

# **Staff Connect Self Service User Guide Claims**

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## 1. CLAIMS

Claims are allowances for items such as meal and travel allowances. Claims are managed from the Payroll page.

You use the Claim Sheets panel to add new claims and manage existing Pending claims.

You use the Claim Lines panel to view historical Non-Pending claims

The page displays the current claims.

ACU AUSTRALIAN CATHOLIC UNIVERSITY

Dashboard Employee Talent Workforce Jennife Smith

Payroll

You can change your primary bank account or add an additional bank account. Please use the correct BSB and Account number.

My Tasks  
Timesheets  
Leave  
Payroll  
My Forms

Accounts and Deductions

Pay Summaries

Claim Sheets

+ Add

Week commencing 2 April 2018 04/04/2018 13:46:32 Draft

### 1. New Claim Sheet

Select Payroll from the Dashboard. The Payroll page is displayed.  
Click the Claim Sheets panel. Your claim sheets are displayed.

Click **Add Claim Sheets**. The Claim Sheet page is displayed.

Enter a descriptive title for the claim sheet in the Claim Message field and click **Save**. The Claim Details page is displayed.

Click **Save**. The Payroll page is displayed and the new claim sheet is added to the Claim Sheets list.

## 2. Add a line to a Claim Sheets

Select Payroll from the Dashboard. The Payroll page is displayed.

Click the Claim Sheets panel. Your claim sheets are displayed.

Select the claim sheet you want to add an entry for. The Claim Details page is displayed.

Click **Add** under Claim Lines. The Claim Line Details page is displayed.

Complete the fields and click **Save**. The Claim Details page is displayed and your record is added to the Claim Lines panel.

## 3. Add a line to a Claim Sheets

<b>Type</b>	Claim type, for example, On Call Allowance
<b>Claim Date</b>	Date of expense claim relates to
<b>Time From</b>	Starting time for claim
<b>Time To</b>	Finishing time for claim
<b>Hrs / Units</b>	Number of hours or units being claimed (for example, kilometres for travel)
<b>Entity</b>	Entity of claim, if applicable
<b>Project – Source of Fund</b>	Project – Source of Fund of claim, if applicable
<b>Activity</b>	Activity of claim, if applicable
<b>Comments</b>	Additional information regarding this claim
<b>Document</b>	Upload document, if applicable

Note: a red box denotes that the field is mandatory.

### Claim Line Details

Claim Line Details ?

TYPE	<input type="text"/>	▼
CLAIM DATE	<input type="text"/>	📅
TIME FROM	<input type="text"/>	
TIME TO	<input type="text"/>	
HRS / UNITS	<input type="text"/>	!
ENTITY	<input type="text"/>	🔍
PROJECT-SOURCE OF FUND	<input type="text"/>	🔍
ACTIVITY	<input type="text"/>	🔍
COMMENTS	<input type="text"/>	!
DOCUMENT	<input type="text"/>	📎

[Save](#)

## 4. View Claim Sheets and Claim Lines

### View Approved Claims

The Claim Lines panel displays all historical Non-Pending claims, in reverse chronological order (most recent to oldest).

Where more than 10 claim lines are present in the list, you can navigate to older claim lines using the Next button, and navigate back to earlier claim lines using the Previous button.

To view Non-Pending claim lines:

1. Select Payroll from the Dashboard. The Payroll page is displayed.
2. Click the Claim Lines panel. Non-Pending claim lines are displayed.
3. Click on the claim line that you wish to view. The Claim Line Details page is displayed showing the selected claim.
4. Click the Next and Previous buttons to move the Next or Previous 10 claim lines if required.

### **View Pending Claims**

1. Select Payroll from the Dashboard. The Payroll page is displayed.
2. Click the Claim Sheets panel. Pending claim sheets are displayed.
3. Click the Next button to move to the next 10 claim sheets if required.
4. Click on the claim sheet that you wish to view the details for. The Claim Details page is displayed showing the details of the claim sheet and a list of claim lines in the Claim Lines panel.
5. Click on the claim line that you wish to view the details for. The Claim Line Details page is displayed showing the details for the selected claim line.

