



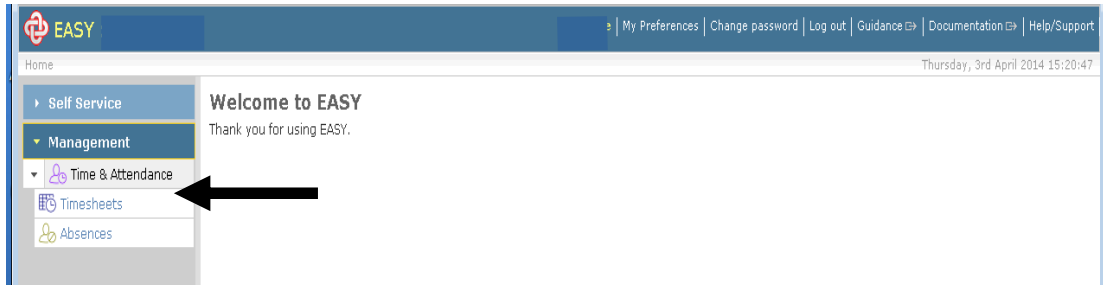
NHSTB Pay Support

EASY Manager's Authorisation Guide

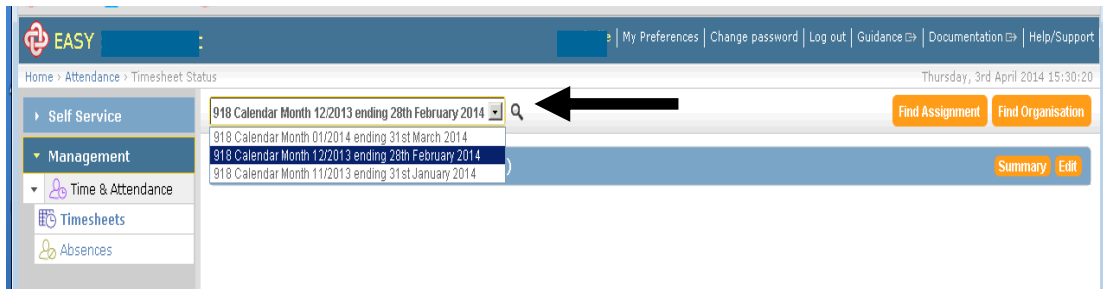
System for the input of Timesheet and Outside
Normal Hours information

1. Authorising Timesheet information

Once you have logged on under the Management banner click on Timesheet to access the main timesheet status screen which will show the organisations (departments) you are able to view and authorise.



To select the period you wish to view use the drop down list located just above the organisations (departments). There will only be the 'open' months available through the drop down box.



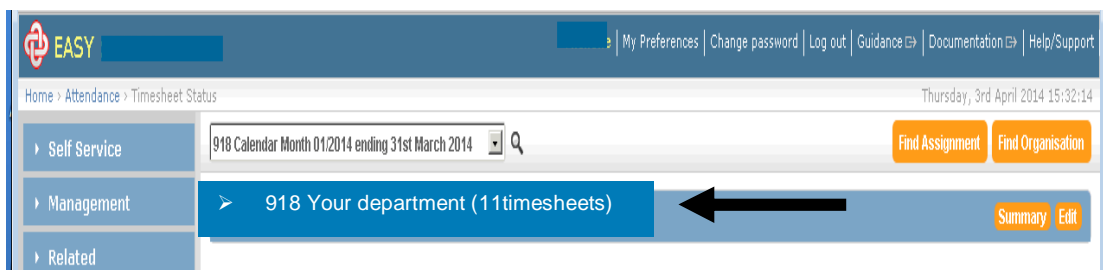
There are 3 different ways of accessing employee information to enable checking and authorisation of claims.

1. **Timesheet status screen**
2. **Edit screen**
3. **Summary screen**

From screens 1 & 2 (Timesheet status & Edit screen) you are able to view, check and authorise individual employees claims and from screen 3 (Summary) you can view, check and authorise single, multiple or the whole group's claims.

