Last Updated: 13/04/22
Version: 5.0

sustainable thriving achieving
East Dunbartonshire Council
www.eastdunbarton.gov.uk

Supply Teacher Database

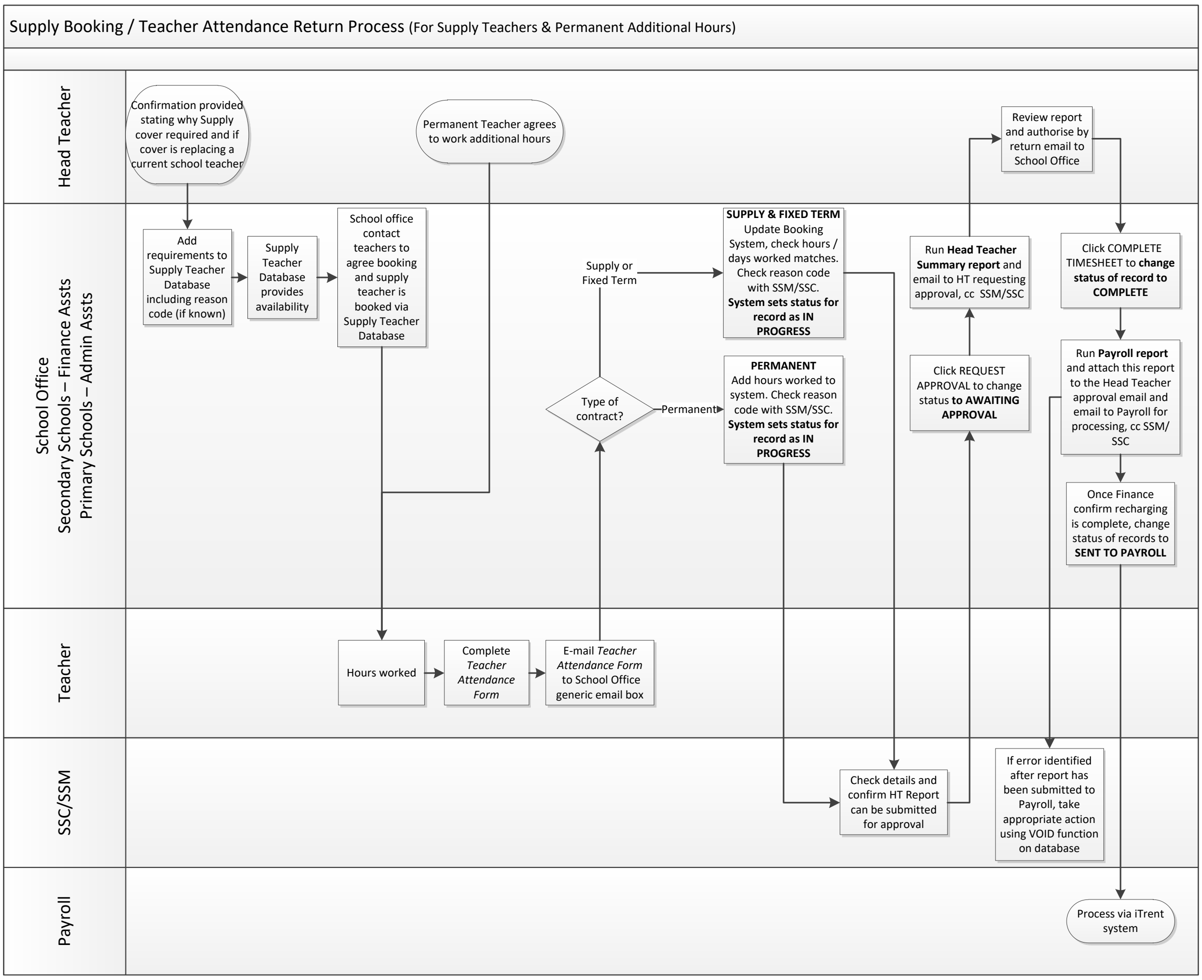
For: Supply Teacher Bookings AND
Timesheets for Supply Teachers / Permanent Teacher Additional Hours

Table of Contents

Introduction

This guide will provide information on how to use the Supply Teacher Booking Database which is used to book out and create timesheets for Supply Teachers working in EDC schools, as well as timesheets for any permanent teachers who work additional hours.

High level steps within booking & timesheets processes:



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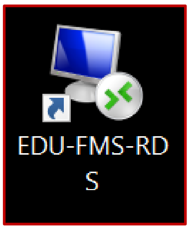
How to access the database

To access the database, you will first need to connect to a RDP Server.

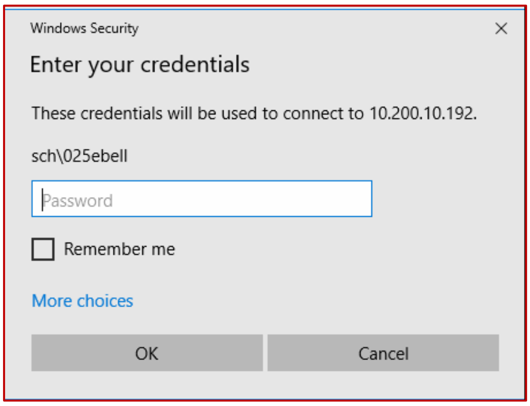
Logging in to the RDP Server

This requires you to log in to an application on your computer before logging in to the database. IT will have set this up for you and created a shortcut on your desktop in which to access the server. ***Please note: New members of staff will need to contact IT Service desk to be given access to the server***

1. Click on the shortcut **EDU-FMS-RDS** (it may also be called **FMS Remote Desktop** and can be found in your **Staff** folder)

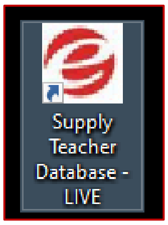


2. On the log in screen that appears, enter your user name and password. The password should be the same one you use to log in to your computer, and so should your username **except** with the characters **sch** before it, demonstrated in the picture below.



To log in to a different account, select **More Choices > Use a different account.**

Once you are logged in to the RDP Server, you will then be able to access the database via the shortcut on your desktop

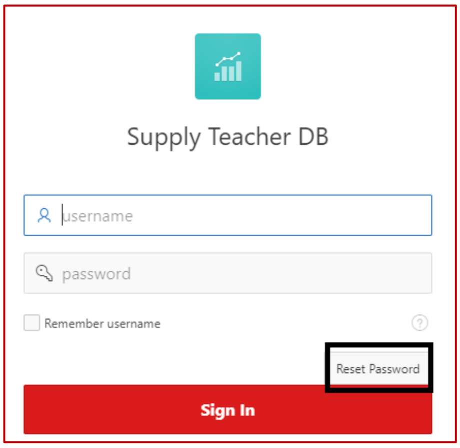


PLEASE NOTE When you have finished in the RDP Server, **you must ensure you <u>log out</u>** of the server by clicking the **red LOG OFF icon**.

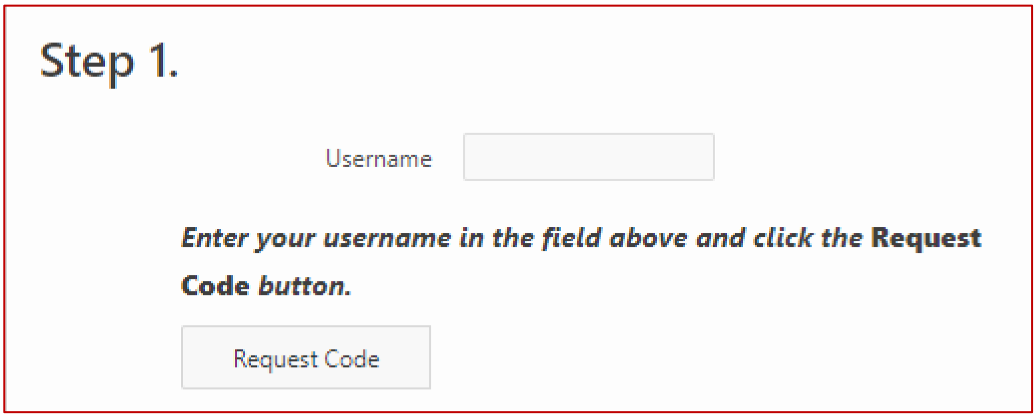
Logging in to the database for the first time

A username will have already been set up for you to use the database, however when logging in for the first time you will need to set your own password.

