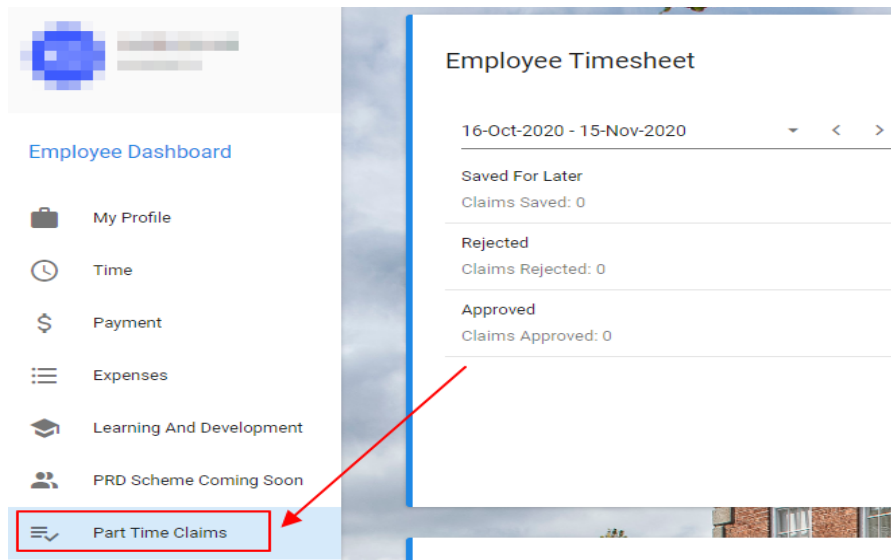## WFM – Timesheet Claimant Training Manual 2021

Overview

This manual describes the steps required to submit a part claim as an employee through the Timesheet module. The link to the CorePortal is: https://my.corehr.com/pls/coreportal_dcup
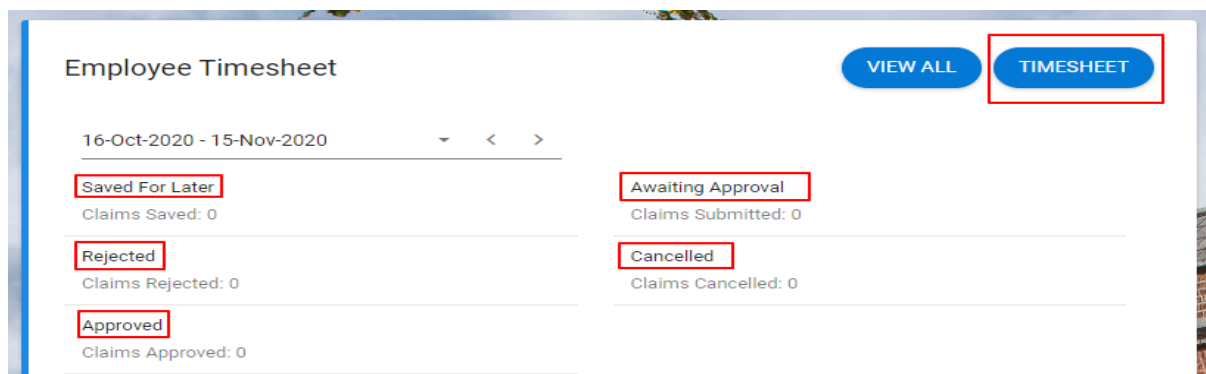
Part Time claim screens

From your Core Portal screen navigate to the **Part Time Claims** tab on the left of the screen.

You will be presented with the two widgets

Employee Timesheet : Displays claim sections under the relevant category.

Timesheet Claims -Employee Summary displays claim history under various heading: By hitting refresh at any point in time you will be able to view the current status of all your claims.

1. GO TO THE 'TIMESHEET'

To submit a claim, select 'TIMESHEET' to begin the claim submission.

PLEASE NOTE

- The pay period displayed in the employee timesheet widget will automatically default to the current pay period. **This period should never be edited as it drives all claims onto the payroll side of the software.**

- When a claim is entered retrospectively it will be displayed in the current live period by default.

