

MyView Dashboard Guidance

Irregular Claims

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What Can You Claim For?

Before you create an irregular claim please check the pay policy to confirm what you are able to claim for on the intranet using the link below.

<http://intranet/our-people/hr/pay-benefits/pay/>

Irregular Claims

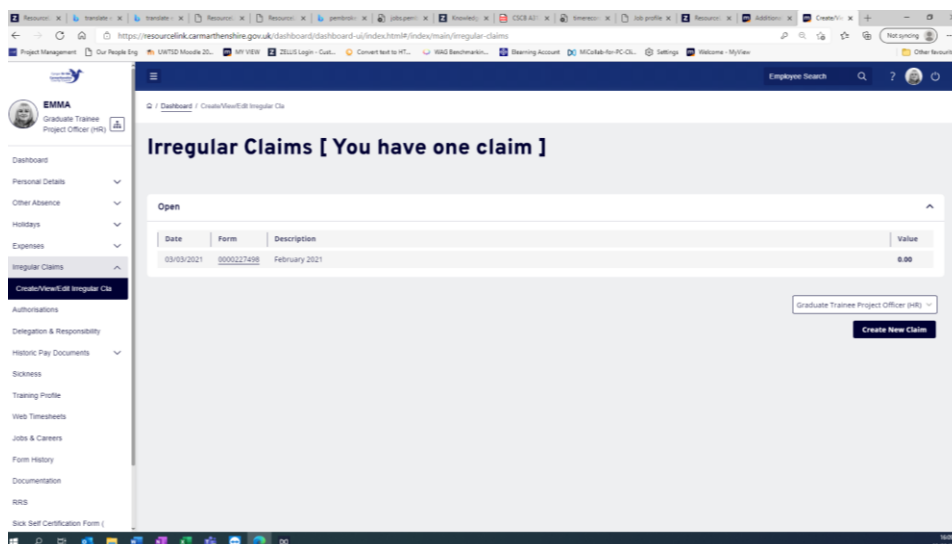
Irregular Claims is the self-service module which enables employees to submit claims such as additional hours, ad hoc overtime, callouts etc.

Creating a Claim

To submit a claim for additional hours/overtime etc, click on Claim Forms in the left-hand menu and then click on Create/View Irregular Claims:

