

# Student Resource Package

## Leave Portal User Guide

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# 1 Introduction

This guide is produced by the School Resource Allocation Branch (SRAB) of the Department of Education and Training. SRAB is responsible for the management of the Student Resource Package.

For policy information see <http://www.education.vic.gov.au/school/principals/finance/Pages/srpmanagerelief.aspx>

## 1.1 Purpose

The purpose of this guide is to assist schools in the use of the Leave Portal.

## 1.2 Navigation

The following provides an overview of the key navigation features

### 1.2.1 Accessing the Leave Home Page

The Leave Home page is accessed from the Leave tab on the SRP Web Site.

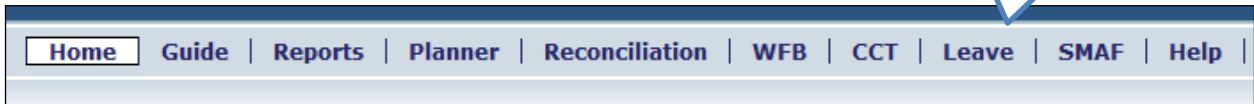


Figure 1. SRP Website Tabs

### 1.2.2 Leave Home Page Panels

The Leave Home Page contains three panels; the *Replacements* panel, the *Absences* panel and the *Special Requests* panel.

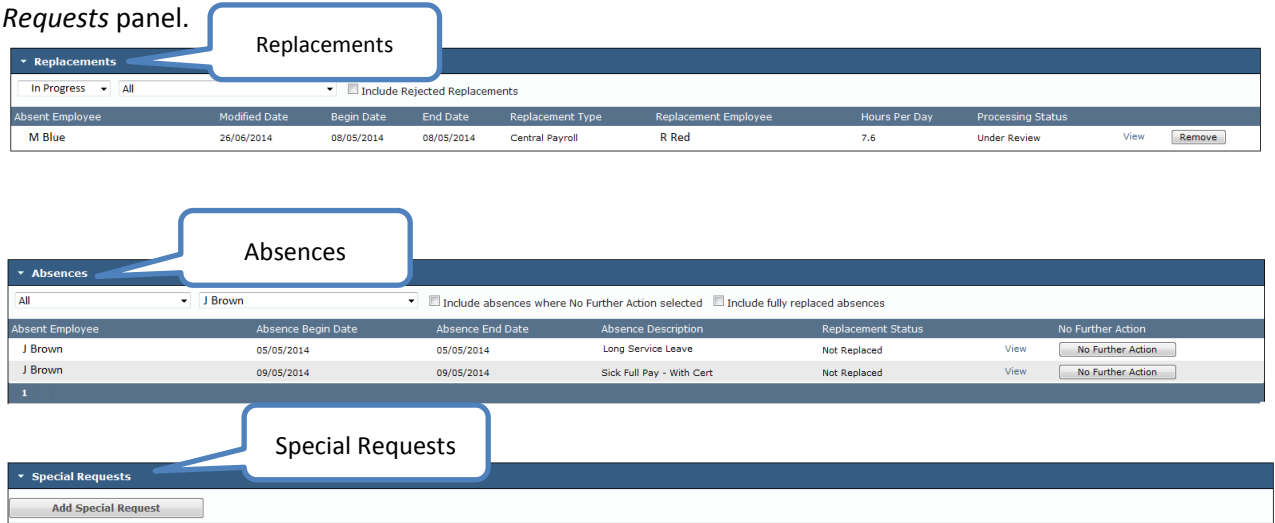
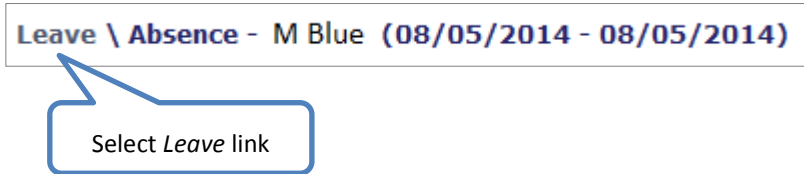


Figure 2. Leave Home Page Panels

When you move from the home page a “breadcrumb” trail can be used to return to home by clicking the *Leave* link.



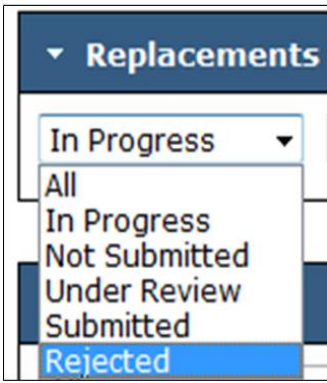
### 1.2.3 The Replacements Panel

The *Replacements* panel shows your replacement activities. In the case below an absent employee, M Blue has been assigned a replacement (R Red) for one day (8/5/14) and the request is under review.

Replacements								
In Progress		All		<input type="checkbox"/> Include Rejected Replacements				
Absent Employee	Modified Date	Begin Date	End Date	Replacement Type	Replacement Employee	Hours Per Day	Processing Status	
M Blue	26/06/2014	08/05/2014	08/05/2014	Central Payroll	R Red	7.6	Under Review	View <input type="button" value="Remove"/>

Figure 3. The Replacements Panel

The display in this panel can be filtered by processing status (*All, In Progress, Not Submitted, Submitted, Under Review* and *Rejected*). The default filter is *In Progress*.



