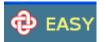




# NHSTB Pay Support EASY Manager's Authorisation Guide

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.

🔁 EASY		s   My Preferences   Change password   Log out   Guidance ⊡>   Documentation ⊡>   Help/Support
Home		Thursday, 3rd April 2014 15:20:47
→ Self Service	Welcome to EASY	
▼ Management	Thank you for using EASY.	
🝷 💪 Time & Attendance		
Timesheets		
🕹 Absences		

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.

nd EASY	:	>   My Preferences   Change password   Log out   Guidance ⊡>   Documentation ⊡>   Help/Support
Home > Attendance > Timesheet	Status	Thursday, 3rd April 2014 15:30:20
Self Service	918 Calendar Month 12/2013 ending 28th February 2014 📃 🔍	Find Assignment Find Organisation
<ul> <li>Management</li> </ul>	918 Calendar Month 01/2014 ending 31st March 2014 918 Calendar Month 12/2013 ending 28th February 2014 918 Calendar Month 11/2013 ending 31st January 2014	Summary Edit
🝷 👍 Time & Attendance	STO Guiendar monar 172213 ending STSCoundary 2014	
Timesheets		
Absences		

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.

🔁 EASY		e   My Preferences   Change password   Log out   Guidance ⊡   Documentation ⊡   Help/Support
Home > Attendance > Timesheet S	tatus	Thursday, 3rd April 2014 15:32:14
→ Self Service	918 Calendar Month 01/2014 ending 31st March 2014 $\  \   \fbox$ Q	Find Assignment Find Organisation
→ Management	918 Your department (11timesheet)	s) Summary Edit
→ Related		



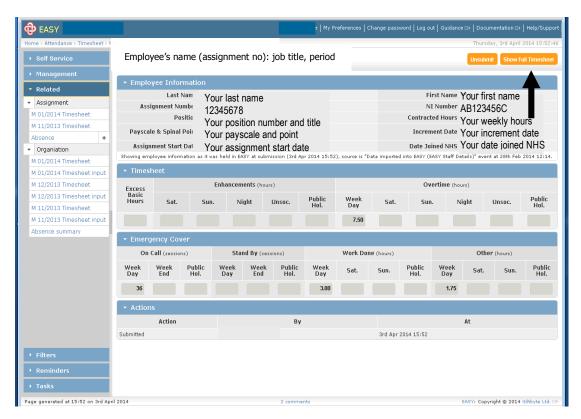


By using the 'filters' from the menu bar you can chose which records you wish to view.

e > Attendance > Timesheet Status	Thursday, 3rd April 201	4 15:
Self Service 918 Calendar Month 01/2014 ending 31st March 2014 📃 🔍	Find Assignment Find Org	anisa
Management > 918 Your department (11 timesheets)	Summar	ry G
Related	signment Stat	tus
Filters Employees name (98765412): job title	Data Entry	
Assignment Employees name (98765412): job title	Data Entry	
tive Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	
Status Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	
tive Employees name (98765412): job title	Data Entry	
ata Entry Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	
Employees name (98765412); job title	Data Entry	
Employees name (98765412): job title	Data Entry	
tracted Employees name (98765412): job title	Data Entry	
Last Action Employees name (98765412): job title	Data Entry	
<sup>1y</sup> Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	
Employees name (98765412): job title	Data Entry	

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.



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.

me > Attendance > Timesheet > N													Т	Thursday, 3	rd April 20	14 15:56
Self Service	<b>E</b> 1				mont	~~\.;	<u></u>		ind					submit	0.00	norise
Management	Employ	ee sn	ame (	assigr	ment	no): j	ווו מס	e, per	100				Un	submit	Auu	lunse
Related	→ Employe	ee Infor														
Assignment	- Timeshe	et														Г
M 01/2014 Timesheet	Week 1	Week 2	Week 3	Week	4 Weel	< 5										
M 11/2013 Timesheet		Ti	ime	Cont	Fuence		Enhar	cements	(hours)				Overtin	1e (hours)		
Absence +	Date	Start	End	Cont. Hours Worked	Excess Basic Hours	Sat.	Sun.	NI-64	Unsoc.	Public	Week	Sat.	Sun.	NULLA	Unsoc.	Public
Organiation		Start	Ellu	WUIKEU	TIOUTS	Sdl.	Suii.	NIGHT	UIISUC.	Hol.	Day	Sdl.	Sun.	NIGHT	Unsuc.	Hol.
M 01/2014 Timesheet	Monday, 10th Feb	09:30	17:30	7.50												
M 01/2014 Timesheet input	2014															
M 12/2013 Timesheet	Tuesday, 11th Feb	09:30	17:30	7.50												
M 12/2013 Timesheet input	2014															
M 11/2013 Timesheet	Wednesday, 12th Feb 2014	09:30	17:30	7.50												
M 11/2013 Timesheet input Absence summary	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

