

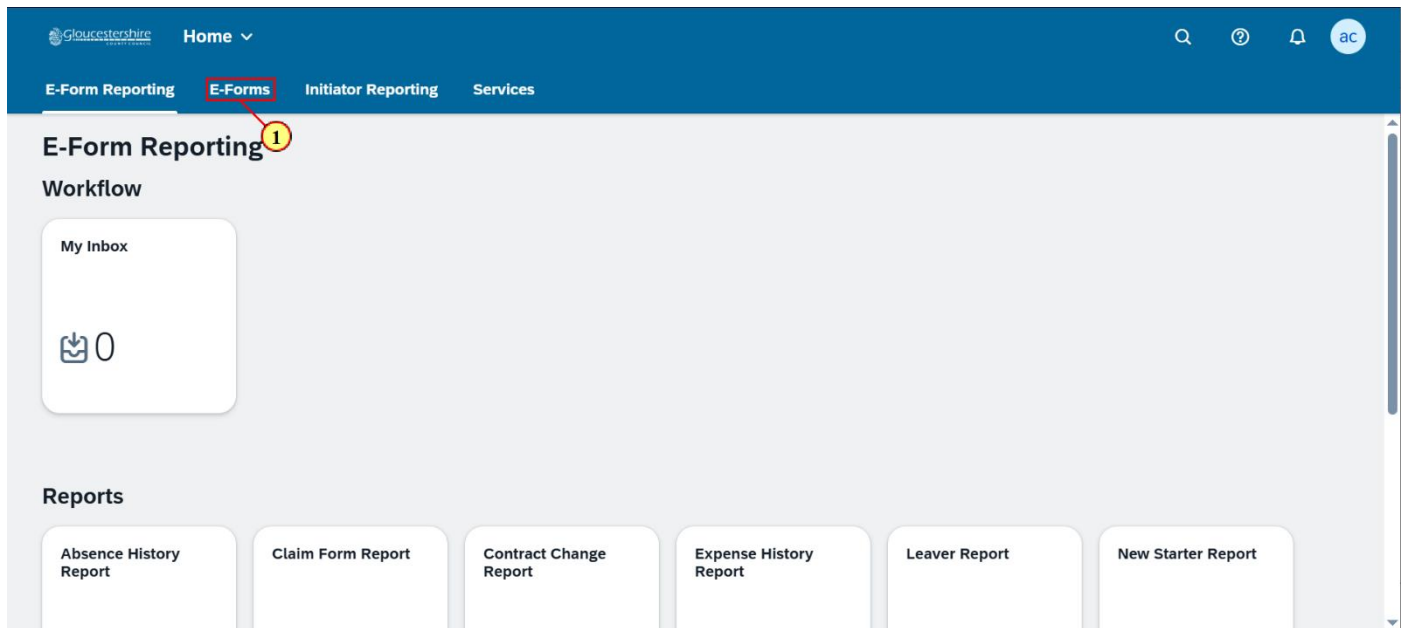


Schools OBO - Claims Form

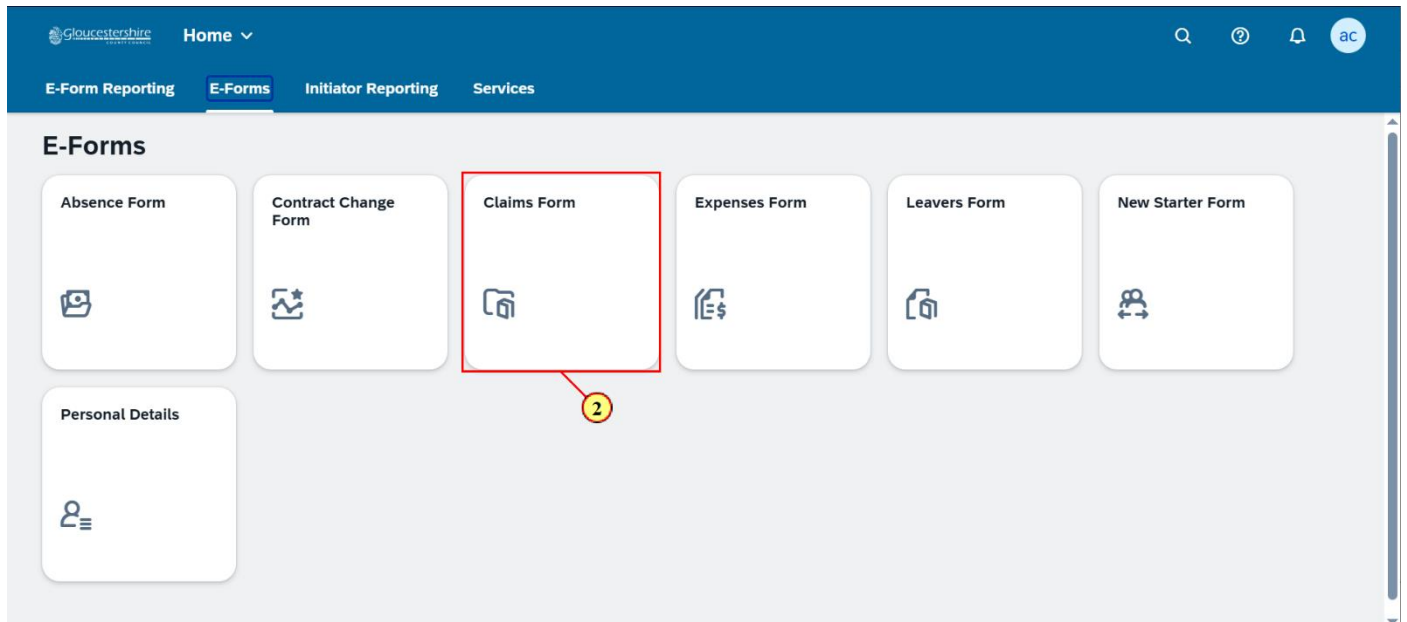
Schools OBO - Claims Form

In this step by step guide, you will learn how to:

- Complete the Claims Schools E-Form



(1) Click on the **E-Forms** tab.



(2) Click on the **Claims Form** tile to access the Claims E-Form.

Claims Form

Form History


Introduction

This is the form used to pay all pay related claims submitted by employees in your organisation on a monthly basis. Upon submission of the claim form, the form will route for approval and upload directly into SAP. Help and guidance on completing this form can be found on our [e-Forms Pages](#).

Header

Initiator: Mrs Marian Khan	Form ID: 0000015055	Date: Mar 27, 2025
Organisation Name: Clearwater C/E Primary Academy (F041)	Cost Centre: 932964	Claim Month: * ▼
Claim End Date:		

Print Cancel Delete Save as draft Submit

 Your details will display in the **Header** section as the initiator of the E-Form.

(3) Click on ▼ to scroll down.

Claims Form

Form History

Introduction

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Header

Initiator: Mrs Marian Khan	Form ID: 0000015055	Date: Mar 27, 2025
Organisation Name: Clearwater C/E Primary Academy (F041)	Cost Centre: 932964	Claim Month: * ▼
Claim End Date:		

Print Cancel Delete Save as draft Submit

(4) Click on ▼ to select the month for which you are making the claim.

The screenshot shows the 'Claims Form' interface. The 'Header' section contains the following fields:

- Initiator: Mrs Marian Khan
- Form ID: 000015055
- Organisation Name: Clearwater C/E Primary Academy (F041)
- Cost Centre: 932964
- Claim End Date: (empty)


A dropdown menu for 'Claim Month' is open, showing the following options: March 2025, February 2025, January 2025, December 2024, November 2024, October 2024, and September 2024. The 'March 2025' option is highlighted with a red box and a red arrow.

At the bottom of the form, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(5) In this example, we will select **March 2025**.

The screenshot shows the 'Claims Form' interface with the 'Header' section updated. The 'Date' field is now populated with 'Mar 27, 2025'. The 'Claim Month' dropdown is set to 'March 2025'. The 'Claim End Date' field is now populated with '31 Mar 2025' and is highlighted with a red box.

At the bottom of the form, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

 Note the **Claim End Date** defaults to the end of the month and is populated automatically.

(6) Click on ▼ to scroll down.

