

# School Portal User Guide

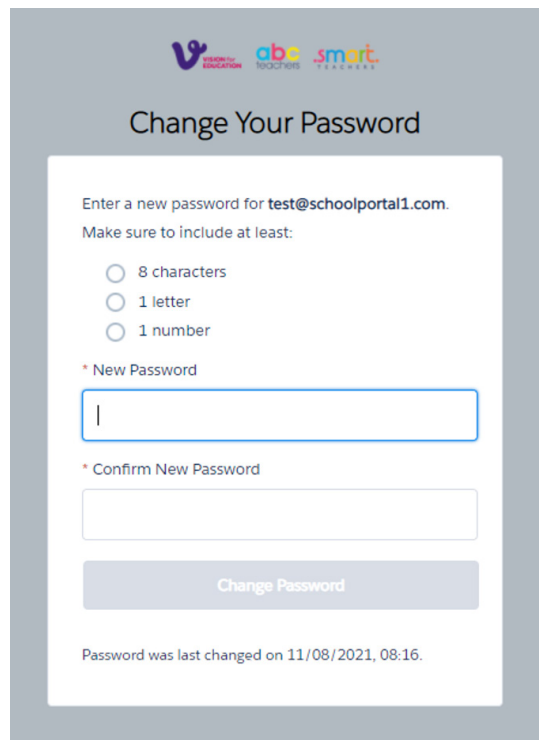
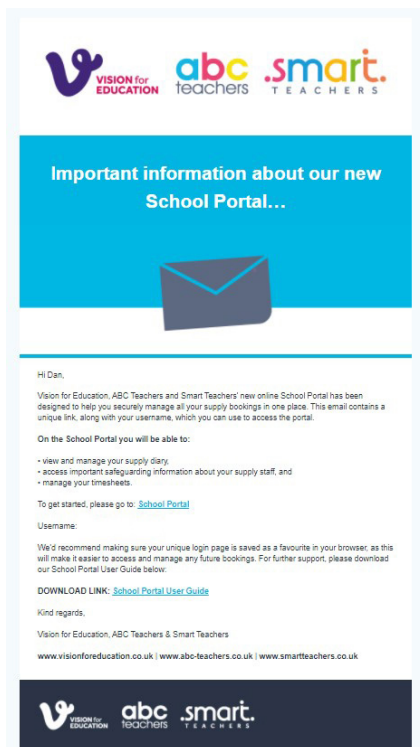
## What is the School Portal?

The School Portal is an area created for schools, colleges and other educational settings to view and download vital supply staff safeguarding information. On the portal, you can also action supply staff's timesheets, allowing us to pay and charge correctly and on time each week.

On the portal, there's also a 'Supply Diary' which gives you a calendar-based overview of the supply staff booked in to work, when they are booked in to work, which role they will be performing and confirmation of the shift charge rate.

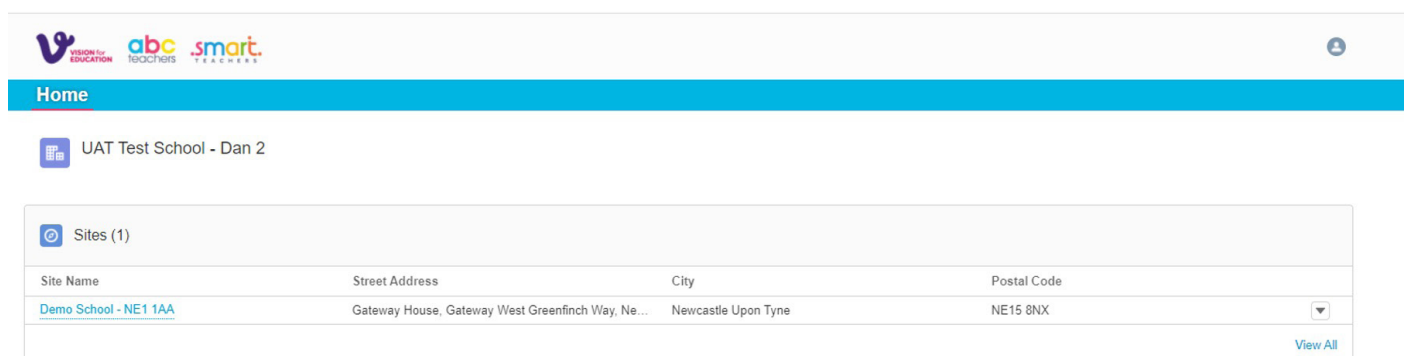
## Account registration

Your nominated school contact will receive an email similar to the example below. They will then be required to click on the link provided and choose a secure password.



