

Guidance for using iTrent for PTA payments

Contents

PTA guide to claiming for hours using the electronic timesheet	1
Making a claim	1
Add a claim.....	2
Complete your timesheet	2
Submit your timesheet	2
Claiming accrued holiday	4

PTA guide to claiming for hours using the electronic timesheet

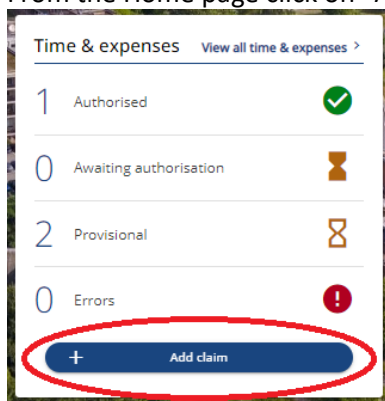
Postgraduate teaching assistants are paid by recording and claiming for the hours they work via iTrent, the University’s payroll and Employee Self Service (ESS) system. This guide shows how to access and make a claim via the ESS system, and the process that is followed to make the salary payment.

Making a claim

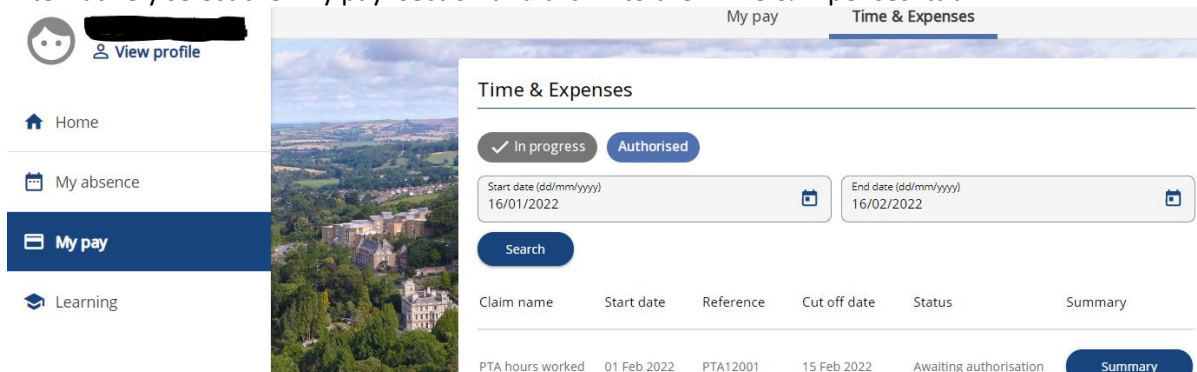
Log in to iTrent self-service: <https://staff.exeter.ac.uk/>

Use your staff username and password – this will be provided to you by the Human Resources team

From the Home page click on “Add claim” on the link under ‘Time & expenses’ (see below):



Alternatively select the ‘My pay’ section and click into the ‘Time & Expenses’ tab:



Add a claim

Complete the details as follows:

Time & Expenses claim entry: New

Start date

Job title

Claim template

This is for reference only. You can choose today's date or perhaps the date of the first work being recorded in this claim.

Choose Postgraduate Teaching Assistant – if you work in different colleges you will have several positions listed, pick the right one for the hours you are claiming.

Choose "PTA hours worked" from the dropdown

Then click the "New" button  to generate your timesheet.

Complete your timesheet

Job title: Postgraduate Teaching Assistant
Employee: Ms Elisa Testperson

Page 1

Add hours for PTA work and related training only.

Use the '+' button to add more rows.

Click 'Submit' to send claim form to your manager for authorisation or 'Save draft' to keep the details entered for editing/submitting later.

Element	Date	Comment	No of hours
Hours worked	<input type="text"/>	<input type="text"/>	<input type="text"/> + -
Training hours	<input type="text"/>	<input type="text"/>	<input type="text"/> + -

Enter the date you worked

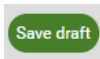
Enter a description of the work undertaken (e.g. Teaching on module x) and **include the name of the approver if you work across different disciplines**. Double clicking will open a larger screen.

Enter the number of hours worked


Use the + to add in additional rows to record more hours.

Use the – to delete any rows.

Then repeat to claim for any training hours.

If you aren't ready to submit the claim, click on the "Save draft" button  to save the details to complete and submit at a later date.

Submit your timesheet

Click on "Submit" button  to submit the claim to your PTA Coordinator for authorisation.

When you submit a timesheet, you will see a summary of your claim together with a message explaining when you will receive payment (subject to authorisation by the cut-off date).

Time & Expenses claim submission:

Claim template
PTA hours worked v3

Job title
Postgraduate Teaching Assistant

Time and expenses claim reference
PTA00003


Payroll
Monthly

Start date
01/08/2019

Cut off date
10/08/2019 - This claim will not now be paid until 27/09/2019.



