My Time & Expenses - An Employee's Guide to Self Service

EPM Connect Guide

Document Control

Document Overview: This document outlines the step-by-step process for managing Time and Expense Claims and Timesheets via Employee Self Service in EPM Connect.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 29th July 2026 and is issued on a version-controlled basis under her signature.

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Contents

Overview

This guide provides an overview of **My Time** and **My Expenses** within **My Portal**. These areas of **My Portal** are only available to customers who have opted for the enhanced **Time & Expenses** module.

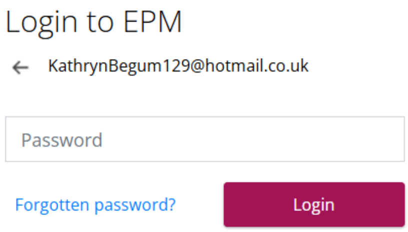
Accessing the system

To Access the system for the first time

1. Using your preferred browser, enter **epmportal.uk**

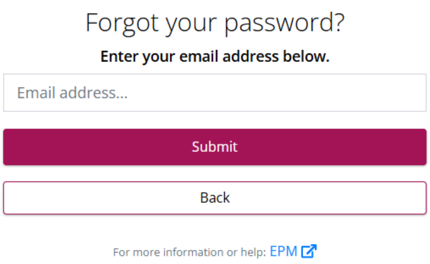
   Ensure that you use epmportal.uk not epm-portal.

2. The first time you login you will need to create a new password via **Forgotten Password**.
3. Click **Forgotten Password.**



4. Enter your work email address and click **Submit**.

   For those with multiple email addresses, it is important that you enter the work email address that your school registered with the EPM Implementation Team.



5. An email will be sent to you with instructions. Open the email and click **Please click on this link to reset your password**. A webpage will open.
6. In the **Email Address** field, enter your email address.

   Your new password should be:

   - 10 characters long
   - include a combination of upper and lower case letters
   - include at least one special character
   - include one number.

7. Re-enter your password and click **Reset**.

   Your password has been reset. Please return to the website and enter your **Login** and **Password**.

My Time

My Time provides an overview of all your **Open Time Claims**, **Closed Time Claims**, **Open Timesheets** and **Closed Timesheets**.

The **Status** displays the current status of the item:

Draft: The item has been saved as a draft but not submitted

Query/Change Required: The item has been queried by the approver/changes requested

Authorisation in Progress: The item has been saved and submitted for approval.

Approved: The item has been approved by the Approver.

Exported for Payment: The item has been processed by the EPM Payroll Team.

Cancelled: The item has been cancelled.

Rejected: The item has been rejected by the Approver.

There is a separate section for adding Casual Time Claims. If the claim is for a casual role, rather than your main role, please follow this guide.

Edit Open Time Claims and Open Timesheets

These can be edited by clicking the pencil icon.

Closed Time Claims and Timesheets

These cannot be edited but can be viewed by clicking on the eye icon.

Time Claims

Time claims for Casual roles should be managed differently than time claims for permanent and fixed term roles. Follow the relevant guide below.

Create a new Time Claim (Permanent and Fixed Term roles)

1. From the left-hand navigation pane, select **My Time**. The **My Time** module is displayed.
2. Click the **+ Create Time Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
6. Click the **Add Time Line** button.

7. In the **Purpose** field, enter a purpose, for example Conference.

8. In the **Date Worked** field select a date. Additional fields are displayed.
9. From the **Job Role** drop-down menu, select the relevant job role.
10. In the **Start Time** field, enter a start time.
11. In the **End Time** field, enter a start time.
12. Tick the circle next to the relevant item – for example Additional Hours

    The items available are set by the school or trust.

13. Click the **Select Item** button.

14. In the **Hours Worked** field, enter hours and minutes worked.
15. In the **Breaks** field, enter breaks in hours and minutes.
16. Click either the **Save Draft** or **Save and Submit** button.

    Clicking **Save and Submit** will send the claim to your Line Manager or Approver for approval. This cannot be edited once submitted. Should a mistake be made, speak to your Line Manager who can reopen the claim for changes to be made..

    Clicking **Save Draft** will save the item and can be viewed and edited by selecting **View** from the **Time and Expenses** menu within the left-hand Navigation Pane.

Create a new Casual Time Claim

If the claim relates to a Casual contract, Holiday Pay should be added as a separate **Time Claim** as the system will recognise an additional **Time Line** with the same **Start Time** and **End Time** as a duplicate. separately. Holiday Pay should be added separately it must be displayed as a separate line within your payslip.

The following steps should be followed for any time claims processed for casual roles.