## Site selector

Sites are specific locations where the candidate is confirmed to work. Most schools will have one site to choose from at this stage, however we do work with many schools and colleges that have more than one site.



Home

UAT Test School - Dan 2

Sites (1)

Site Name	Street Address	City	Postal Code
<a href="#">Demo School - NE1 1AA</a>	Gateway House, Gateway West Greenfinch Way, Ne...	Newcastle Upon Tyne	NE15 8NX

[View All](#)

## Supply Diary

The Supply Diary provides you with an overview of all the shifts that are confirmed to take place at your school/sites. Using the buttons on the right-hand side, you can select between a daily, weekly or monthly view, or select to view by supply worker.

Please be aware that our system only allows you to view 28 days at a time, so if you have confirmed a member of staff to work for more than 28 days in the future, those shifts will only appear as time goes on. Please note, the start and end date of your booking will be included in your email confirmation, but if you have any queries, please speak to your Consultant.

## Weekly view

Home

Demo School - NE1 1AA

Supply Diary Timesheets

< 11 Aug 2021 >

Day **Week** Month By Worker

August 2021						
Mon 09	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15
8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	9:00 - 10:00 Tutor - Online £35.00 Daniel Rutledge (Test UAT)	8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	9:00 - 10:00 Tutor - Online £35.00 Daniel Rutledge (Test UAT)	

## Monthly view

Home

Demo School - NE1 1AA

Supply Diary Timesheets

< 11 Aug 2021 >

Day Week **Month** By Worker

August 2021						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
26	27	28	29	30	31	1
2	3	4	5	6 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	7	8
9 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	10 9:00 - 10:00 Tutor - Online £35.00 Daniel Rutledge (Test UAT)	11 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	12 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	13 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	14 9:00 - 10:00 Tutor - Online £35.00 Daniel Rutledge (Test UAT)	15
16	17	18	19 8:30 - 15:30 UAT Test Rota - Dan £190.00 Daniel Rutledge (Test UAT)	20 8:30 - 15:30 General Cover Teacher £190.00 Daniel Rutledge (Test UAT)	21	22
23	24	25	26	27	28	29

## Worker view

VISION FOR EDUCATION abc smart. teachers TEACHERS

Home

Demo School - NE1 1AA

Supply Diary Timesheets

11 Aug 2021

Day Week Month By Worker

Workers	Mon 09	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15
Daniel Rutledge (Test UAT) 447710701099	8:30 - 15:30 UAT Test Rota - Dan £190.00	9:00 - 10:00 Tutor - Online £35.00	8:30 - 15:30 UAT Test Rota - Dan £190.00	8:30 - 15:30 UAT Test Rota - Dan £190.00	8:30 - 15:30 UAT Test Rota - Dan £95.00	9:00 - 10:00 Tutor - Online £35.00	

## Supply staff safeguarding information

To view a supply worker's safeguarding information, click on their name within your 'Supply Diary'. This will open a new tab.

VISION FOR EDUCATION abc smart. teachers TEACHERS

Home

Mr. Daniel Rutledge (Test UAT)

Safeguarding Information Safeguarding History

Custom Links

Single Central Record [detailTest](#)

Identity

Name: Mr. Daniel Rutledge (Test UAT) National Insurance #

Date of Birth: 25/04/1985

Address: 1 Test Street NE1 1AB

Qualifications

Candidate DFE Number: 0000000 Qualification Verified Date: 06/08/2021

As well as being able to view supply worker's safeguarding information, you can also download their Single Central Record and a Booking Confirmation (if required). These are located in the 'Custom Links' drop down

