# WEB SELF SERVICE (WSS)

## OVERTIME CLAIMS GUIDE



V1.1

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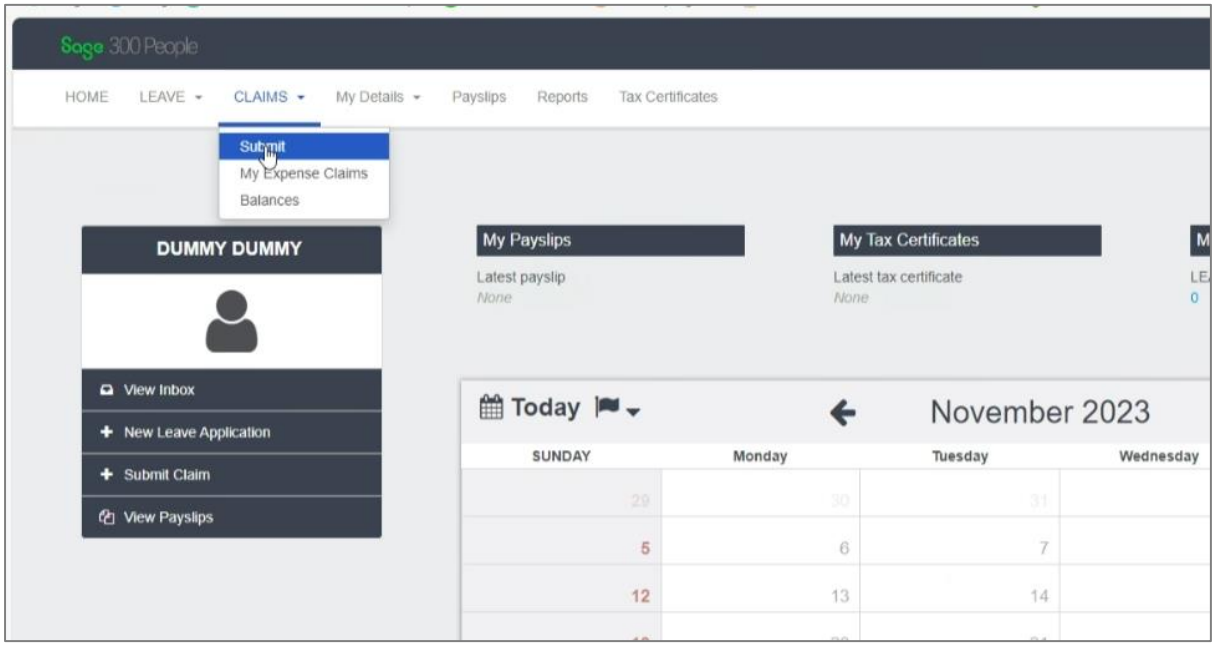
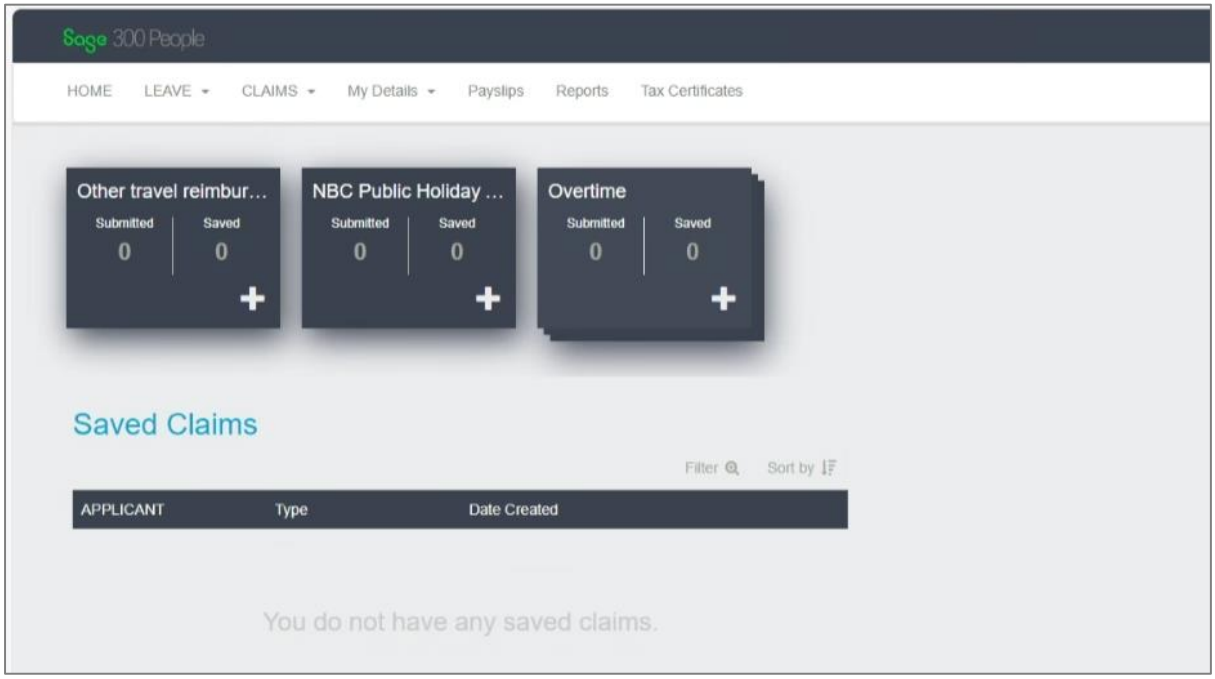
## 1. Submitting an Overtime Claim

