ManageHR

Self-Service System User Guide

Manage Employee Time and Expenses

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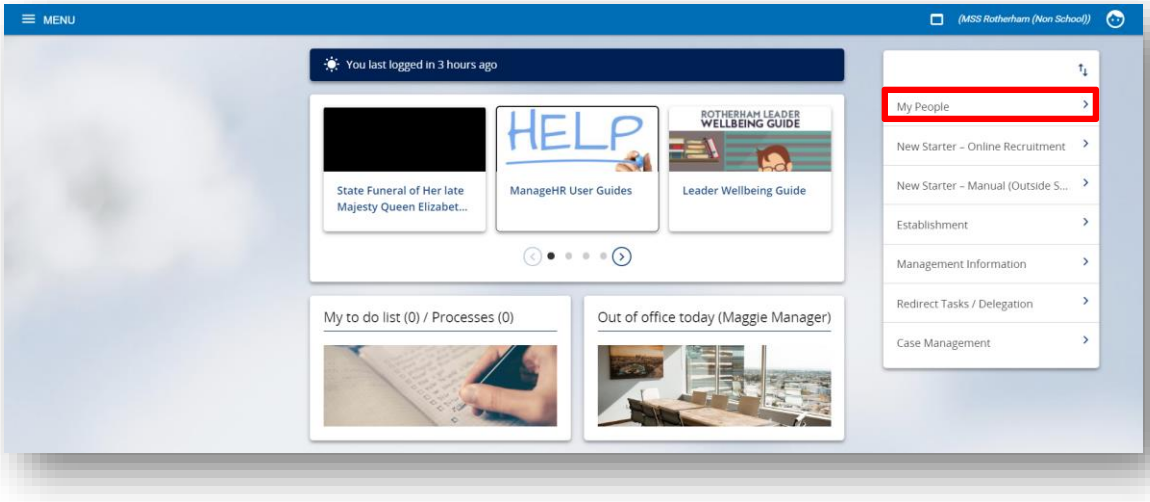
1 Introduction

1.1 General

To enable you to process a Time & Expenses claim on behalf of an employee you can access the employee's record via 'My People' in the 'Useful Links' section on the top right-hand side of the ManageHR home page.

This should be used where an employee is unable to input their own claim through YourHR, and as their manager you should have discussed the work undertaken with the employee to prevent duplication, inform the employee that you will input the claim details and authorise the claim in preparation for payment on the next available payroll cycle.



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 red asterisk, it means it is a required field and the page will not save correctly unless all fields marked with a red asterisk have been completed.
	If a field has a small calendar button next to it, then this should be clicked to enter the relevant date. It will not be possible to enter a date directly into the field.
	If a field has an arrow button at the side, then it will contain a picklist from which you should make your selection. It will not be possible to enter data in the picklist.
	Where a cloud icon is visible, it means that the information displayed is inherited from the setup of the post of the organisation which it is attached to.
	To move through the new starter process, select the right arrow at the top right-hand side of the window. Click the left arrow to view previously completed windows.

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

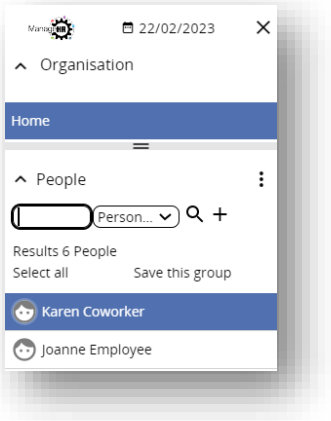
Note: Do not use web browser navigation buttons.