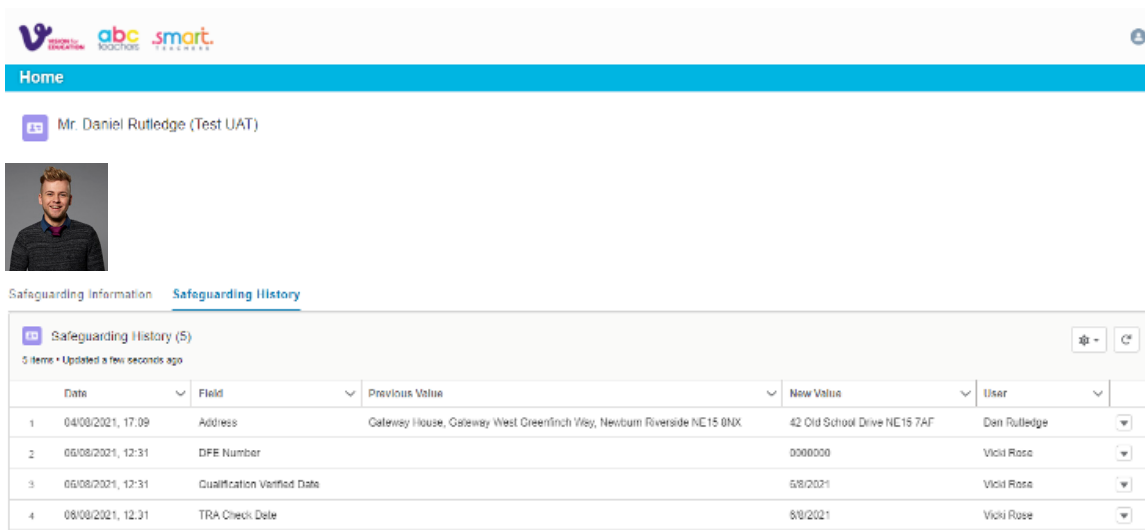
Safeguarding Information Safeguarding History

Custom Links

Single Central Record

## Supply worker's safeguarding history

In the 'Safeguarding History' tab, you can view which compliance checks have been completed in order to clear that supply worker for work and when each check was



The screenshot shows the 'Safeguarding History' tab for Mr. Daniel Rutledge. The table below lists the history entries:

Date	Field	Previous Value	New Value	User
04/08/2021, 17:09	Address	Gateway House, Gateway West Greenfinch Way, Newburn Riverside NE15 0NX	42 Old School Drive NE15 7AF	Dan Rutledge
06/08/2021, 12:31	DFE Number		000000	Vicki Rose
06/08/2021, 12:31	Qualification Verified Date		08/2021	Vicki Rose
08/08/2021, 12:31	TRA Check Date		8/8/2021	Vicki Rose

## Timesheets

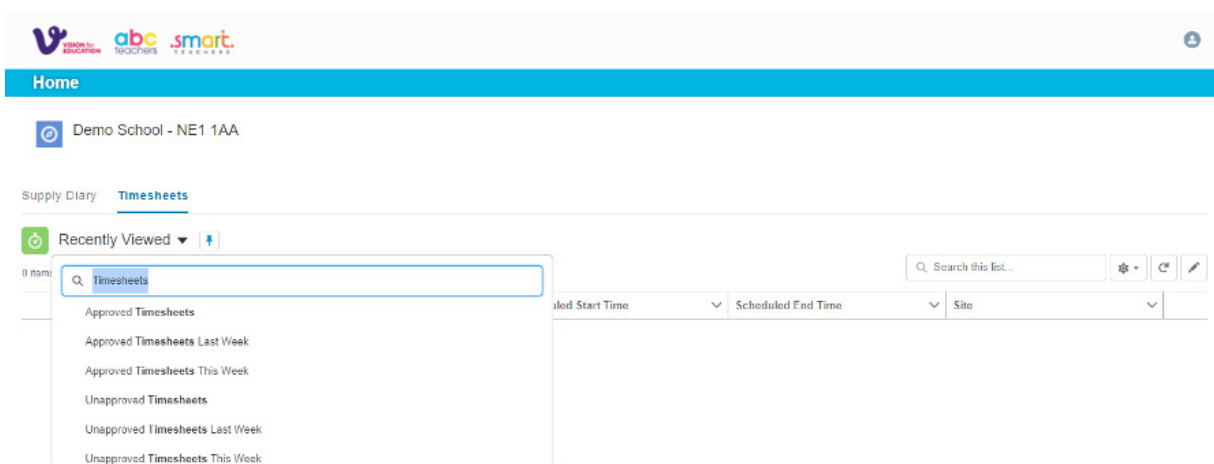
The 'Timesheet' tab allows you to select a pre-set list of shifts and approve, query or reject timesheets either on a shift-by-shift basis, or in bulk if preferred.