- You must navigate through the 'Timesheet' tab to submit or view historical/future claims.
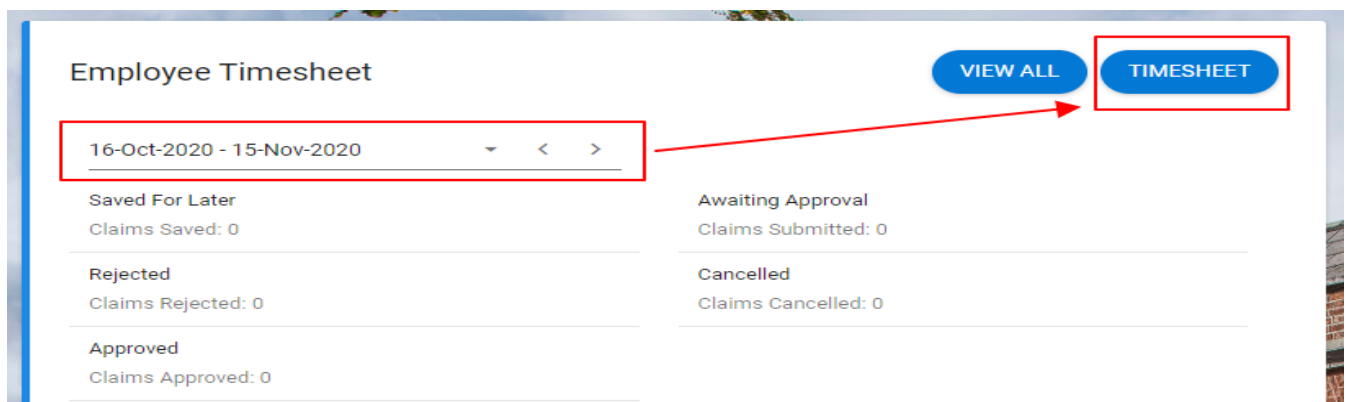

2. CHOOSE THE APPROPRIATE WEEK YOU WANT TO CLAIM AGAINST

The system automatically defaults to the first week of the open payroll period. Navigate to the appropriate week be it historic or in the future. **Claims should only be submitted up to and including the 15th of the month.** If for some unusual situation you need to enter a claim past the 15th of the month, it will automatically default into the next claim period and remain there for the next pay run.
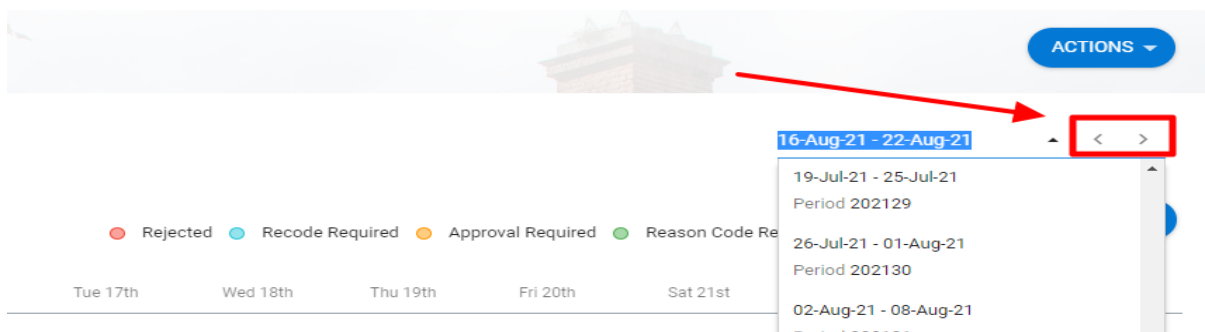
3. To enter a claim having chosen the week

    a. First ensure the correct week is selected on the top right.

    b. Confirm Work Group starts with **'PT'** and appropriate school/unit.