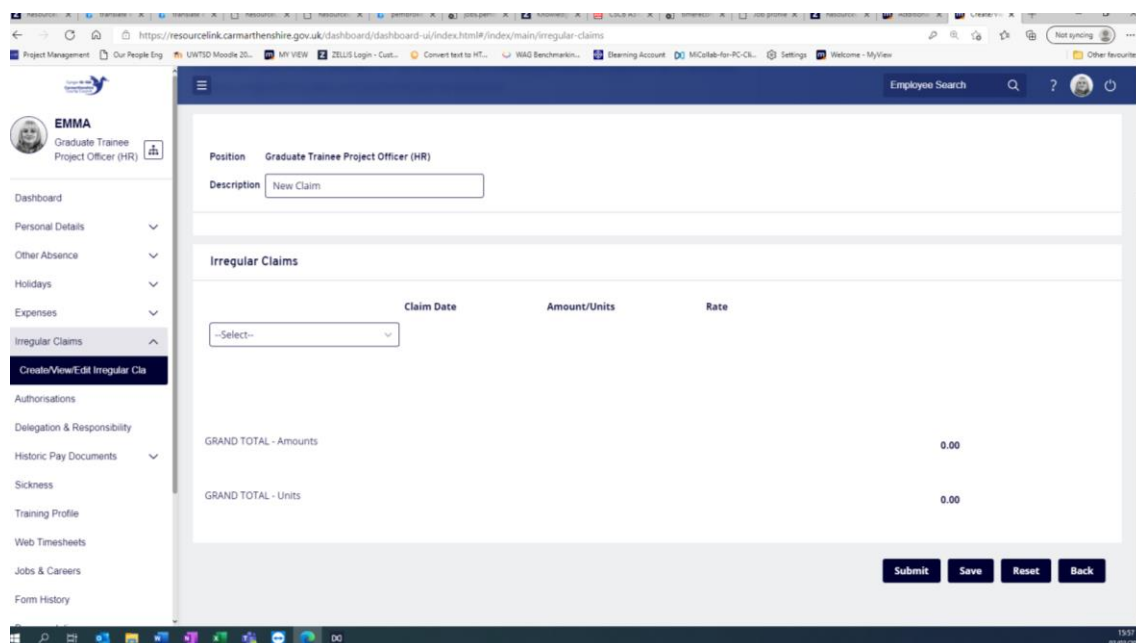
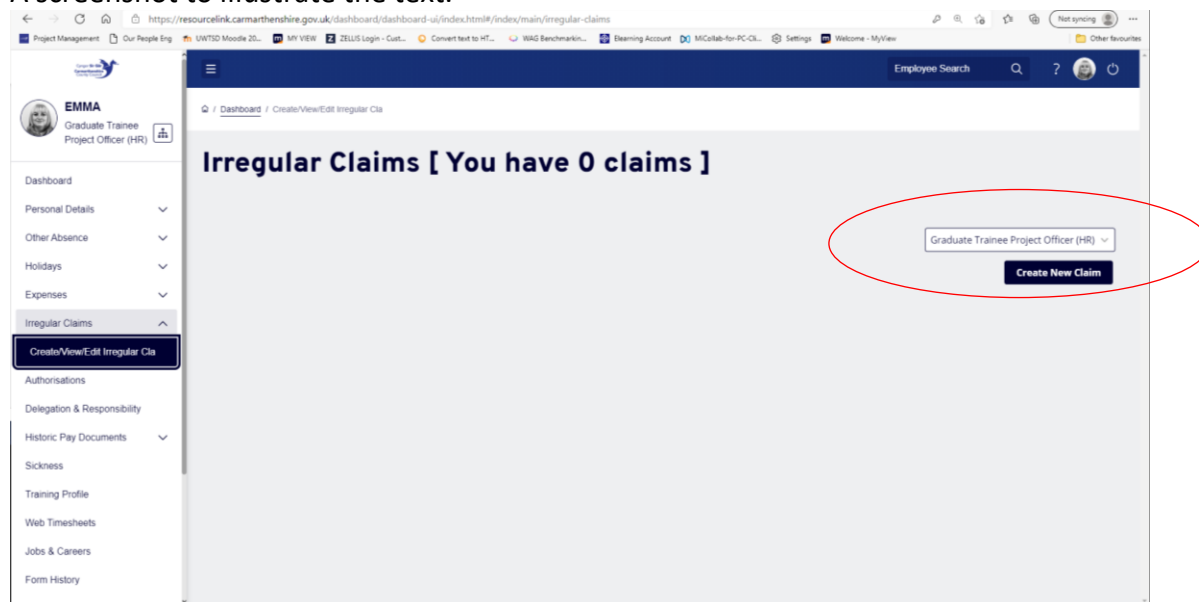


The above screen will appear if this is the first claim, the screen below will appear if you have claimed before.



To start your claim, first **check the post** that the claim is being generated for. If you have more than one post, **select the post** from the dropdown menu. **Click** on the **Create New Claim** button to the right of the selected post title and the following screen appears:

A screenshot to illustrate the text.



In the **Description Box** put the Month and the Year of the claim. This will help you track of your claims in the Summary and in Form History because this will be displayed next to the form number.

In the **Irregular Claims section** select from the dropdown the type of payment being claimed e.g., Standby; once the payment type has been selected the detail fields will appear on screen alongside the payment type.

A screenshot to illustrate the text.

If standby was selected from the dropdown menu the following fields require completion.

Please note that the value formats will differ according to the payment type selected.

Enter the unique description include the month and the year.

Select from the dropdown box the payment type.

The date of your claim.

State the number of sessions for Standby, in this case 3.

Description or reason for your claim.

NB: Staff who are claiming additional hours, over and above their contracted hours should select the appropriate Overtime payment, if the member of staff is on a Casual contract, then the Basic Hours payment should be selected so that their holiday entitlement adjustments can be calculated correctly.

The **Claim Date** field should be completed with the date that the additional hours/payment was worked **NB**. This cannot be a future date as the work claimed for must have already been completed. Either click on the calendar icon to select the appropriate date or enter the date in the format **ddmmyyyy**.

