



Keele People

People Manager Guide:

Authorising Overtime Claims

Entering Overtime Claims

& Processing Timesheets for Casuals

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Introduction

Welcome to the People Manager Guide for authorising/entering Overtime Claims (for members of staff at Grade 5 or below on Keele University Grading Structure (KUGS) and for processing Casual Fee Payments. This Guide provides step by step instructions on how to perform these tasks within Keele People.

Keele People Time & Expenses is an online facility designed for authorising/entering Overtime Claims and processing Casual Fee Payments. Where possible the Overtime Claim will be submitted by the employee online through the Employee Self Service portal (ESS) and then will be sent electronically to the Overtime Authoriser for authorisation.

Where the employee does not have access to ESS the Overtime Authoriser/Line Manager may be required to enter the information directly into the Keele People system to facilitate payment. If you require these access rights in Keele People – you should request this via the IT Top Desk facility. Log into Top Desk and under Forms complete the Keele People Access Form.

It is the responsibility of the Overtime Authoriser/Line Manager to ensure that for each claim authorised (and/or entered) the following points are checked:-

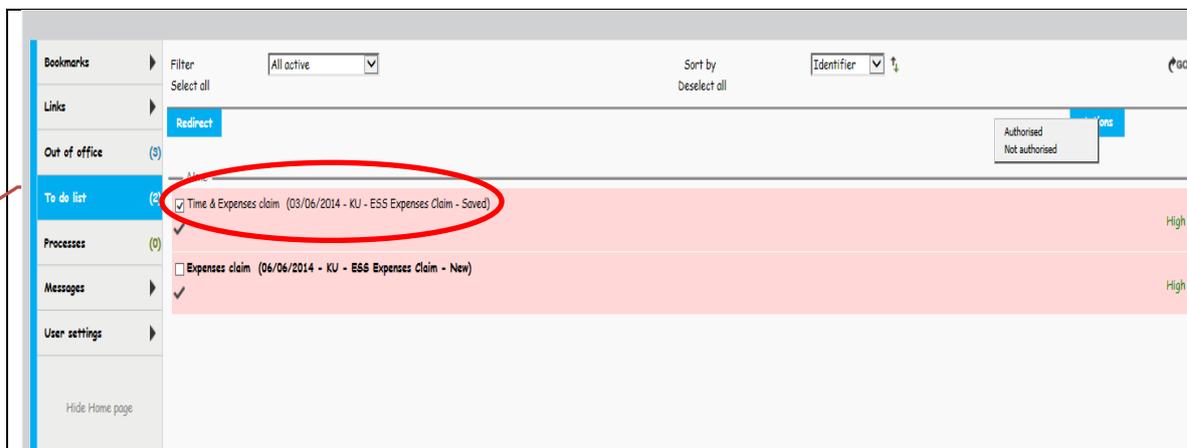
- 1 – Re-imburements, Overtime hours claimed, Fee payments are not claimed in advance.
- 2 – Claims are correct and confirm reasonableness and purpose.
- 3 – Payroll cut-off deadlines are adhered to (late submission after the cut-off deadline will result in delayed payment).
- 4 – The correct expenditure code (under 'cost code') is entered. Note: The format for cost codes has changed slightly in Keele People where there is a 'blank' field the character '~' should be entered e.g. A0400~~~~304.

Regular Timesheet submission

National Insurance (NI) deductions are evaluated on a non-cumulative monthly basis. Staff submitting their overtime/timesheets and administrators entering the payments on an infrequent basis are advised to submit and enter these on a more frequent basis where possible (in line with the Payroll cut-off deadlines) to avoid breaching the NI threshold unnecessarily.

1. Authorising Staff Overtime Claims

When an employee submits their expense claim you, as the Overtime Authoriser, will receive a notification via your 'To Do' list



The task illustrated above is for a 'Time & Expenses claim' Overtime claims will be called 'Overtime claim'.

To review details of the overtime claim being submitted by the employee click on the text line, and it will then display the details of the claim. Please note that the claim will only contain the number of hours being claimed for, rather than the monetary value. The values will be calculated once the approved claim is received by Payroll.

Please take care to review the hours being claimed for to ensure that the correct rates are being claimed for (Single Time [OT x 1], Time & Half [OT x 1.5], or Double Time [OT x 2]). Please ensure you refer to the [Employee Self Service User Guide – Claiming Overtime](#) guide for the rules on enhanced overtime claim rates.

