**FAQs for New Claim Form – v1.2**

*Updated March 2018*

From the 1st February 2018 a new claim form replaced all existing forms used by Associate Lecturers, Associate Researchers, Casuals and Variable Hours (including Invigilators). Below are answers to some possible questions that may arise on the form itself and its use. Please note that old forms will not be accepted for processing after the 6th February 2018. Faculty /Directorate deadlines for submission of claims by employees should be followed. The submission process by the Faculty or Directorate will be shortened and will now go direct to Payroll in line with the Payroll Cycle deadline sent to you each month. Please ensure that you download the latest form from the HR Forms link - <https://www2.brookes.ac.uk/services/hr/handbook/forms/index.html>

**Quick Jump links to sections in this document: -**

**WHAT IS DIFFERENT**

**USING THE NEW CLAIM FORM**

**TROUBLESHOOTING**

WHAT IS DIFFERENT

1. **Why is there a new claim form?**

*There were multiple claim forms, each for a different category of employee, mostly collecting the same or similar information and much of the data requested is already held in the Core system as a result of being appointed. This new form has been streamlined and will collect only the data necessary for Payroll to find your record in the system and to record your hours and cost codings.*

1. **Much of the data requested on the old forms is not present on the new one?**

*This is because data such as Address, DOB, NI number and Bank Details are already in the system.*

*Additionally, the General Data Protection Regulation (GDPR) must be complied with.*

*All staff must provide their bank details via the Staff HR Portal in order to be paid. A video and manual on how to provide your bank details can be found on this link:* <https://sites.google.com/a/brookes.ac.uk/hr-and-payroll-system/training/erecruitment-training>

*Any changes must be made by the employee in their Staff HR Portal whenever possible or be notified in writing/email to the HR Directorate.*

1. **There is no space for Bank Details, how will you know how to pay me?**

*All bank details should be entered and updated via the Staff HR Portal.*

1. **There is no longer a field for Hourly Rate?**

*The hourly rate will already be in the system as a result of your appointment to the post. You will have been notified of this in your Contract. Hourly rates are also held in the workload planning system in the case of Associate Lecturers, so it is only necessary to know the number of hours worked. Administrative staff can find hourly rates on the Staff Request Post Numbers (Master) Google Sheet (accessible to those who raise Staff Requests).*

1. **There is no longer a Total Value field, how will you know the correct amount to pay me?**

*Once the hours are entered by Payroll, the Core system will work out the Total Value to be paid based on the hourly rate for the appointment. Faculties and Directorates use a workload planning system which contains the rates for each module and once the hours are recorded this will give a total value if required. Spreadsheets are also commonly used for monitoring Casuals and Variable Hours and rates can be added to these from the Staff Request Post Numbers (Master) sheet.*

1. **Why is this form now electronic?**

*It is often very difficult to read written entries and risks data being entered incorrectly by the Payroll team and consequently incorrect payments or cost coding. Typewritten entries will be clearer and result in quicker system entry times.*

1. **Can I open this spreadsheet in Google Sheets?**

*No, the functionality of the Excel spreadsheet and its protection settings are lost if opened in Google Sheets, therefore, it is only to be used via Excel.*

1. **Why is the Claim Form version controlled?**

*It is important that only the most current form on the website is downloaded and used. This will be in Excel spreadsheet form. Any claims made on old forms will be returned and a new form will need to be completed and authorised. Updates / Changes to the form will be communicated via a University wide email and OnStream.*

1. **Why is the HR team no longer part of the process?**

*The HR team were effectively policing what was entered on the claim forms and liaising with the employing departments to get the forms filled correctly; this was time consuming and should not be necessary. The Authorising Signatory will no longer sign incomplete or incorrect forms. If incomplete in any way the Payroll team will return them to the Faculty / Directorate for correction.*

USING THE NEW CLAIM FORM

1. **Do I need to print out my claim form?**

*As an employee you can type in your signature and send a copy of the form to the relevant Authorising Signatory from a Brookes email account. This email will serve as confirmation of the date submitted within the department. The Authoriser (or Administrator) will print off and sign physically until such time as digital signatures are used by the University. NB: Faculties / Directorates may have differing procedures for ensuring the claim forms are checked and signed.*