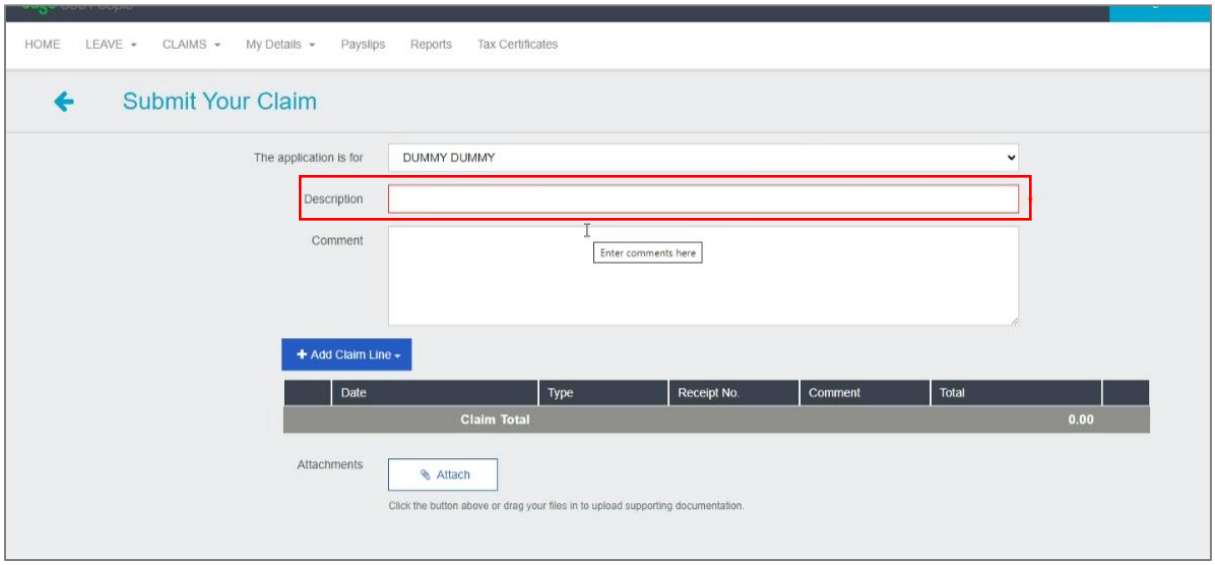
Step 1: Select Claims > Submit



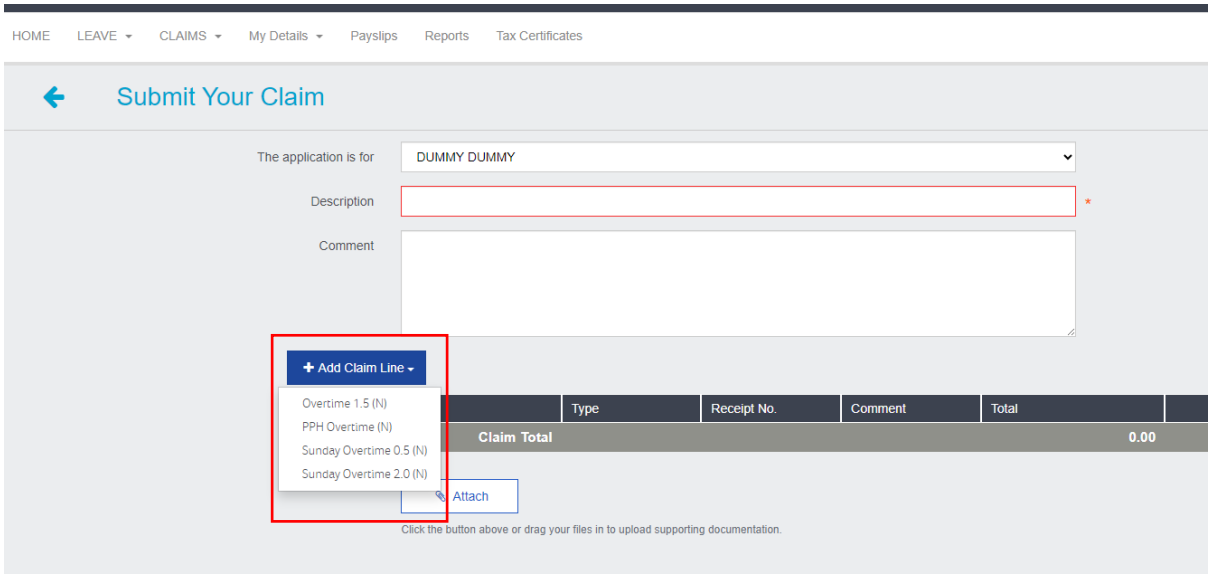

Step 2: Select the tile called Overtime and click on the + to add a new transaction.



Step 3: The Description field is a mandatory field and needs to be completed to submit the claim. Add for instance the month for which the claims will be submitted.



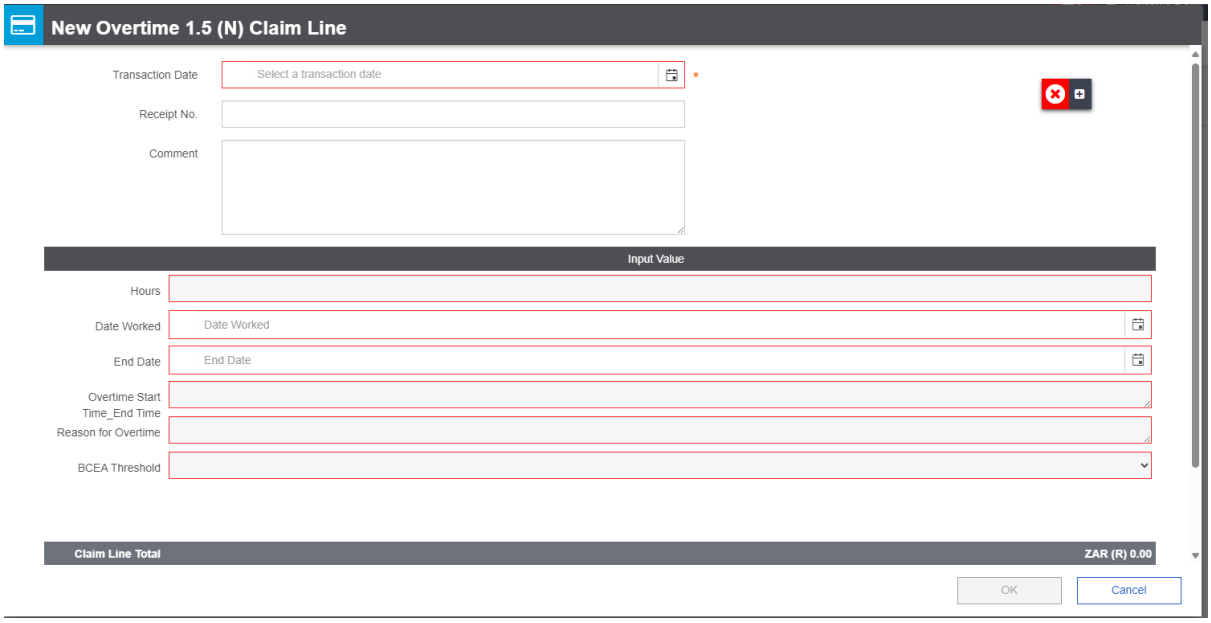

Step 4: Click on the blue **+ Add Claim Line** tile. From the dropdown menu select the applicable overtime type.

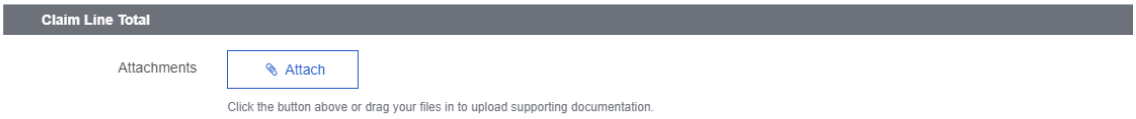



Step 5: Complete the overtime claim details.