1. Timesheet status screen

From the timesheet status screen click on the organisation (department) banner and you will see the list of employees with timesheet records including claim status.



By using the 'filters' from the menu bar you can chose which records you wish to view.

The screenshot shows the EASY interface with a list of timesheet records. The left-hand menu has the 'Filters' section expanded, showing options for 'Assignment' (Active, With data), 'Status' (Any, Active, Data Entry, Submitted, Authorised, Extracted), and 'Last Action' (Any, 3+ days, 7+ days, 14+ days, 28+ days). The main area displays a table with columns for 'Assignment' and 'Status'. Each row contains the text 'Employees name (98765412): job title' and 'Data Entry'. An arrow points to one of the rows in the table.

Clicking on an individual name will take you into the employee's record.

If the timesheet has been submitted it will show as a summary view of the totals claimed by the employee.

The screenshot shows the EASY interface for an employee's record. The top section is titled 'Employee's name (assignment no): job title, period' and includes 'Unsubmit' and 'Show Full Timesheet' buttons. Below this is the 'Employee Information' section with fields for Last Name, First Name, Assignment Number, NI Number, Position, Contracted Hours, Payscale & Spinal Point, Increment Date, Assignment Start Date, and Date Joined NHS. The 'Timesheet' section shows a table for 'Enhancements (hours)' and 'Overtime (hours)' with columns for Sat., Sun., Night, Unsoc., and Public Hol. The 'Emergency Cover' section shows tables for 'On Call (sessions)', 'Stand By (sessions)', 'Work Done (hours)', and 'Other (hours)'. The 'Actions' section shows a table with columns for Action, By, and At. An arrow points to the 'Show Full Timesheet' button.

You can view the full timesheet by clicking on 'Show Full Timesheet'

The full timesheet once checked can be authorised from this screen. Once authorised the claim will be transferred to the payment file.

Employee's name (assignment no): job title, period

Employee Information

Timesheet

Date	Time		Cont. Hours Worked	Excess Basic Hours	Enhancements (hours)					Overtime (hours)				
	Start	End			Sat.	Sun.	Night	Unsoc.	Public Hol.	Week Day	Sat.	Sun.	Night	Unsoc.
Monday, 10th Feb 2014	09:30	17:30	7.50											
Tuesday, 11th Feb 2014	09:30	17:30	7.50											
Wednesday, 12th Feb 2014	09:30	17:30	7.50											
Thursday, 13th Feb 2014	09:30	17:30	7.50											
Friday, 14th Feb 2014	09:30	17:30	7.50						7.50					
Saturday, 15th Feb 2014														
Sunday, 16th Feb 2014														
Period Totals			149.92							7.50				