1. **I am an Authoriser; can I use a PDF signature?**

*If the signature is not manual, then to ensure a proper audit trail is evident, Payroll can only accept claims with a PDF signature if they are received in an email from the authoriser, or the authoriser is copied into the email to provide assurance that the authoriser has actually seen the claims. This also provides evidence of receipt by the deadline for payment and if any claims are missed, there is a permanent record of what has been received by the Payroll Team and when. A typed signature will be accepted in exceptional circumstances but only if the authoriser themselves have sent the claim from their own Brookes email address.*

1. **I cannot fit all my hours onto one claim form for the month.**

*There are 22 lines in place, so this should cover most claims. If you need more lines than this you can*

*submit a claim for the first half of the month and another for the second half. You will still be paid monthly.*

1. **How do I record my lunch breaks?**

*Any staff member working for 6 hours should take a 30 minute unpaid break. On your claim form you should enter the start time and end time for your working day and deduct 30 minutes (or the time you took for your break if longer) from the total hours for that day. See the pop up note on the claim form.*

1. **Recording hours in decimals instead of minutes.**

*This enables the spreadsheet to calculate the* ***Total Hours*** *for the claim.*

*There is an explanatory pop up note on the claim form and a more detailed explanation on the Guidance tab of the spreadsheet as follows: -*

***Daily Hours (decimal)*** *– the total should be entered as e.g. 5.25 for 5 ¼ hours, 5.50 for 5 ½ hours, 5.75 for 5 ¾ hrs etc. If you have worked over 6 hours in a day, ensure you deduct 30 minutes for your unpaid break. Claims should not include time of less than 15 minutes.*

1. **Where do I enter the Fixed Asset Code or Job Code?**

*Central Finance has advised that these codes are rarely used. Job Codes are being phased out and Fixed Asset codes match the Activity code apart from the first part and can be deduced if needed.*

1. **Are External Examiners, Affiliates and Specialist Lecturers to use this new claim form?**

*No, this is only for the employee types of Associate Lecturer, Associate Researcher, Variable Hours and Casuals.*

1. **How is the Appointment Id generated?**

*The Appointment Id is made up of the Post number plus a sequential number which denotes the number of the person appointed to the post e.g. 234436-689 - this being the 689th person appointed to post number 234436. For hourly paid staff, there will be a rate of pay for each post number. Faculty / Directorate administrators are able to see this on the Google Sheet – ‘Staff Request – Post Numbers (Master)’.*

1. **Where can I find my Appointment Id?**

*Read the Guidance tab on the Claim Form spreadsheet, this will show you how you can find your Appointment Id, Contract details and Module numbers (if applicable) in your Staff HR Portal.*

1. **Where can I find my Module Numbers?**

*Read the Guidance tab on the Claim Form spreadsheet, this will show you how you can find your Appointment Id, Contract details and Module numbers (if applicable) in your Staff HR Portal.*

1. **What form should I use for Overtime?**

*There is a new Overtime form which should be used for claims submitted direct to Payroll, after the 7th February 2018. Please use the latest one from the HR Forms link:-*

<https://www2.brookes.ac.uk/services/hr/handbook/forms/index.html>

TROUBLESHOOTING

1. **I have clicked on the Hourly Paid Claim Form link and get a page of gobbledygook?**
2. *If you are using an iPad or Mac please download using Safari.*
3. *If you are using a PC, first ensure you have cleared your Browser cache – you can find out how, via the internet.*
4. *If you still have a problem, contact the HRIS System team* *hr-system-team@brookes.ac.uk*
5. **I cannot see the module number that relates to the appointment id on my Staff HR Portal?**

*If you have followed the instructions on the Guidance tab of the claim form and do not see the module number, contact HR Operations for assistance.* *hrteam-operations@brookes.ac.uk*

1. **In the Staff HR Portal, there is no slide bar to scroll down to see multiple Appointments?**

*You can only see this, if you have accessed the Staff HR Portal using the recommended browser Chrome, please access again using this browser.*

1. **My Claim Form is printing off over more than one page?**

*Make sure you have checked your printing options before selecting Print, ensure you have*

1. **I use a Mac and / or I do not have Excel?**

*As a member of staff with a Brookes email address you can download Office 365 from Microsoft for free. Please use this link for more information on how to do this:-*

<https://brookes.service-now.com/kb_view.do?sysparm_article=KB0011776>