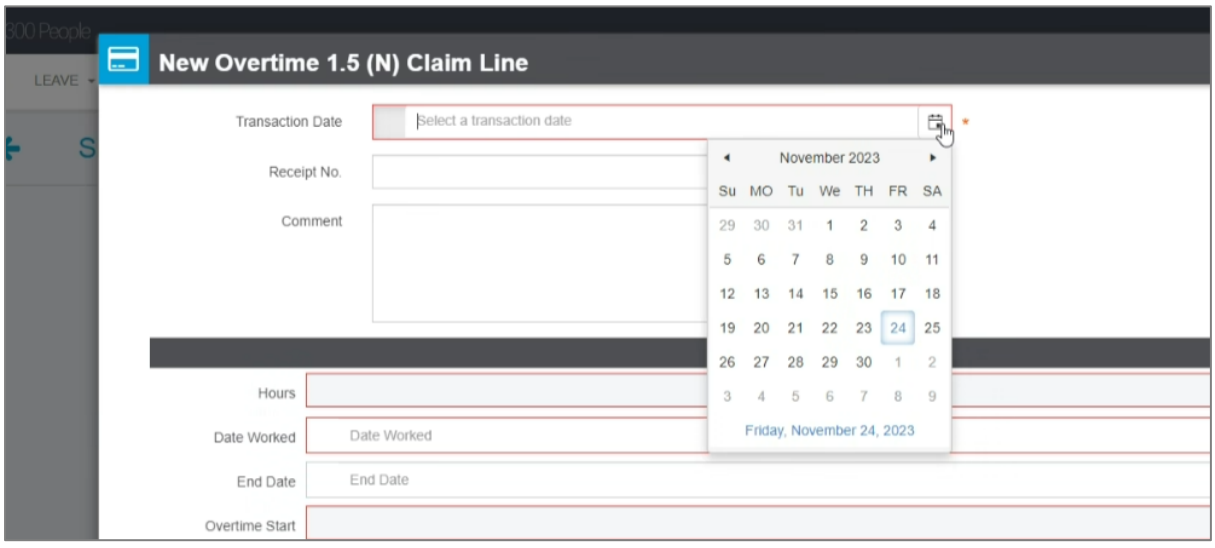
- **Transaction Date** - The date on which the transaction is submitted. Use the date picker to the right to select the date (Mandatory)
- **Receipt No** – Leave blank
- **Comment** – Can be used for any additional comments
- **Hours** – Enter the number of overtime hours worked (Mandatory)

- **Date Worked** – The date on which the overtime was worked. An additional claim line detail will be added for each separate date on which overtime was worked (Mandatory)
- **End Date** – The date on which the overtime end for the specific transaction (Mandatory)
- **Overtime Start Time_End Time** – The start and end time for overtime being claimed. The times should be entered as follows: 20:00 – 22:00 (Mandatory)
- **Reason for Overtime** – Any additional detail to be added to the specific claim. Might be a specific project or client. (Mandatory)
- **BCEA Threshold –** Select if you are Under or Over the BCEA Threshold. (Mandatory)
- **Attachment –** pre-approved documentation must be uploaded. (Mandatory)

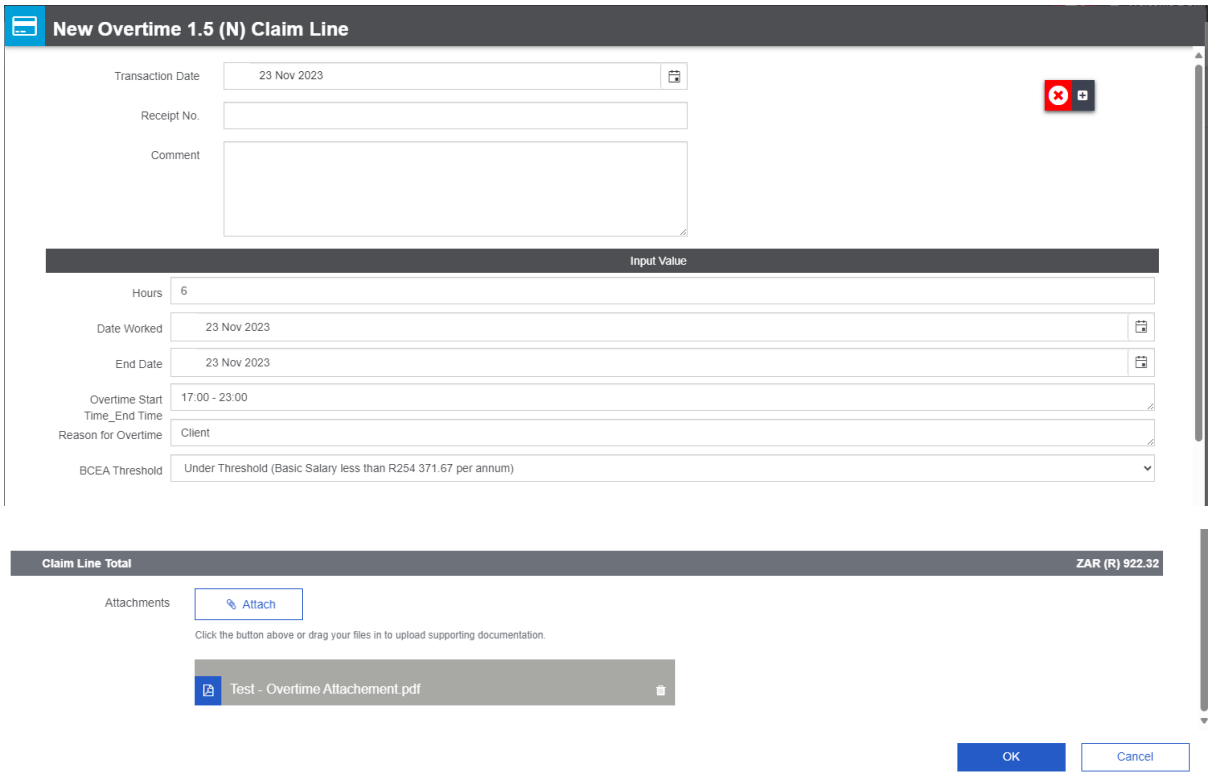


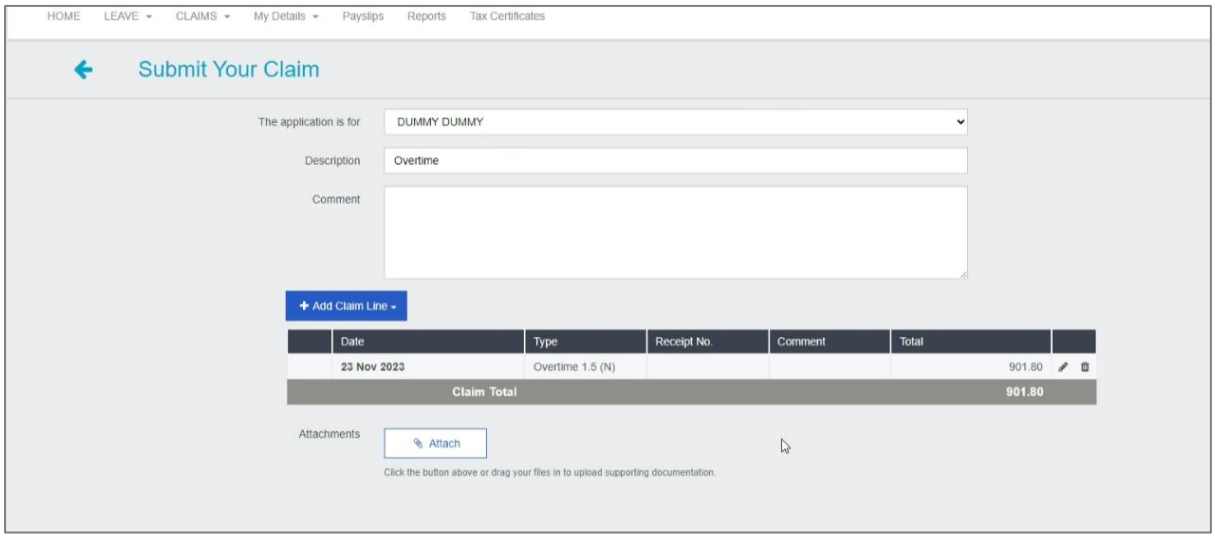

Use the date picker on date fields to select the date.