Comments
Cutoff and payment dates are subject to timesheet approval. By clicking 'Submit' you agree the information provided is correct and subject to the relevant terms & conditions of employment of the University of Exeter.

Password

You must re-enter your password before you can submit.
Click on the "Submit" button  to submit the timesheet.

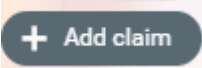
Your timesheet will now be listed as "Awaiting authorisation" in My Pay > Time & Expenses:
Time & Expenses

In progress
 Authorised

Start date (dd/mm/yyyy) 
 End date (dd/mm/yyyy) 
 16/02/2022

Claim name	Start date	Reference	Cut off date	Status	Summary
PTA hours worked	01 Feb 2022	PTA12001	15 Feb 2022	Awaiting authorisation	<input type="button" value="Summary"/>

You will receive an email confirming that your timesheet has been submitted "Confirmation that a Timesheet has been submitted for authorisation" this will include provisional cash values for the hours worked.

You can add additional claims by clicking on the "Add claim" button  and repeating these steps.

Your PTA Coordinator will also receive an email alerting them that your timesheet has been submitted and needs authorisation. If they do not authorise your timesheet within 2 days they will receive a further reminder.

When your timesheet is approved you will receive an email confirming that it has been approved" and confirming when you will be paid. This will move the record to the history section so to view the details you will need to perform a search. NB You can clear the dates and click 'Search' to return all timesheets. The 'In progress' and 'Authorised' filters can also be used.

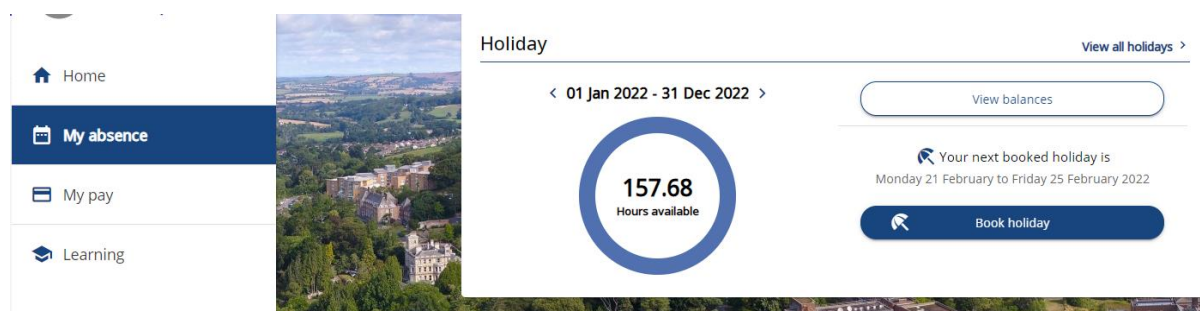
If your timesheet is rejected by your PTA Coordinator you will receive an email “Timesheet Rejected”, the email will contain a link to your timesheet which you can amend and resubmit.

Notes

- you can cancel timesheets before they are authorised by accessing the timesheet and clicking the cancel button
- to claim for non PTA work please use the [PTA103 form](#)
- you can also complete, and view, your timesheets via your mobile

Claiming accrued holiday

Holiday is accrued for all hours authorised using this process. Time accrued is calculated after each month’s pay run and added to a balance displayed in the ‘My Absence’ section:



NB The PTA Holiday year runs from 1st September each year. Other year’s details can be viewed by clicking ‘View balances’

All accrued holiday will be paid automatically in your final month’s pay when your employment ends.

Holiday pay can be claimed earlier by clicking




Complete the displayed form as below selecting the number of hours you wish to claim. *NB This functionality is designed for standard holiday booking so some of the following steps may seem unnecessary but are unavoidable:*

Holiday details

Absence type •
Annual leave ▼

Holiday period •
Part day ▼

Start date (dd/mm/yyyy) •
02/09/2019 

Morning or Afternoon •
Specify time ▼

Hours absent
02:00|

Notes

A few important points:

1. Holiday balance is displayed in decimal but "Hours absent" must be in hours and mins "HH:MM". The fractional part can be converted into minutes by multiplying 60 by it. E.g. 60 * 0.529 = 31.74. 31 minutes can be requested with the number of whole hours i.e. 10.529 hrs can be requested as "10:31".
2. The maximum time that can be requested in any transaction is 23:59. To request payment for more than this you will need to submit additional request for different dates.
3. The system will allow you to claim for more hours than you have accrued. However this cannot be authorised and a warning will be included in the resultant confirmation email. You should click on the relevant 'card' to cancel the request and submit another within the accrued limit.
4. Requests for up to and including the total hours accrued will require authorisation by your PTA Co-ordinator. All approved requests will be paid in the following month's pay run.
5. Any unpaid holiday, without limit, will be carried over into the following year.

You will receive an email confirming your request and another once it has been approved (or rejected).

Your payslip will show the value on an additional line.