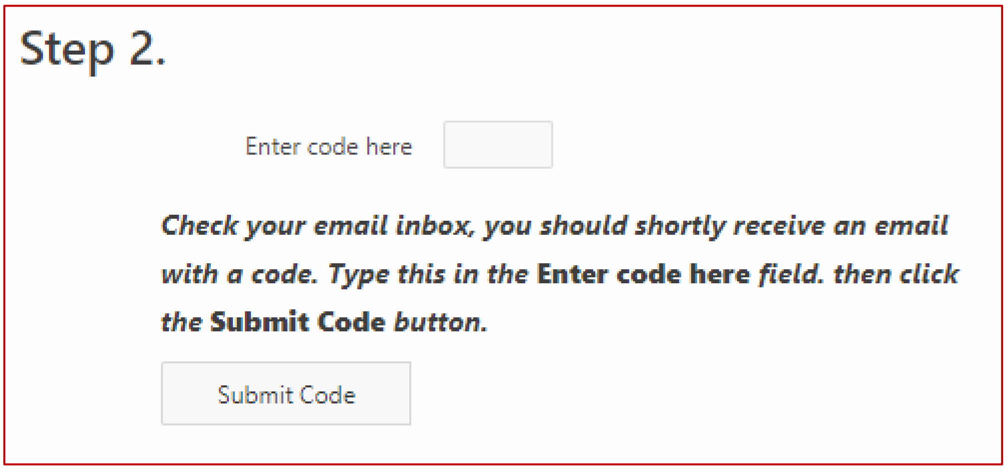
1. On the log in page, click **Reset Password**



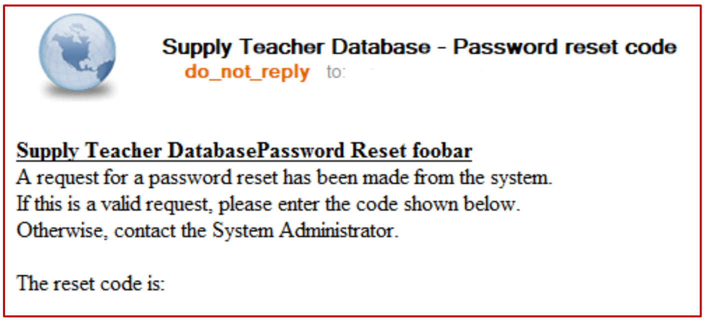
On the next page there are three steps you need to follow:

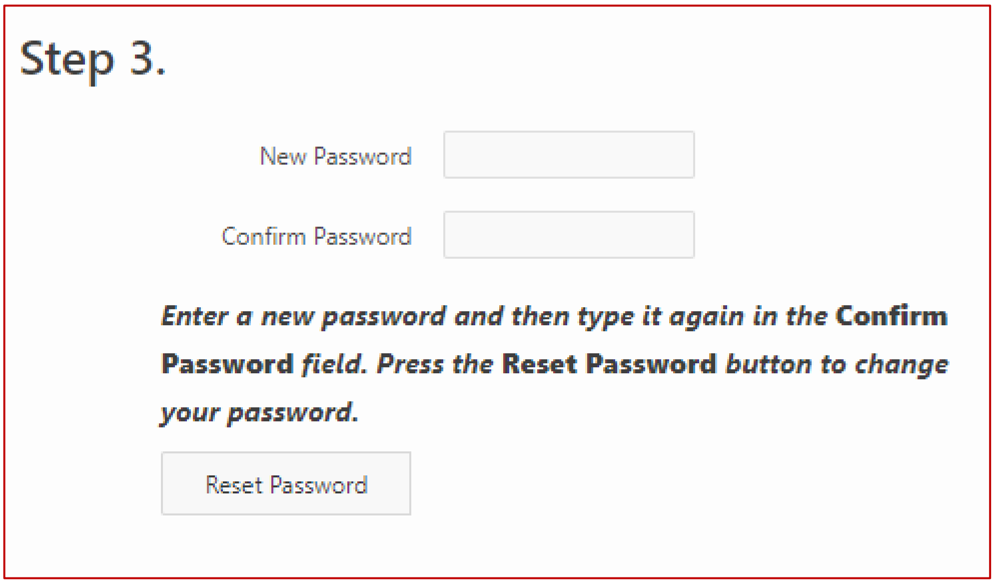


The username that has been set up for you should be your **first initial** and **surname in capitals** e.g. JSMITH, check with your SSC/SSM to confirm. Enter this in to the *Username* field then click **Request Code**, then go and check your e-mail inbox.



You will receive an e-mail from a do_not_reply address providing you with a code made up of both upper and lower case letters. **Copy** the code exactly and **paste** it in to the *Enter code here* field, then click **Submit Code**. If you do not receive a code then please contact your SSM/SSC as your e-mail address may have been entered incorrectly when setting up your access.



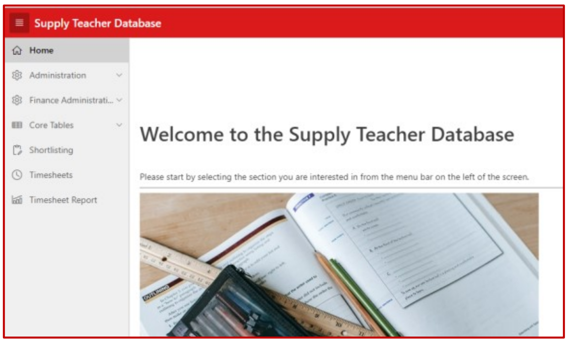


Once the code has been submitted successfully, you will then be asked to set your new password; once you have done this click **Reset Password**.

How to reset your password

If you have forgotten your password and need to reset it, please follow the same process as above to create a new one, however **do not log out of the database** as you will have to reset the password again

You can now return to the database log in page and using your username and new password can now gain access to your account, where you will be taken to the Home Page of the Supply Teacher Database.

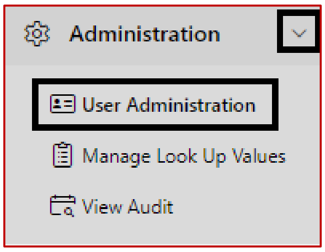


Administration Functions

School Support Managers and Co-ordinators will have Administration access which will allow them to add a new user.

How to add a new user

1. To create profiles for staff members, click on the down arrow next to **Administration** on the left hand side of the screen, then click **User Administration** from the menu that appears. Once on the User Administration page click **Add User**.



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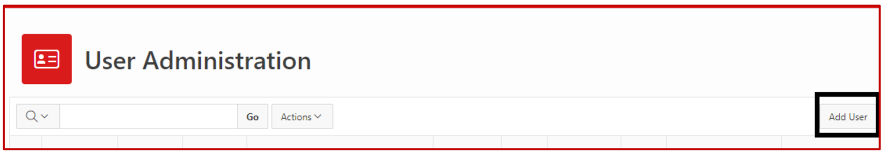


2. In the **User Detail** box that appears, complete all fields:

Field	Information required
Username	For all new users, make username their **first initial** and **surname in capitals**, e.g. for John Smith set username as **JSMITH**
First Name/Last Name	Enter both first and last name of user
E-mail	Enter users work e-mail address
Credentials	Provides edit permissions for staff. There are options to choose from: - **Administrator:** This will allow staff to add and delete users and manage supply bookings within a school or cluster. This access should be give to <u>SSM/SSC's</u> - **Edit Permissions**: This will allow access to create and edit the supply booking of a teacher only. This access should be given to <u>admin staff</u> - **View Only Permissions**: This allows a view access only to the booking on the system within their respective school, no edit function available with this access. This should be given to <u>Head Teachers/Depute Heads/Principal Teachers</u>
Scope	Provides area cover for user. There are 4 options to choose from: - **Cluster**: This option is for both School Support Co-ordinators to give them access to all schools and Managers to give them access to the administration functions to add new users to their school - **Finance**: For Finance only - **Organisation**: This if for HQ Staff only, staff within schools will not see the scope option

Field	Information required
	- **School**: This option is for admin staff within all schools
Base School	This provide a drop down list of all schools within the Authority and identifies the schools in which the user is based.
Status	This is the status of that users account. There are 4 options: - **Account Active**: Select this when setting up a new user to give them access to the system - **Account Locked**: This takes access away from a user - **Not Active**: This takes access away from a user, should be used for any members of staff that have left the school - **Password Reset Required**: If a member of staff needs to reset their password it can be done through select this option, or through the *Reset Password* button on the sign in page

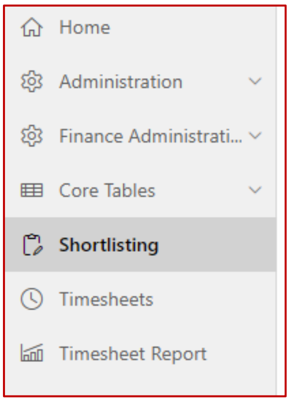
3. Click **Create**. The user will now appear on the list on the *User Administration* page. To make any changes to their account click the **yellow pencil** ( ) on the left hand side against their name to edit.

Process for booking a Supply Teacher

KEY	
Icon	**What it means**
	Booked
	Teacher Preference
	Only this School
	Shortlisted

Creating a requirement

1. To book a supply teacher, select **Shortlisting** from the list on the left. This will take you to the *Shortlisting – Main List* page where you will be able to see all bookings that have been made in your school. To create a new booking, click **Create**.