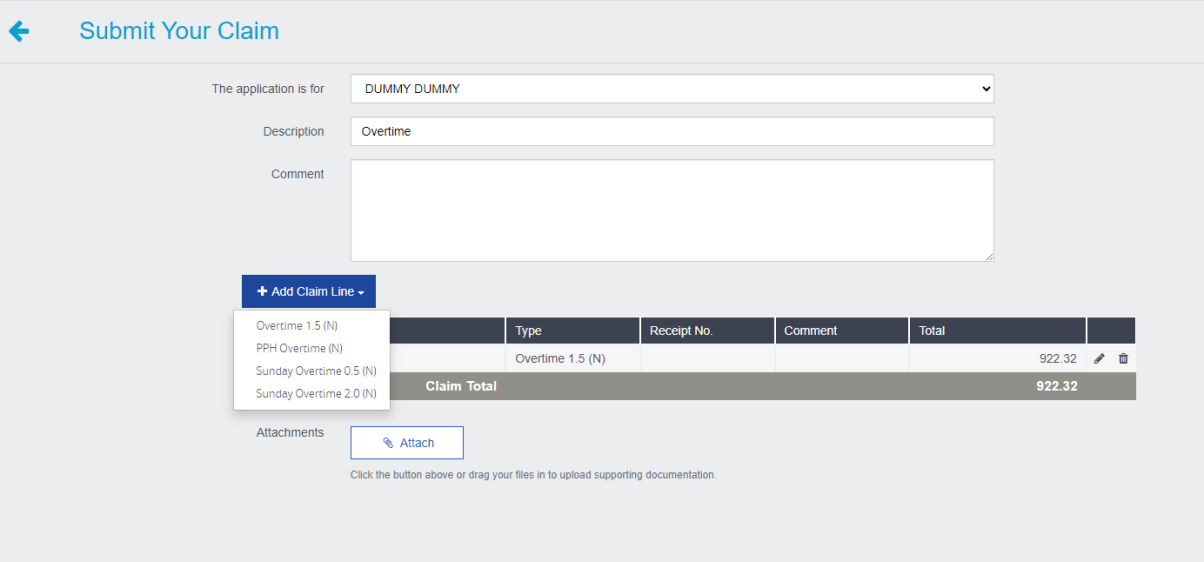
The value of the overtime claim will be displayed at the bottom of the screen as the Claim Line Total. Once all fields have been completed, click on **OK** at the bottom of the screen.



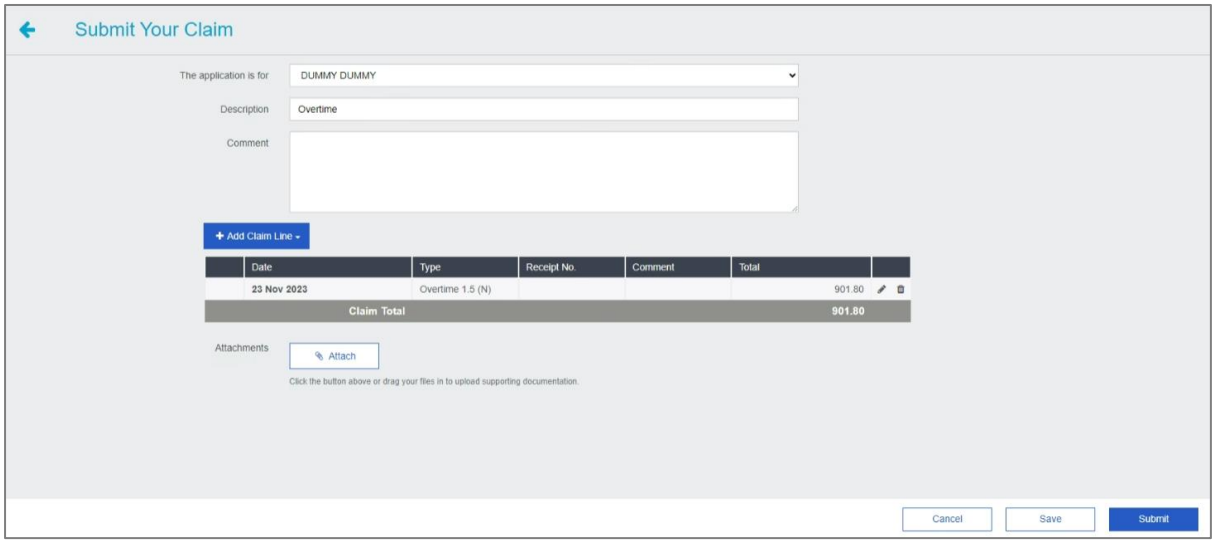

You will return to the main overtime screen.




Additional claims can be added by clicking on the **+ Add Claim Line** and following the same process as above.

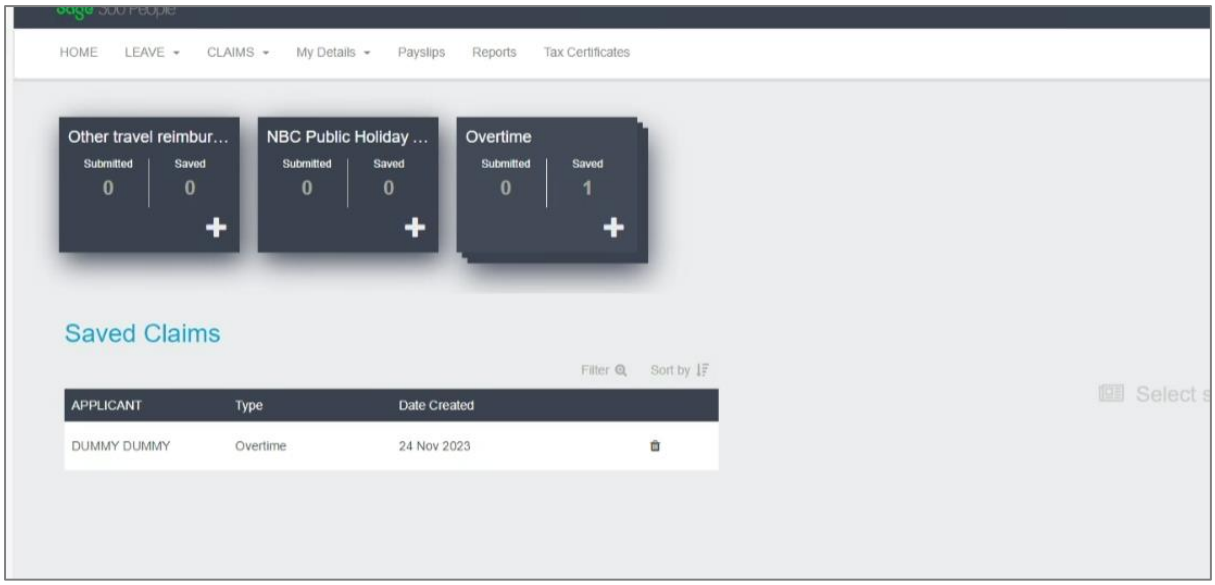



A claim can also be saved and submitted at a later stage. Overtime can for instance be loaded weekly and then submitted all at once at the end of the month. To save a claim, use the **Save** button at the bottom of the screen.