3 Frequently Asked Questions

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

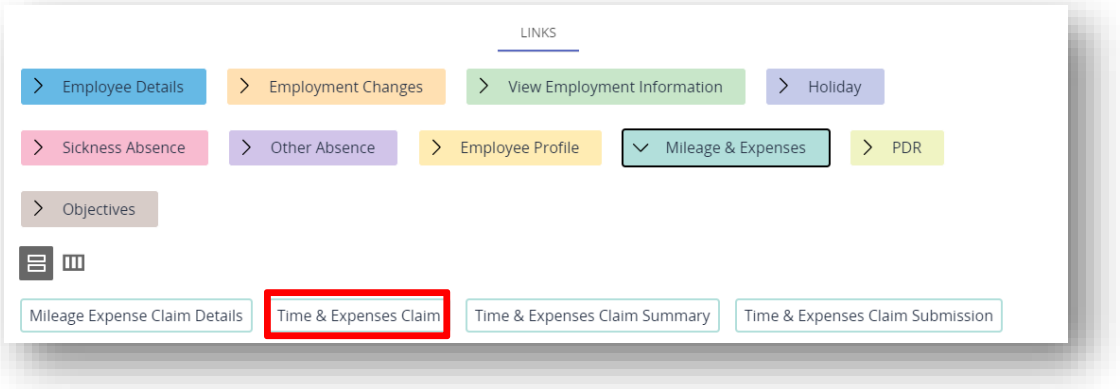
4 Navigating to the Time & Expenses Section

Once the ‘My People’ option has been selected from the ‘Useful Links’ section on the ManageHR home page, the system will display the list of all direct reportees in the information panel. Where the employee you are entering a claim for is not a direct reportee, you can search for the person by using the search field.

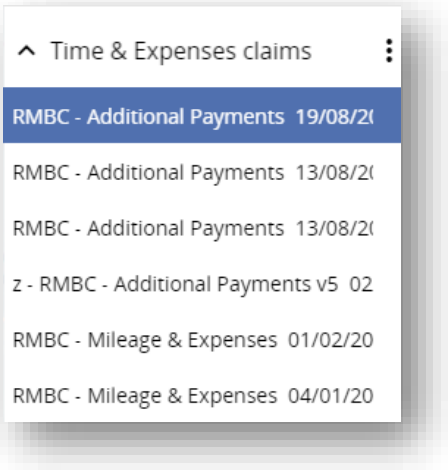


Selecting an employee will then display the menu ‘LINKS’ in the centre of the page.

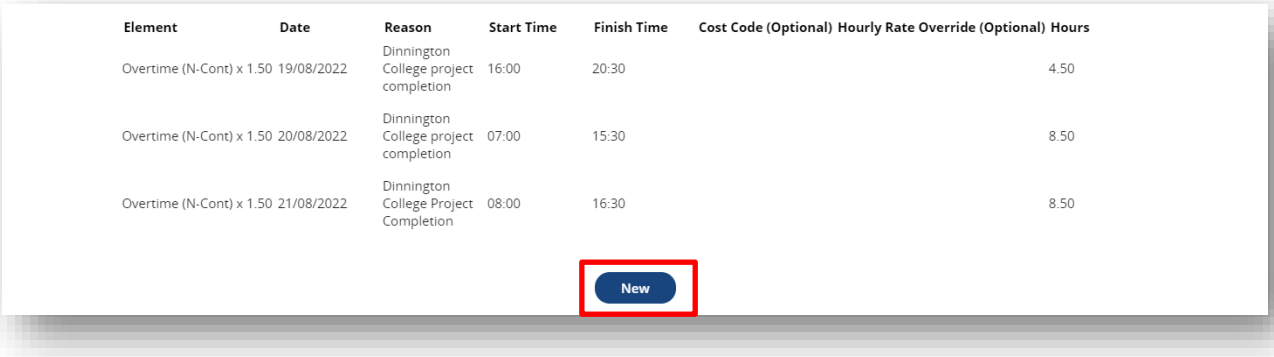
Select the ‘Mileage & Expenses’ button in the ‘LINKS’ section at the bottom of the page, then select ‘Time & Expenses Claim’ as detailed below:



Previous claims will be displayed on the left-hand side menu and details of the latest claim will automatically display on the main page as shown below.



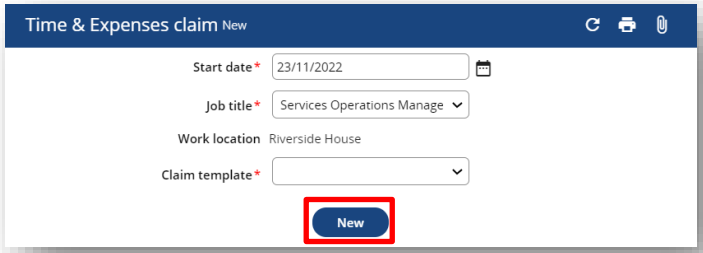
To start a new claim, click ‘New’. If no previous claims have been made this button can easily be located in the centre of the main screen. Alternativley if details of a claim are being displayed, scroll to the very bottom of the screen to find the ‘New’button.



