

EASY Platform User Guide

TITLE:	EASY Platform – Allowance Claims (FOR EFTPs)		
Category:	IR35	Date:	16/6/2026

Background

Definitions/Acronyms

EFTP	Employed for Tax Purposes
CEST	Check Employment Status for Tax
HMRC CEST Link	https://www.gov.uk/guidance/check-employment-status-for-tax
OPW	Off-Payroll Worker
ESR	Electronic Staff Record
EASY	Electronic Expenses System

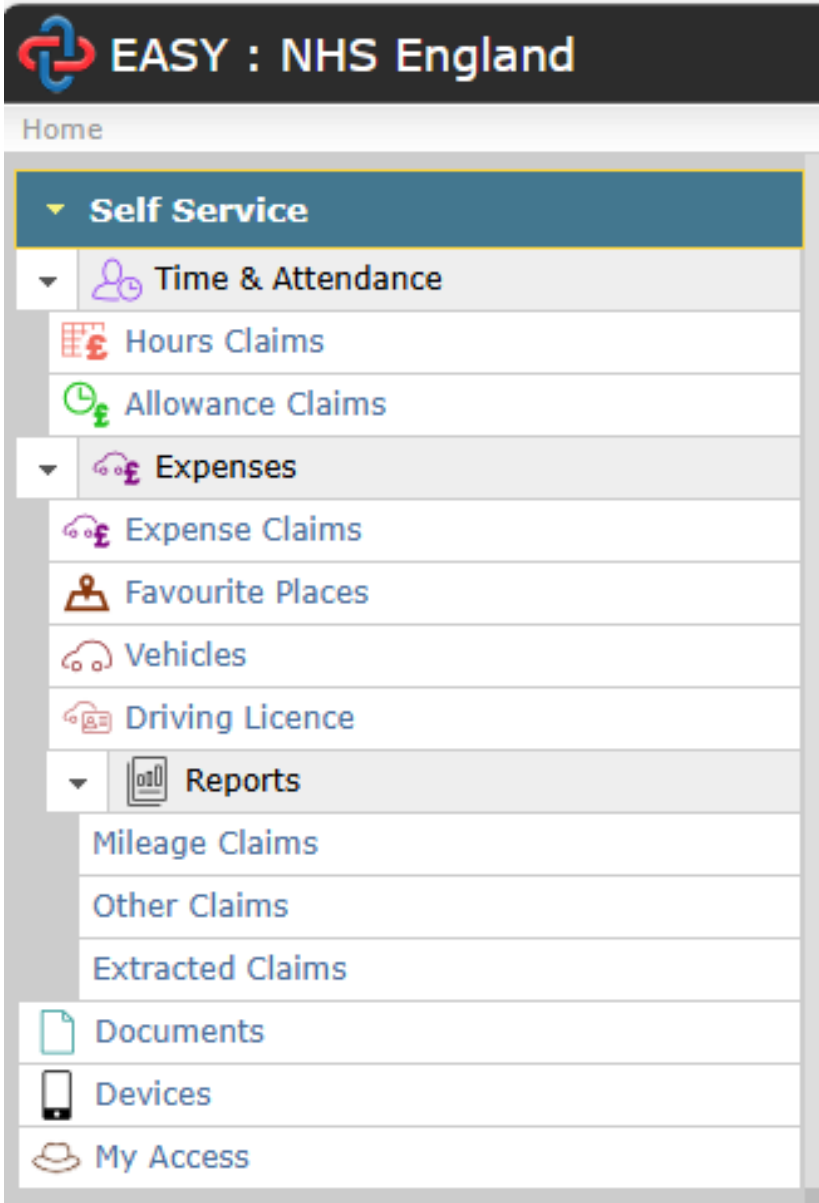
Related resources

EASY Helpdesk	Support: Giltbyte Helpdesk
How to Register with Easy	Link
Link to Easy Registration	EASY User Registration
Delegate approval nominee	Delegate Activities: Giltbyte Helpdesk
EASY – self-service – Expense Claims	Link
How to Make a Time Sheet Claim	Link
Update Insurance Certificate	Update Insurance Certificate (Video Tutorial): Giltbyte Helpdesk
Adding/Updating Driving Licence	Adding/Updating My Driving Licence: Giltbyte Helpdesk
How to add a new vehicle	How to add a new vehicle: Giltbyte Helpdesk
Management of Expense Claims	Link
Frequently asked questions	Link