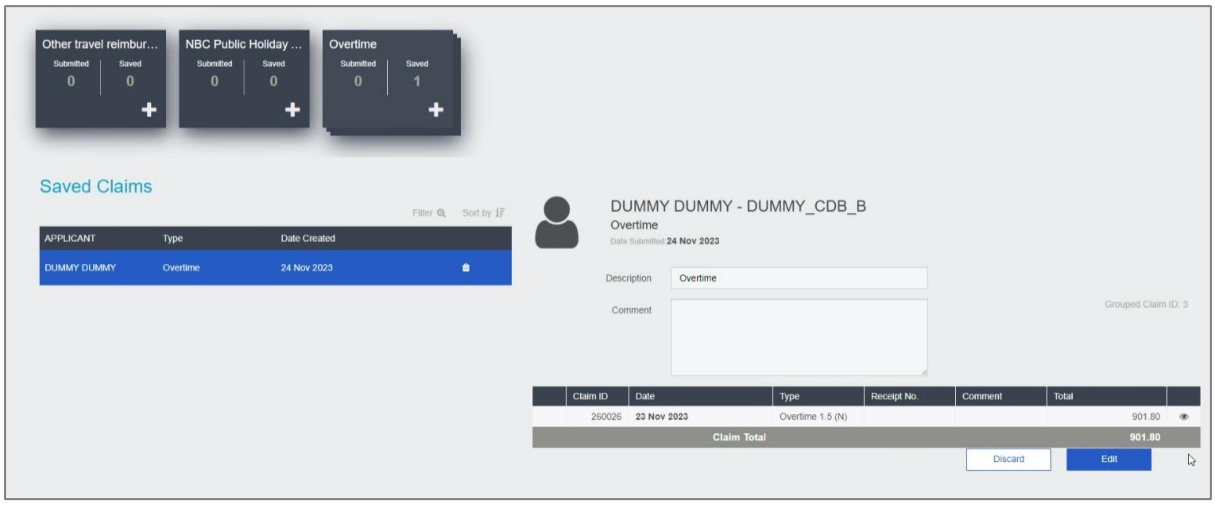


**Saved Claims**

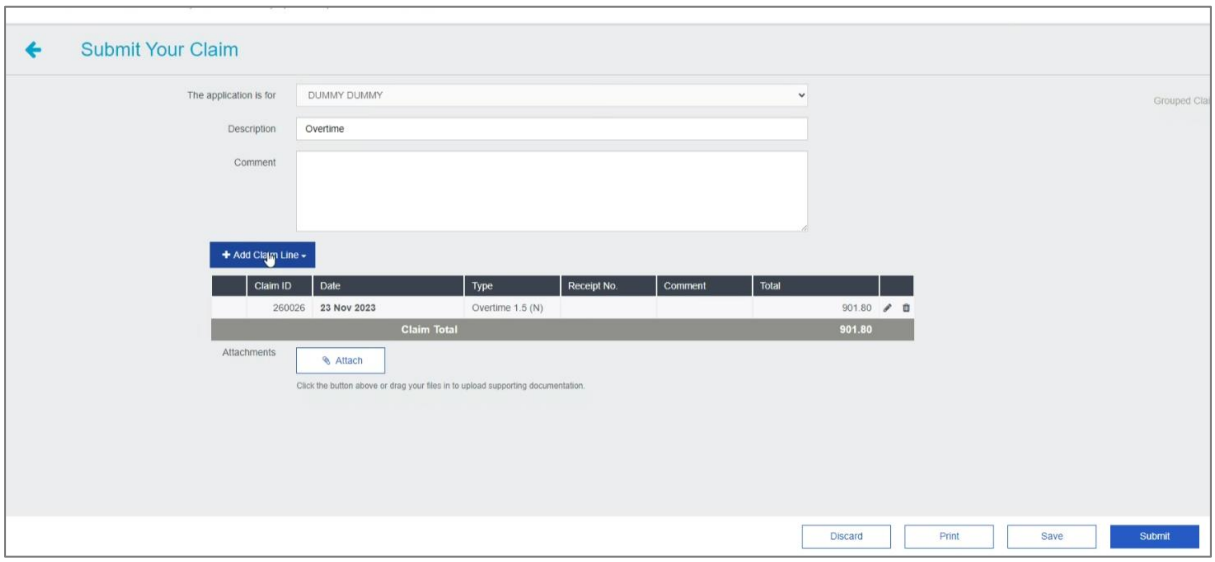
All saved claims will be displayed under the heading **Saved Claims** on the main claim screen.




By selecting the claim under saved claims, the claim detail will open to the right of the screen. Click on **Edit** to add additional claim lines to the claim.