5 How to process a Time & Expenses Claim

5.1 Step 1 – Beginning the Claim

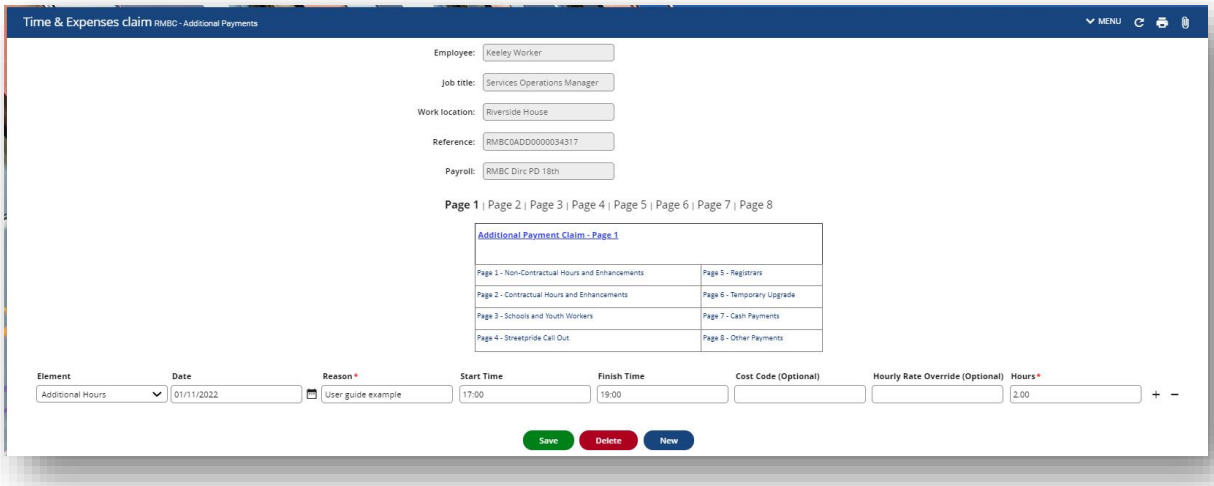
To generate a claim, complete the fields on the Time & Expenses claim’ page and click New.



Start date	Enter the date the claim begins from, not the current date. You will not be able to claim anything before the start date. E.g., If the current date is 01/07/2022 and you enter this as the start date and then try to claim overtime for 30/06/2022 the claim form will error.
Job title	Select the job title that the claim is to be made against.
Work location	This field is automatically populated by the system.
Claim template	Select an option from the drop-down list, for most people this will be ‘Additional Payments’ or ‘Mileage & Expenses’.

5.2 Step 2 - Claim Details

The claim form has different pages dependant on the type of claim template you selected, by selecting the page number the claim will switch to the different claim entry screen e.g., Page 1 ‘Additional Payment Claim’ and Page 2 ‘Expense Claim’.



- Select an ‘Element’ type from the drop-down list, this relates to the rate of pay that the claim is to be paid at.
- Enter the ‘Date’ when the work was undertaken.
- Enter the ‘Reason’ why the work was undertaken.

- Enter the ‘Start Time’, using the 24hour clock e.g. 18:00.
- Enter a ‘Finish Time’, using the 24hour clock e.g. 18:00.
- ‘Cost Code’ is optional, where details are not entered, these will default to the one related to the selected job contract.
- ‘Hourly Rate Override’ is again optional and is to be used as required if any different rate has been agreed that does not appear in the ‘Element’ type dropdown. Enter any rate in decimal amounts only (e.g.,10.35), do not enter a £ sign asthis will cause errors when submitting your claim.
- Enter the ’Total hours to be claimed’ in Hours, figures entered should be indecimal amounts only (e.g., 1.5 - one and a half hours).
- To add extra lines, select the ‘+’ at the end of the line.