## **5. Submit a Claim Sheet**

Select Payroll from the Dashboard. The Payroll page is displayed.

Click the Claim Sheets panel. Your claim sheets are displayed.

Select the claim sheet you want to submit. The Claim Details page is displayed.

Click **Submit**. The Payment Claim: <Description> page is displayed.

Select the recipient to approve the claim in the Send To field .

Enter additional information about the claim in the Message field.

Click **Submit**. The claim is submitted for processing and the Tasks page is displayed.

## **6. Delete a Claim Sheet**

You cannot delete a claim once it has been approved by your supervisor.

Select Payroll from the Dashboard. The Payroll page is displayed.

Click the Claim Sheets panel. Your claim sheets are displayed.

Select the claim sheet you want to delete. The Claim Details page is displayed.

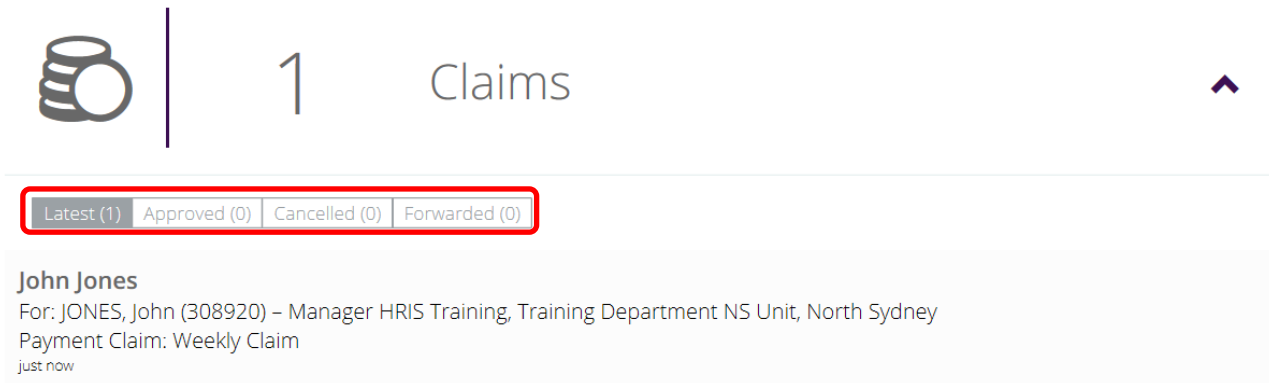
Click **Delete**. The claim sheet is deleted and the Payroll page is displayed.

## 2. APPROVING A CLAIM – SUPERVISOR / MANAGER

The My Tasks page shows workflow tasks and messages awaiting attention, grouped by task type. Select a task type to view the individual tasks displayed from the newest to oldest. Click an individual task to view its details.

The Tasks page allows you to manage Claims awaiting your attention. Claims are requests for reimbursement for additional times worked, and items such as meal and travel allowances.

Claims can be classified as **Latest, Approved, Cancelled, or Forwarded**. Your latest Claims are displayed by default. To switch the view between Latest, Approved, Cancelled, and Forwarded items click the relevant button at the top of the expanded Claims panel.



### 1. Process a Claim

Select Tasks from the Dashboard menu. The Tasks page is displayed.

Click the Claims panel. Claims assigned to you are displayed.

Click the claim you wish to process. The Leave Details page is displayed.

Select the claim sheet you want to delete. The Claim Lines page is displayed.

Click a row in the Claim Lines table to review it, if required. The Claim Line Details page is displayed.

Select the required option to:

- **Forward** the claim to another recipient
- **Approve** the claim
- **Decline** the claim

The applicant is notified of the outcome of the claim. If you selected Approve, the application will be forwarded to the next workflow recipient, if applicable.