If the timesheet has not been submitted it will show as below

Employee's name (assignment no): job title, period

Employee Information

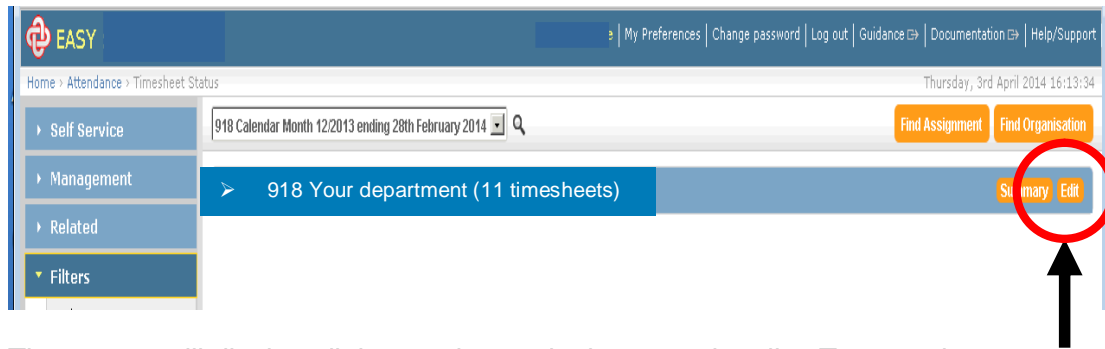
Timesheet

Date	Time		Cont. Hours Worked	Excess Basic Hours	Enhancements (hours)					Overtime (hours)				
	Start	End			Sat.	Sun.	Night	Unsoc.	Public Hol.	Week Day	Sat.	Sun.	Night	Unsoc.
Monday, 10th Feb 2014	<input type="text"/>	<input type="text"/>	7.50											
Tuesday, 11th Feb 2014	<input type="text"/>	<input type="text"/>	7.50											
Wednesday, 12th Feb 2014	09:25	18:00	8.08											
Thursday, 13th Feb 2014	08:55	18:00	8.58											
Friday, 14th Feb 2014	08:45	17:50	8.58											
Saturday, 15th Feb 2014	<input type="text"/>	<input type="text"/>												
Sunday, 16th Feb 2014	<input type="text"/>	<input type="text"/>												
Period Totals			113.39											

Employees timesheets should not be submitted by the manager on the employee's behalf unless the employee is absent due to sickness, maternity, paternity or adoption.

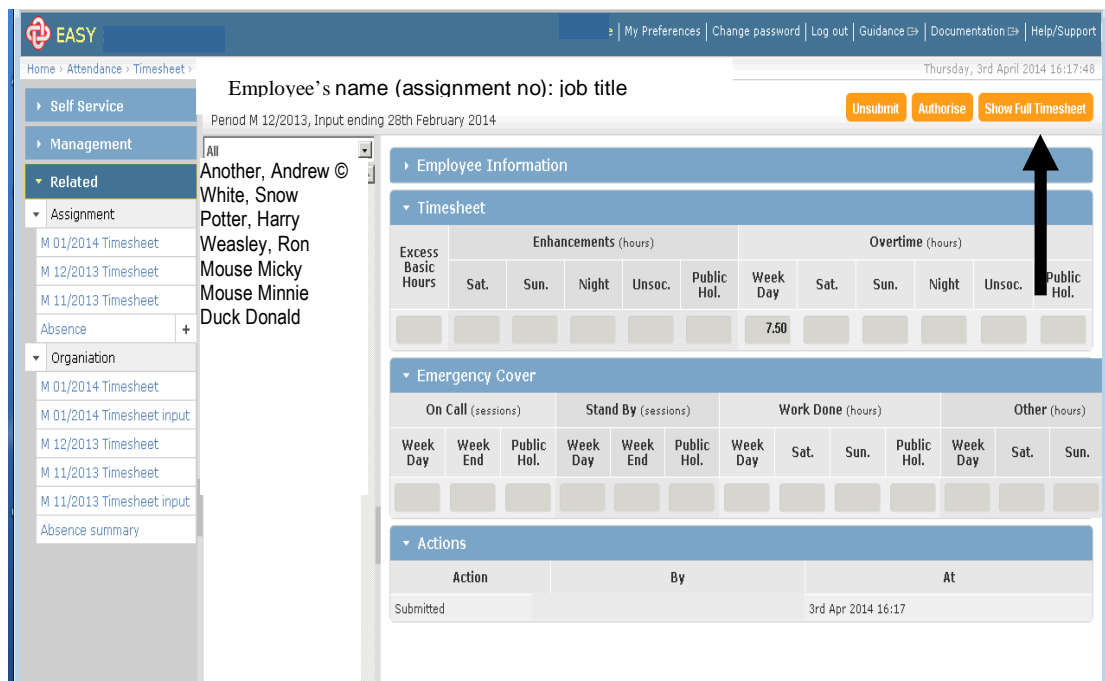
2. Edit screen

From the main screen you can go to the group **Edit** view of the timesheets by clicking on Edit, from this screen you can view, check and authorise individual claims.