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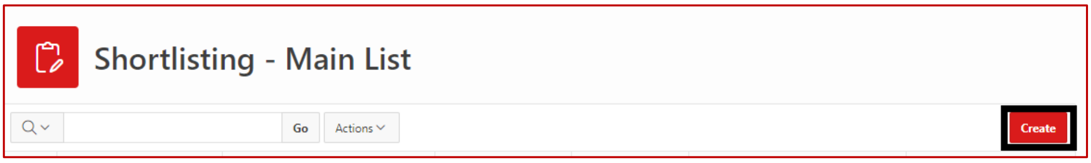
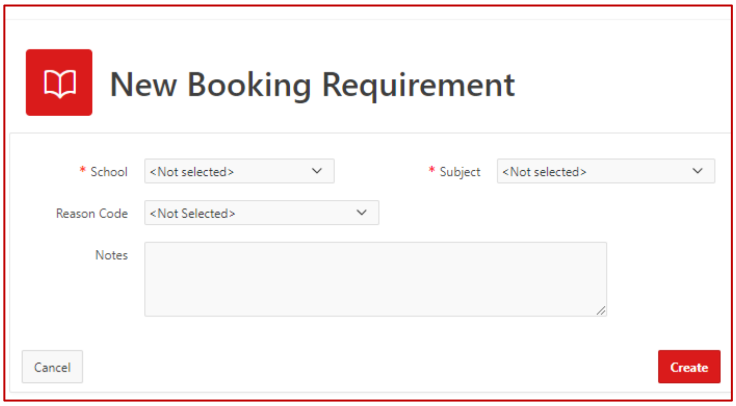


2. A *New Booking Requirement* box will appear. Fill out the different fields:



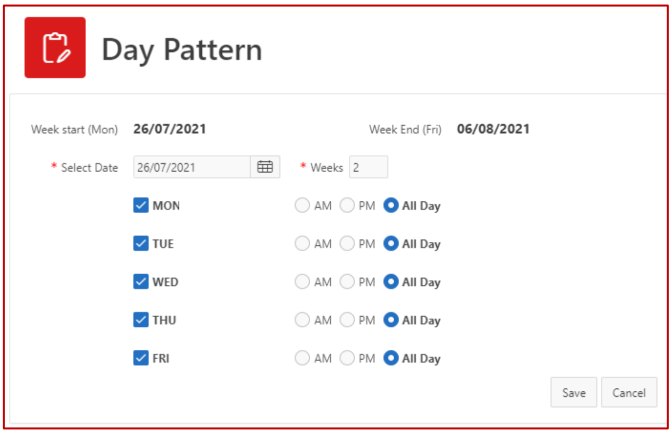
Field	Information required
School	This will default to school/s according to the access someone has
Subject	Qualified GTC subject, specific to both secondary and primaries
Reason Code	Length of cover required in schools. Enter if known at point of creating the booking, if it is not known then can be added later
Notes	Free text box

Once you have entered all information, click **Create**. (Clicking *Cancel* will take you back to the main Shortlisting page). You will be taken to the *Shortlist* page to input hours required a select a teacher to book.

Choosing hours for a requirement

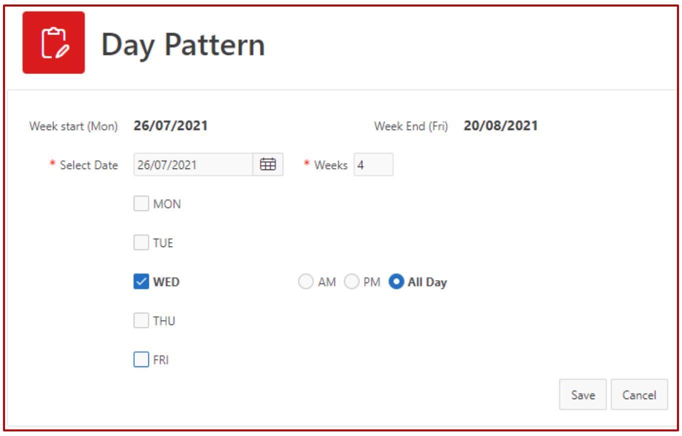
To input the required days you need a supply teacher for, you can either:

- **Click Add Day Pattern**. This will allow you to add a weekly pattern for as many weeks as required.
  - In the *Select Date* field chose the **first day** you need the teacher to cover, and then **type** in the number of weeks you will need them for in the *Weeks* field
  - Then select the days you want the teacher to work. If you need a teacher to work for a whole week then you **must tick the box against all five days of the week**, where you can then select if it is **AM/PM/All day**. If you only need a teacher to cover some days of the week then **only tick the days you need them for** and this will filter through on the booking based on the number of weeks you have input. Click **Save**.

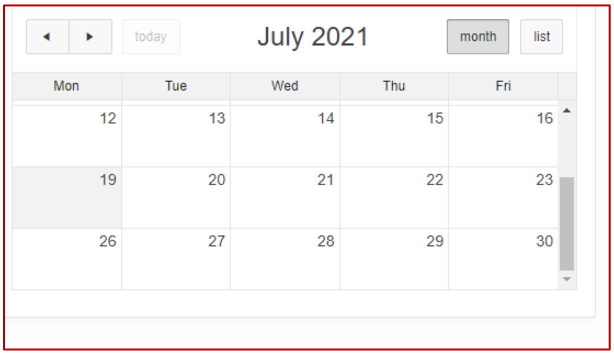


< E.g. If you need a teacher to cover supply in your school for 2 full weeks, you day pattern will look like this

E.g. If you need a teacher for 4 weeks on a Wednesday only, your day pattern will look like this **>**



- **<u>Select each day a teacher is required for on the calendar</u>**. You will be given the option of the day pattern, once you have selected this click **Create**.



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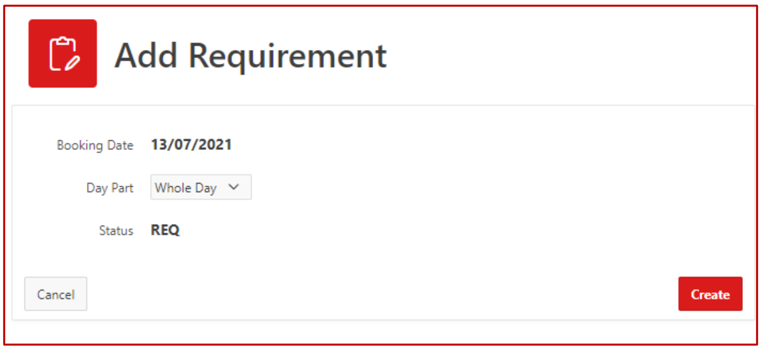


3. Once you have entered the required dates you need covered either using the *requirements calendar* or the *Add Day Pattern* options, you will see on the left hand side of the screen the list of supply teachers that **meet the requirements of your booking** and are **available to be booked**. You can browse candidates in a number of ways:

   - Scroll through the list as it appears
   - Search for a particular teacher using the search bar
   - To search for teachers by postcode, click **Actions > Filter >** In the *Column* Field select **Postcode >** In the Operator field select Contains **>** In the *Expression* Field put in a postcode/part of a postcode **>** Click **Apply,** e.g. if you only want to consider teachers in the surrounding area with a G Postcode then enter **G** in the *Expressions* field
   - To find teacher that are approved to work in Roman Catholic schools, click **Actions > Filter >** In the *Column* Field select **RC Approved >** In the *Operator* column select **= >** In the *Expression* field select **Y > Apply**. You will then be able to see all RC approved teachers.

You can view the details of a teacher by clicking the **yellow pencil** to the left of their name.

4. When you come across some teachers you would like to try booking, you can select **Shortlist** (

), a pop up box will ask you to confirm that person for your shortlist, select **Yes**. Anyone you shortlist will move in to the *Shortlist* tab along with all their contact information to allow you to try getting in touch with them by telephone using the number provided or by email to see if they can work in your school. Choosing email will send the following email to teachers on your shortlist:

<u>Request availability for Supply Booking</u>

If contacting the school in relation to this requirement please quote Ref: ***BR\ED010\001100***.

Dear John Smith,

Our records indicate that you may be available to provide tuition in Computing at Bearsden Academy on the date(s) shown below.

