

# Manager Guide to Online Timesheets

## When online timesheets are used

Online timesheets are used for employees to log and claim their hours worked each week. As the Owner (creator) of the timesheet, you can set up and authorise payments each month. You can also delegate duties such as approving timesheets to other staff members.

## Levels of authorisation

If you intend to delegate the creation, maintenance and authorisation of timesheet claims to your staff, then you will need to attach them to the timesheet with the appropriate level of authorisation. There are three levels of authorisation for online timesheets:

<b>Owner</b>	<ul style="list-style-type: none"> <li>Can create timesheets (projects) and edit all details</li> <li>Can create pay rates</li> <li>Can add Admins and Approvers</li> <li>Can add claimants to the project</li> <li>Can approve claims</li> <li>Can run project reports on any project</li> </ul>
<b>Admin</b>	<ul style="list-style-type: none"> <li>Can only access projects they are added to.</li> <li>Can edit project start and end dates only</li> <li>Cannot create pay rates</li> <li>Can add Approvers only</li> <li>Can add claimants to the project</li> <li>Can approve claims</li> <li>Can run project reports against projects they are added to only</li> </ul>
<b>Approver</b>	<ul style="list-style-type: none"> <li>Can only approve projects they are assigned to</li> <li>Can approve claims only</li> </ul>

You should try to ensure that there are two different people involved in the approval of claims to ensure there is diligence in the claims that are allowed.

In addition, the Owner or the Admin can add claimants to the project:

<b>Claimant</b>	<ul style="list-style-type: none"> <li>Can only access projects they are assigned to</li> <li>Can submit claims for hours worked only</li> </ul>
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The system will not allow a user to have more than one role in a project, including being a claimant.

## How to create a Timesheet

1. Log into the staff portal
2. Click the **Timesheet Admin** link
3. A new screen will open called Timesheet Manager, click on **Create Project**
4. Complete the form:
  - a. Title – timesheets are listed in alphabetical order, so put your departmental code at the start in order to make the project easier to find as well as a date identifier.  
i.e. **IHS DEMENTIA STUDY 010616**
  - b. Description – Any other identifying information needed
  - c. Total Project Hours - Projects are defined by the hours needed
  - d. Default Project Rate – This is set at £7.83 per hour.
  - e. Start Date
  - f. End Date
  - g. Finance Code – entered in the format XX.XXX. This can be provided by your accountant.
5. You will be added as the **Owner** of the project

## Pay Rates

The Owner of the project can set pay rates for the project here. You should have this rate costed out and confirmed by HR, who will also ensure that Holiday Pay has been accounted for.

**Flat Rate** should not be used without prior approval by HR.

**Salary** is used where a member of staff may be working additional hours in an existing role. For example, where someone in your team is working extra hours to cover absence. Overtime will be calculated by Payroll where appropriate.

Pay rates set here will be accessible by the claimants of the project.

## Adding Staff to the Project

1. In **Timesheet Manager** click **Add Staff**.
2. On the new form add the staff member by adding their Staff ID number.
3. Choose either **Approver** or **Admin** from the drop down box.

## Adding Claimants to the Project

1. In **Timesheet Manager** click **Add Claimant**
2. On the new form add the **Staff Number** of the claimant.
3. A new form will be populated with the Name and Student Number of the claimant. If the claimant is not a student then this can be left blank.
  - a. If the student has finished their course, then it will not be possible to add them. At this point you will need to email Mark Jones [m.jones@worc.ac.uk](mailto:m.jones@worc.ac.uk) and ask him to manually add the student to the project as well as the pay rate for the work. At the time of creation of this document, ICT are reviewing this to increase the time the student can be added to projects until graduation.
4. In **Number of hours** add the total hours that the claimant will be allowed to claim on this project

5. Choose the **Rate of Pay** for that claimant from the drop down box.

## Adding a group of users from an existing project

If the project is similar to an existing project, then the users can be copied across and modified after.

1. In **Timesheet Manager** click **Add Claimant**
2. On the new form click **Select Project** and find the project you wish to copy the users from
3. Choose the **Rate of Pay** for the claimants from the drop down box
4. Individual Claimants, Approvers and Admins can then be added and removed, and rates of pay adjusted.

## How to approve claims made

1. In **Timesheet Manager** click on **Claims**
2. **Owners** will be able to see all projects, **Admin** and **Approvers** only the projects they are assigned to.
3. Claimants who have submitted claims will be shown on this screen. The claim can be approved or rejected using the cross or the tick. The claimant can also be emailed from this screen if you need to discuss a claim with them.
4. By approving the claim, you submit the details to Payroll.

## How claimants submit hours worked

1. The student or staff will need to log in through their intranet page.
2. Click on **Timesheet Claim Form**
3. In the new window, click on **Submit New Claim**
4. On the new screen, complete:
  - a. Payment For – choose the project from the drop down list
  - b. Date Worked
  - c. Start Time
  - d. Finish Time (breaks are unpaid and so should not be counted in hours worked)
5. Click **Add Row** in order to add additional days worked into the claim.
6. Tick the box to **Confirm that I have worked the hours detailed.**

There is a reminder on each page for Tier 4 Students not to claim over their permitted hours each week. For most Tier 4 students this will be no more than 20 hours in a term week, although there may also be restrictions on the work allowed outside of term time.

## Other functionality

### Reports

There is a range of reporting available in **Timesheet Reports** that allows the owner to run reports on:

- A particular project
- Claims that have been approved, unapproved or rejected
- Finance Codes; and
- A particular claimant

These reports can be filtered by a date period and whether any salary or flat rate claims were included.

## Roles of other departments

### HR

HR will also conduct monthly checks to ensure Tier 4 students have not submitted claims above their permitted hours. If this happens, HR will contact the student to advise them that their claim will only be paid to a maximum of 20 hours a week, and that they are putting their visa and right to be in this country at risk.

### Payroll

Payroll will ensure that claims are paid if they are received and authorised by the 10<sup>th</sup> of each month. Claims not made and authorised in time, or made for work completed after this date will be paid in the following month.