To approve the claim, place a tick in the box to the left of the text line (as illustrated by the first expense claim shown above). A small pop-up box will then appear showing the options to 'Authorise' or 'Not Authorise'. Note: you can authorise multiple claims at one time by 'ticking' all the boxes.

If you 'Authorise' the claim will be sent electronically to Payroll for processing (subject to payroll cut-off dates). If you select 'Not Authorise', the claim will be sent back to the Employee to amend as necessary. The Employee is then able to amend and resubmit, and then you will get a new notification in your 'To Do' List.

2. Entering Overtime Payments for Permanent Staff

There may be instances where the employee is unable to enter their own overtime claim through the ESS portal. As a People Manager you also have the option to enter overtime payments directly into the Keele People system.

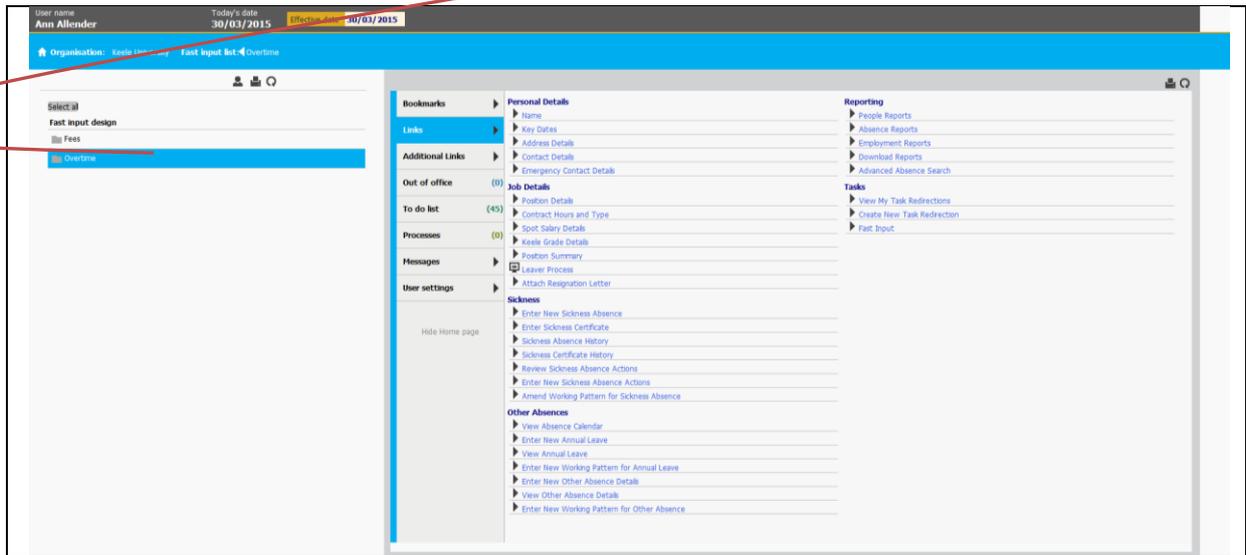
To do this you will need to go to the 'Links' section of your homepage.

From the 'Tasks' section please select the option called 'Fast Input' as illustrated below.