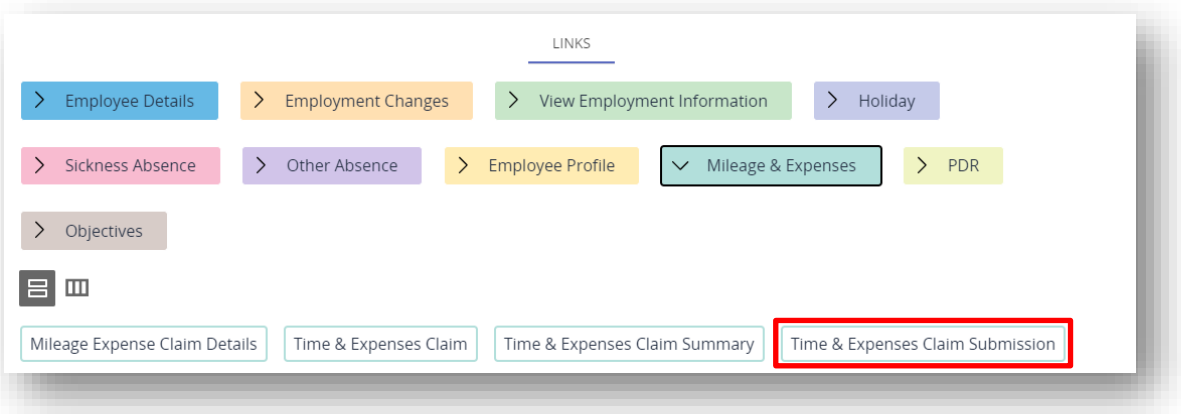
Once complete click the green Save button, the claim will then appear in the black information panel to the left of the screen with a status of Provisional.

Note: The start time and finish time should be a 24-hour clock and the units where hours should be decimal, for example, 30 minutes will be entered as 0.5.

6 Authorising a Time & Expenses Claim

6.1 Navigating to the Time & Expenses Claim Submission

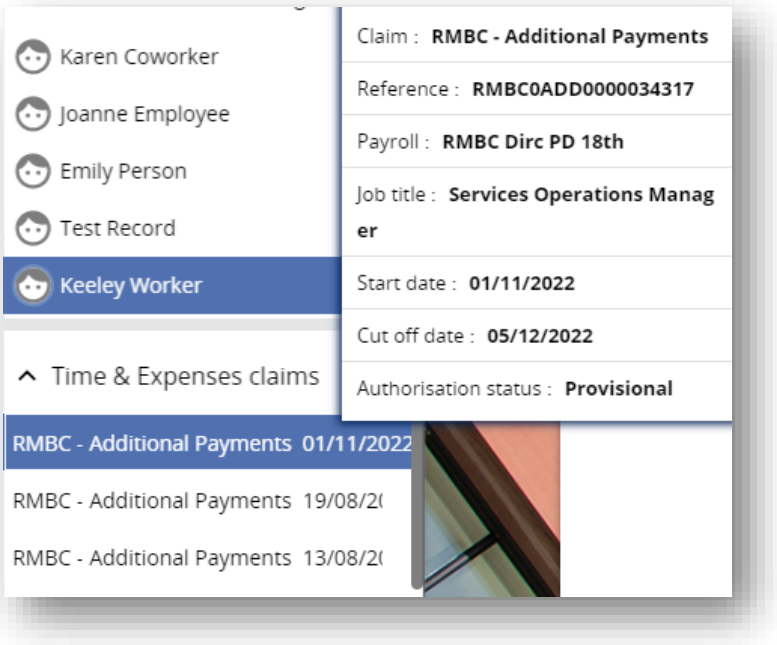
Choose the employee and open the ‘Mileage & Expenses menu and select ‘Time & Expenses Claim Submission’.