Gloucestershire Claims Form

Section A - Claim Hours

Add Row Delete Row


<input type="checkbox"/>	Emp.Name/Per no./Position	Wage Type	Amount	Units/Hours	
<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	Show

Your Comments - Internal Organisation use only

Your Comments - Internal Organisation use only:

Add Comment

Print Cancel Delete Save as draft Submit

 Here you need to specify the **Employee name**, the **Claim (Wage) type** as well as the **Amount and/or Units/Hours** for the claim.

Note you can add lines and complete a claim for several employees on the same Claims E-Form.

(7) Click on  to select the name of the employee you are making a claim on behalf of.

Gloucestershire Claims Form

Section A - Claim Hours

Add Row Delete Row

<input type="checkbox"/>	Emp.Name/Per no./Position	Wage Type	Amount	Units/Hours	
<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	Show

Your Comments - Internal Organisation use only

Your Comments - Internal Organisation use only:

Add Comment

Print Cancel Delete Save as draft Submit


- Davies Branwen 00163934 SENCO
- Davis Sara 00129920 Teaching Assistant (GRD D)**
- Edwardsa Elaina 00196697 Teaching Assistant
- Evans Carys 00186591 Teaching Assistant
- Evans Carys 00186592 Breakfast and After-School Club Assistan
- Griffiths Leah 00165467 Teaching Assistant
- Griffiths Marie 00170595 Teaching Assistant
- Hall Leslie 00132895 Teaching Assistant

(8) In this example, we will select **Davis Sara**.

The screenshot shows the 'Claims Form' interface. At the top, there is a navigation bar with the Gloucestershire logo and 'Claims Form' dropdown. Below this is 'Section A - Claim Hours' with 'Add Row' and 'Delete Row' buttons. A table with columns 'Emp.Name/Per no./Position', 'Wage Type', 'Amount', and 'Units/Hours' is visible. The first row has 'Davis Sara 00129920' in the first column and a dropdown arrow in the 'Wage Type' column, which is highlighted with a red box and a yellow circle containing the number 9. Below the table is the 'Your Comments - Internal Organisation use only' section with a text input field and an 'Add Comment' button. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(9) Click on  to select the **Wage Type**.


This screenshot shows the 'Wage Type' dropdown menu open. The menu lists several options: '3025 - Letting Fees (TNP)', '3081 - PlainTime WTD>5Yrs(TNP)NC', '3338 - Overtime @ 1.5 (TNP) NC' (highlighted with a red box), '3339 - Overtime @ 10 NP) NC', '3989 - Enhanced Rate (TNP)', and '3990 - Misc Claim (TNP)'. A yellow circle containing the number 10 is positioned next to the '3339' option. The background shows the same 'Section A - Claim Hours' table and 'Your Comments' section as in the previous screenshot.



The **Wage Type** list may vary depending on the employee selected.


(10) In this example we will select **Overtime @ 1.5 (TNP) NC**.

The screenshot shows the 'Claims Form' interface. At the top, there is a navigation bar with the Gloucestershire logo and 'Claims Form' dropdown. Below this is 'Section A - Claim Hours' with 'Add Row' and 'Delete Row' links. A table is displayed with columns: 'Emp.Name/Per no./Position', 'Wage Type', 'Amount', and 'Units/Hours'. The first row contains 'Davis Sara 001299...' and '3338 - Overtime @ 1.'. The 'Units/Hours' field is highlighted with a red box and a yellow callout bubble containing the number '11'. A 'Show' button is located to the right of the 'Units/Hours' field. Below the table is a 'Your Comments - Internal Organisation use only' section with a text input area and an 'Add Comment' button. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

 Depending on the Wage Type selected, you may need to enter the number of **Units/Hours only** or the **Amount and Units/Hours**.

(11) Enter the number of hours worked in overtime, i.e: **2**, in the **Units/Hours** field.

This screenshot is similar to the previous one, but the 'Units/Hours' field in the table now contains the number '2'. The 'Show' button is highlighted with a red box and a yellow callout bubble containing the number '12'. The rest of the interface remains the same.

 The **Show** field allows you to enter comments for a specific line.

(12) Click on **Show** .

(13) You can add your comment(s) in the **Comments** field.

(14) Click on **Close**.
Your comment will be saved automatically. To view the comment, click on **Show** again.