EASY EASY								e   My	Preference			Log out	Guidance		mentation (	⇒   Help/S	Supp
ome > Attendance > Timesheet > J														Thursd	ay, 3rd Ap	ril 2014 16	:06
Self Service	Employe	e's na	me	(assid	nment r	no): iob	title, r	period	-				s	ive Res	et Subn	nit Autho	oris
Management																	
Related	Employe	ee Info	rmat	tion													
Assignment	🝷 Timeshe																
M 01/2014 Timesheet	Week 1	Week 2	w	eek 3	Week 4	Week 5											
M 11/2013 Timesheet			Tim	ne	Cont.	Excess		Enhar	ncements	(hours)				Overtin	<b>1e</b> (hours)		
Absence + Organiation	Date	Sta	t	End	Hours Worked	Basic	Sat.	Sun.	Night	Unsoc.	Public Hol.	Week Day	Sat.	Sun.	Night	Unsoc.	
M 01/2014 Timesheet	Monday,											,					
M 01/2014 Timesheet input	10th Feb 2014		0	(	7.50												
M 12/2013 Timesheet	Tuesday, 11th Feb 2014		0		7.50												
M 12/2013 Timesheet input M 11/2013 Timesheet	Wednesday, 12th Feb 2014	09:25	0	18:00	8.08												
M 11/2013 Timesheet input Absence summary	Thursday, 13th Feb 2014	08:55	0	18:00	8.58												
	Friday, 14th Feb 2014	08:45	0	17:50	8.58												
	Saturday, 15th Feb 2014		0														
	Sunday, 16th Feb 2014		0														
	Period Totals				113.39												

Employees timesheets should be 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.





	Thursday, 3rd April 2014 16:13:34
	Hidisday, sid April 2014 10.15.54
alendar Month 12:2013 ending 28th February 2014 🗾 🔍	Find Assignment Find Organisation
918 Your department (11 timesheets)	Su mary Edit
	· · · · · · · · · · · · · · · · · · ·
	<b>↑</b>
2	

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.

🔁 EASY :					;	My Pref	erences   C	hange pass	word   Log	out   Guid	ance ⊡   D	ocumenta	ation ⊡>   H	elp/Support
Home > Attendance > Timesheet >	England's nome	(000)		at a a).	ich tit						Th	ursday, 3	rd April 201	L4 16:17:48
➤ Self Service	Employee's name		-	it no):	ווו מסן	e				Unsut	omit Auth	norise	Show Full 1	limesheet
▶ Management	Period M 12/2013, Input ending	28th Febru	ary 2014											
✓ Related	Another, Andrew ©	→ Emp	loyee Ir	nformatio	on								_	
<ul> <li>Assignment</li> </ul>	Potter, Harry	🝷 Time	sheet											
M 01/2014 Timesheet	Weasley, Ron	Excess		Enh	ancements	(hours)				0	vertime (h	ours)		
M 12/2013 Timesheet	Mouse Micky	Basic Hours	Sat.	Sun.	Night	Unso	Publi			ıt. S	un. N	ight	Unsoc.	Public Hol.
M 11/2013 Timesheet	Mouse Minnie Duck Donald						Hol.					-		- Hol.
Absence +	Buok Bonala							7.	50					
<ul> <li>Organiation</li> </ul>		▼ Eme	rgency (	over										
M 01/2014 Timesheet														
M 01/2014 Timesheet input		On	C <b>all</b> (sessi	ons)	Stan	d By (ses:	sions)		Work Do	<b>ne</b> (hours)			Othe	B <b>r</b> (hours)
M 12/2013 Timesheet		Week Day	Week End	Public Hol.	Week Day	Week End	Public Hol.	Week Day	Sat.	Sun.	Public Hol.	Week Day	Sat.	Sun.
M 11/2013 Timesheet		Duy	LIIU	1101.	Duy	LIIU	1101.	Duy			1101.	Duy		
M 11/2013 Timesheet input														
Absence summary		• Actio	ns											
			Action				By					At		
		Submitted							3rd	Apr 2014 1	.6:17			

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.

🔁 EASY	ι, γ	Preferences   Change password   Log out   Guidance ⊡   Documentation ⊡   Help/Support
Home > Attendance > Timesheet S	tatus	Thursday, 3rd April 2014 16:13:34
▸ Self Service	918 Calendar Month 12/2013 ending 28th February 2014 🖃 🔍	Find Assignment Find Organisation
→ Management	> 918 Your department (11 timesheets)	Summary dit
→ Related		Y
<ul> <li>Filters</li> </ul>		T
THUIS	1	

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.