    c. Where there are multiple appointments, **select the appropriate appointment** the claim should be submitted against. This is imperative to ensure the correct rate of pay is processed.
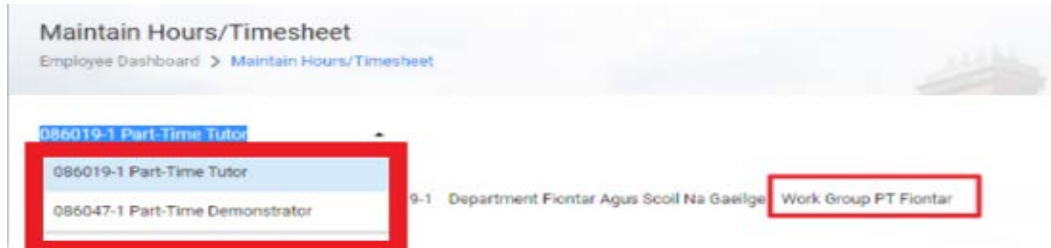
    d. Click the 'ADD' button to submit hours for selected appointment (s).
    e. System will automatically default to the PT Hours & Minutes pay code.
    f. Enter hours on the appropriate date. - **Note**- Part Hours must always be entered in **Minutes**. The system will automatically total the hours claimed.
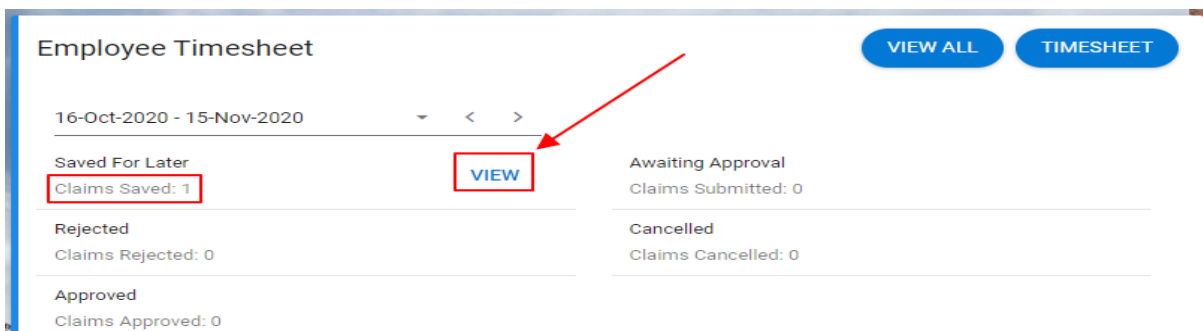   g. Then press 'save'.
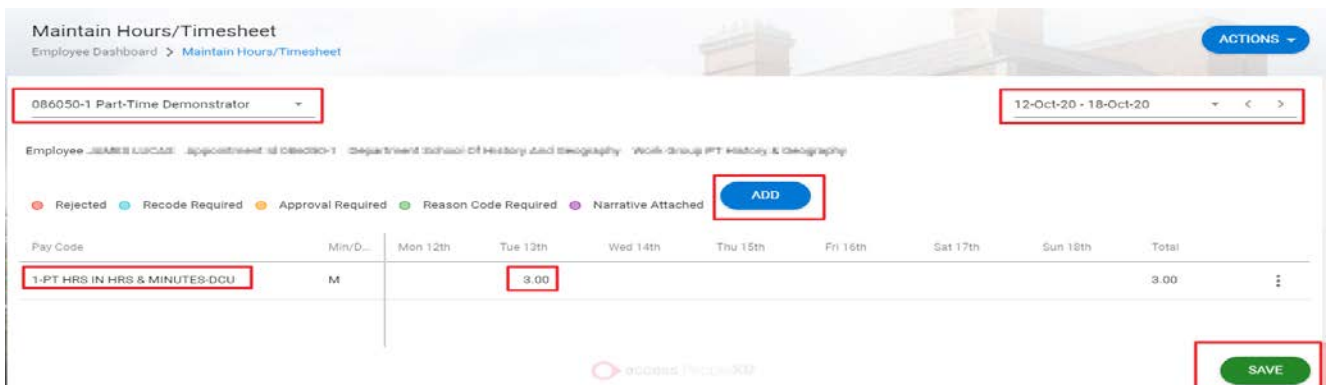
The claim is 'SAVED' **not submitted.** The following section will outline how to **'Submit'** a 'Saved for later' claim.

Navigate back to the employee dashboard to your Employee Timesheet Widget.