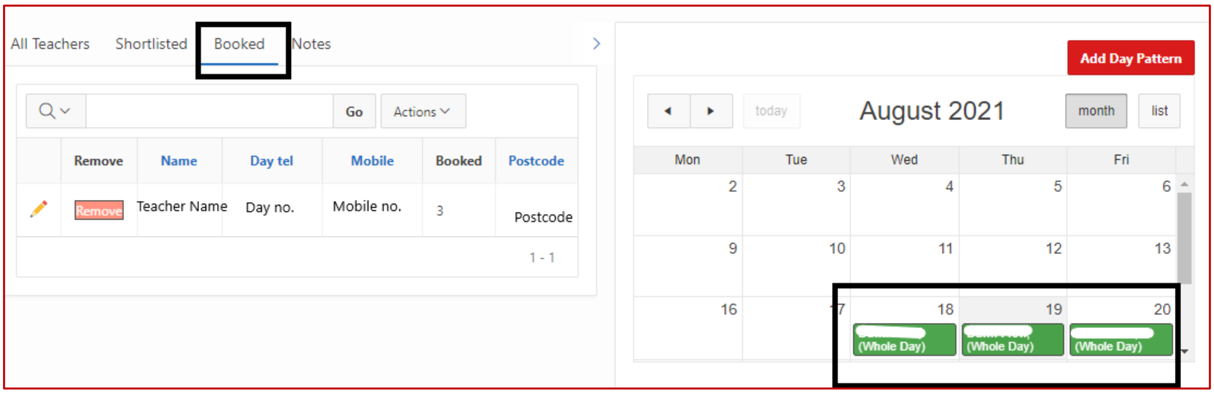
11/08/2021 Whole Day
20/08/2021 Whole Day

If you are available to fill this booking, please contact the school office at:

office@bearsdenacademy.e-dunbarton.sch.uk

You can **remove** a teacher from your shortlist by clicking the **Remove** option; this will return you to the *All Teachers* Tab.

5. Once you have contacted a teacher and confirmed the booking with them, you can then click **Book** (Book) to **book the teacher** on the database. Again a box will pop up asking you to confirm you want to book that teachers; select **Yes**. You will now be able to see the booking on the request calendar and on the *Booking* Tab.



Once you have booked a teacher on the system, you can then send a **confirmation e-mail** providing information about the booking and a link to the EDC Hub to access the Teacher Attendance Form and guidance. ***Please Note*** when calling a supply teacher and confirming a booking with them, ask them to check their SPAM folder for this email if it does not arrive right away.

- When on the booked tab, next to the teachers name click the button that says **email**
- In the box that appears, you will see the e-mail address in the system for that teacher. If this is correct, click **send**
- The following e-mail will be sent to the teacher with information about the booking:

<u>Confirmation of Supply Booking</u>

If contacting the school in relation to this booking please quote Ref: ***BR\ED012\000607***.

This email is to confirm that John Smith, (employee no - :1234567), has been booked as a supply teacher at Douglas Academy on the date(s) shown in the table below.

16/08/2021 Whole Day
17/08/2021 Whole Day
18/08/2021 Whole Day

Important points to note:
School holiday dates within booking periods are excluded from payment and should **not** be submitted as part of your Teacher Attendance Form.
It is your responsibility to submit a completed Teacher Attendance Form o time to the school office for processing.
Please complete **all sections** of the form electronically and email it to the school office at:
office@douglas.e-dunbarton.sch.uk
Forms should be submitted by the last Friday of every month - failure to submit forms on time could lead to delays in payment.

Guidance on completion of the Teacher Attendance Form together with blank forms can be found here.
This link can only be accessed from an EDC device. If you cannot access this link please contact the school office.

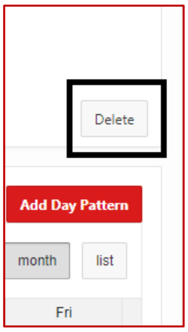
Finally, please be aware that your payslip will show the total time worked in **hours** and **not** days.

Removing information from a booking

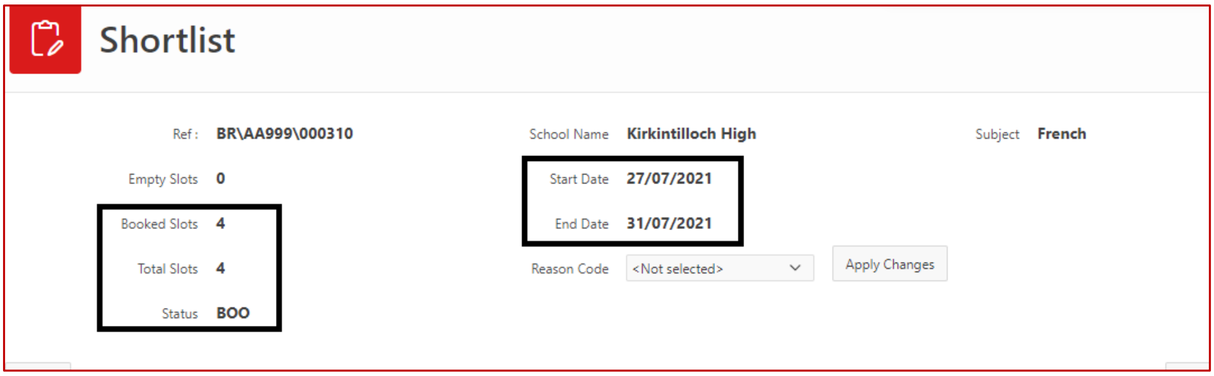
If you need to **remove** a teacher from a booking, you can either click **each day** on the request calendar and select either:

- **Delete Booking**: This will remove the teacher from that particular day. This could be because you contact a teacher and there is a day in your requirement that they can not do, in which case you will need to **book another teacher to cover that one day**
- **Delete Requirement**: This will remove that day as a requirement e.g. that day no longer requires a teacher to provide supply cover on it

You can also delete the **whole request** by selecting **Delete** on the right hand side of the screen to start the requirement again



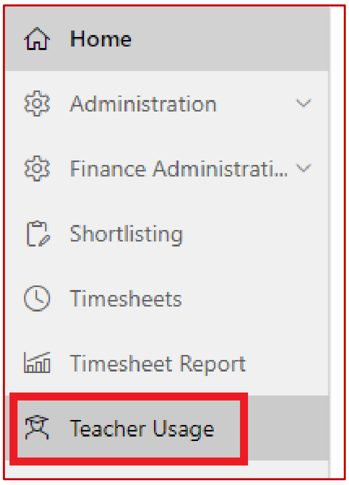
Once you have booked a teacher, you will see that the information at the top of the booking has updated and the **status** of the booking has changed from **REQ (required)** to **BOO (Booked)** and that the number of slots they have been booked for has been filled. Also the start date and end date of the cover is shown. If you know the *Reason code* at this stage you can add it at the top and select **Apply Changes** to save the change.



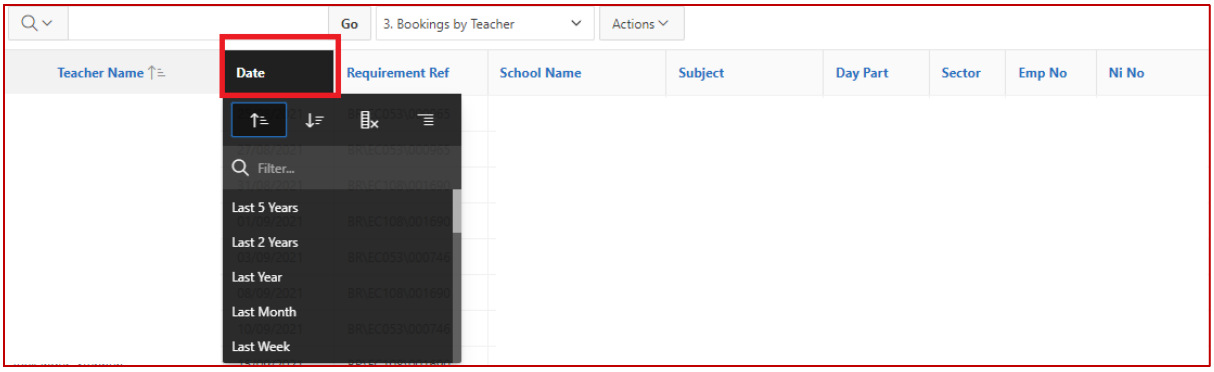
If you need to make any amendments to a booking, from the S*hortlisting – Main List* page, select the **yellow pencil** next to a booking to do so

Teacher Usage Report

The Teacher Usage report provides a breakdown of supply teacher usage and captures **all supply books completed** on the system. It can be accessed from the menu down the left hand side of the database



The report allows you to filter on all column headers as required. Further refinement of data is available by **clicking directly on blue highlighted headers**



There are currently **four** booking reports available:

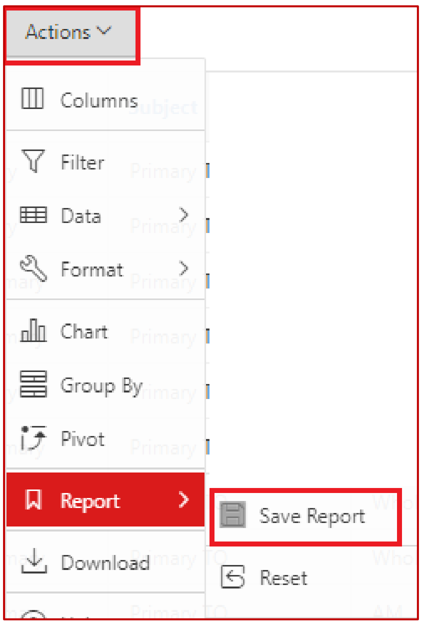
Report Name	Information within report
Primary Report	This is the default report and includes all data for respective school(s). If you have access to more than one school, you can filter by individual school
Bookings by school	This report filters by school name. If you have access to more than one school you can filter by individual school. To see what teachers you have booked to work in your schools over a certain period, filter this report by **Date** for the date range you are interested in
Bookings by teacher	This report filters by teacher name
Total Bookings per school	This provides the total number of bookings by school. This can be filtered by school name if you have access to more than one school

Saving Custom Reports

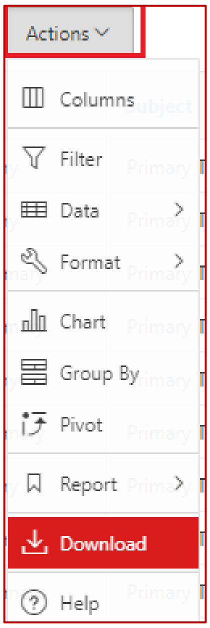
Using the filtering functions available, you can also create your own custom report to include only the information you are interested from all that is available. This report can then be saved and used as and when required. This report will only be unique to your establishment and will not appear on any other schools page.

Once you have made your report with the filters you want, click **Actions > Report > Save Report**. You can then export this report you have made as a **CSV**, **PDF** or **Email** by selecting **Actions > Download**

Saving a report



Download a report



Timesheets

The Timesheets part of this process is to be used for both **Supply Teachers** and **Permanent Teachers working additional hours**, and is split in to two sections:

- Supply teacher/perm additional hours teacher fills in **digital timesheet** of hours worked
- School **create timesheet** on database with information for Payroll to pay teacher

Process for Supply Teacher/Permanent Teacher working additional Hours

When a supply teacher is booked on the database, they will receive a confirmation e-mail with a link to the East Dunbartonshire Council website, where they will see **Teacher Attendance Form** (This can be found within **Employee Zone > Policy & Procedures)**. If there is a Permanent Teacher working additional hours, they **do not** need to be booked out on the system, therefore they will need to have the link to this page sent to them via e-mail.

For school office info, the forms can be found on the EDC Website and the Hub at the links below:

- **East Dunbartonshire Website**
- **Education Processes (SEEMiS Replacement) on the Hub**

The teacher must complete the timesheet below electronically, filling in the **dates** and **hours** they have worked in one school. Once they have signed and dated the timesheet, they should then **e-mail** the completed time sheet to the **school office.** In order to be **paid on time**, the teacher must submit the timesheet **by last Friday of every month.**

Please Note:

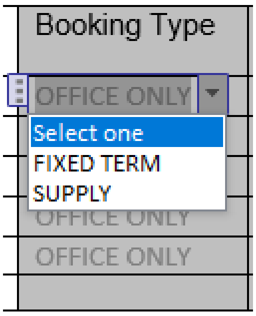
- This time sheet must be completed **electronically** and then **e-mailed** to the school office. A physical copy **should not** be printed and filled in.
- The booking confirmation e-mail contains information the teacher needs to complete the time sheet, ie. their **employee number**, **school office e-mail address**
- It is the Teachers responsibility to ensure that their time sheet is completed correctly and submitted on time. Failure to do this could lead to delays and Payroll processing could carry forward to the following month. Direct the teacher to the information box on the timesheet for information about this
- If a teacher has worked in more than one school in the one pay period, **they must complete a separate sheet for each school**

Inputting timesheet information on the database

The information on the teachers digital timesheet return must be entering in to the Supply Teacher Database in order to be processed by payroll and the teacher paid.

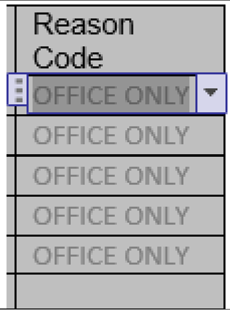
Creating a timesheet on the system

1. Once a teacher has emailed their digital timesheet to the school office where they have worked, an admin member will need to complete the sections marked **OFFICE ONLY** on the sheet and save the complete timesheet in an appropriate place for your schools own audit purposes

<table>
<tr><th>Section of timesheet</th><th>Data required</th></tr>
<tr><td>
</td><td>For each date that has hours worked against it, select the Booking type from the list provided

Supply = less than 2 days

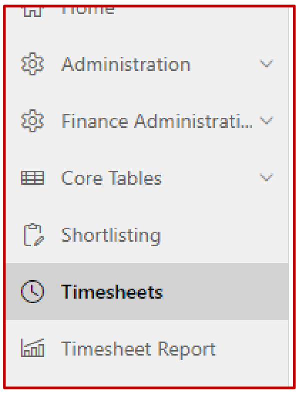
Fixed Term = more than 2 days

For Permanent teachers doing additional hours leave this blank</td></tr>
<tr><td>
</td><td>For each date that has hours worked against it, select the correct Reason Code for each day from the list provided. If you do not know the reason code, contact your SSC/SSM and they can provide this information</td></tr>
<tr><td colspan="2"><table>
<tr><th colspan="2">Days Worked: Full Sheet Total</th><th colspan="2">Sick Absence</th></tr>
<tr><th>Whole Days</th><th>Hours</th><th>Whole Days</th><th>Hours</th></tr>
<tr><td>Enter Total number of days worked</td><td>Enter Total number of hours worked.</td><td>Enter Total number of days sick</td><td>Enter Total number of hours sick</td></tr>
</table></td></tr>
<tr><td colspan="2">Supply Teachers will add up the total number of days and hours they have worked, as well as total number of days/hours they have been off sick. Please check that the totals they have entered are correct and amend if necessary.

If a teacher has ticked any date to say they were sick, then also add this information up and put the total in days and hours in the Sick Absence section, and follow the current process that is in place for paying supply teacher who have been off and are entitled to sick pay</td></tr>
</table>

2. Once you have filled in the OFFICE ONLY sections of the timesheet, **Save** the timesheet in an appropriate place. Now the information on the timesheet can be input in to the database

3. Within the database, along the left hand side select **Timesheets** and then select **Create** to make a new one.



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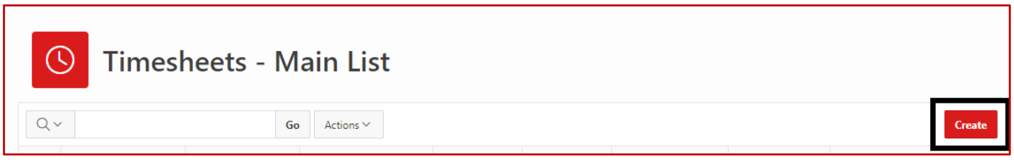
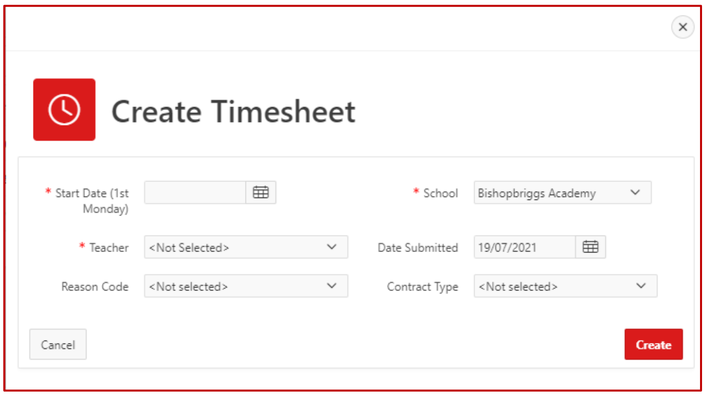
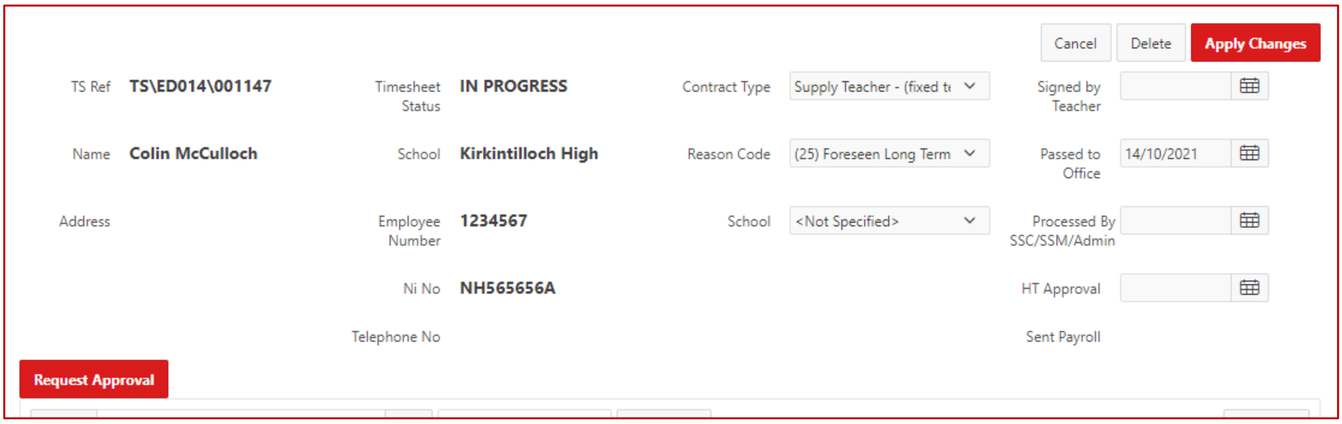