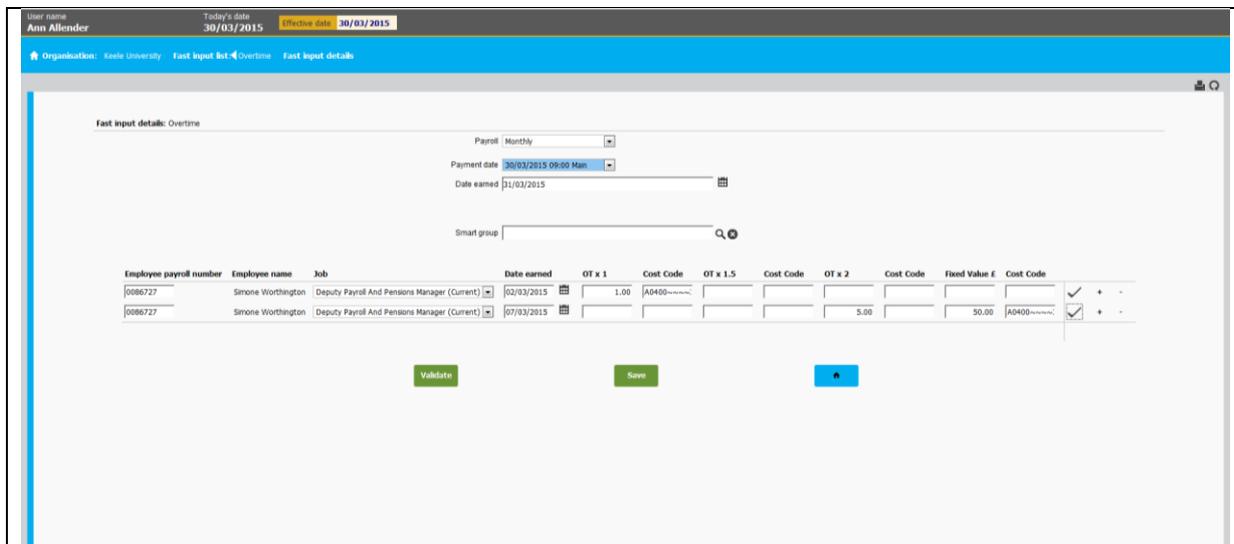
The screenshot displays the Keele People system homepage for user Claire Muttock. The interface includes a top navigation bar with the user's name, today's date (08/08/2014), and the effective date (08/08/2014). Below this is a blue header bar with the organization name 'Keele University v2' and the 'Reporting' section. A sidebar on the left lists various users, including Claire Muttock, Magsood Ahmed, Henrietta Cross, Ramona Hamilton, Ryan Lloyd, Julie Beeston, Anthony Day, Kerry Edwards, Jake Elikowski, Joyce Harris, Anthony Jackson, Stephen Morrissey, Sarah Richmond, Louise Rodger, Alex Smith, and Samuel Smith. The main content area is divided into several sections: 'Bookmarks', 'Additional Links', 'Out of office' (4), 'To do list' (0), 'Processes' (0), 'Messages', and 'User settings'. A red arrow points from the 'Links' section in the sidebar to the 'Fast Input' option in the 'Tasks' section. The 'Tasks' section also includes 'View My Task Redirections' and 'Create New Task Redirection'. The 'Fast Input' option is circled in red.

When you select 'Fast Input' you will be presented with a list of possible options (depending on your system access rights)

The when entering Overtime for members of staff at Grade 5 or below on the Keele University Grading Structure (KUGS) select the Overtime option.



You will then be presented with a screen for the input of overtime details. The screen will appear as below:



Notes to assist you when completing this screen:

- The Payroll should always be input as 'Monthly' (from the drop down list).
- The 'Payment date' and the 'Date Earned' will default to the current pay period, so these do not need to be inputted.
- You will need to know the employee's payroll number in order to enter their claim. See Annex A for guidance on how to undertake a people search to obtain a payroll number. If you then enter the payroll number, select position (from the drop down under 'Job') and then press the 'Validate' button it will display the employee name and job title.
- If the employee has more than one job, please be careful to select the correct job that the overtime relates to.
- You will notice that there are fields for
 - Overtime at Single Time [OT x 1] – and the 'cost code' that this will be charged to
 - Overtime at Time & Half [OT x 1.5] – and the 'cost code' that this will be charged to
 - Overtime at Double Time [OT x 2] – and the 'cost code' that this will be charged to
 - 'Fixed Value payments' – and the 'cost code' that this will be charged to

If no code is entered the overtime will be charged to the default cost code (where their monthly salary is charged).

- Please take care to ensure that the correct columns are used as it will affect the value of the overtime payment that is calculated when received by Payroll.
- The '+' and '-' buttons at the far right of the line allows you to add or delete lines as appropriate

When you have inputted the relevant overtime details press 'Save' and this will be automatically sent through to Payroll. As the Overtime Authoriser you are authorised to submit overtime claims for your staff and so no further approval is required.