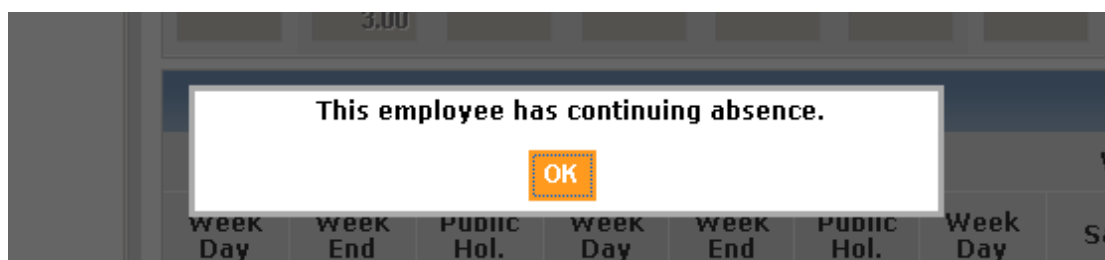
The screen will display all the employees in the group in a list. To move between employees timesheets click on the employee's name in the list.

As previously shown in the screens above: the timesheet will show as a summary view if submitted or a full timesheet if unsubmitted.



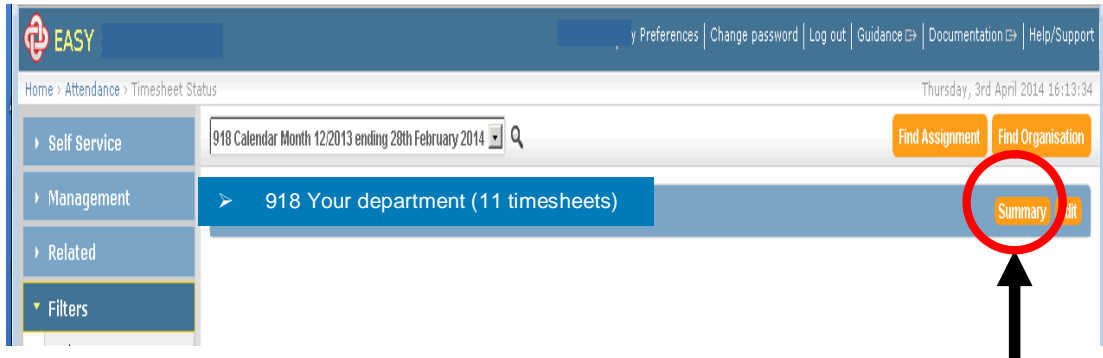
From the summary view you can view the full timesheet by clicking on 'Show Full Timesheet'. Claim can be authorised from this screen. Once authorised the claim will be transferred to the payment file.

If the employee has a continuing sickness then there will be a © at the side of the employees name in the list. Whenever you click on the employee's record you will receive an information message informing that the employee has a continuing sickness. Click ok to proceed as normal.