e > Attendance > Timesheet > 9														Thursd	ay, 3rd (	April 2014	16:2
Self Service	9	18 your department,	period, ir	iput e	nding			All	Has	Timesheet	Has Hou	rs	Subi	nit Selec	ed A	uthorise S	Select
Management	_			_									_				
Related	•																
								Enhan	cement	ts			C	vertime			
Organisation 01/2014 Timesheet		Assignment	Status	Exce	ss Basic Hrs		t. Sun	. Night	t Uns.	Public Hol.	Week Da	y Sa	t. Su	n. Nigh	t Uns.	Public	Hol
			Submitted														
01/2014 Timesheet input		Employee name Employee name	Submitted														
12/2013 Timesheet input			Submitted														
11/2013 Timesheet	Г	Employee name	Submitted														
11/2013 Timesheet input	Г	Employee name	Submitted								7.5	50					
sence summary	Г	Employee name	Submitted														
	Г	Employee name	Submitted														
	Г	Employee name	Submitted														
	Г	Employee name	Submitted														
	Г	Employee name	Data Entry														
		Employee name Employee name	Submitted								7.5	50					
		Employee name	Submitted														
		Employee name	Submitted														
		Employee name	Data Entry														
		Employee name	Submitted														
		Employee name	Data Entry														
		Totals									15.0	0					
		Emergency Cover															
					On Call		s	tand By			Wor	k Don	е				Ot
Filters		Assignment	Status	Week Day	Week Put End Ho	olic V	∛eek Day	Week End	Public Hol.	WDay/Sat.	Sun./P. Hol	Week Day	Sat.	Sun. F	ublic Hol.	Week Day S	at.
Reminders		Employee name	Submitted	,			-,					,				-,	
		<sup>1</sup> Emplyee name	Submitted														

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.



# **NHS** Blood and Transplant

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

9'	18 your de	enartm	ent					Show:		All	Has 1	limeshe	et	Has Ho	ours	A	uthoris	e Selec	ted:
Ŭ	re year a	oparan	on															•	
•	Timesheet																		
	Assign	ment	Sta	tus	Excess Ba	asic Hrs			nhance							ertime			
() 	Employee	names					Sat.	Sun. 1	Vight		Public Ho	n. we	ek Day			Night	Uns.	Pub	lic Ho
	And		Submi				5.00			1.00			8.0	3.00	'				
	Assianment	number	Addio	1560		5.00	5.00		14.00	13.00	8.	00	3.0						
-	Emergency (																		
	Linergeney	50001		On Cal		s	tand B	y			Wa	ork Don	e				Ot	her	
	Assignment	Status	Week Day	Week End	Public Hol.	Week Day	Week End	Public Hol.	WDa	y/Sat.	Sun./P. Hol	Week Day	Sat.	Sun.	Public Hol.	Week Day	Sat.	Sun.	Pub Ho
	Implovee	Submitted	48.00	48.00									3.00			1.00			
	Names, assignment	Authorised	80.00	48.00								3.00					2.00	1.00	
	Totals	Machorisea	128.00	96.00									3.00			1.00	2.00		
-				50100	24100		_					4100	0.00			1.00	2100	1.00	
	Additional Ir																		
•		ssignment			Status	С	ontinu	ing Abse	nce		Comment		Com	nented	IBy	C	ommo	ented #	At
•	Fmnlove				mitted			•		Test	t comment	M	ichelle (	Goddard		29th Ja	n 2013	11:06	
	assignme	nt number		Aut	horised			•											

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

	Timesheet							Enh	ancements					Ove	rtime		Т	•
	Assigni	ment	Statu	s Ex	cess Basi	ic Hrs	Sat.	Sun. Nig	ht Uns. F	Public Hol.	Week	Day	Sat.	Sun.	Night	Uns.	F	lic H
	Employee name	es	Submitt	ed														
•	Employee name Totals	es	Submitt	ed														
		Davian	_		_	-					-				_			
	Emergency	Cover		On Call			Stand	D.,			ork Don						her	
◄	Asignment	Status	Week		Public	Week		-					_	Public	Week			Pu
			Day	End	Hol.	Day	End	Hol.	WDay/Sat	Hol	Day	Sat.	Sun.	Hol.	Day	Sat.	Sun.	Pul He
P	Employee names	Submitted	80.00	48.00														
V	Employee	Submitted	80.00	48.00														
	Totals		160.00	96.00														
	 Additional I	nformatio	n															
		Assignment			Status		Cont	inuing Abs	ence	Comme	nt	Cor	nment	ed By		Comn	nented	l At
	-mployee nam	-		Sut	mitted			•										
V	Employee nam	es		Sut	mitted			•										

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.

- Related		Surname. Forename ©	
ignment		_	- Times
1/2014 Timesheet			Week 1
/2013 Timesheet /2013 Timesheet			Date
ence	+		
Organiation 01/2014 Timesheet	-		Saturday, 1st Mar 2014
12/2013 Timesheet			Sunday, 2nd Mar
12/2013 Timesheet inp	put		2014 Period
11/2013 Timesheet 11/2013 Timesheet in:	put		Totals
sence summary			• Emerg

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

			NHS
Blood	and	Tran	splant

▼ Related	· Inneancer								
Organisation	Г	Assignment	Status	Excess Basic Hrs	Enhancements				
M 01/2014 Timesheet					Sat.	Sun.	Night	Uns.	Public Hol.
M 01/2014 Timesheet input		Employee name	Submitted						
M 12/2013 Timesheet input		Employee name	Submitted						
M 11/2013 Timesheet		Employee name	Submitted						
M 11/2013 Timesheet input		Employee name	Submitted						
Absence summary		Employee name	Submitted						
		Employee name	Submitted						

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