The **Amount/Units** field should be completed in either hours (with a decimal point between the hours and minutes e.g., 4.50 for 4 & ½ hours, or ££. pp for cash values (with a decimal point between the £'s and pence). For **Standby**, the number of sessions should be entered e.g., for one 9-hour standby session enter 1.0.

The **Rate** field will automatically pick up the hourly rate attached to the post the claim is being submitted for. If the pay element Acting Up is available for selection on the claim form, then the amount to pay each hour at will need to be entered.

The **Override Cost Centre** will only need to be entered if the payment is being costed to a separate budget, if left blank the payment will automatically be apportioned to the post holding budget. Click Search to find the appropriate cost centre, if it is not in the list displayed please contact the ResourceLink Team to attach the valid cost code to the Irregular Claim form prior to Submitting the claim.

The **Start Time** and **End Time** fields should be completed with the times which the additional hours were worked in 24hour format **hh:mm**. The system will automatically enter a colon between the hours and minutes.

The **Description** box should be completed with a brief description of the work undertaken.

The screenshot shows the 'Irregular Claims' form in the ResourceLink system. The user is Emma, a Graduate Trainee Project Officer (HR). The form is for a claim made on 06/02/21 for 2.00 units at a derived rate. The description is 'standby for #####'. The form also shows a table with Grand Total - Amounts (0.00) and Grand Total - Units (2.00). Buttons for Submit, Save, Reset, and Back are at the bottom.

The claim form can then either be **saved** to add additional rows later or **submitted** to the appropriate line manager for authorisation.

If a claim has been submitted and has not been Authorised, it can be withdrawn and re-opened to make amendments.

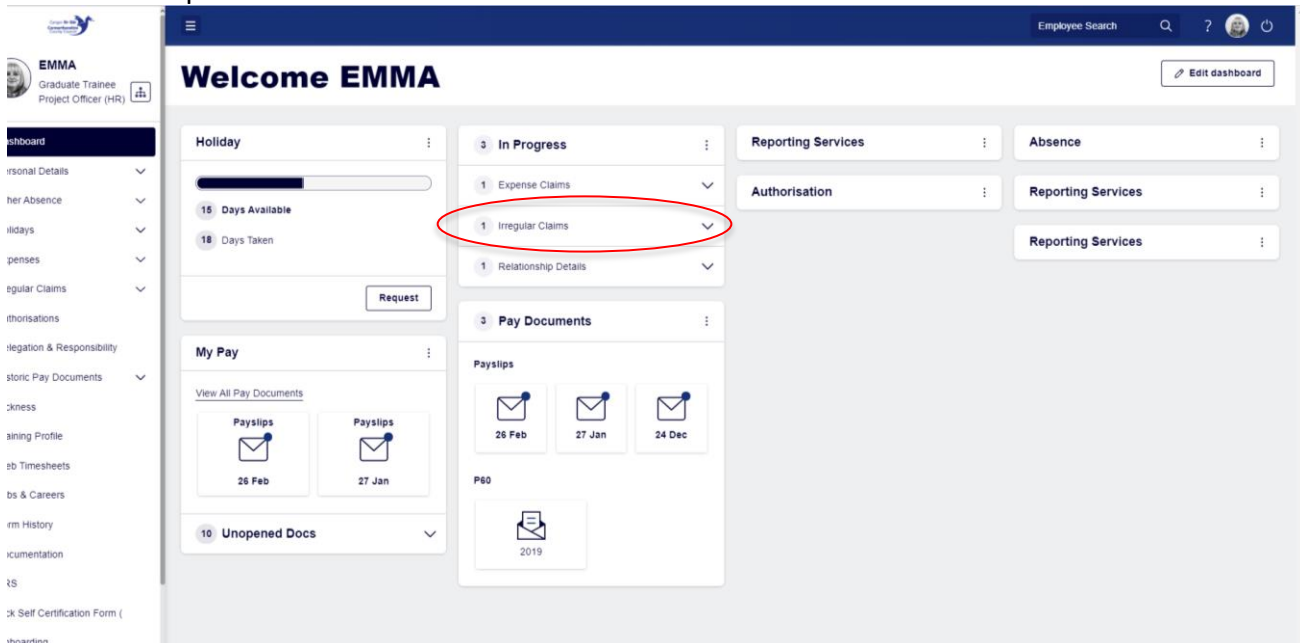
NOTE: The Grand Total box does not total the number of hours claimed; only monetary amounts are totalled here.