Submit a saved for later claim

You can view and action claims in the 'Saved for later' section of the Employee Timesheet Widget.
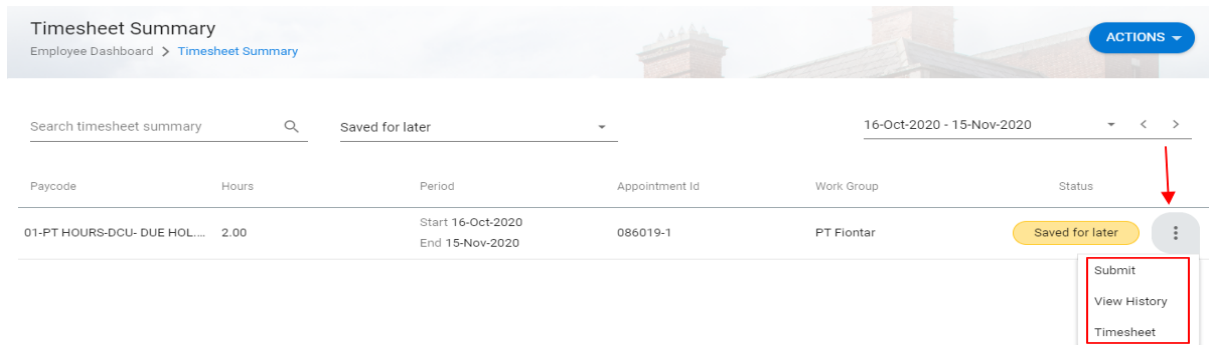
Choose the 'View' option within the 'Saved for later' section. The claim is now ready for review and submission.

The ellipsis button presents 3 options:

1. A 'submit' button to finalise and submit the claim for approval.

Click submit you then can now see that the claim has transferred to the 'Awaiting Approval' area.

Your manager will pick it up from here. Once approved the claim will move to the 'Approved' status field. Here you can view all the claims awaiting payment in the next payroll run.
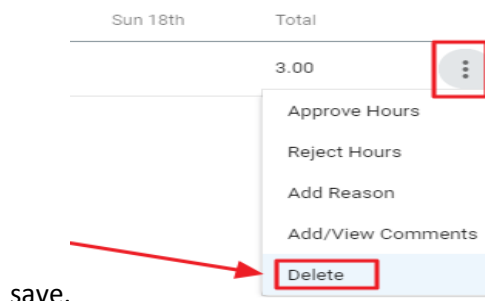
2. View 'History' to see the hours submitted.

This area will show you claims that have been submitted in summary format only.

3. 'Timesheet' to edit or delete the claim (prior to being submitted).

To amend the hours saved. You click 'timesheet', then navigate to the date. Click on the hours and edit as appropriate. Hit save.

To delete the hours you have entered, click the ellipsis and choose 'delete'. Hit yes and then hit

save.

HOW TO RECALL A CLAIM AWAITING APPROVAL

The 'VIEW' button can be selected to review the submitted claim.
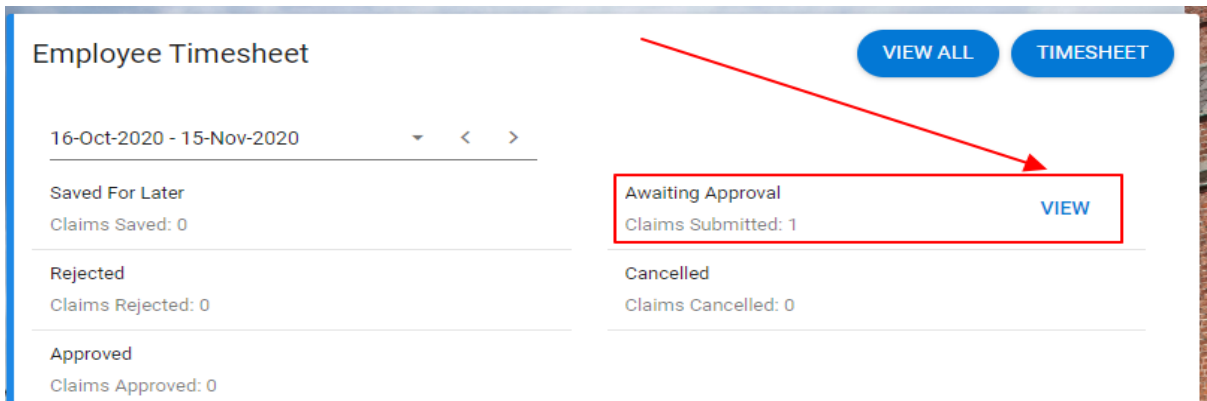
When you click the ellipsis there is an option to recall the claim. In order to delete a claim 'awaiting approval' you must 'recall' the claim and then delete the claim from the 'Timesheet' saved for later tab. Hit the timesheet option for the ellipsis button and you will be given a recall option - hit save.