1. From the left-hand navigation pane, select **My Time**. The **My Time** module is displayed.
2. Click the **+ Create Time Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
6. Click the **Add Time Line** button.

7. In the **Purpose** field, enter a purpose, for example Conference.
8. In the **Date Worked** field select a date. Additional fields are displayed.
9. From the **Job Role** drop-down menu, select the relevant job role.
10. In the **Start Time** field, enter a start time.

11. In the **End Time** field, enter a start time.
12. Tick the circle next to the relevant item – for example Additional Hours

    The items available are set by the school or trust.

13. Click the **Select Item** button.

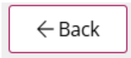
14. In the **Hours Worked** field, enter hours and minutes worked.
15. In the **Breaks** field, enter breaks in hours and minutes.
16. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Add Holiday Pay

Important

If the claim relates to a Casual contract, Holiday Pay should be added as a separate **Time Claim** as the system will recognise an additional **Time Line** with the same **Start Time** and **End Time** as a duplicate. separately. Holiday Pay should be added separately it must be displayed as a separate line within your payslip. See below.

1. Click the Back button at the top left-hand of the screen. The My Time screen is displayed.



2. Select the Open Time Claims tab.

3. Click the + Create Time Claim button. A new window is displayed.
4. In the **Reference** field, enter a reference
5. In the **Claim Title** field, enter a Claim Title.
6. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
7. Click the **Add Time Line** button.

8. In the **Purpose** field, enter a purpose, for example Conference.
9. In the **Date Worked** field select a date. Additional fields are displayed.
10. From the **Job Role** drop-down menu, select the relevant job role.
11. In the **Start Time** field, enter a start time.
12. In the **End Time** field, enter a start time.
13. In the **Hours Worked** field, enter hours and minutes worked.
14. Tick the circle next to **Holiday Pay**.
15. Click the **Select Item** button.

16. In the **Breaks** field, enter breaks in hours and minutes.
17. Click either the **Save Draft** or **Save and Submit** button. Clicking **Save and Submit** will send the claim to your Line Manager or Approver for approval.

Timesheets

Create Timesheets (Permanent and Fixed Term roles)

There are two options for timesheets: Fixed and custom timesheets.

Fixed Timesheets are useful when an employee works the same hours each day, or at least the same hours for a period of time. Custom Timesheets are useful when an employee works varied hours each week and can even combine time worked in multiple roles within a single timesheet.

Create Fixed Timesheets

Fixed Timesheets can be created for employees. These are useful when an employee works the same hours each day, or at least the same hours for a period of time.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Fixed Timesheet** button.

   Create Fixed Timesheet

5. In the **Title** field, enter a title.
6. In the **Start Date** field, enter a start date.
7. In the **End Date** field, enter an end date.
8. Select the days that apply from the options available.
9. These will default to Monday, Tuesday, Wednesday, Thursday and Friday and will be shown in pink. To remove any days which do not apply click the day and it will change to grey.

   Mo Tu We Th Fr Sa Su

10. From the **Job Role** drop-down menu, select the job role that applies.
11. In the **Start Time** field, enter a start time.
12. In the **End Time** field, enter an end time.
13. In the **Hours Worked** field, enter the hours worked.

    Please note that any **Notes** added are for internal purposes only and will not be read by your Payroll Team. Messages for the Payroll Team should be sent via the **Client Communication Platform**.

14. Click the **Save Draft** button.

    Save Draft

    Save and Submit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.

    Save and Submit

If the claim relates to a Permanent or Fixed Term contract, the time claim will not include any additions. please create a new claim and repeat the process above for any relevant additions related to each **Time Line**.

Create Custom Timesheets

Custom timesheets are useful when an employee works varied hours each week and can even combine tie worked in multiple roles within a single timesheet.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Custom Timesheet** button.

5. In the **Title** field, enter a title.
6. From the **Default Job Role*** drop-down menu, select a job role.

   Default Job Role, **Default Start Time**, **Default End Time** and **Default Hours Worked** when entered will automatically populate each new line entered but can be overwritten.

7. In the **Default Start Time** field, enter a start time.
8. In the **Default End Time** field, enter an end time.
9. In the **Default Hours Worked** field, enter the hours worked.
10. In **Line 1**, select a **Date Worked**.
11. From the **Job Role** drop-down menu, select a job role.
12. In the **Start Time** field, enter a start time.
13. In the **End Time** field, enter an end time.
14. In the **Hours Worked** field, enter the hours worked.

   Please note that any **Notes** added are for internal purposes only and will not be read by your Payroll Team. Messages for the Payroll Team should be sent via the **Client Communication Platform**.