4. A *Create Timesheet* box will appear; fill in all fields:



Field	Data Required
Start Date (1st Monday)	Select the **first Monday** for the week the teacher started working in your school e.g. if a teacher did Wednesday 21st – Friday 23rd in a school, select the date **Monday 19th**
School	This will auto-populate with your school and cannot be changed (those with Cluster permissions will be able to select from the schools in their Cluster)
Teacher	Select the name of the teacher who has submitted the timesheet, confirming the employee number on the database matches the one on the sheet (Use employees numbers to differentiate between teachers with the same name)
Date Submitted	Auto-populates to date timesheet is created
Reason Code	Enter Reason code, contact your SSC/SSM if unknown
Contract Type	Distinguishes between teachers who have worked supply and those who are permanent teachers working additional hours. Select the correct option based off the information the teacher has put on their sheet and the time they have worked

Once you have filled in all the fields, select **Create**.



5. When the timesheet has been created, you will be taken to the *Timesheet Entry Form*. Here, you will see at a glance some contact information about the teacher along with some editable fields.

Field	Data Required
Contract Type	Pre-populated with type selected when creating timesheet. Can be changed between: • Permanent Staff • Supply Teacher (< 2 days) • Supply Teacher (fixed term)
Reason Code	Pre-populated with Reason Code selected when creating timesheet
School	This field is only to be filled in if the timesheet is for a Permanent Teacher working additional hours. Choose the name of the school they have a permanent contract at from the list
Passed to Office	Auto-populates to the date that the timesheet was **created**
Signed by Teacher	This is the date that the teacher has e-mailed timesheet to school office. Only saved to record when **Apply Changes** is clicked
Processed by SSC/SSM/Admin	The field will **auto-populate** when ***Awaiting Approval*** button is pressed to change status of timesheet to **Awaiting Approval**
Approved by Head Teacher	Once the Head Teacher has approved the timesheets via the Head Teacher Summary report, this field will **auto-populate** when **Complete** button is pressed to change the status of timesheet to **Complete**
Sent to Payroll	**Auto-populate** when timesheet status is changed from **Complete** to **Sent to Payroll** on the *Timesheet Main List* page

Status of Timesheets - Overview

There are a number of different statuses that timesheets can be on the database which relate to various stages of the process. What you are able to do on a timesheet when it is at each status is unique also.

Status	Description of Status	Access
In Progress	Status that record is automatically set to when timesheet is created on system. Functions available: - Input hours against days worked by teacher - Input/edit reason codes against days worked - Add a note to record - Delete record Final stage of status: SSC/SSM to check details on timesheet records are correct, Once checked, all records to be changed to *Awaiting Approval* by selecting **Request Approval**	Everyone
Awaiting Approval	Selecting *Request Approval* button on timesheet record sets this status and populates *SSC/SSM/Adm* date field. *Head Teacher Report* will run off records sitting at this status. Report must be downloaded from system and e-mail to Head Teacher for approval, with SSM/SSC cc'd. Functions available: - Input hours against days worked by teacher - Input/edit reason codes against days worked - Add a note to record - Delete record Final stage of status: Head Teacher gives approval for all records sitting on system via e-mail. All records to be changed to *Complete* by selecting **Complete Timesheet**	Everyone
Complete	Selecting *Complete Timesheet* button on timesheet record sets this status and populates *HT Approval* date field. Records are locked at this status and no changes can be made without unlocking first. *Payroll Report* will run off records sitting at this status. Report must be downloaded from system and e-mailed to Payroll within same e-mail chain as Head Teachers Approval, with SSC/SSM cc'd. Functions available: - Unlock timesheet to revert back to *In Progress* if error noticed on record before sending Payroll Report	SSC/SSM

	- Add a note Final stage of status: *Payroll Report* emailed to Payroll for processing. **Do not** make any more changes to records/statuses on the system **until** Finance contact to advise differently	
Sent To Payroll	Selecting *Send to Payroll* button when using the add bulk feature changes records sitting at *Complete* to this status and populates *Sent Payroll* date field. This should **only be done** once Finance contact schools to advise that recharge has been complete. Functions available: - Add a note Once record is sitting at this status, **it can not be unlocked to be amended, or deleted**. If no errors have been identified during processing, then changing records to this status is the final step in the process and prevents old records already submitted to Payroll pulling through on to future reports.	No users
Void	The VOID status should **only** be used if an **overpayment error** has been identified and **the Payroll Report has been submitted** but **Payroll processing is <u>not complete</u>**. The entire timesheet for the employee in question must be marked as void – **please refer to *Timesheets - Guidance on Correcting Entries* on the Hub.** **Only** records with status *Complete* can be changed to Void by selecting VOID Timesheet. Once at this status, **it cannot be unlocked to be amended, or deleted**. Functions available: - Add a note A note must be added to Void Records with information on the error identified and wat mitigating action is being taken (a note must also be added to the new record that is create to correct the identified error) **Note: Do not VOID a timesheet if the Payroll processing has been complete** – please refer to *Timesheets - Guidance on Correcting Entries* on the Hub and **refer to your SSC / SSM**	SSC/SSM

Entering hours worked on to a timesheet

At the bottom of the page there is a long list of dates Mon-Fri. This is 5 weeks from the **start date (1st Monday)** that was chosen when the timesheet was created as there are 5 weeks worth of hours a teacher can work in a pay period. **Please note** that only days that have **Hours** entered against them will pull through to the report for Payroll so teachers will only be paid for day that have hours entered against them.

Click on the **yellow pencil** against a day the teacher has worked, and in the *Timesheet Details* box that appears, fill in the following fields:

- Hrs: The hours the teacher has worked on that particular day according to their timesheet.
- Sick: Select Yes/No from the drop down if the teacher's digital timesheet reports them as sick for that day
- Reason Code: This can be changed here if a particular day a teacher has worked was under a different reason code. Your SSC/SSM will tell you if this is the case.
- Contract Type: Select if the teacher worked that day as supply or permanent doing additional hours

PLEASE NOTE If a teacher in your school works under a different reason code in the morning **and** the afternoon, then you must **create two timesheets – one with morning hours, and one with afternoon hours**.

On the **Stats Tab (** Stats **)**, you will be able to see some more information:

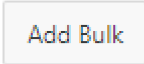
- Start and end date of the pay period
- Total number of days and hours entered on the sheet
- The estimated cost of the booking (£270 is the average daily rate in the system for the cost of a supply teacher for one day, therefore 270 x no. of hours worked = estimated total for teacher)

Start Date	06/09/2021	End Date	08/10/2021		
Days Claimed	23	Hrs Claimed	150	Est Cost	£5785.71

On the **Notes Tab (** Notes **)**, you will be able to add notes to a timesheet record, no matter the status of the timesheet.

Adding hours onto a timesheet in bulk

If a teacher has worked for whole weeks at a time for a few weeks with the same reason code, e.g. a teacher has worked for 3 weeks, 7 hours each day, under reason code 24 (Long Term Absence over 9 days), you are able to load that information in to the system in one go.



1. Click **Add Bulk** on the right hand side of the screen

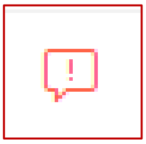
2. In the pop-up box that appears, enter the first date that the teacher has entered on their time sheet in the *Start Date* field and the last date on their time sheet in the *End Date* field.

   Then, select the Reason Code for all of those days, as well as the contract type for the teacher. The hours are set to 7 automatically, so please change this if required, then select **Apply**. You will then see that all the available dates between the start and end date you entered will have the hour worked, contract type and reason code against them.

3. If you have entered hours against a day and need to remove them, click the **yellow pencil** and then just remove the number of hours that was entered and click **Apply Changes**, then you will see that day no longer has hours against it.

Entering hours worked on an In-service day/Holiday

A school calendar held within the background of system prevents the input of hours on days which are Holidays (non-working schools days). Any day that is a school holiday where teachers would not work will have the symbol below next to it, as well as information in the *Holiday Description* column of a timesheet record.