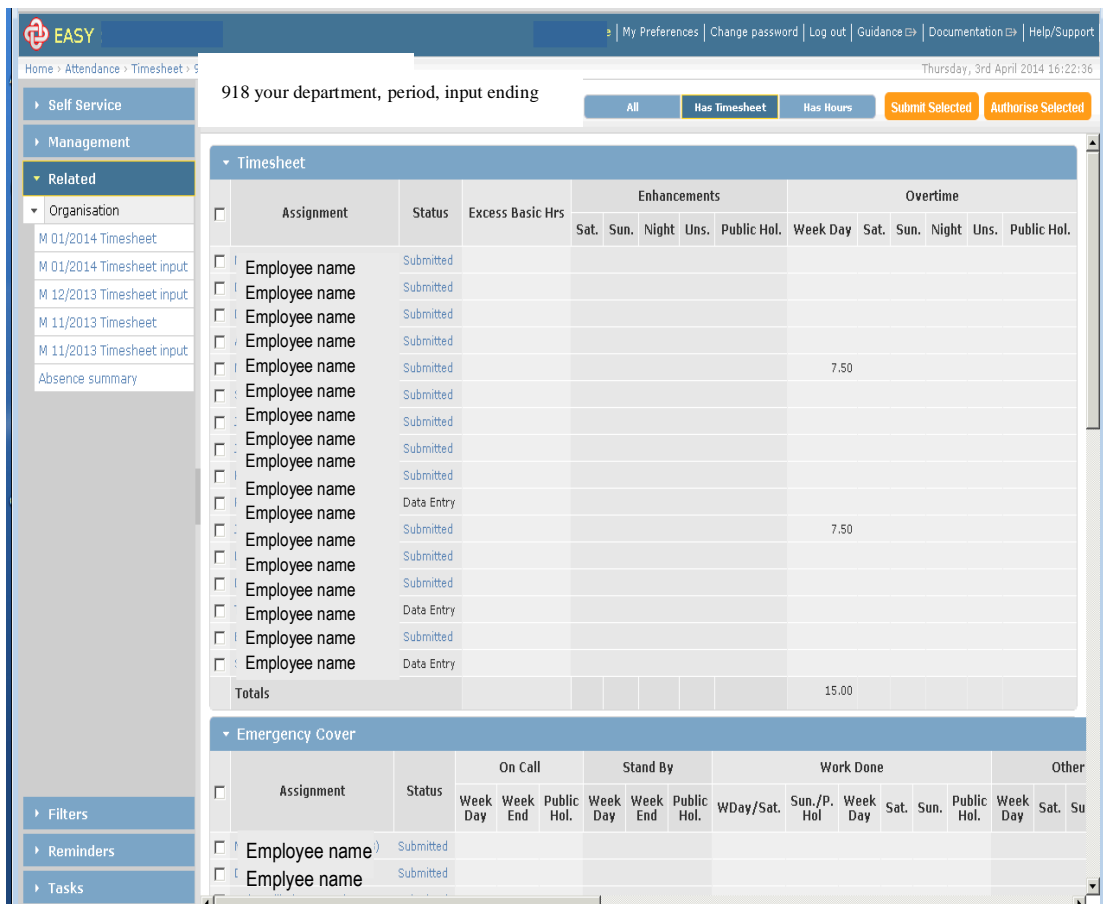


3. Summary View

From the main screen you can go to the **Summary view** by clicking on Summary, from this screen you can view, check, submit and authorise single, multiple or the whole group's claims.



The Summary view will show the total amounts claimed for each employee for timesheet, emergency cover and additional information, plus claim status. Clicking on the employees name in any section will take you to the individual's timesheet to enable individual checking and authorisation.



Once your checking is complete (see checking guidance below) - from the summary screen you can choose which timesheets you wish to authorise by clicking on the small box next to the individual's name.

Ticking a box in one section will select the employee's records in each section.

918 your department

Show: All Has Timesheet Has Hours Authorise Selected

Timesheet

Assignment	Status	Excess Basic Hrs	Enhancements				Overtime								
			Sat.	Sun.	Night	Uns.	Public Hol.	Week Day	Sat.	Sun.	Night	Uns.	Public Hol.		
<input checked="" type="checkbox"/> Employee names	Submitted					1.00					3.00				
And assignment number	Authorised		5.00				13.00			8.00					
Totals			5.00				14.00			8.00					

Emergency Cover

Assignment	Status	On Call			Stand By			Work Done			Other						
		Week Day	Week End	Public Hol.	Week Day	Week End	Public Hol.	WDay/Sat.	Sun./P. Hol.	Week Day	Sat.	Sun.	Public Hol.	Week Day	Sat.	Sun.	Public Hol.
<input checked="" type="checkbox"/> Employee names, assignment number	Submitted	48.00	48.00	24.00						1.00	3.00			1.00			
And assignment number	Authorised	80.00	48.00							3.00					2.00	1.00	
Totals		128.00	96.00	24.00						4.00	3.00			1.00	2.00	1.00	

Additional Information

Assignment	Status	Continuing Absence	Comment	Commented By	Commented At
<input checked="" type="checkbox"/> Employee names	Submitted	○	Test comment	Michelle Goddard	29th Jan 2013 11:06
And assignment number	Authorised	○			

9th January 2013

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Ticking a box in one of the small boxes at the top of each section will select all employees' records in all sections.