6.2 Selecting the Claim to be Authorised

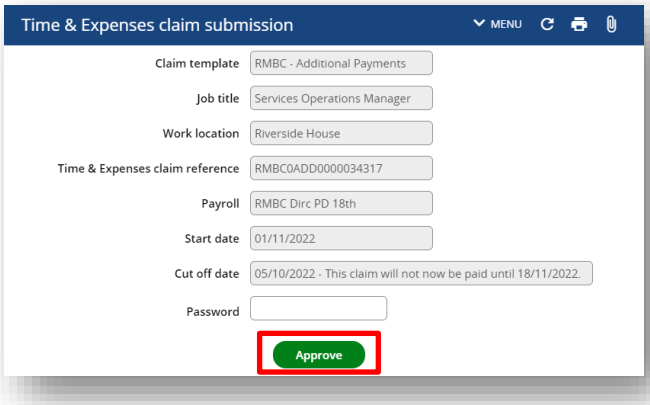
The employee’s claims will show in the information panel to the left of the screen, by hovering over the claim a pop-up box will become visible, showing the authorisation status of a claim.

Select the ‘Authorisation status’ - ‘Provisional’ claim that you want to authorise.



6.3 Authorising the Claim

The selected claim will show in the 'Time & Expenses claim submission' screen, where you will need to enter the password that you use to access ManageHR and select 'Approve'.

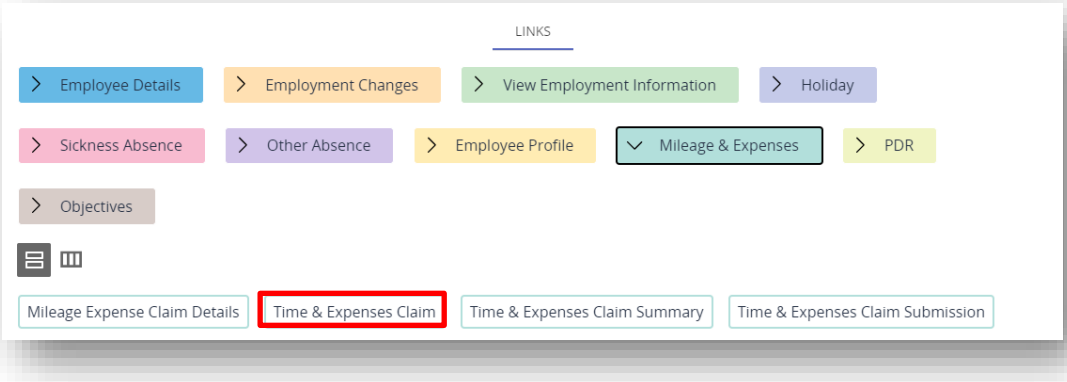


Note: By hovering back over the claim in the black information panel the claim status will have changed to 'Authorised' and will be paid on the next available payrollrun.

7 Searching for Previous Time & Expenses Claims and Claim Summaries

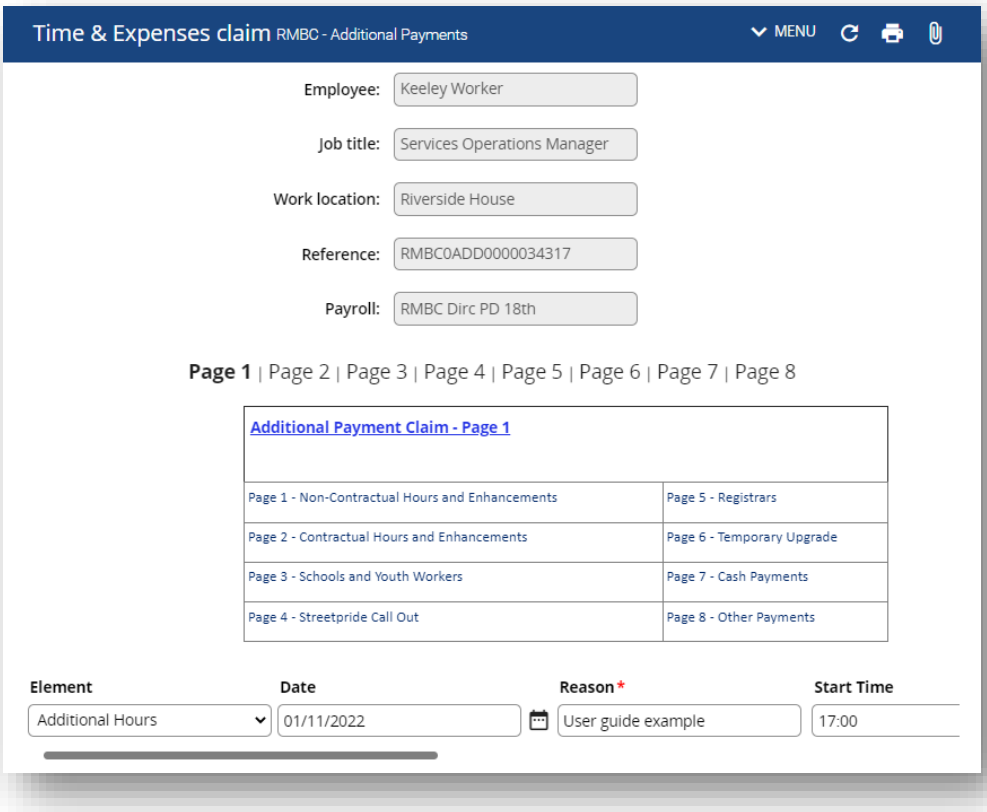
7.1 Navigating to View all Previous Time & Expenses Claims.