Updating Saved Claims

To re-open a claim, open the In Progress box on your Dashboard and under the sub-heading “Irregular Claims” click on the Created on dd/mm/yyyy/ form number to open your claim which has not been submitted.

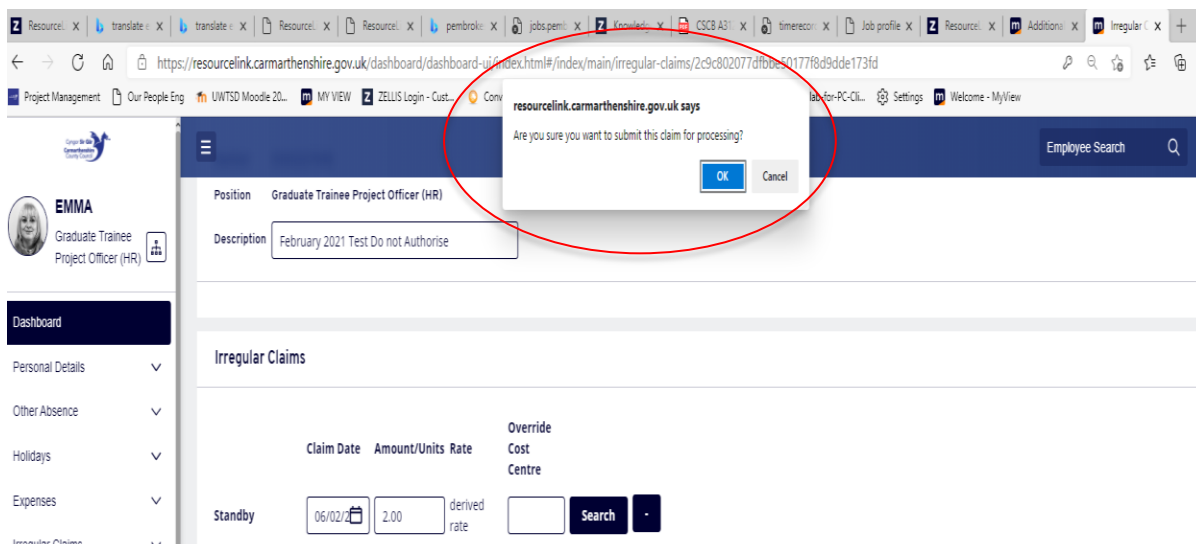
Or you can access your Claim Forms from the left-hand menu and in the Open section of your Irregular Claims page, click on the underlined form number. An Open claim can have additional items/adjustments made to it prior to submission.

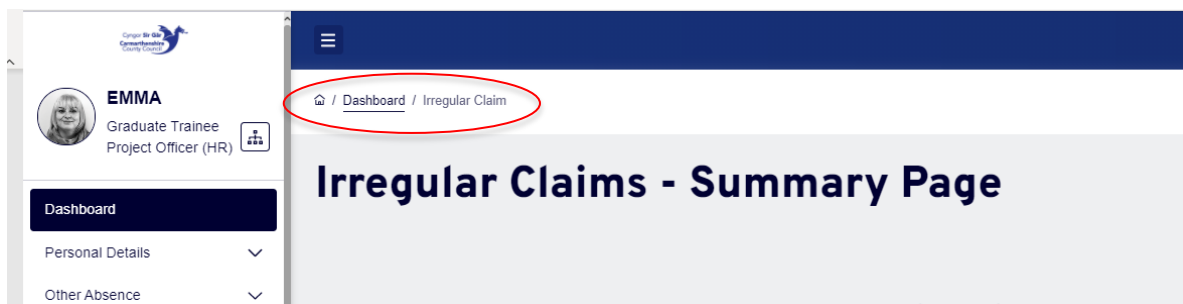
Or you can access your **Form History** from the left-hand menu and click on the underlined writing against the claim to open the form.