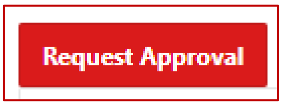
In-service days are also recorded in the system. These days will have the green symbol below, next to them, as well as *In-Service Day* in the Holiday Description column of a timesheet record. When adding hours **In Bulk**, any in-service days worked in the date range you select will **not pull through** as hours worked at the bottom of the page.

As some teachers do work on **In-service days,** Schools can manually enter hours worked on that day using the **yellow pencil.**

Requesting Approval

Once you have input all information from the teachers' digital timesheet in to the database and have **checked all information is correct**, please **contact your SSM/SSC** to let them know that the entry is **ready for them to review.**

Once the SSC/SSM has confirmed timesheets are ready to be approved by Head Teacher, click **Request Approval** to change timesheet status to **Awaiting Approval.** This will auto-populate the *Processed by SSC/SSM/Admin* field with the date. This can be done individually or using the **Bulk function** (steps to do this are on **page 23**)



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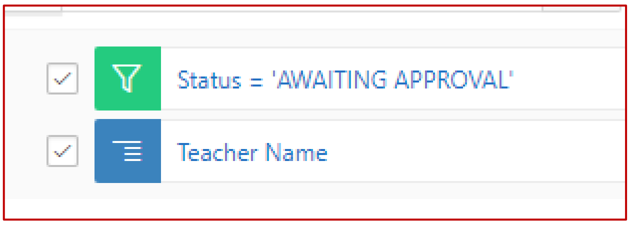
Timesheet Report

Timesheet Reports have been created to provide information from the system relating to hours teachers have worked. These reports can be sent to Head Teachers to approve timesheet and Payroll to process timesheets. The reports **must be approved by the Head Teacher** before sending to Payroll for processing.

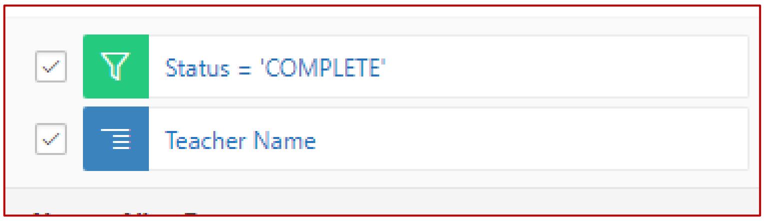
Please note - there may be changes made to values or codes within the background of the system over time, e.g. the average daily cost for a supply teacher is reviewed each year and therefore could change or reason codes could be amended. **Be aware** - when these values are changed, they impact the new records added in the future, but also all historical records sitting in the system. Therefore, for Schools to review historical information, please rely on days / hours worked and not cost OR refer to the reports downloaded and saved direct from the system at the time of processing.

When running reports from the Supply Teacher Database, please ensure that the appropriate filters are on each report so only the required information pulls through. If filters are missing from report, close down the database and re-open to reset.

Head Teacher Summary – the correct filters are:



Payroll Report - the correct filters are:



Report Name	Description of Report	STATUS report pulls from
Primary Report	This report contains all information relating	**Does not pull**

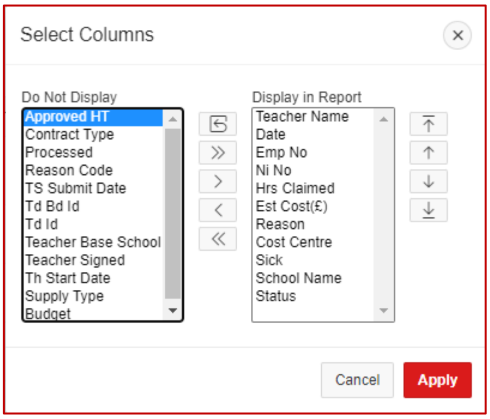
Report Name	Description of Report	STATUS report pulls from
	to timesheets for your school on the system. It can be filtered in any way you need to provide information about your records for your school using the *Filter* option. It is also possible to create custom reports with this information.	**on a status**
Head Teacher Summary	Provides high level information for Head Teachers about total number of hours a teacher has worked in their school and the estimated cost. **Report only pulls through timesheets marked as Awaiting Approval. Timesheets with the status In Progress or Complete will NOT be included within this report.**	**AWAITING APPROVAL**
Payroll Report	Provides detailed information about the hours a teacher has worked in school which Payroll require to process a timesheet. Report filtered to only pull through timesheets marked as **Complete. Timesheets with the status In Progress or Awaiting Approval will NOT be included within this report.** This report can also be provided to Head Teachers / SSM / SSCs if a more breakdown of the Head Teacher Summary is required / preferred.	**COMPLETE**
Void Report	Provides detail on records that have been marked as VOID on the system, following identification of an error to a record during Payroll Processing. Can be filtered by date if required	**VOID**

How to create Custom Reports

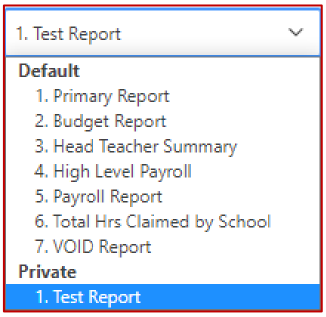
The database allows you to create your own custom reports from any of the different pieces of information held within the system using the **Primary Report**. This may be useful to help you to identify amounts spent on Individual / Groups of teachers or Individual / Groups of Reason Codes, or provide specific information requested by your Head Teacher.

The Reports can be downloaded into Excel and then filtered and sorted for whatever information you are required to check.

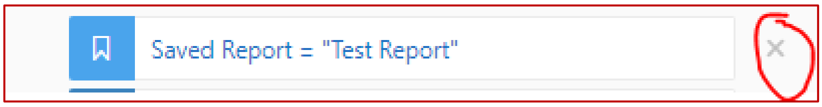
1. On the *Timesheet Report* section of the system, select **1. Primary Report** from the drop down lists of reports available
2. Click **Action > Columns**. This will show you all the different pieces of information you can make a report on



3. Using the buttons down the middle of the columns, move information you need in to the **Display In Report** column, and any information you do not need in the **Do not display** column.
4. Once you have all the columns you require, click **Apply**
5. To save this report and rename, select **Actions > Report > Save Report,** then name your report
6. Your custom report will show under **Private** from the drop down list of reports and can be ran any time.



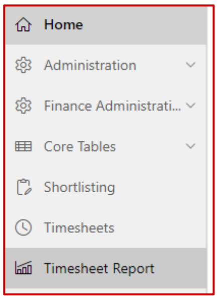
7. To delete a customer report, delete the filter showing on the report and select **Apply** to the message that appears



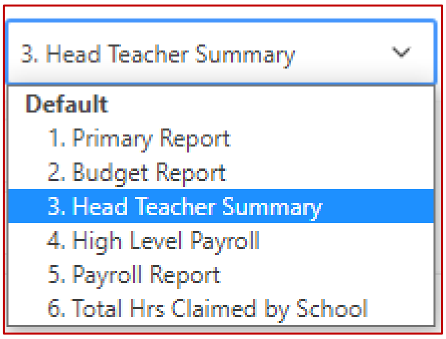
Head Teacher Approval

To obtain Head Teacher approval:

1. Once the SSM/SSC has reviewed all timesheets and all records have had their status changed to **Awaiting Approval,** the report is ready to be run. Select **Timesheet Report** from the menu on the left hand side



2. From the drop down list, select **Head Teacher Summary**



3. Ensure the following filters appear on the report (if they do not, add filter back on **or** close down system and re-open to regenerate filters):

This report will **only** show timesheets that have been marked as **Awaiting Approval** so you must ensure all timesheets requiring Head Teacher approval has been changed to status, Awaiting Approval.

The information on the Head Teacher Summary is identicial to that of the Payroll report; the only difference between the two is what status it pulls from.

School Name	Date	Emp No	Ni No	Hrs Claimed	Est Cost(£)	Reason	Budget	Supply Type	TS Submit Date	Approved HT	Sick	Status

4. To run the report to send to your Head Teacher, click on **Actions > Download**. In the pop up box that appears select **CSV**. Save this document in an appropriate place and then e-mail to your Head Teacher to approve the reports. **Their e-mail signature is sufficient for the timesheets to be actioned by Payroll.**

It is vital that Head Teachers are familiar with the Head Teacher Report and understand the requirements as the budget holder, to thoroughly check timesheet submissions each month, as this is key to identifying any anomalies and preventing errors before the Payroll processing takes place.

When reviewing the report each month, Head Teacher should:

- **examine** every entry within the report **prior to approving** to ensure the details are correct
- **ensure employees** included in the report **have undertaken Supply or additional hours**, within your own School, on the dates specified
- **ensure hours** included in the report **are accurate** and in line with Supply or additional hours worked, on the dates specified
- **query any estimated costs** that don't look quite right, with your SSC / SSM
- **query any suspected anomalies** in the report with your SSC / SSM and **ensure the data** within the report **is correct** before providing approval to progress to Payroll.