### Pre-set shift list views

In the dropdown (usually labelled 'Recently Viewed' initially) you can select one of the following list views:

- **Unapproved Timesheets ALL** (displays all timesheets outstanding, this will be right up-to-date, so you can action timesheets on the day the work took place)
- **Unapproved Timesheets This Week** (displays unapproved shifts of which scheduled dates fall within this current week)
- **Unapproved Timesheets Last Week** (displays unapproved shifts of which scheduled dates fall within last week)
- **Approved Timesheets ALL** (displays all timesheets that have been approved)
- **Approved Timesheets This Week** (displays approved shifts of which scheduled dates fall within this current week)
- **Approved Timesheets Last Week** (displays unapproved shifts of which scheduled dates fall within last week)

If you choose to action timesheets on a Friday afternoon, you would select 'Unapproved Timesheets This Week'. If you action your timesheets on a Monday for work completed the previous week, you would select 'Unapproved Timesheets Last Week'.



The screenshot shows the 'Timesheets' tab for 'Demo School - NE1 1AA'. A dropdown menu is open under 'Recently Viewed', showing the following options:

- Approved Timesheets
- Approved Timesheets Last Week
- Approved Timesheets This Week
- Unapproved Timesheets
- Unapproved Timesheets Last Week
- Unapproved Timesheets This Week

## Actioning timesheets

Timesheets can be actioned on a shift-by-shift basis. To do this, in the 'Action' field of the relevant shift, double-click and select your action (Approved, Rejected or Queried). If the user chooses to Reject or Query the timesheet, a comment must be left in the 'Comments' field next to the 'Action' field.

Both of these actions can be completed in bulk by ticking the relevant shifts using the tick boxes to the left.

**Please remember to press SAVE to confirm any changes or actions.**

## Action field

The screenshot shows the 'Unapproved Timesheets This Week' section. A table lists 6 items with columns: Teacher Name, School Name, Scheduled Time, Forecast Charge, Action, Comment, and Shift Name. The 'Action' column for the first item is highlighted in yellow, indicating it is the focus of the current view.

	Teacher Name ↑	School Name	Scheduled Time	Forecast Charge ...	Action	Comment	Shift Name
1	<input type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	09/08/2021 08:30 - 15:30	GBP 190.00			SHIFT-197603
2	<input type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	11/08/2021 08:30 - 15:30	GBP 190.00			SHIFT-197605
3	<input type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	12/08/2021 08:30 - 15:30	GBP 190.00			SHIFT-197606
4	<input type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	13/08/2021 08:30 - 15:30	GBP 95.00			SHIFT-197607
5	<input type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	14/08/2021 09:00 - 10:00	GBP 35.00			SHIFT-197636
6	<input type="checkbox"/> Daniel Rutledge (Test UAT)	Demo School - NE1 1AA	10/08/2021 09:00 - 10:00	GBP 35.00			SHIFT-197672

## Action Options

The screenshot shows the 'Unapproved Timesheets This Week' section with 6 items selected. A dropdown menu is open over the 'Action' column of the first item, showing options: --None--, --None-- (checked), Approved, Rejected, and Queried. An 'Approved' button is visible next to the 'Approved' option.

	Teacher Name ↑	School Name	Scheduled Time	Forecast Charge ...	Action	Comment	Shift Name
1	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	09/08/2021 08:30 - 15:30	GBP 190.00	--None--		
2	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	11/08/2021 08:30 - 15:30	GBP 190.00	<input checked="" type="checkbox"/> --None--		
3	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	12/08/2021 08:30 - 15:30	GBP 190.00	Approved		
4	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	13/08/2021 08:30 - 15:30	GBP 95.00	Rejected		
5	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	14/08/2021 09:00 - 10:00	GBP 35.00	Queried		
6	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	Demo School - NE1 1AA	10/08/2021 09:00 - 10:00	GBP 35.00			SHIFT-197672

## Bulk select shifts to action

The screenshot shows the 'Unapproved Timesheets This Week' section with 6 items selected. A dropdown menu is open over the 'Action' column, showing options: --None--,  Update 6 selected items, Cancel, and Apply. The 'Update 6 selected items' option is selected.