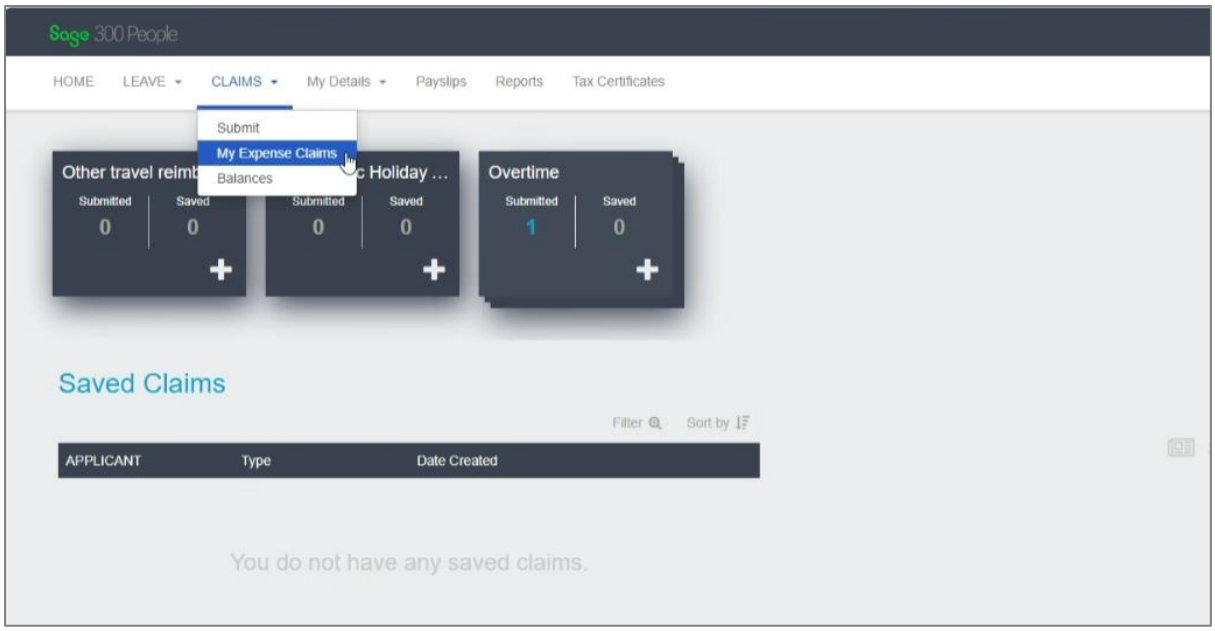


Step 6: The claim will open after which you can click on **+ Add Claim Line** to add additional claims to the claim submission. If all claims have been loaded, click on **Submit**



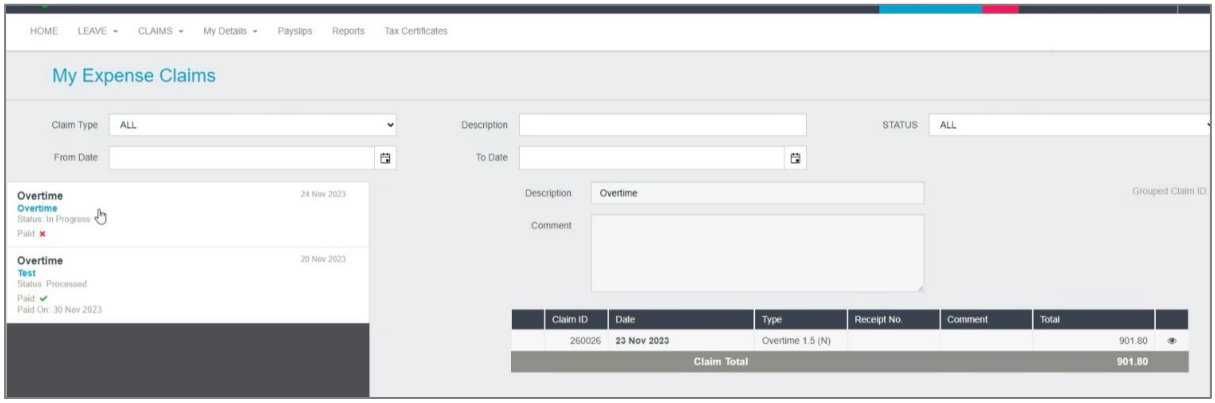

## 2. My Expense Claims

To view the status or detail of your submitted overtime claims, click on Claims and select **My Expense Claims**

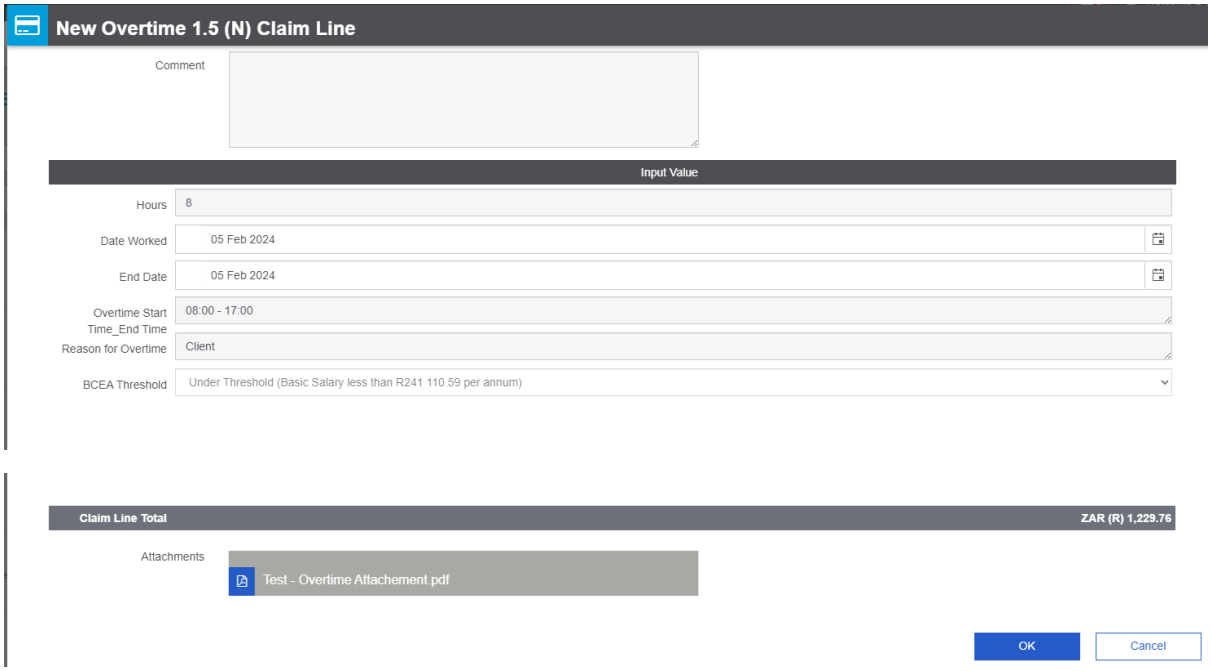



A screen will open with all claims list on the left below each other sorted from newest to oldest. At the top of the screen, you have filter selections to assist in locating a specific claim. Whether or not a claim has been paid, will be indicated next to the Paid field. If it has been paid, it will indicate the period end date in which it was paid just below that.

Select the applicable claim on the left for the detail to be displayed on the right. Click on the little eye icon all the way to the right of the applicable claim detail line.

