

EASY – general checking guide for managers

1. Maintenance of the employees in organisations (departments)

- Make sure that the list of employees within each of the organisations that you can see is correct and if changes are required please raise a query through HR Direct.
- Leavers should disappear from the organisation's employee list when they leave the payroll.
- New starters should appear within a week of you sending the new starter documentation to NHSBT Pay Support.
- If an employee transfers to/from another department, they should show/leave the employee list in EASY within a week of submitting the change documentation to Pay Support.

2. Absences

- You should enter and authorise new periods of absence as soon as the employee commences the absence.
- You should close and authorise absences only when the employee has actually returned to work and then close it down as soon as possible.
- The end date is the last day of absence prior to return to work or absence on other leave. (E.g. maternity leave, career break or annual leave being taken in advance of return to work)
- Maternity and Career breaks would not be recorded in EASY. Application for Maternity and Career forms should be submitted.
- Remember that sickness entitlements are in calendar days; therefore if an employee works 2 days a week and is off for those 2 days only, this should be recorded as 7 calendar days.
- Make sure that you do NOT record continuing sickness as individual episodes as this will result in;
 - [Incorrect generation/instigation of Policy trigger points](#)
 - [incorrect sickness entitlement & pay](#)
 - [incorrect management information being provided to NHSBT executive.](#)
- Check all absence at the end of each month to make sure nothing has been missed.
- Remember all absences must be authorised to be extracted to ESR.
- Authorised absences are extracted for transfer to ESR each morning.

3. Checking Individual Claims

- You must check each claim and be satisfied that it is valid, accurately reflects the work done and is in line with the appropriate Terms and Conditions.
- Enhancements and overtime payments cannot both be claimed for the same working hours.
- Employees should claim either Saturday or Sunday Enhancements rather than Unsocial if the shift worked is on a weekend.
- Work done (or other hours) when called in may only be claimed if the employee was on-call.
- Employees cannot work and be paid (e.g. overtime, on-call/call-out) if they are off sick, on annual leave or absent for any other reason.
- Employees should claim Public Holiday Enhancement for hours worked, if they would have worked that shift had that day not been a public holiday.
- Employees should claim Public Holiday overtime for hours worked *only* 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.

- Public Holiday enhancements and overtime are paid for hours between midnight and midnight.

4. Comments – requests to adjust pay

- Remember that if a claim is authorised after the deadline it will be paid the following month but any comments will not be reviewed for action.
- Please do not use the comments box to initiate payments already in an authorised, but unextracted claim.
- You must check comments recorded in each individual's claim and specifically review those requesting pay adjustments.
- These comments should start with the words "Pay Adjustment", you must be satisfied that it is a valid claim, accurately reflects the work done and is in line with the appropriate Terms and Conditions.
- You must also be sure any adjustments requested have not been claimed previously.
- Please remember that use of comments to generate pay should be exceptional only.

5. Authorising Claims

- Make sure that you are in the month you wish to authorise.
- Each authorised claim/timesheet is extracted for payment at the published deadline.
- Any timesheets not authorised by the deadline will remain available for a further month, and will be extracted the following month if authorised by that deadline.
- After 2 months any unauthorised timesheets are only available to view. This means they are inactive and cannot be submitted or authorised.
- All submitted claims should be authorised monthly by the 8th of each month, at 22.00
- Only authorise a claim once you have checked that it has been correctly completed and reviewed any comments.

6. Late Claims

- Payment for 'late' claims will be made in the following (or next available) pay run.
- Manual advances of pay will not be available.