	Teacher Name ↑	School Name	Scheduled Time	Forecast Charge ...	Action	Comment	Shift Name
1	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	09/08/2021 08:30 - 15:30	GBP 190.00	--None--		
2	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	11/08/2021 08:30 - 15:30	GBP 190.00	<input checked="" type="checkbox"/> Update 6 selected items		
3	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	12/08/2021 08:30 - 15:30	GBP 190.00			
4	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	13/08/2021 08:30 - 15:30	GBP 95.00			SHIFT-197607
5	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	14/08/2021 09:00 - 10:00	GBP 35.00			SHIFT-197636
6	<input checked="" type="checkbox"/> Daniel Rutledge (Test UAT)	Demo School - NE1 1AA	10/08/2021 09:00 - 10:00	GBP 35.00			SHIFT-197672

## Example of a 'Queried' comment (must be provided if shift is rejected or queried)

Home

Demo School - NE1 1AA

Supply Diary Timesheets

Unapproved Timesheets This Week

6 items • Sorted by Teacher Name • Filtered by All shifts • 5 more filters applied • Updated 2 minutes ago

Search this list...

<input type="checkbox"/>	Teacher Name ↑	School Name	Scheduled Time	Forecast Charge ...	Action	Comment	Shift Name
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	09/08/2021 08:30 - 15:30	GBP 190.00	Queried	Daniel finished early at 1pm, please amend the charge rate	
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	11/08/2021 08:30 - 15:30	GBP 190.00			SHFT-197606
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	12/08/2021 08:30 - 15:30	GBP 190.00			SHFT-197607
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	13/08/2021 08:30 - 15:30	GBP 95.00			SHFT-197636
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	14/08/2021 09:00 - 10:00	GBP 35.00			SHFT-197672
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	Demo School - NE1 1AA	10/08/2021 09:00 - 10:00	GBP 35.00			

## Example of a 'Rejected' comment (must be provided if shift is rejected or queried)

Home

Demo School - NE1 1AA

Supply Diary Timesheets

Unapproved Timesheets This Week

6 items • Sorted by Teacher Name • Filtered by All shifts • 5 more filters applied • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Teacher Name ↑	School Name	Scheduled Time	Forecast Charge ...	Action	Comment	Shift Name
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	09/08/2021 08:30 - 15:30	GBP 190.00	Rejected	Daniel did not work this day!	
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	11/08/2021 08:30 - 15:30	GBP 190.00			SHFT-197606
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	12/08/2021 08:30 - 15:30	GBP 190.00			SHFT-197607
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	13/08/2021 08:30 - 15:30	GDP 95.00			SHFT-197636
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test School - Dan 2 - Site	14/08/2021 09:00 - 10:00	GBP 35.00			SHFT-197672
<input type="checkbox"/>	Daniel Rutledge (Test UAT)	Demo School - NE1 1AA	10/08/2021 09:00 - 10:00	GBP 35.00			

Please remember to press **SAVE** to confirm any changes or actions.

Supply Diary Timesheets

Unapproved Timesheets Last Week

5 items selected

Search this list...

<input checked="" type="checkbox"/>	Worker Name ↑	Rota Name	School Name	Scheduled Time	Charge	Action	Com...	Shift Name
<input checked="" type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test Rota - Dan	Dan Demo School - NE1 1AA	01/11/2021 08:30 - 10:15	GBP 40.00	Approved		SHFT-198104
<input checked="" type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test Rota - Dan	Dan Demo School - NE1 1AA	02/11/2021 08:30 - 10:15	GBP 40.00	Approved		SHFT-198105
<input checked="" type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test Rota - Dan	Dan Demo School - NE1 1AA	03/11/2021 08:30 - 10:15	GBP 40.00	Approved		SHFT-198106
<input checked="" type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test Rota - Dan	Dan Demo School - NE1 1AA	04/11/2021 08:30 - 10:15	GBP 40.00	Approved		SHFT-198107
<input checked="" type="checkbox"/>	Daniel Rutledge (Test UAT)	UAT Test Rota - Dan	Dan Demo School - NE1 1AA	05/11/2021 08:30 - 10:15	GBP 40.00	Approved		SHFT-198108

Cancel Save

Save