RMBC 🗸			
	Journey Date	Miles claimed	Passengers	Journey Details	Fuel Receipt Number	0 + -	
							*

To successfully complete a claim you will need to select an Element and complete the associated mandatory fields (coloured in grey). You may also need to fill in some of the non-mandatory fields to ensure correct payment.

Below is a list of all the possible fields you may need to complete for your claim and what to enter in each field:

Element	Select the mileage or expense to be paid (e.g. Subsistence).
Date	Enter the date of the journey or the date the expense occurred.
Journey Date	Enter the date the journey took place
Miles Claimed	Enter the number of miles to be claimed.
Reason For Journey	Enter the reason you are claiming expenses for the journey.
Fuel Receipt Number	Enter the fuel receipt number for fuel purchased for the journey.
Passengers	If your organisation pays for passenger mileage, enter the number of passengers that were with you on the journey.
Journey Details	Enter the details of the journey, as agreed with your manager.
Journey	Select the saved journey this claim relates to from the drop- down list.

Receipt Number	Enter the receipt number for the travel expense you are claiming for.
Detail Of Expense	Enter specific details for the expense you are claiming.
Amount	Enter the cash amount to be paid.
Details	Enter specific details for the travel reimbursement you are claiming for.
Days/Miles	Enter the number of days or miles to be claimed. Check with your manager if you are unsure.

Once complete, you can either select the Save Draft button to create a Provisional claim to submit later or click the Submit button to submit the claim to your manager for authorisation now.

Selecting the Submit button will take you to a new page which shows an overview of the claim and when it will be paid. To add receipts to your claim, select the plus icon next to Receipt Attachments to open the drop-down. Select the Receipt Type from the Receipt Type drop-down list and use the Attach Receipt option to select a file to upload.

-	
Changes have been saved.	
ne & Expenses claim submission:	
im template IBC - Mileage & Expenses	
vitile siness Support Officer	
ie and expenses claim reference IBC0EXP0000022127	
roll BC Dire PD 18th	
rt date /02/2022	
off date 02/2022 - This claim will not now be paid until 03/2022.	
nments sase ensure that you have attached your receipts fore submitting the claim.	
browerd	
Receipt attachments	
eneral File	
ach receipt	
Choose File Fuel receipt.PNG	
submit	

Enter your password in the Password box and click Submit to initiate the authorisation process.

< Back to Dashboard		
Changes have been saved.	 	
Time & Expenses claim submission:		
Claim template RMBC - Mileage & Expenses		
Job title Business Support Officer		
Time and expenses claim reference RMBC0EXP0000022127		
Payroll RMBC Dirc PD 18th		
Start date 01/02/2022		
Cut off date 05/02/2022 - This claim will not now be paid until 18/03/2022.		
Comments Please ensure that you have attached your receipts before submitting the claim		
Password		
+ Receipt attachments		
Submit		

After you have submitted your claim, you will be taken back to the YourHR Home page.

6 Saved Journeys

Saved Journeys allows you to create and save the details of a journey that you make on a regular basis. It is possible to have up to 20 Saved Journeys.

To add a Saved Journey, click the Add Saved Journey button and in future you can select the journey on Page 2 of the Mileage & Expenses claim template instead of manually entering the details on Page 1 each time you need to claim for the journey.

	Active status	
Journey name	Active	-
Search		
	No personalised journey details have been added yet	
[

Clicking the Add Saved Journey button will open the Saved Journey Detail page. The fields on the page and details of what to enter are listed below:

Journey Name	Enter a name for the journey so this will appear in the Saved Journeys drop-down list.
Journey Type	Select Journey Type from the drop-down list.
Miles Claimed	Enter the number of miles to be claimed for this journey.
Active	Tick the box to add the entry to your list of available Saved Journeys.
From	Enter the start location of the journey.
То	Enter the end location of the journey.
Comments	Add any comments you think will be useful.

< Back to Time & Expenses	
Saved journey detail	
*Journey name (required)	
Riverside to Wentworth	
*Journey type (required)	
Regular Journey ×	-
* Miles claimed (required)	
2	
✓ Active	
From	
Riverside House - Rotherham	
То	
Wentworth	
Comments 1	
Comments 2	
Comments 3	
Comments 4	
Comments 5	
Save Cancel	_

Once completed, Save the page and you will get confirmation that the journey has been saved and how many of your Saved Journey slots have been used.

Saved iournev detail		
i Changes have been saved.		

The journey will now be visible on the Saved Journeys tile.

Journey name Search	Active status Active	~
Journey name 🕈	Active	
Riverside to Wentworth	Yes	
+ Add saved journey		

7 Change History

Date Revised	Date Approved	Summary of Changes	Author
	17/02/2022	Initial document creation	Elliott Carter