Please note there is a waiting period after claim submission before an employee can recall their claim, error code in red will be displayed where the claim is still being processed.
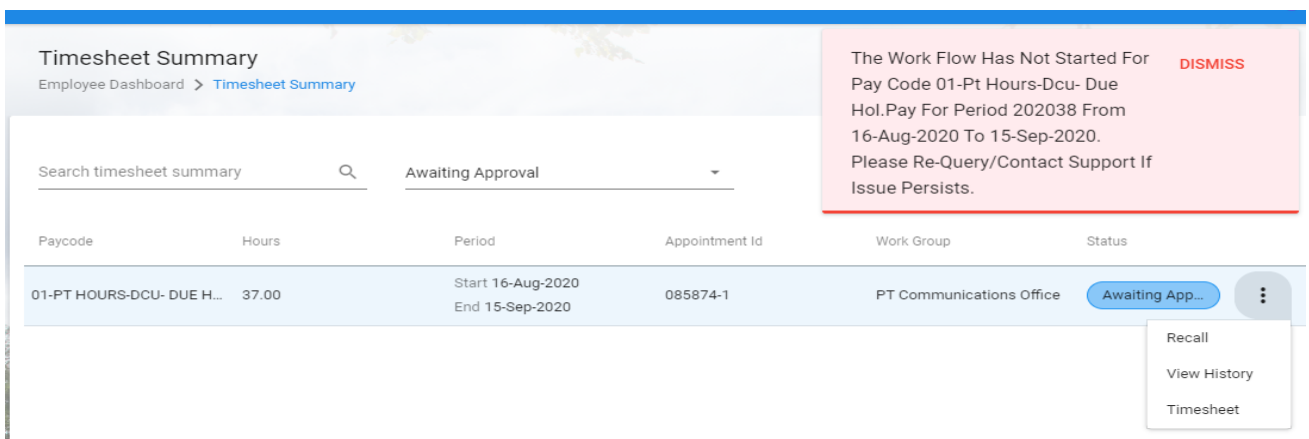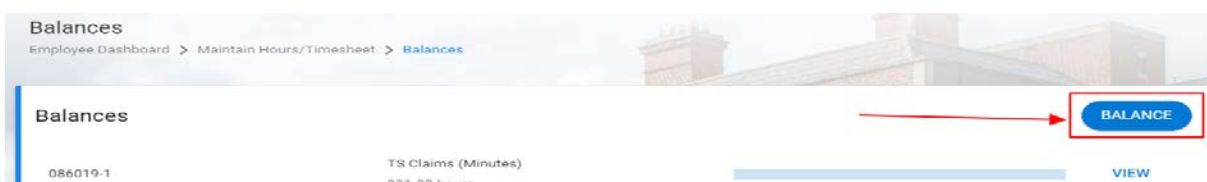

Once the waiting period has lapsed you can recall the Timesheet successfully. Now navigate back to your employee dashboard and the claim is now visible under your saved for later tab. Click on view, scroll to the appropriate week, then from the ellipsis click on the timesheet option, the delete option becomes available, hit delete and then hit save. This claim is now fully deleted.

TO VIEW APPOINTMENT BALANCES

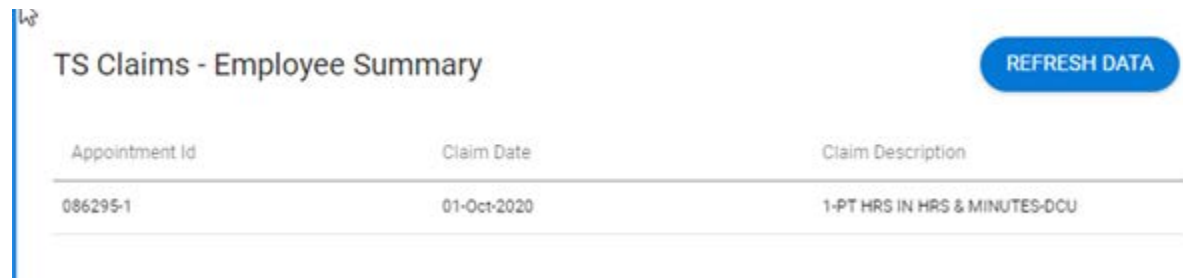Go to your 'Timesheet' and select 'ACTIONS' to view current balances and click 'Balances'.

Click the 'Balance' button again to see dates and details of current balance remaining.

This screen can be refreshed at any point in time and all your claims against all appointments can be viewed under various headings by scrolling across the screen.

Important Note: -

While your claim must always be entered in **Hours and Minutes**, your Balance Screen, TS Claims-Employee Summary Widget and Payslip will always be reflected in **Decimal.**