3. Entering Timesheets for Casual Fee Payments

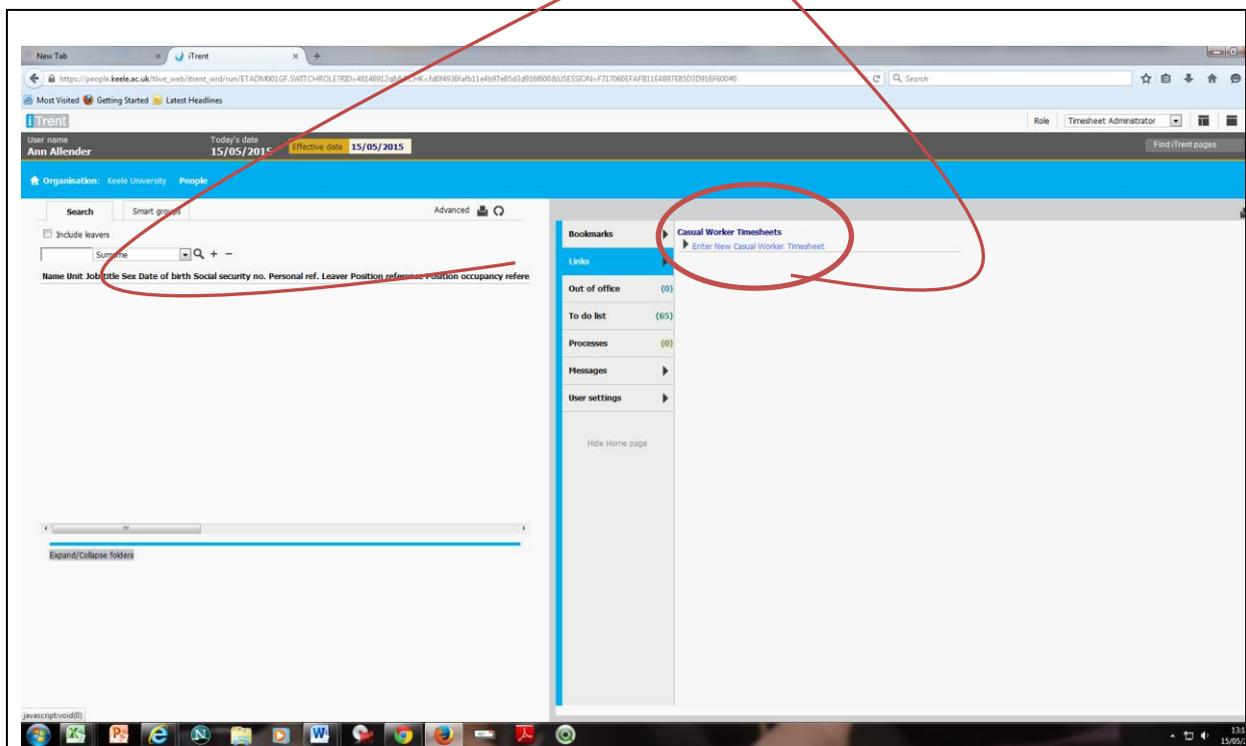
The process for entering Casual Fee Payments is similar to the process outlined in Section (2) above for Overtime payments.

To do this you will need to go to the 'Links' section of your homepage.

From the 'Tasks' section please select the option called 'Fast Input' as illustrated below.

As an approved Administrator you can do this by going to the 'Links' section of your homepage.

You will see the option called 'New Casual Worker Timesheets' as illustrated below.



Click on 'Enter New Casual Worker Timesheet'.

You will then be presented with a screen for the input of the fee payment details. The screen will appear as below:

You can enter a payment for one employee or batch of payments for multiple casual employees using this screen.

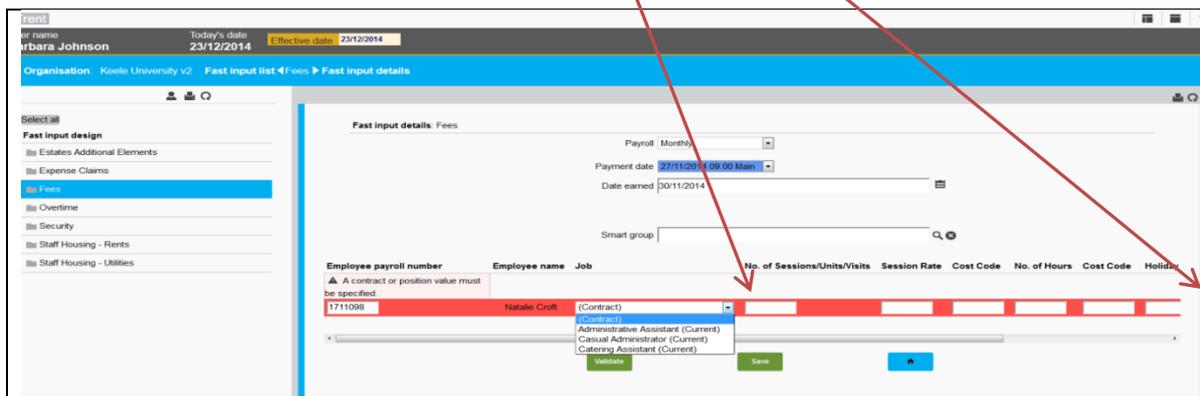
Single line entry

You can enter a payment for one employee or batch of payments for multiple casuals.