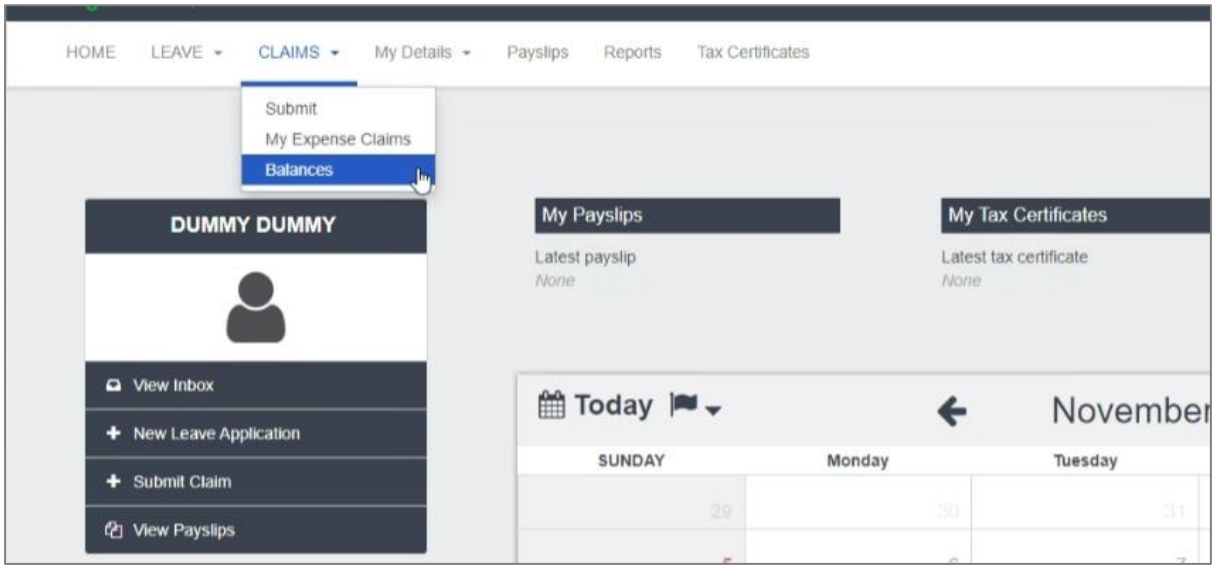



The detail of the claim line will be displayed.

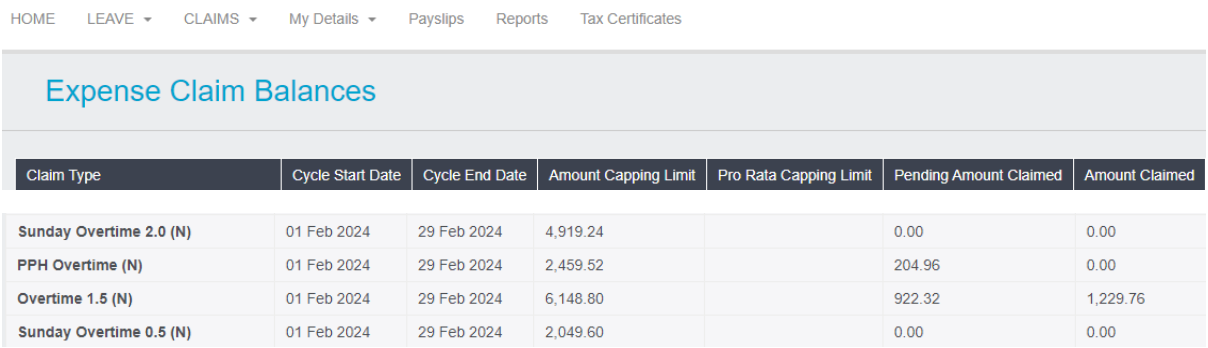


### 3. Claim Capping Policy

A claim capping policy has been setup per overtime type which means a limit has been applied on the number of overtime hours that can be claimed. The policies are not applicable to all employees and certain employees will be excluded from this. To view the claim cappy policy, click on claims and select **Balances**

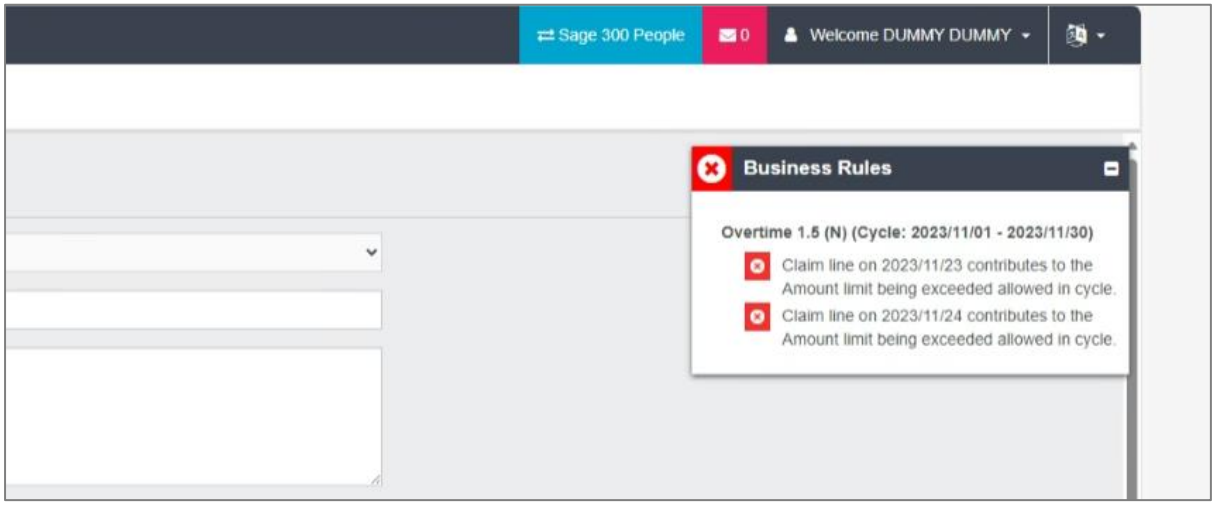



The different overtime types will be displayed along with the Amount Capping Limit per type.




| Claim Type | Cycle Start Date | Cycle End Date | Amount Capping Limit | Pro Rata Capping Limit | Pending Amount Claimed | Amount Claimed |
|---|---|---|---|---|---|---|
| Sunday Overtime 2.0 (N) | 01 Feb 2024 | 29 Feb 2024 | 4,919.24 | | 0.00 | 0.00 |
| PPH Overtime (N) | 01 Feb 2024 | 29 Feb 2024 | 2,459.52 | | 204.96 | 0.00 |
| Overtime 1.5 (N) | 01 Feb 2024 | 29 Feb 2024 | 6,148.80 | | 922.32 | 1,229.76 |
| Sunday Overtime 0.5 (N) | 01 Feb 2024 | 29 Feb 2024 | 2,049.60 | | 0.00 | 0.00 |

If an employee submits claims more than the allowable limit, the application will return an error message called Business Rules and the transaction cannot be submitted.




## 4. Claims Email Notifications

Below an example of the claims notification email that will go out when a claim gets submitted. The email will contain the individual claim detail lines with the value of each of the claims.



Claims Workflow for DUMMY DUMMY - CREATED by DUMMY DUMMY

ess@bidvestIL.com
To Cindy De Beer
Retention Policy Mail Retention (10 years) Expires 21 Nov 2033

Cindy De Beer,

This email was generated by the Sage 300 People System. The Request for Claims Workflow for DUMMY DUMMY has been Created.

