Guidance for using iTrent for PTA payments

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PTA guide to claiming for hours using the electronic timesheet

Postgraduate teaching associates 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.

Logging in to ESS

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

Our systems use single sign on (SSO) which means you will automatically be logged in to ESS with the account you are logged on to your computer with. To make a claim against your PTA contract you need to be logged in with your staff username and password (this will be provided to you by the Human Resources team). If you are logged on to your computer with your Postgrad IT account then you will be logged into your Postgrad ESS profile and you will not be able to submit a PTA claim. You should:
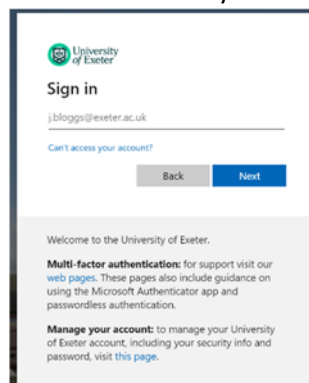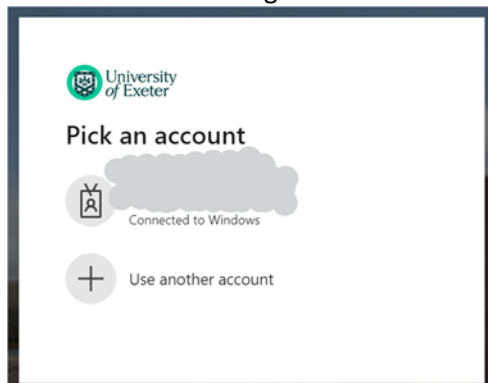
Sign out of your computer and log back on using your staff login details.

OR

Sign out of ESS - click on the person in the top right of the screen and select "Sign out":
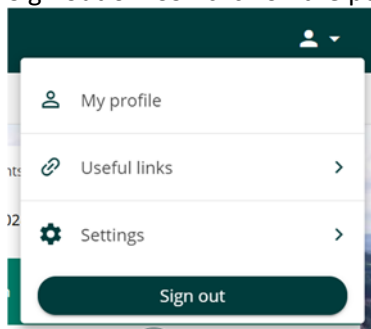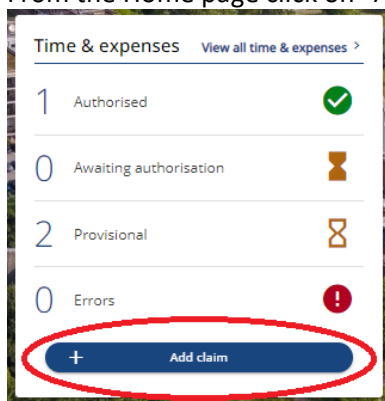

Click on the ESS link again and select "Use another account" then enter your staff account details:
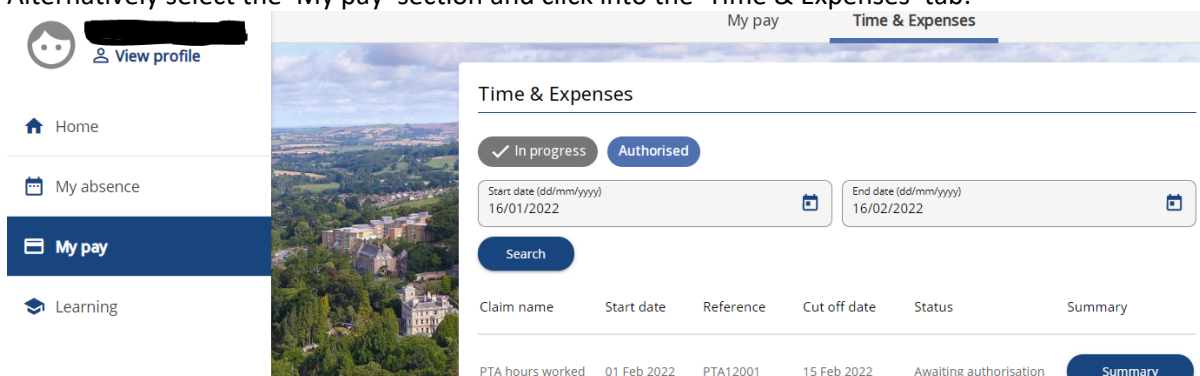
Making a claim

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:

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 [New] to generate your timesheet.

Complete your timesheet

Job title: Postgraduate Teaching Assistant
Employee: Ms Elisa Testperson

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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	🗓			+ −
Training hours	🗓			+ −

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 [Save draft] to save the details to complete and submit at a later date.

Submit your timesheet

Click on "Submit" button [Submit] 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 [Submit] to submit the timesheet.

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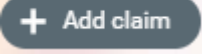
Time & Expenses

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