

HOW TO CREATE DAY WORKER CLAIMS

NB.

DAY WORKERS WITH NO EMPLOYEE ID MUST COMPLETE THE BANK & PERSONAL INFORMATION FORM FIRST; THIS FORM MUST BE SEND TO HR BEFORE THE CLAIM CAN BE CREATED ON THE SYSTEM. (Mrs A Pieterseon x 3838, Room 4-69, Admin building)

MAKE SURE IF ANY PERSONAL INFORMATION CHANGED, ESPECIALLY IF BANK DETAILS CHANGED, THE DAY WORKER MUST COMPLETE THE PERSONAL INFORMATION FORM FIRST, THE PERSONAL INFORMATION FORM MUST BE SEND TO HR BEFORE YOU CREATE THE CLAIM ON THE SYSTEM.

REMEMBER TO DELEGATE APPROVAL OF CLAIMS IF YOU ARE ON LEAVE OR NOT ABLE TO APPROVE THE CLAIMS.

1. Navigate to PeopleSoft HR, Main Menu, Self Service – UP, Employees workcentre, Claim request
2. Select the remuneration tab
3. Select claim request
4. Select the type of Claim, Day workers
5. Enter the Employee id
6. Select process request

Favorites Main Menu > Self Service - UP > Employees workcentre > Claim request

Employees WorkCentre

Navigations Remuneration Maintenance

Employee remuneration

Claim request

View/Print Payslip

View/Print Tax Certificate

Claim requisition

Process request

Claim requisition

*Type of Claim Day workers

Employee 04221516

Claim selection

7. Add the date worked, start time, end time and the position number
8. Save for later
9. Make sure everything is correct
10. Submit the claim

NB – Total Units indicate the hours or days or can be a combination of hours & days.

Employees WorkCentre

Navigations Remuneration Maintenance

Employee remuneration

- Claim request
- View/Print Payslip
- View/Print Tax Certificate

Claim requisition for Mr ER Mogale

Personnel Information

Day workers

Claim

	*Date worked	Start time	End time	Hours/days	Rate	Tax/UIF	Position number		
1	10/09/2013	8:00AM	12:00PM	4.00	39.39	1.58	00020404	+	
2	09/09/2013	8:00AM	5:00PM	1.00	315.92	26.93	00020404	+	

Total amount *****473.48

Total Units 5.00

Save for later Submit Return

11. You can yes-confirm if you are happy that the claim is correct, or no return if you need to change something

Favorites Main Menu > Self Service - UP > Employees workcentre > Claim requests

Employees WorkCentre

Remuneration Maintenance

Employee remuneration

- Claim request
- View/Print Payslip
- View/Print Tax Certificate

Confirmation of claim request for Mr ER Mogale

Day workers

Please confirm your claim request or return to modify it.

	Activity code	Start date	Day	Time started	Time ended	Hours worked	Rate amount	Total amount due	UIF/tax	Payment amount	Position number
1	Day workers - per hour	10/09/2013	Tue	8:00AM	12:00PM	4.00	39.39	157.56	1.58	155.98	00020404
2	Day workers - Day tariff	09/09/2013	Mon	8:00AM	5:00PM	1.00	315.92	315.92	26.93	288.99	00020404

Yes - Confirm No - Return

Total amount *****473.48

Total Units 5.00

- You will see that the claim was successfully completed, make sure on this page that the claim is routed to the correct line manager for approval(if not correct please phone Charmaine Groenewald 012 420 5024)
- See the routing it will go to the line manager for approval, then to finance (Mr TP Mashaba x2869) to pay the day worker and then to payroll (Mr AJ Cupido x2869) for finalization.
- If the day worker does not have bank details the claim will go directly to payroll for payment.**

Favorites Main Menu > Self Service - UP > Employees workcentre > Claim requests

Employees WorkCentre

Navigations Remuneration Maintenance

Employee remuneration

- Claim request
- View/Print Payslip
- View/Print Tax Certificate

Claim request has been successfully completed



Your claim request has been successfully completed and has been sent to your Line Manager for consideration.