15. In the **Breaks** field, enter the breaks in hours and minutes.
16. In the **Notes** field, enter any relevant notes.
17. Click the **+ Add Day** button. This will create a new line.
18. Click the **Save Draft** button.

mit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.

If the claim relates to a Permanent or Fixed Term contract, the time claim will not include any additions. please create a new claim and repeat the process above for any relevant additions related to each **Time Line**.

Create Casual Timesheets

If the timesheet relates to a Casual contract, please create a separate Time Claim for Holiday Pay. Holiday Pay should be added separately as it must be displayed as a separate line within your payslip.

There are two options for timesheets: Fixed and custom timesheets..

Fixed Timesheets are useful when an employee works the same hours each day, or at least the same hours for a period of time. Custom Timesheets are useful when an employee works varied hours each week and can even combine time worked in multiple roles within a single timesheet.

Create Casual Fixed Timesheets

Fixed Timesheets can be created for employees. These are useful when an employee works the same hours each day, or at least the same hours for a period of time.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Fixed Timesheet** button.

5. In the **Title** field, enter a title.
6. In the **Start Date** field, enter a start date.
7. In the **End Date** field, enter an end date.
8. Select the days that apply from the options available.
9. These will default to Monday, Tuesday, Wednesday, Thursday and Friday and will be shown in pink. To remove any days which do not apply click the day and it will change to grey.

10. From the **Job Role** drop-down menu, select the job role that applies.
11. In the **Start Time** field, enter a start time.
12. In the **End Time** field, enter an end time.
13. In the **Hours Worked** field, enter the hours worked.

Please note that any **Notes** added are for internal purposes only and will not be read by your Payroll Team. Messages for the Payroll Team should be sent via the **Client Communication Platform**.

14. Click the **Save Draft** button.

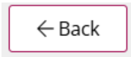
Save and Submit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.

Add Holiday Pay

Important

If the timesheet relates to a Casual contract, please create a separate Time Claim for Holiday Pay. Holiday Pay should be added separately as it must be displayed as a separate line within your payslip. See below.

1. Click the **Back** button at the top left-hand of the screen. The My Time screen is displayed.

2. Select the **Open Time Claims** tab.
3. Click the **+ Create Time Claim** button. A new window is displayed.

4. In the **Reference** field, enter a reference
5. In the **Claim Title** field, enter a Claim Title.
6. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
7. Click the **Add Time Line** button.

8. In the **Purpose** field, enter a purpose, for example Conference.
9. In the **Date Worked** field select a date. Additional fields are displayed.
10. From the **Job Role** drop-down menu, select the relevant job role.
11. In the **Start Time** field, enter a start time.
12. In the **End Time** field, enter a start time.
13. In the **Hours Worked** field, enter hours and minutes worked. A new window is displayed.

    If the window does not open click **Change Item**.

14. Tick the circle next to **Holiday Pay**.
15. Click the **Select Item** button.

16. In the **Breaks** field, enter breaks in hours and minutes.
17. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

Create Casual Custom Timesheets

Custom Timesheets can be created for employees. These are useful when an employee works varied hours each week and can even combine tie worked in multiple roles within a single timesheet.

1. On the left-hand side of the EPM Connect window, select **Time & Expenses**. A list of further menu options is displayed.
2. Select **Create**. A list of further menu options is displayed.
3. Within the **Create As…** drop-down-menu at the top of the screen, select an employee.
4. Click the **Create Custom Timesheet** button.

5. In the **Title** field, enter a title.
6. From the **Default Job Role*** drop-down menu, select a job role.

   Default Job Role, **Default Start Time**, **Default End Time** and **Default Hours Worked** when entered will automatically populate each new line entered but can be overwritten.

7. In the **Default Start Time** field, enter a start time.
8. In the **Default End Time** field, enter an end time.
9. In the **Default Hours Worked** field, enter the hours worked.
10. In **Line 1**, select a **Date Worked**.
11. From the **Job Role** drop-down menu, select a job role.
12. In the **Start Time** field, enter a start time.
13. In the **End Time** field, enter an end time.
14. In the **Hours Worked** field, enter the hours worked.
15. In the **Breaks** field, enter the breaks in hours and minutes.
16. In the **Notes** field, enter any relevant notes.
17. Click the **+ Add Day** button. This will create a new line.
18. Click the **Save Draft** button.

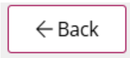
Save and Submit should only be clicked once the month has completed, unless you are certain that there will be no change to hours. Once a timesheet has been submitted no changes can be made.

Holiday Pay

Important

If the timesheet relates to a Casual contract, please create a separate Time Claim for Holiday Pay. Holiday Pay should be added separately as it must be displayed as a separate line within your payslip. See below.