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Process:

Work Needed Before Proceeding
Access to ESR and EASY platforms (links below) ESR login XXXNAMEXX Assignment number (8 numbers) - Remote Access Login Screen - EASY Login

Action Required	Screenshot / Link / Notes
Open EASY and click on Self Service and then click on the down arrows to open each category	

Action Required	Screenshot / Link / Notes
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Employed for Tax Purposes Employees

Employed for Tax Purposes Employees will claim either the hours or sessions worked, the system will detect whether you are a sessional or hourly worker. Those claiming sessions or half-day sessions cannot claim for more than 2 sessions in a given day.

The rate of pay will reflect the number of hours or sessions claimed against the hourly or sessional rate as held on the assignment in ESR. **Please ensure that this is known before making the claim.**

If you have more than one assignment, it is important that you have selected the correct assignment from the drop down list prior to starting the claim.

Allowance Claims

NB: EFTPs should use the Allowance Claim section in Easy instead of the Hours Claim section.



The screenshot shows the 'Allowance Claims' page in the EASY platform. On the left, the 'Self Service' menu is expanded, and 'Allowance Claims' is selected under 'Time & Attendance'. The main content area displays employment details for Jeffrey Hackland (96168532) and a list of claim categories: Unsubmitted Claims (0), Submitted Claims (0), Authorised Claims (0), Accepted Claims (0), Rejected Claims (0), and Recently Processed Claims. An 'Add/Edit' button is visible next to the 'Unsubmitted Claims' banner.

1. As with Hours claims, to find the Allowance Claims page, expand the Self-Service tab on the left hand-side of the Homepage and navigate to **Time & Attendance > Allowance Claims**. This will bring you to the Allowance claims landing page where you can view some employment details related to your assignment.
2. If you have more than one assignment you can select the assignment you need from the field 'Allowance Claims for' at the top of the screen.
3. To add a new claim, click the Add/Edit button within the banner of the 'Unsubmitted Claims' tab.

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Action Required	Screenshot / Link / Notes																						
	Enter the date of the claim This field is left blank by default Enter the number of sessions or Hours to be claimed. Those claiming sessions or half-day sessions cannot claim for more than 2 sessions in a given day Additional Allowances <table><tr><th rowspan="2">Date</th><th rowspan="2">Allowance Type</th><th rowspan="2">Shift/Project Related</th><th colspan="2">Shift Times</th><th rowspan="2">Reason</th><th rowspan="2">Claimed</th><th rowspan="2">Rate</th><th rowspan="2">Payable</th><th rowspan="2"></th></tr><tr><th>Start</th><th>End</th></tr><tr><td>09 May 2022 Monday</td><td>EFTP (Hourly)</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>   </td></tr></table> Enter the date of the claim Select the relevant allowance type. For Employees on an hourly rate this will be EFTP (Hourly), for those on Sessional rates this will be EFTP (Sessional) This field is left blank by default Enter the Start and End times for the shift. Enter the number of sessions or Hours to be claimed. Those claiming sessions or half-day sessions cannot claim for more than 2 sessions in a given day There are 4 icons on the right-hand side. Speech bubble will allow you to enter a reason for the claim. + will allow you to enter another claim ++ will replicate the current claim, minimising the number of changes required if you have to make a very similar claim. The last icon will remove the claim.	Date	Allowance Type	Shift/Project Related	Shift Times		Reason	Claimed	Rate	Payable		Start	End	09 May 2022 Monday	EFTP (Hourly)								   
Date	Allowance Type				Shift/Project Related	Shift Times						Reason	Claimed	Rate	Payable								
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**** PROCESS END ****