Choose the employee and open the ‘Mileage & Expenses’ menu and select ‘Time & Expenses Claim’.



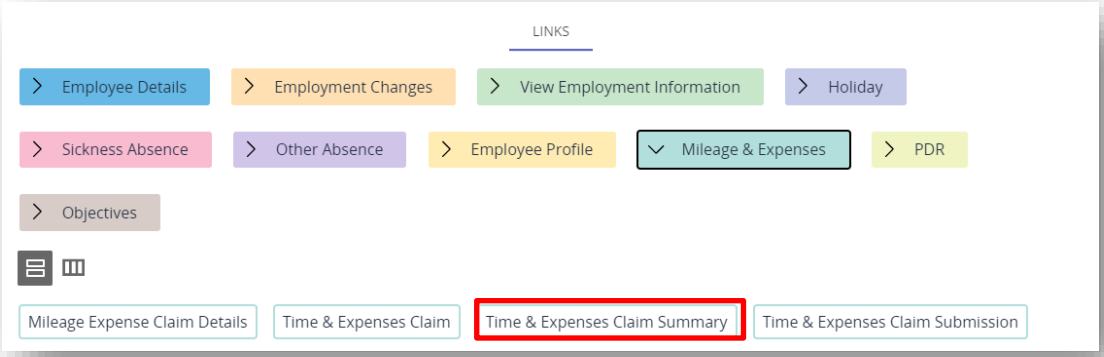
7.2 Viewing Claim Details

All an employee’s current and previous claims will show in the information panel to the left of the screen, by clicking on a claim, the ‘Time & Expenses claim’ page will display on the main screen. The detail of the claim will be visible for review.



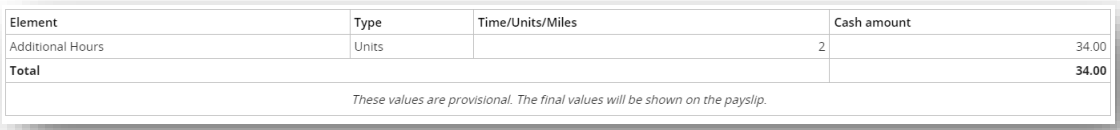
7.3 Navigating to View all Previous Time & Expenses Claim Summaries

Choose the employee and open the ‘Mileage & Expenses’ menu and select ‘Time & Expenses Claim Summary’.



7.4 Viewing all Claims

All an employee’s current and previous claims will show in the information panel to the left of the screen, by clicking on a claim, a summary of details will display on the main screen, including what the ‘Cash amount’ equates to.



Element	Type	Time/Units/Miles	Cash amount
Additional Hours	Units	2	34.00
Total			**34.00**

These values are provisional. The final values will be shown on the payslip.

8 Change History

Date Revised	Date Approved	Summary of Changes	Author
		Initial document creation	Steven Brooke
16/01/2023	24/02/2023	Quality Review (Grammar, spelling, context, consistency)/ Approval	Chris Mellor/Shirley Henderson