Head Teachers support in checking the report, prior to providing approval, will help to identify any incorrect salary payments, allows for errors to be rectified before these are processed by the Payroll Team and removes the need for time consuming investigations when errors are identified too late.

Once Head Teacher approval has been provided via e-mail, the status of each timesheet must be changed from Awaiting Approval to **Complete**. This can be done individually or using the **Bulk function** (steps to do this are on **page 28**)

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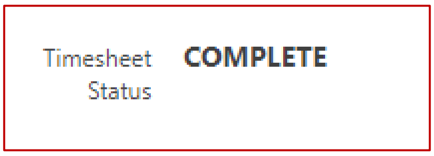


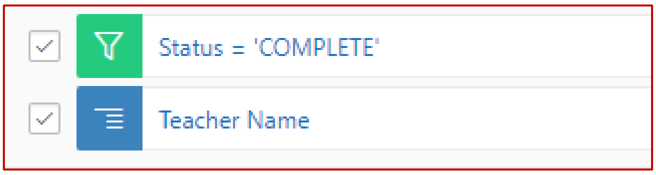
Unlocking timesheets

Once a timesheet has been marked as **Complete**, it is then **locked** and **no more changes** can be made to the timesheet and it **cannot be deleted**. If an error has been made on a timesheet that is locked **after** it has been approved by the Head Teacher, please refer to *Timesheets - Guidance on Correcting Entries* on the Hub and **refer to your SSC / SSM**.

Sending Reports for Payroll Processing

Once all timesheets for the current pay period have had their **status** changed to **Complete**, the information must then be sent to Payroll for processing.

1. Go to the Timesheet Report section of the system, from the dropdown select **Payroll Report** and ensure the following filters appear (if they do not, add filter back on or close down system and re-open to regenerate filters):



2. Download CSV. Open the report and **check** that all information has pulled through and is **correct**. Then **save** this document for your own audit records

3. Attach the downloaded **Payroll Report** to the Head Teacher approval email and send to Payroll for processing. **Existing Payroll cut-off dates still apply.**

For Audit purposes, Payroll must receive the Payroll report <u>and</u> the Head Teacher's approval email.

Once a timesheet has been marked as Complete, you cannot **delete or amend the**

timesheet. If you realise there is an error on the timesheet after you have locked it and **before** a report has gone to Payroll, you will need to contact your **School support Co-ordinator** or **Manager** who have the ability to do this.

If a changes needs to be made to a timesheet **after** the report has been submitted to Payroll, you must request a **Journal**.

How to update status in Bulk

The status of timesheets can be changed in bulk, without needing to go in and out of each individual record. This feature can help save time and make the process easier if you have multiple timesheets in the system. Statuses can only be moved in the following order; **you cannot skip over a step using this function:**

In Progress **>** *Awaiting Approval*
Awaiting Approval **>** *Complete*
Complete **>** *Sent To Payroll*

To change the status of records in bulk:

1. Go to the **Timesheet – Main List** page
2. Here you will be able to see all records for timesheets in your system. Down the left hand side of the screen, you will see a tick box next to each record. **Tick this box** next to each record whose status you would like to change

	☐ Select All	Timesheet Ref
✎	☑	TS\ED014\001145
✎	☑	TS\ED014\001144
✎	☐	TS\ED014\001143

3. (To use the ***Select all*** **Feature** which ticks all records on the screen, you can filter on the current status of the timesheets. E.g. If you are wanting to close down processed timesheets, filter the status on **Complete**)

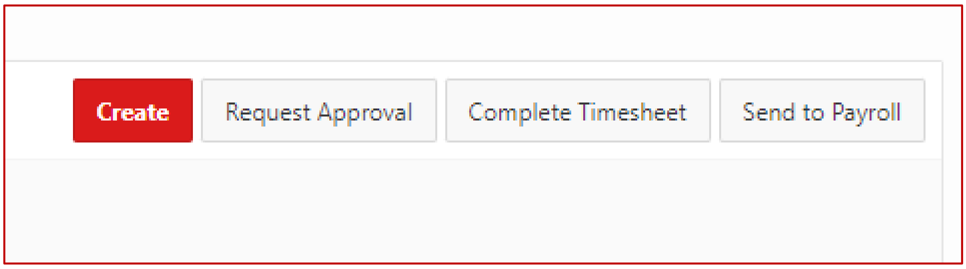
***Please note* If the ‘Select All’ box does not tick all records on first try, please <u>refresh the page</u> and try again.**

Status = 'COMPLETE'

	☑ Select All	Timesheet Ref	Teacher Name	School Name	Start Date	End Date	Submitted Date	Status
✎	☑	TS\ED014\001150	Colin McCulloch	Kirkintilloch High	11/10/2021	12/11/2021	14/10/2021	COMPLETE
✎	☑	TS\ED014\001148	Colin McCulloch	Kirkintilloch High	04/10/2021	05/11/2021	14/10/2021	COMPLETE
✎	☑	TS\ED014\001149	Colin McCulloch	Kirkintilloch High	04/10/2021	05/11/2021	14/10/2021	COMPLETE

4. Once you have selected all of the records you need to change, select the **status** you

want to change the records too using the **three options** from the **top right hand corner** of the screen



5. A box will appear for you to **confirm the date** that these records are being changed. This date will pull through on to each timesheet record. The field will default to today's date however you can enter a date in the past, then click **OK**

   (e.g. if your SSC/SSM told you that your records were ready to go to the Head Teacher on the Friday but you are not changing the status until Monday, you can enter **Friday's Date** when clicking Awaiting Approval)

6. You will see from the Main list that the status for the selected records will have changed

<u>Changing records from Complete to Sent to Payroll - for clear down ahead of the next payrun</u>

Once the Payroll report has been sent to and processed by Payroll, those records need to be **closed down** on the database so that they do not pull through on future Payroll Reports and lead to duplicate payments.

This task should not be done on the system until Finance Team have issued the finance journal for recharge for the current month's PYOL's. Once you have heard from the Finance team with this information, records from the previous pay run should be changed to **Sent to Payroll <u>BEFORE</u>** any new timesheets for the next pay run as put on to the system.

To do this, the **status** of the timesheets that have been sent for processing need to be changed from **Complete** to **Sent To Payroll**. This must be done using the **Update in Bulk** function:

***PLEASE NOTE* Once a record has been marked as *Sent to* Payroll it <u>cannot be unlocked or changed</u>**. If an error is found then **contact your SSC/SSM** and **raise a Journal** if need be.

To change the status:

1. On the Timesheet – Main List page, **select the check box** for all records sitting at **Complete**, or filter the page to show only **Complete** records

2. **Double check** that you have selected all the correct records against the Payroll

Report

3. Click **Sent To Payroll** from the top right hand corner

4. Check the correct date is showing in the box that appears, then click **OK**

5. You will see that the status of all record selected is now **Sent to Payroll.** These records will not pull through on to any reports for the next pay period

Errors with timesheets after submission to Payroll

If an error is identified with a timesheet record any time **after** the Payroll Report has been sent to Payroll, action will need to be taken to rectify this and changes made on the database.

Depending on the type of error and at what stage in the process it is identified will dictate the appropriate action required. Please refer to *Timesheets - Guidance on Correcting Entries* on the Hub and **refer to your SSC / SSM.**

Void Status

The Void Status should **ONLY** be used when:
1. The timesheet record has a COMPLETE status **and**
2. an **overpayment error** has been identified **and**
3. the Payroll Report has been submitted but Payroll processing is not complete.

Refer to *Timesheets - Guidance on Correcting* Entries and refer to your SSC / SSM

If these conditions are all met, the incorrect timesheet should be marked as **Void** on the system and a new correct timesheet should be created which needs to be approved by the Head Teacher and sent to Payroll.

Only **SSC/SSM's can mark timesheet records as VOID**

To Void a timesheet, select the **VOID Timesheet** button on a record sitting at Complete. This will change the status to VOID. Ensure that a note is added to the Void record to provide information about the action that is being taken to resolve the issue.

Once you have created a **new timesheet** which corrects the error made in the original Payroll Report and have followed the whole approval process up until the timesheet is sitting at *Complete*, you will need to run a new Payroll Report **only containing the new record**. To do this:

1. On *Timesheet Report* section of the system, select **5. Payroll Report** from the drop down list
2. Check that the following filters are on the report:

3. In the search bar, type in the teachers name who the new record has been made for

4. Ensure that only the information relating to the correct record is showing, before selecting **Action > Download > CSV**
5. Check again that the report only has information about the corrected entry, then send the report via e-mail to Payroll (with HT Approval within e-mail chain), making mention that this is a new record that is correcting one with an error