The screenshot shows the 'Claims Form' interface. At the top, there is a navigation bar with the Gloucestershire logo, the title 'Claims Form', and user initials 'ac'. Below this is a section titled 'Section A - Claim Hours'. It contains a table with columns: 'Emp.Name/Per no./Position', 'Wage Type', 'Amount', and 'Units/Hours'. The first row is populated with 'Davis Sara 001299...', '3338 - Overtime @...', and '2'. To the right of the table, there are 'Add Row' and 'Delete Row' buttons. The 'Add Row' button is highlighted with a red box, and a yellow circle with the number '15' points to it. Below the table is a 'Your Comments - Internal Organisation use only' section with a text input field and an 'Add Comment' button. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(15) Click on **Add Row** to add a new line.

This screenshot shows the same 'Claims Form' interface, but with a second row added to the table. The second row is currently empty, with a dropdown arrow in the 'Emp.Name/Per no./Position' column highlighted by a red box. A yellow circle with the number '16' points to this dropdown arrow. The 'Add Row' button is now outlined in blue. The rest of the interface, including the comments section and bottom navigation buttons, remains the same.

(16) Click on **▼** to select the Employee's name from the list.

The screenshot shows the 'Claims Form' interface. At the top, there is a navigation bar with the Gloucestershire logo and the text 'Claims Form'. Below this is a section titled 'Section A - Claim Hours'. It contains a table with columns: 'Emp.Name/Per no./Position', 'Wage Type', 'Amount', and 'Units/Hours'. The first row is populated with 'Davis Sara 001299...', '3338 - Overtime @...', and '2'. A dropdown menu is open for the second row, showing a list of employees. The first option in the dropdown is 'Davies Branwen 00163934 SENCO', which is highlighted with a red box. A yellow circle with the number '17' is placed over the dropdown arrow. Below the table is a 'Your Comments' section with a text area. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(17) In this example, we will select a different employee, **Davies Branwen**.


The screenshot shows the 'Claims Form' interface. The 'Section A - Claim Hours' table now has two rows. The second row has 'Davies Branwen 00163934 SENCO' selected in the 'Emp.Name/Per no./Position' column. A dropdown menu is open for the 'Wage Type' column of the second row, showing a list of options. The first option is selected, and a yellow circle with the number '18' is placed over the dropdown arrow. Below the table is a 'Your Comments - Internal Organisation use only' section with a text area. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(18) Click on **▼** to select the **Wage Type**.

The screenshot shows the 'Claims Form' interface. Under 'Section A - Claim Hours', there is a table with columns: Emp.Name/Per no./Position, Wage Type, Amount, and Units/Hours. The first row is for 'Davis Sara 001299...' with '3338 - Overtime @...' as the Wage Type and '2' in the Units/Hours column. The second row is for 'Davies Branwen 00...' with a dropdown menu open for the Wage Type. The dropdown menu lists several options: '3035 - Supply Claim (TNP)', '3127 - Paid Covid19 (TNP)', '3990 - Misc Claim (TNP)', and '3993 - 1 to 1 Tuition (TNP)'. The '3993 - 1 to 1 Tuition (TNP)' option is highlighted with a red box, and a yellow callout bubble with the number '19' points to it. Below the table is a 'Your Comments - Internal Organisation use only' section with a text input field. At the bottom, there are buttons for 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'.

(19) In this example, we will select **3993 - 1 to 1 Tuition (TNP)**.

This screenshot shows the same 'Claims Form' interface. The '3993 - 1 to 1 Tuition (TNP)' option is now selected in the Wage Type dropdown. The 'Amount' field for this row is highlighted with a red box, and a yellow callout bubble with the number '20' points to it. The 'Units/Hours' field for this row is also highlighted with a red box and contains the value '2'. The rest of the interface, including the 'Your Comments' section and the bottom navigation buttons, remains the same as in the previous screenshot.



Note for this type of claim, the **Amount and Units/Hours** can be entered.

(20) Enter **the Amount** in the **Amount** field.

Section A - Claim Hours

	Emp.Name/Per no./Position	Wage Type	Amount	Units/Hours	
<input type="checkbox"/>	Davis Sara 001299...	3338 - Overtime @...		2	Show
<input type="checkbox"/>	Davies Branwen 00...	3993 - 1 to 1 Tuitio...	50		Show

Amount cannot exceed 75

Your Comments - Internal Organisation use only:

Print Cancel Delete Save as draft Submit

(21) Enter the number of Units/Hours in the Units/Hours field.