You will need the payroll number for each individual you wish to pay (see Annex A). Enter the number and “Validate” if the employee has multiple positions please ensure that you select the correct position (using the drop down list).

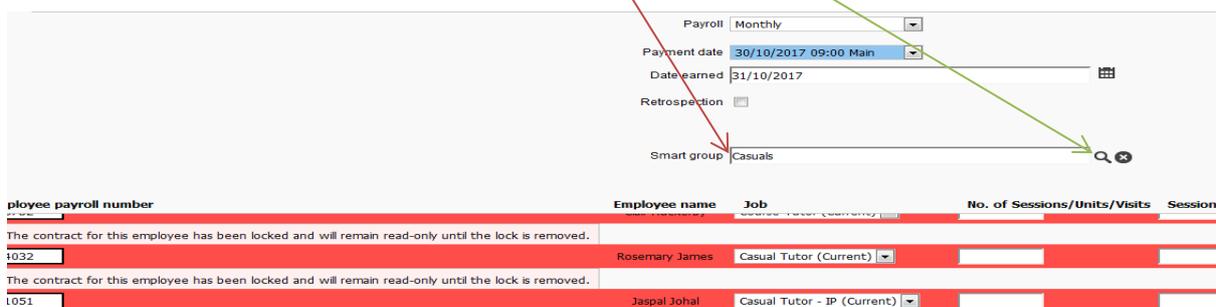
To add or remove entries simply click on the “+” or “-” button at the end of each row.

The screen shot below is “normal view” to switch to full view click on the icon for “Full View”



Smart Groups

If you have a specific Smart Group set up for your area (for large numbers of casuals being paid each month) – click on the spy glass at the side of the Smart group header and select your group. There is also a Casual Smart Group which can be selected. Selecting a Smart Group will then prepopulate the data in the appropriate fields. To remove a Casual from the screen who does not require payment in the pay period simply delete the line by clicking on the ‘-’ at the end of the row.



Notes to assist you when completing the screen:

- The Payroll should always be input as 'Monthly' (from the drop down list).
- The 'Payment date' and the 'Date Earned' will default to the current pay period, so these do not need to be inputted – However, if the individual's 'position' has ended and the payment is for work done prior to the 'position' end date you will need to enter the actual date the work was completed under 'Date Earned' e.g. 'Payment Date' 30 October 2017 contract ended 10 October 2017 work undertaken by 2 October 2017 enter 'Date Earned' 2 October 2017 otherwise they may not be paid correctly.
- You will need to know the employee's payroll number in order to enter their claim (if you are not using a Smart Group). If you enter the payroll number, select position (from the drop down under 'Job') and then click on the  at the end of the row or click on the 'Validate' button it will bring up the employee name and job title.
- If the employee has more than one job, please be careful to select the correct position that the overtime relates to. The **RED** highlighted line above (under single line entry header) shows where an individual has more than one 'job' and so requires manual selection. **Always make sure you select a CURRENT 'position' the word 'current' should appear next to the position name. DO NOT select the 'contract' or a 'position' without 'current' after it as the individual will not be paid correctly.**
- If you have a long list of payments to enter it is recommended that you regularly **SAVE** the data as you are entering (as there is a 30 minute 'time out' set within the system) rather than 'saving' at the end as you may lose all the data you have entered if over 30 minutes have passed since you began entering. Please note that once you press SAVE the data you have entered will disappear from your screen, so please ensure that you have checked prior to saving.
- You will notice that there are fields for
 - 'Sessions / Units / Visits' – this is to be used where the fee being paid is NOT at an hourly rate. So for payments being made at a day rate, half day rate, unit rate or session rate – please enter the number of units in this box.
 - 'Session Rate' – please enter the £ rate per day, half day, unit or session.
 - 'Hours' – if the payment is simply a number of hours at the agreed rate for the employee then enter the hours in this box. The hourly rate for the employee should already be stored in the system; therefore, there is no need to enter it on the form. The system will then calculate the pay due.
 - Holiday Pay – you will need to keep a record of any holiday pay due and enter the total £ monetary amount to be paid under the Holiday Pay header
- You will need to input the relevant cost code. Please note that 'blanks' in the account code must be replaced with the '~' sign. For example A0400~~~~304.

Invalid cost codes will be rejected. In the case of an invalid cost code please contact your link Management Accountant.