Claim request number **416600**

[Return to claim application](#)

Claim request approval

Claim requisition: Pending

Claim approvals

```

    graph LR
      A["Pending  
Mr D Shrikumar  
Claim Approvals"] --> B["Not Routed  
Mr TP Mashaba  
2nd approval"]
      B --> C["Not Routed  
Mr AJ Cupido  
UPClaimThirdApproval"]
  
```

15. You can view all Day worker claims you've created, click on the green claim selection button, the page will expand
16. Select the type of Claim
17. Select the claim you want to view
18. Select process selected

Favorites Main Menu > Self Service - UP > Employees workcentre > Claim request

Employees WorkCentre

Navigations Remuneration Maintenance

Employee remuneration

- Claim request
- View/Print Payslip
- View/Print Tax Certificate

Claim requisition

*Type of Claim

Claim selection

Type of Claim

Workflow Status

Select a date from

Select a date to

EmplID

Claim number

[Select](#)

Claims to process

Claim number	Name	Type of Claim	Workflow Status	Date From	Date to	Claim amount
<input type="radio"/>	416562 Mrs C Groenewald	Day workers	Approved	02/09/2013	02/09/2013	78.78
<input type="radio"/>	416564 Mrs C Groenewald	Day workers	Data Saved	03/09/2013	03/09/2013	155.98
<input type="radio"/>	416595 Mr VK Nyalunga	Day workers	In Approval Process	16/09/2013	16/09/2013	157.56
<input type="radio"/>	416597 Mr ER Mogale	Day workers	Data Saved	03/09/2013	17/09/2013	473.48
<input type="radio"/>	416598 Mr ER Mogale	Day workers	Data Saved	17/09/2013	17/09/2013	39.39
<input type="radio"/>	416599 Mr ER Mogale	Day workers	In Approval Process	15/09/2013	15/09/2013	157.56
<input type="radio"/>	416600 Mr ER Mogale	Day workers	In Approval Process	09/09/2013	10/09/2013	473.48

[Process selected](#) [Cancel selected](#)

HOW TO APPROVE DAY WORKER CLAIMS

1. The line manager will receive an email
2. You can also navigate to PeopleSoft HR, Main menu, Self Service – UP, Managers workcentre, Approve/Disapprove claims
3. You can approve one by one claim by clicking the approve button to view the claim
4. You can also approve more than one claim at the same time, by selecting the claims you want to approve and then select the “approve selected” button.

	Approve	Disapprove	Claim request number	Name	Type of Claim	Submit date	Total amount due
<input type="checkbox"/>	Approve	Disapprove	416588	Cloete Mr CH	Day workers	2013/09/16	591.65
<input type="checkbox"/>	Approve	Disapprove	416589	Combrink Mr JFD	Day workers	2013/09/16	315.12
<input type="checkbox"/>	Approve	Disapprove	416590	van Heerden Mrs EC	Day workers	2013/09/16	355.31
<input type="checkbox"/>	Approve	Disapprove	416591	Smith Mr EJ	Day workers	2013/09/16	355.31
<input type="checkbox"/>	Approve	Disapprove	416592	Greyling Mr JJE	Day workers	2013/09/16	355.31
<input type="checkbox"/>	Approve	Disapprove	416593	Ndlovu Mr W	Day workers	2013/09/17	157.56
<input type="checkbox"/>	Approve	Disapprove	416594	Matemane Mr KL	Day workers	2013/09/17	315.12
<input type="checkbox"/>	Approve	Disapprove	416595	Nyalunga Mr VK	Day workers	2013/09/17	157.56
<input type="checkbox"/>	Approve	Disapprove	416599	Mogale Mr ER	Day workers	2013/09/18	157.56
<input type="checkbox"/>	Approve	Disapprove	416600	Mogale Mr ER	Day workers	2013/09/18	473.48

5. If you approve one claim at a time you will see this confirmation screen
6. You can yes – confirm to approve the claim or No-return or you can refer the claim back.
7. You can also see the routing of the claim to finance and payroll for payment.

Activity code	Start date	Day	Time started	Time ended	Hours worked	Rate amount	Total amount due	UIF/tax	Payment amount	Position number
1 Day workers - per hour	2013/09/15	Sun	8:00AM	12:00PM	4.00	39.39	157.56	1.58	155.98	00020404

Total amount *****157.56
 Total Units 4.00

Yes - Confirm No - Return Refer back

Claim request approval
 Claim requisition: Pending
 Claim approvals
 Pending (Mr D Shrikumar Claim Approvals) → Not Routed (Mr TP Mashaba 2nd approval) → Not Routed (Mr AJ Cupido UPClaimThirdApproval)

SELF SERVICE CLAIM: DAY WORKER

DEPARTMENT

APPROVER

PAYROLL

FINANCE