Section A - Claim Hours


	Emp.Name/Per no./Position	Wage Type	Amount	Units/Hours	
<input type="checkbox"/>	Davis Sara 001299...	3338 - Overtime @...		2	Show
<input type="checkbox"/>	Davies Branwen 00...	3993 - 1 to 1 Tuitio...	50	1	Show

Your Comments - Internal Organisation use only:

Please approve asap

Print Cancel Delete Save as draft Submit

(22) Click on  to scroll down.

 You can also add comments for the entire E-Form.
Note these comments are for internal-use only.

(23) Click on **Add Comment** to save your comment.

(24) Click on ▼ to scroll down.

Gloucestershire Claims Form

Your Comments - Internal Organisation use only:

Add Comment

Section C - Notify Approver

Please tick this box if you require an email to be generated to you approver notifying this form is awaiting approval.

Data Protection Act 2018 and General Data Protection Regulation(GDPR) - The information you supply on this form will be used to manage and maintain your employment relationship. It may also be used for the wider purpose of providing statistical data used to assist with monitoring provision and/or determining areas of need in order to target future provision. The information will be treated as confidential except where such information has to be disclosed by law to relevant statutory bodies and in circumstances specific to the employment relationship.If you would like more information please contact the Business Service centre.

Print Cancel Delete Save as draft Submit

(25) Tick this checkbox if you wish for a notification email to be sent to the approver notifying them the E-Form has been submitted for their approval.

Gloucestershire Claims Form

Your Comments - Internal Organisation use only:

Add Comment

Section C - Notify Approver

Please tick this box if you require an email to be generated to you approver notifying this form is awaiting approval.

Data Protection Act 2018 and General Data Protection Regulation(GDPR) - The information you supply on this form will be used to manage and maintain your employment relationship. It may also be used for the wider purpose of providing statistical data used to assist with monitoring provision and/or determining areas of need in order to target future provision. The information will be treated as confidential except where such information has to be disclosed by law to relevant statutory bodies and in circumstances specific to the employment relationship.If you would like more information please contact the Business Service centre.

Print Cancel Delete Save as draft Submit

(26) Click on **Submit** to submit the E-Form to your approver.

Alternatively, you can cancel, delete or save the e-Form as a draft.

The screenshot shows the Gloucestershire Claims Form interface. At the top, there is a blue header with the Gloucestershire logo, the text 'Claims Form', and navigation icons. Below the header, there is a section for 'Your Comments - Internal Organisation use only:' with a text area and an 'Add Comment' button. The main content area is titled 'Section C - Notify Approver' and contains a checkbox with the text 'Please tick this box if you require an email to be generated by the system for approval.' Below this is a blue box containing text about the Data Protection Act 2018 and GDPR. At the bottom, there is a row of buttons: 'Print', 'Cancel', 'Delete', 'Save as draft', and 'Submit'. A white dialog box titled 'Submit Form' is centered on the screen, asking 'Are you sure you want to Submit the form?' with 'OK' and 'Cancel' buttons. A red circle with the number 27 is around the 'OK' button, and a red arrow points from it to the 'OK' button in the dialog box.

(27) Click on **OK** to submit the E-Form for approval.

The screenshot shows the Gloucestershire Claims Form interface after successful submission. The 'Submit Form' dialog box is replaced by a white dialog box titled 'Success Message' with a green checkmark icon. The message text reads: 'Form: 0000015055 is submitted successfully! Please call ContactUs on 01452 425888 should you have any queries regarding this e-Form.' Below the message is an 'OK' button. A red circle with the number 28 is around the 'OK' button, and a red arrow points from it to the 'OK' button in the dialog box. The rest of the interface, including the 'Section C - Notify Approver' section and the bottom buttons, remains the same as in the previous screenshot.


(28) Click on **OK**.

Gloucestershire Home

E-Form Reporting E-Forms Initiator Reporting Services

E-Forms

- Absence Form
- Contract Change Form
- Claims Form
- Expenses Form
- Leavers Form
- New Starter Form
- Personal Details

 You have successfully completed a **Claims Schools E-Form**.