MANAGER GUIDE

Submitting Time & Expense Claims on Behalf of Employees

This guide provides step-by-step instructions for Managers and Business Managers on how to use Batch Time & Expense (T&E) Access to submit claims on behalf of employees with Read-Only ESS access. Batch T&E Access streamlines the submission process by allowing managers to create and automatically authorise claims in a single step.

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SHARED SERVICES   **iTrent**

What is "Batch T&E Access" and why use it?

Managers are being given **Batch Time & Expense (T&E) Access**, which simplifies the process if submitting time and expense claims on behalf of your employees:

- It allows you to **create and submit a claim in one step**.

- When you click **"Save"**, the claim is **automatically authorised**.

- This means you **no longer need to go back** and authorise the claim separately - saving time and reducing steps.

If you're a Manager or Business Manager submitting a Time & Expense claim for an employee who only has **Read-Only ESS** access, follow these simple steps:
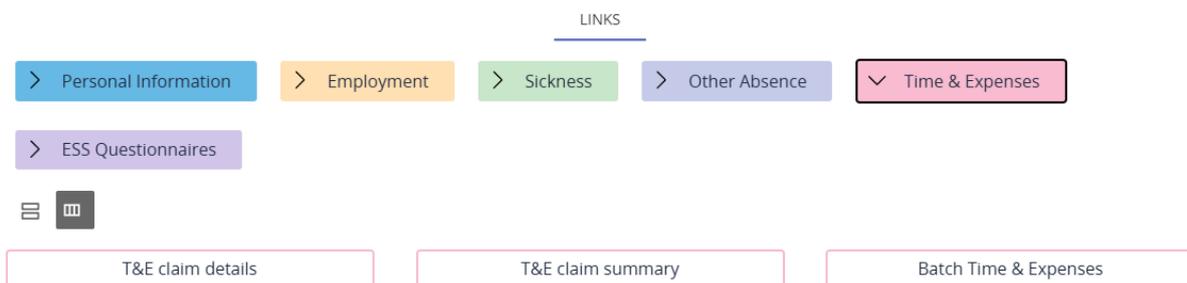
1. From the **Manager Dashboard**, navigate to **"Your Staff"** to view the list of employees under your management.
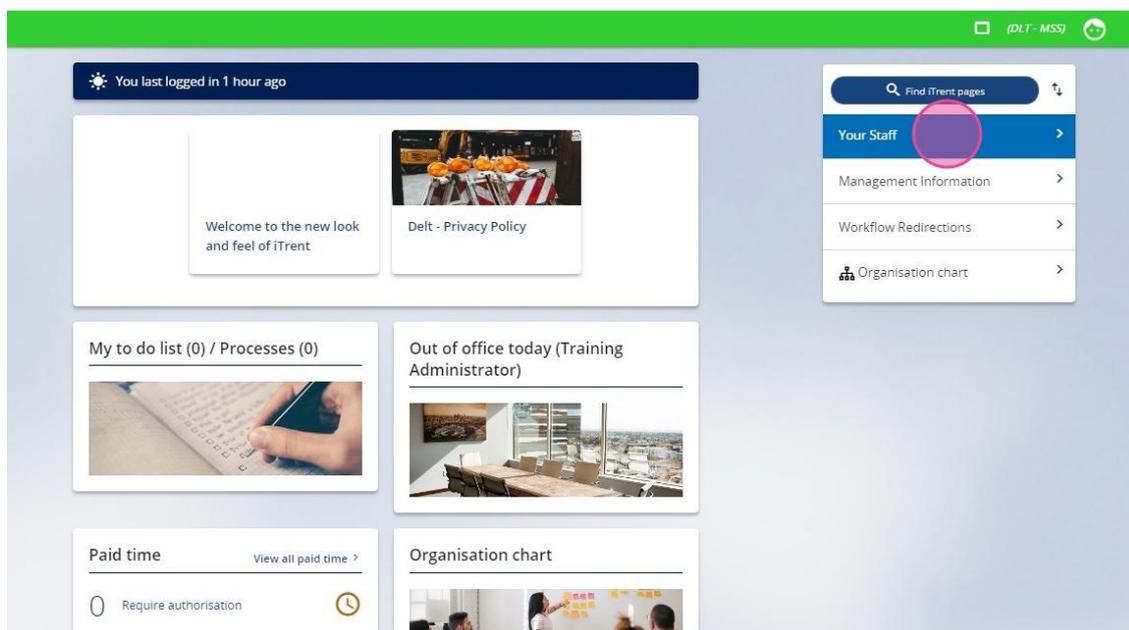
2. Use the **left-hand search pane** to find and select the employee whose records you need to view or update.
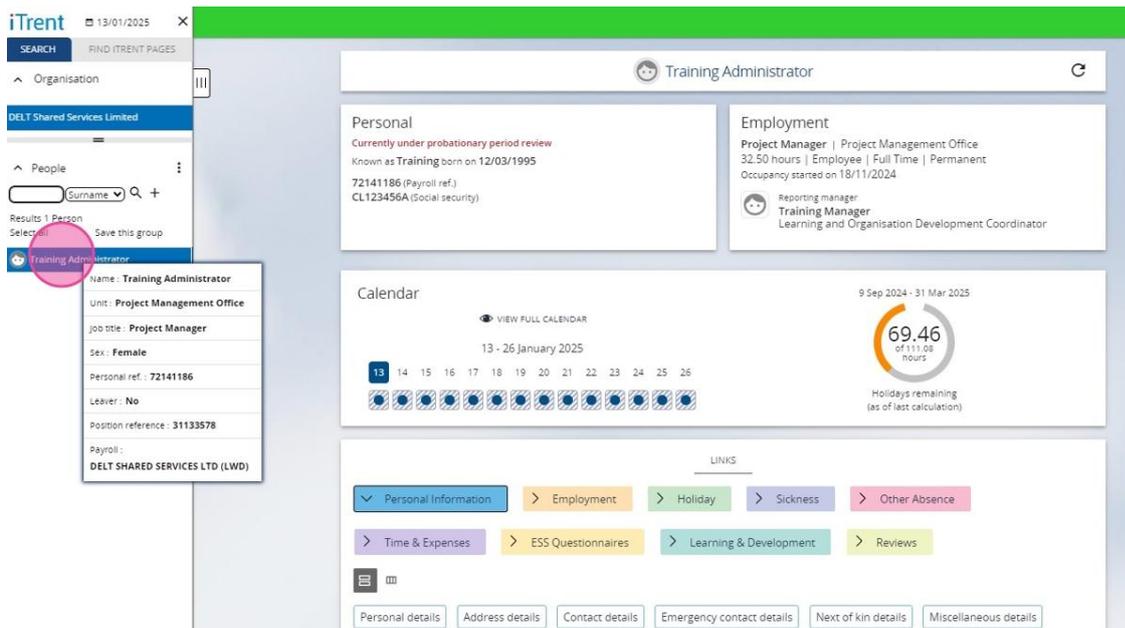
3. Scroll to the **Links** section and click on **"Time & Expenses"**. Click **"Batch Time & Expenses"**.

4. From the **Time & Expenses List**, select the claim type that corresponds to what you need to enter. For example, choose **'Support Staff Claim'** to record additional or overtime hours for a school support staff member, **'Teacher Claim'** to record extra hours for a teacher, or **'Mileage and Expenses'** to submit mileage and expense claims.

   Please note: If you wish to submit a **mileage claim** on behalf of your employee, you will need to add a vehicle for them first. Please follow the steps in the *Managing Employee Records* guide to do this if you haven't done so already.