- NB – you will EITHER :
 - Complete the ‘Sessions /Units / Visits’ box AND the ‘Session Rate’ box OR
 - Complete the ‘Hours’ box if they are just being paid for HOURS worked

When you have inputted the relevant fee details press ‘Save’ and this will be automatically sent through to Payroll for payment in the next available payroll run. As a Causal Fees Administrator you are authorised to enter and submit Fee payments for your staff and so no further approval is required.

Locked payroll

If you try to enter data whilst the payroll is locked you will see the message below. You will not be able to enter until Payroll unlocks the payroll for the month (note this only usually happens at the end of the month when the payroll is being finalised prior to payment).

004032

 The contract for this employee has been locked and will remain read-only until the lock is removed.

Contact us

Overtime / Casual Fee Payments

Web page: to be entered

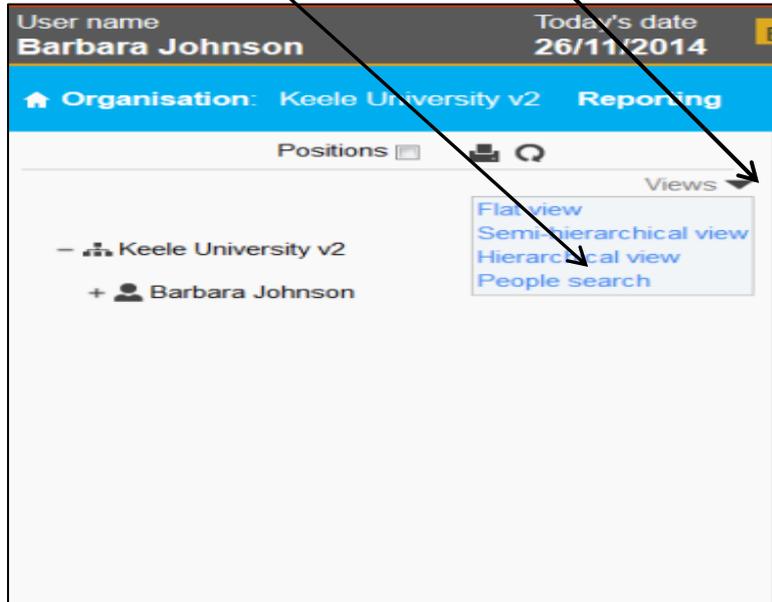
Email: finance.payroll@keele.ac.uk

Direct Telephone: 01782 – 733773 / 734167 / 734325 / 733524

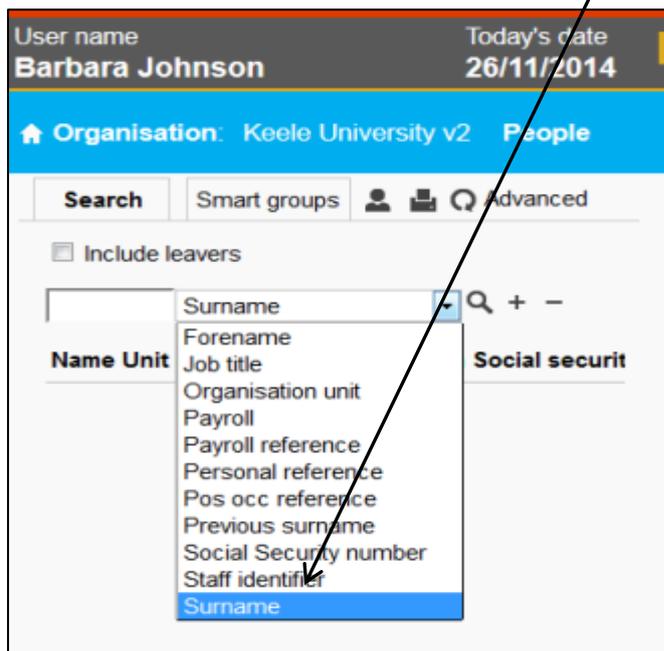
Annex A

How to carry out a People Search

In order to carry out a 'people search' and to find the employee's payroll number, select the 'people search' option from the "Views" drop down list.



The default search option is by an individual's surname. As you can see from the drop down list, searches can be carried out by a number of different search criteria according to the search being carried out.



Enter a value (part or the entire name of the person you wish to 'search' for) in to the search field and click on the search icon  to perform a basic search. Users can enter the start of a surname and Keele People will search for all individuals whose surname begins with that, rather than all individuals whose surname contains the letters entered. In the example below, you can see that searching for individuals whose surnames start with 'Buk' returns one result, Leopold Bukowski.

If you then 'hover' over the blue bar containing the full name of the employee you are searching for the payroll number will be visible (see Personal ref: 8965217).