Submitting Claims

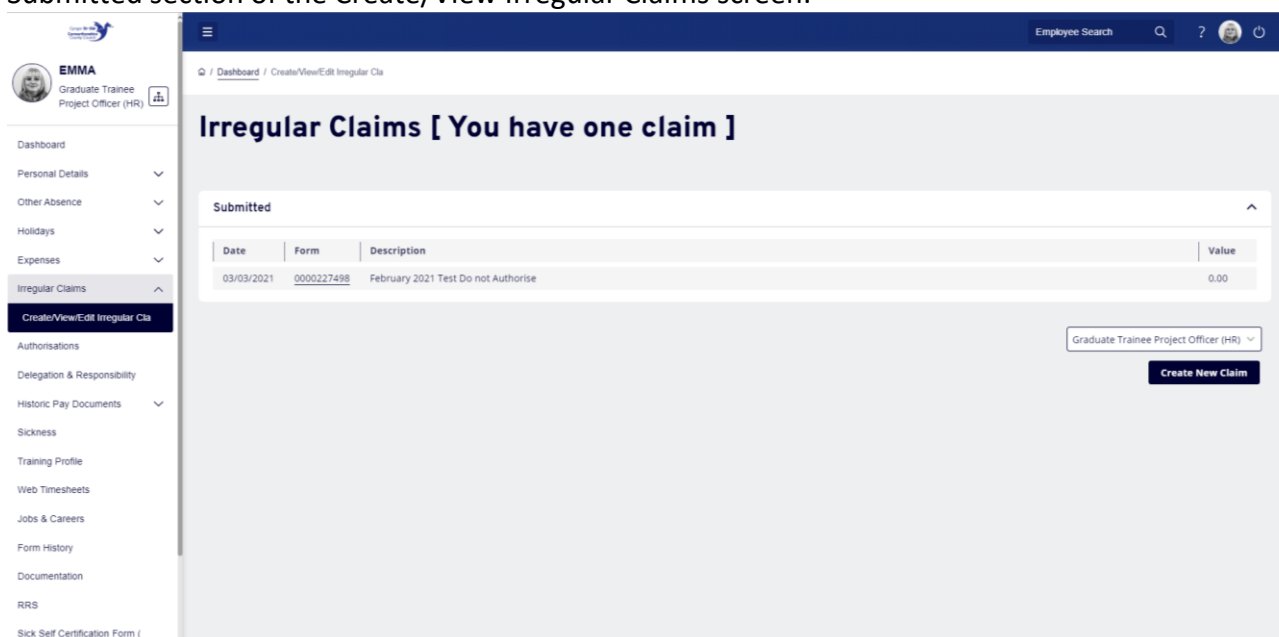
After checking your claim and clicking the Submit button a confirmation box appears **click OK**. summary sheet appears which gives details of the claim. For Irregular Claims this does not require printing so **click on dashboard** at the top of the screen.





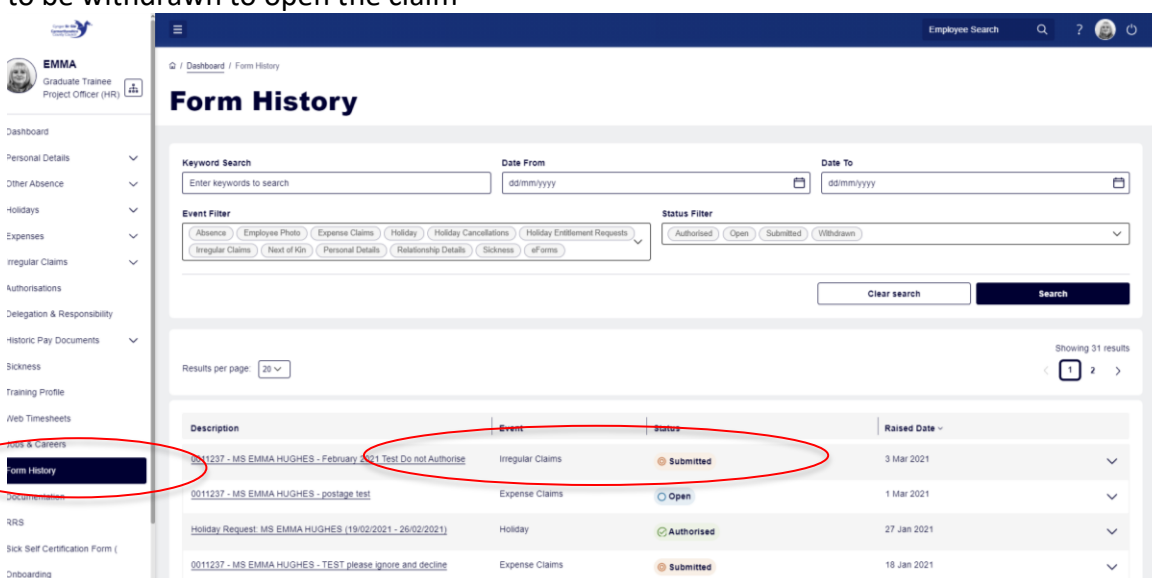
Withdrawing a Submitted Claim:

Click on **Create/View Irregular Claims** in the left-hand menu, the claim can be Withdrawn if it is in the Submitted section of the Create/View Irregular Claims screen:



Click on the underlined form number of the claim to be withdrawn.

Or click on **Form History** in the left-hand menu and then click on the underlined form number for the form to be withdrawn to open the claim



Click the **Withdraw** button on the bottom right-hand corner of the screen. The system will ask you if you're sure click ok. A confirmation message will appear on screen that the claim has been withdrawn and it will

now appear in the Withdrawn section of the Create/View Irregular Claims screen. Click on Dashboard at the top of the screen to return to the dashboard.

The screenshot shows the 'Irregular Claims' form for a user named EMMA, Graduate Trainee Project Officer (HR). The form has a left-hand menu with options like Dashboard, Personal Details, Other Absence, Holidays, Expenses, Irregular Claims, Authorisations, Delegation & Responsibility, Historic Pay Documents, Sickness, Training Profile, Web Timesheets, Jobs & Careers, Form History, Documentation, RRS, Sick Self Certification Form, and Onboarding. The main area shows the 'Irregular Claims' section with a table of claims. The first claim is for 'Standby' on 06/02/2 at a rate of 2.00. The 'Withdraw' button is circled in red.

Claim Date	Amount/Units	Rate	Override Cost Centre
06/02/2	2.00	derived rate	

GRAND TOTAL - Amounts: 0.00
GRAND TOTAL - Units: 2.00

Withdraw **Show Summary**

board-ui/index.html#/index/main/irregular-claims/2c9c802077dfbbe50177f8d9dde173f

A confirmation dialog box is shown with the text: "Are you sure you want to withdraw this claim from processing?". The dialog has two buttons: "OK" and "Cancel".

The screenshot shows the EMMA system dashboard. A confirmation message is displayed: "Confirmation Message! Your claim number 0000227498 has been withdrawn. Please select a navigation item in the Dashboard." The 'Dashboard' link in the breadcrumb is circled in red.

Re-opening Withdrawn Irregular Claim forms

To adjust a Withdrawn claim, click on **Create/View Irregular Claims** in the left-hand menu and then click on the **underlined form number** in the Withdrawn sections.

EMMA
Graduate Trainee
Project Officer (HR)

Dashboard / Create/View/Edit Irregular Cla

Irregular Claims [You have one claim]

Withdrawn

Date	Form	Description	Value
03/03/2021	0000227498	February 2021 Test Do not Authorise	0.00

Graduate Trainee Project Officer (HR)

Create New Claim

Or click on **Form History** in the left-hand menu and then click on the **underlined writing** against the form with a withdrawn status.

Once the form opens, scroll to the bottom of the screen, and then **click** on the **Re-Open** button in the bottom right-hand corner.

EMMA
Graduate Trainee
Project Officer (HR)

Position Graduate Trainee Project Officer (HR)

Description February 2021 Test Do not Authorise

Irregular Claims

Claim Date	Amount/Units	Rate	Override Cost Centre
Standby	06/02/2	2.00	derived rate

Description
standby for #####

GRAND TOTAL - Amounts 0.00

GRAND TOTAL - Units 2.00

Re-open Back

Should you need further assistance please contact us at resourcelink@carmarthenshire.gov.uk.