918 your department

Show: All Has Timesheet Has Hours Authorise Selected

Timesheet

Assignment	Status	Excess Basic Hrs	Enhancements				Overtime								
			Sat.	Sun.	Night	Uns.	Public Hol.	Week Day	Sat.	Sun.	Night	Uns.	Public Hol.		
<input checked="" type="checkbox"/> Employee names	Submitted														
<input checked="" type="checkbox"/> Employee names	Submitted														
Totals															

Emergency Cover

Assignment	Status	On Call			Stand By			Work Done			Other						
		Week Day	Week End	Public Hol.	Week Day	Week End	Public Hol.	WDay/Sat.	Sun./P. Hol.	Week Day	Sat.	Sun.	Public Hol.	Week Day	Sat.	Sun.	Public Hol.
<input checked="" type="checkbox"/> Employee names	Submitted	80.00	48.00														
<input checked="" type="checkbox"/> Employee names	Submitted	80.00	48.00														
Totals		160.00	96.00														

Additional Information

Assignment	Status	Continuing Absence	Comment	Commented By	Commented At
<input checked="" type="checkbox"/> Employee names	Submitted	○			
<input checked="" type="checkbox"/> Employee names	Submitted	○			

1st November 2013

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Press the 'Authorise selected' button to authorise selected records. All authorised records will be extracted to the payment file irrespective of the status of other records.

Checking Claims guide

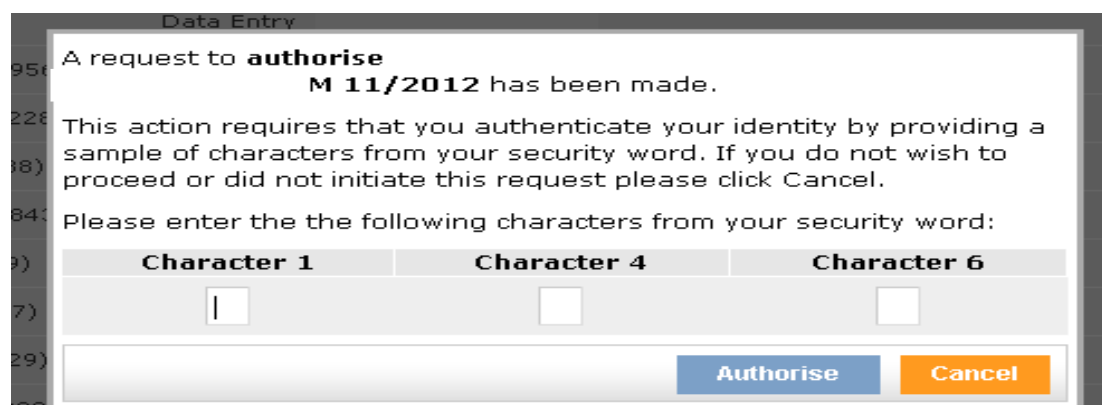
Here are a few things to remember when performing checking:

1. Check that the list of staff in the group/s that you can see is correct and where necessary complete any NHSBT Pay Support documentation to correct.
2. Check absences and close down any absences where the employee has returned to work
 - Remember all absences must be at the authorisation stage to be extracted to ESR
3. Make sure that you are in the correct month.
4. Have you checked all timesheets where there has been a claim?
 - You must check claims and be satisfied that it is valid, accurately reflects the work done and be in line with the appropriate Terms and Conditions
 - Enhancements and Overtime cannot be claimed for the same hours
 - Employees should claim Public Holiday Enhancement if the shift they work is a shift they would have worked if the day had not been a public holiday
 - Employees should claim Bank Holiday Overtime if the shift they work is an extra shift above full-time (37.5 hours) and is NOT a shift they would have worked if the day had not been a public holiday
 - Employees should claim either Saturday or Sunday Enhancement and not unsocial if the shift worked is on a weekend
 - Check the summaries, ensure that the total number of hours claimed are valid and correct
5. Have you checked all on-call / call out sheets where there has been a claim?
 - You must check claims and be satisfied that it is valid, accurately reflects the work done and be in line with the appropriate Terms and Conditions
 - Work done / Other hours can only be claimed if the employee was on-call
 - Check the summaries, ensure that the total numbers claimed are valid and correct
6. For BD Nurses who have claimed AfB (away from Base)
 - You must check that the AfB claimed is valid and accurately reflects the Duty / Session payment due, according to the actual number of hours, or part hours, actually spent away from base
7. Have you checked all comments for any adjustments for payment?
 - You must check claims and be satisfied that it is valid, accurately reflects the work done and be in line with the appropriate Terms and Conditions
 - You must make sure any adjustments have not been claimed previously.
8. You should not submit a claim on the behalf of an employee except if employee is absent due to sickness, maternity, paternity or adoption

9. Authorise all submitted claims by the published deadlines.
 - NHSBT Pay Support will no longer be able to identify any unauthorised records by the deadline and so the payment file will be extracted as per the published deadlines
10. Only authorise once you have checked all claims and comments

Authorisation

To authorise from any screen you will be required to agree to the declaration and input 3 characters from your security word.

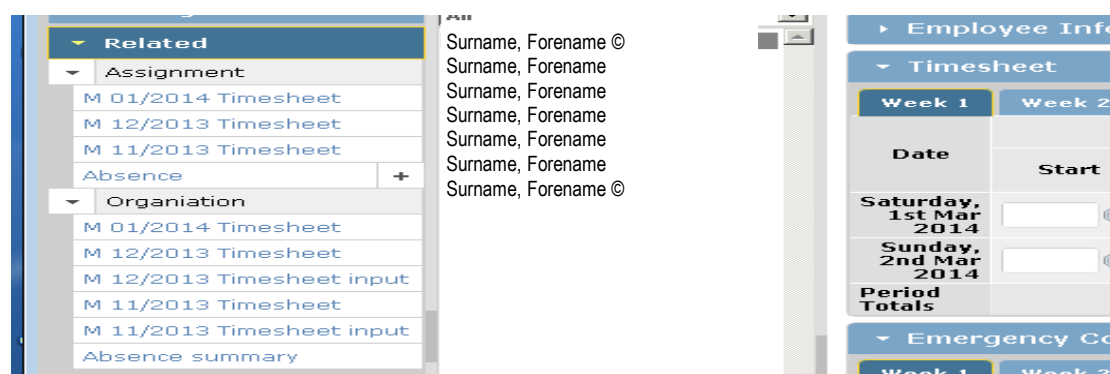


If you have forgotten your security word please contact the NHSBT Pay Support Helpline either by telephone on 0191 202 4455 (f/net 54455) or by e-mail to the Pay Support Helpline e-mail box.

Related function

When in some screens you have the option to use the **Related** banner from the navigation bar which will give you quick links to other related screens which can be related either to the group or individual including a link to the absence function.

When in an individual timesheet record or in the edit view the Related banner includes both assignment and organisation quick links.



When in the Summary view the Related banner includes group quick links.

▼ Related
▼ Organisation
M 01/2014 Timesheet
M 01/2014 Timesheet input
M 12/2013 Timesheet input
M 11/2013 Timesheet
M 11/2013 Timesheet input
Absence summary

Timesheet		Status	Excess Basic Hrs	Enhancements				
Assignment				Sat.	Sun.	Night	Uns.	Public Hol.
<input type="checkbox"/>								
<input type="checkbox"/>	Employee name	Submitted						
<input type="checkbox"/>	Employee name	Submitted						
<input type="checkbox"/>	Employee name	Submitted						
<input type="checkbox"/>	Employee name	Submitted						
<input type="checkbox"/>	Employee name	Submitted						
<input type="checkbox"/>	Employee name	Submitted						

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