Time & Expenses list

PCC CORP Ceremonies Offr Claim

PCC CORP Contracted Staff Claim

PCC CORP Learning Facilitator Claim

PCC CORP Office Holders Claim

PCC CORP On Course SW Claim

PCC Mileage and Expenses

PCC SCH Casual Support Staff Claim

PCC SCH Supply Teacher Claim

PCC SCH Support Staff Claim

PCC SCH Teacher Claim

5. **Enter the Effective Date** for the claim.

Effective date ×

Please enter the date you wish to view or edit information from. Entering 't' will select today's date.

21/05/2025

OK   CANCEL

6. Enter the **employee's Surname or Personal Ref** again and click **"Search"**.

7. **Scroll down** to the bottom section of the page. The **claim template** will automatically populate with:

- Employee's Name

- Job Title

- Start Date

Click **"New"** to create a new claim entry.

PCC Mileage and Expenses

Batch Time & Expenses (as of 21/05/2025) New   ⌄ MENU ⟳ 🖨

Person search

Surname	holt
Forename	
Unit	
Job title	
Social security no.	
Personal ref.	
Position occupancy reference	
Payroll number	
Payroll	
Previous surname	
Smartgroup	🔍

Search

Time & Expenses claim

Claim template	PCC Mileage and Expenses
Person name *	
Job title *	⌄
Start date *	21/05/2025 📅

New

8. The form will open (this is an example of a mileage, and expenses claim) – **complete all required fields**. Don't forget to open all the pages available.

Payroll: PCC TCH (25TH)

Page 1 | Page 2

PLYMOUTH CITY COUNCIL - Mileage and Expenses Claim Form

Use this form to claim mileage and expenses.

PAGE 1 = Enter Mileage
PAGE 2 = Enter Business Expenses claimed for reimbursement

Select the correct scheme for the claimed journeys, if claiming under more than one scheme, submit a separate form.
Enter number of miles and post codes per journey.

Following submitting the claim, you can attach receipts.

If you need to claim against more than one item, click the "+" or "-" to
add or remove extra rows.

Please note if you need to change the budget cost centre and classification code that the claim is charged this will include *** to make up 16 characters

Vehicle	Scheme	Cost centre (if not home cost centre)
Error - you have no default vehicle	NEOST PB-Caretakers Letting ⌄	

Date	Miles claimed	No of Passengers	From postcode	To postcode	Reason for Journey		
📅						❌	+ −

Save **Skip**

Page 1 | **Page 2**

PLYMOUTH CITY COUNCIL - Mileage and Expenses Claim Form

PAGE 2 = Enter Business Expenses claimed for reimbursement

Element	Date	Reason for Claim	Cost Centre	Expenses Claim Amount *		
⌄	📅				+	−
				0.00		

Save Skip

9. For reference, the below is an example of the time claim form. There are three separate pages on this form.
   - Page 1 is for additional/overtime hours
   - Page 2 is for cash claims e.g. standby cash. (This is only applicable for certain employee groups)
   - Page 3 is for occurrences/units of standby etc. (This is also only applicable for certain employee groups).

   Make sure to complete all relevant pages before submitting.

Page 1 | Page 2 | Page 3

DELT SHARED SERVICES – TIME CLAIM FORM

Use this form to claim DELT Time Claims.

PAGE 1 = Enter Hours
PAGE 2 = Enter Cash
PAGE 3 = Enter Occurrences/Units

Enter a cost centre only your claim needs to be charged to a different to your normal cost centre. If you need to make claims against a different cost centres, use a claim form per cost centre. If you need to claim against more than one item, click the "+" or "-" to
add or remove extra rows.

PLEASE ENSURE THAT MINUS HOURS ARE PREFIXED WITH A "-" MINUS SYMBOL.

Element	Date	Reason for Claim	Cost Centre	Hours (decimal)		
⌄	📅			🔍⊗	+	−
				0.00		

10. Once done, **click "Save"**.

Save Skip
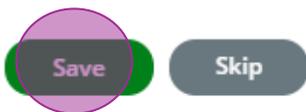
Note: Saving the form will also **authorise** it. The claim will now be sent to the **Payroll Team** for processing.