You are the Approver for this Request. The following Request needs to be completed by you. DUMMY_CDB_B

To view or action the request please click here

Request Details

Description: Overtime

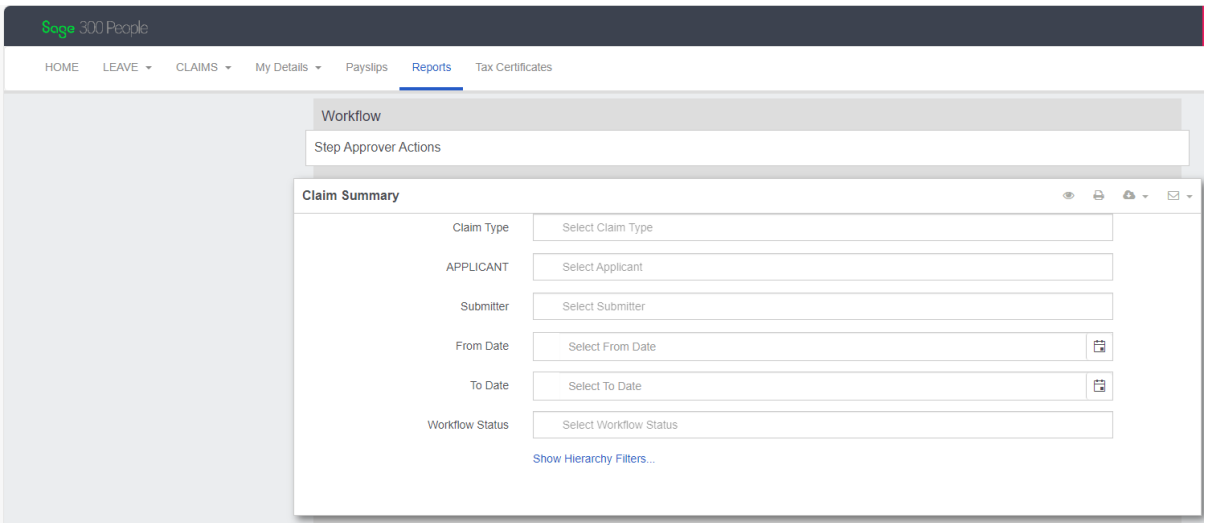
Grouped Claim Id: 3

| Claim Id | Date | Type | Receipt Number | Total | |
|---|---|---|---|---|---|
| 260026 | 2023/11/23 | Overtime 1.5 (N) | | 901.80 | |
| | | | | 901.80 | View Detail |

Request History

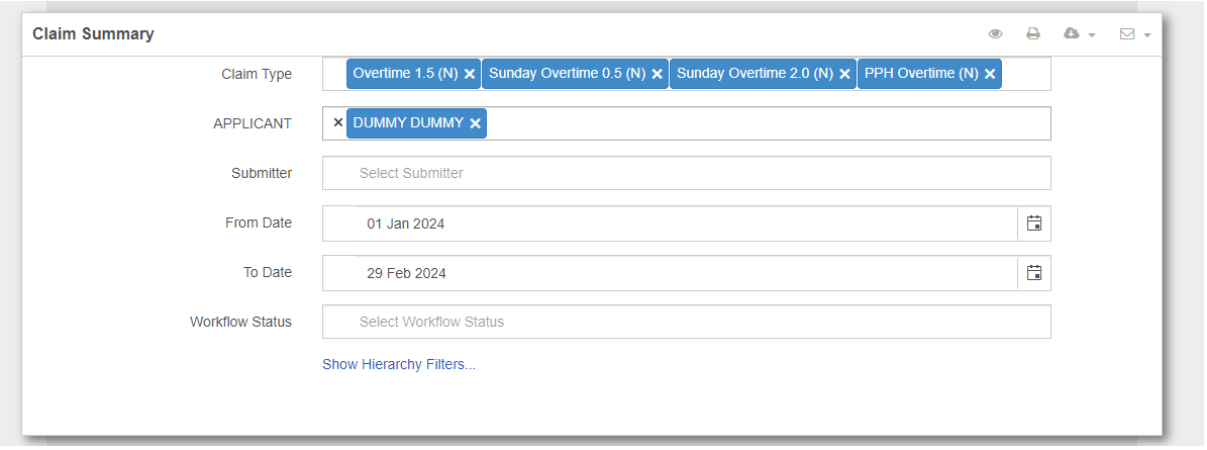
## 5. Overtime Claim Summary Report

Step1: Select Reports > Workflow > Claim Summary



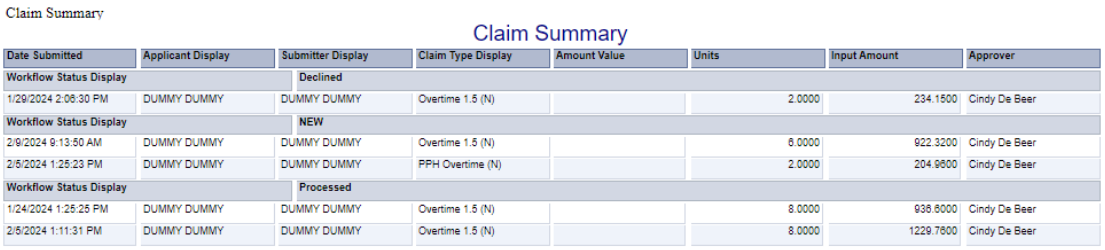

Step2: Complete the Claim Summary Report

- **Claim Type** – Select all the overtime earnings lines. Overtime 1.5(N), Sunday Overtime 0.5 (N), Sunday Overtime 2.0 (N) and PPH Overtime (N).
- **Applicant** – Select one employee or leave blank to see all employees linked to your profile
- **Submitter** – Leave blank
- **From Date** – The date on which the overtime was captured/processed.
- **To Date** – The date on which the overtime was captured/processed.
- **Workflow Status** – Leave blank to see if a claim was new, processed, decline or pending.




Step3: Click on the little eye icon all the way to the right of the applicable claim summary.

The detail of the claims will display on the Claim Summary report.



Claim Summary

Claim Summary

| Date Submitted | Applicant Display | Submitter Display | Claim Type Display | Amount Value | Units | Input Amount | Approver |
|---|---|---|---|---|---|---|---|
| **Workflow Status Display** | | **Declined** | | | | | |
| 1/29/2024 2:06:30 PM | DUMMY DUMMY | DUMMY DUMMY | Overtime 1.5 (N) | | 2.0000 | 234.1500 | Cindy De Beer |
| **Workflow Status Display** | | **NEW** | | | | | |
| 2/9/2024 9:13:50 AM | DUMMY DUMMY | DUMMY DUMMY | Overtime 1.5 (N) | | 6.0000 | 922.3200 | Cindy De Beer |
| 2/5/2024 1:25:23 PM | DUMMY DUMMY | DUMMY DUMMY | PPH Overtime (N) | | 2.0000 | 204.9600 | Cindy De Beer |
| **Workflow Status Display** | | **Processed** | | | | | |
| 1/24/2024 1:25:25 PM | DUMMY DUMMY | DUMMY DUMMY | Overtime 1.5 (N) | | 8.0000 | 936.6000 | Cindy De Beer |
| 2/5/2024 1:11:31 PM | DUMMY DUMMY | DUMMY DUMMY | Overtime 1.5 (N) | | 8.0000 | 1229.7600 | Cindy De Beer |