1. Click the **Back** button at the top left-hand of the screen.



2. Click the **+ Create Time Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.
6. Click the **Add Time Line** button.

7. In the **Purpose** field, enter a purpose, for example Conference.
8. In the **Date Worked** field select a date. Additional fields are displayed.
9. From the **Job Role** drop-down menu, select the relevant job role.
10. In the **Start Time** field, enter a start time.
11. In the **End Time** field, enter a start time. Anew window is displayed.

    If the window does not open click **Change Item**.

12. Tick the circle next to the relevant item – for example Additional Hours

    The items available are set by the school or trust.

13. Click the **Select Item** button.

14. In the **Hours Worked** field, enter hours and minutes worked.
15. In the **Breaks** field, enter breaks in hours and minutes.
16. Click either the **Save Draft** or **Save and Submit** button. This will now be sent to your Line Manager or Approver for approval.

My Expenses

My Expenses provides an overview of all your **Open Expense Claims** and **Closed Expense Claims**.

Creating a new Expense Claim

Claims can be entered together or individually or together. For example, inputting hotel and mileage claims one after another.

1. From the left-hand navigation pane, select **My Expenses**. The **My Expenses** module is displayed.
2. Click the **+ Create Expense Claim** button. A new window is displayed.

3. In the **Reference** field, enter a reference.
4. In the **Claim Title** field, enter a Claim Title.
5. From the **Default Job Role** drop-down menu, select the job role this claim applies to.

   This will display **None** but clicking on the drop-down menu will display all roles held by the employee.

6. Select either **Add Mileage Line** or **Add Mileage Line**.

Add Mileage Line

1. In the **Purpose** field, enter a purpose, for example Conference.
2. In the **Date Incurred** field select a date. Additional fields are displayed.
3. From the **Job Role** drop-down menu, select the relevant job role.
4. From the **Vehicle*** drop-down menu, select ***Add a new vehicle*** or select the relevant vehicle. Additional fields are displayed.

   If previous mileage claims have been made, the drop-down menu will display the registration numbers of vehicles used in previous claims.

   If no previous mileage claims have been made or the drop-down does not display the registration number of the vehicle you wish to use, select ***Add a new vehicle***.

5. In the **Registration Number** field, enter the registration number of the vehicle used during the claim.
6. From the **Type** field, select the vehicle type.
7. From the **Engine Size (CC)** drop-down menu, select the engine size.
8. Move the **Is this a Company Car?** toggle to **YES** if this applies.
9. Move the **Does a Car Allowance apply?** Toggle to **YES** if this applies.
10. Click **Save**. The window closes.

11. In the **From** field, enter the starting location.

12. In the **Total Miles** field, enter the total miles.
13. Select the **Round Trip** tick box if you wish to include the both the outgoing and return trip as a single claim.
14. The **Total Amount** (**Gross)** field will be updated. To check the calculation, click the calculator icon next to the figure displayed.
15. Click the box next to the message at the bottom of the page.
16. Click either the **Save Draft** or **Save and Submit** button.

Clicking **Save and Submit** will send the claim to your Line Manager or Approver for approval. This cannot be edited once submitted. Should a mistake be made, speak to your Line Manager who can reopen the claim for changes to be made..

Clicking **Save Draft** will save the item and can be viewed and edited by selecting **View** from the **Time and Expenses** menu within the left-hand Navigation Pane.

Add Non-Mileage Line

1. In the **Date Incurred** field, select a date. A new window is displayed.
2. Select the expense item you wish to claim and click the **Select Item** button. You will return to the main page where additional fields are displayed.

The fields displayed depend on the expense type selected.

For some expense claims the **Total Amount (Gross)** will be calculated automatically. We therefore recommend completing this field last. If this has not been completed automatically, enter the total within this field.

3. Complete the remaining fields.
4. Click the box next to the message at the bottom of the page.

To enter the next claim click **Add Mileage Line** or **Add Non-Mileage Line** or if all claims have been entered click either the **Save Draft** or **Save** and **Submit** button.

5. Once all claims have been entered click either the **Save Draft** or **Save and Submit** button.

Clicking **Save and Submit** will send the claim to your Line Manager or Approver for approval. This cannot be edited once submitted. Should a mistake be made, speak to your Line Manager who can reopen the claim for changes to be made..

Clicking **Save Draft** will save the item and can be viewed and edited by selecting **View** from the **Time and Expenses** menu within the left-hand Navigation Pane.

Edit Open Expense Claims

These can be edited by clicking the pencil icon.

Closed Expense Claims

These cannot be edited but can be viewed by clicking on the eye icon.