- **In Progress** shows any replacement that requires further attention i.e. under review, not submitted and rejected
- **Not Submitted** replacements will display those replacements saved but not yet submitted.
- **Under Review** indicates that the submission is being reviewed by SRAB.
- **Submitted** indicates that the replacement has been submitted for the system to assess eligibility for reimbursement and calculate budget outcomes where applicable.
- **Rejected** replacements have not been approved and will be accompanied by a note for further action.

Figure 4. Processing Status Filters

A second filter enables the selection of an individual employee and a tick box (if ticked) will include rejected replacements in the display.

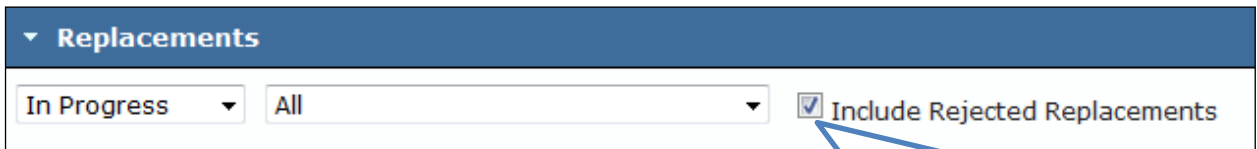


Figure 5. Employee Filter

Tick to include rejected replacements

From within the panel, each replacement activity can be viewed in detail or be removed .

Handy Hint – if there are no leave replacements entered, the panel filters described above will not be displayed; only the panel header will be displayed.

### 1.2.4 The Absences Panel

The *Absences* panel displays (*eduPay*) employee absences. In the panel below J Brown has two absences displayed.

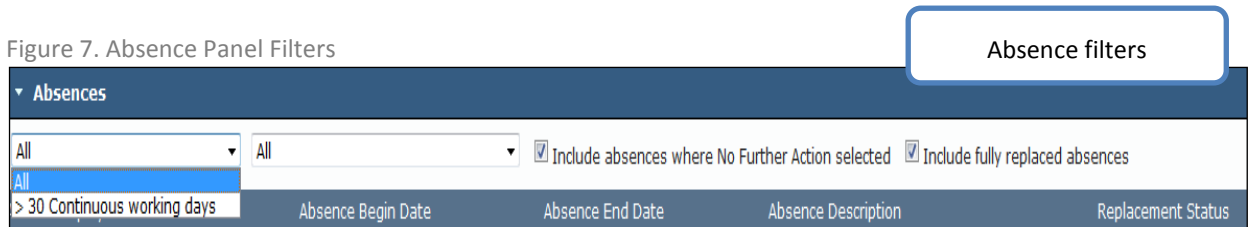
Absences						
All		J Brown		<input type="checkbox"/> Include absences where No Further Action selected <input type="checkbox"/> Include fully replaced absences		
Absent Employee	Absence Begin Date	Absence End Date	Absence Description	Replacement Status	No Further Action	
J Brown	05/05/2014	05/05/2014	Long Service Leave	Not Replaced	View	<input type="button" value="No Further Action"/>
J Brown	09/05/2014	09/05/2014	Sick Full Pay - With Cert	Not Replaced	View	<input type="button" value="No Further Action"/>

Figure 6. The Absences Panel

For all absences displayed, a *No Further Action* button is available. Selecting this button will remove the absence from display. The absence can be reinstated in the display by ticking the tick box: *Include absences where No Further Action selected*.

The display in this panel can be filtered to show all absences or only those over 30 continuous working days. A second filter may be selected to show absences for all employees or a particular employee.

There are two tick boxes that you can use to refine your search. You can choose to include absences where previously you had selected the *No Further Action* button and / or to include fully replaced absences by ticking the relevant tick box.



Clicking the column heading will sort the display accordingly.

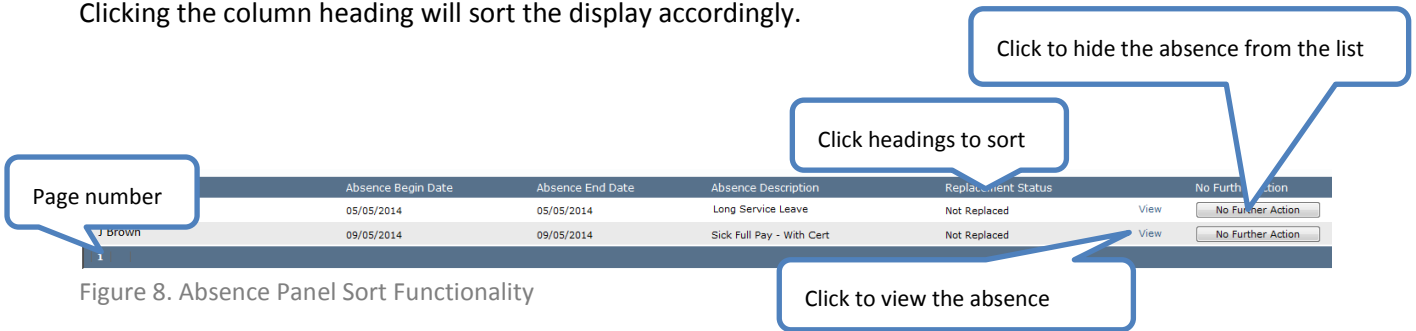


Figure 8. Absence Panel Sort Functionality

The number at the bottom of the panel indicates the number of pages of information that can be displayed. Clicking on a page number will display the selected page.

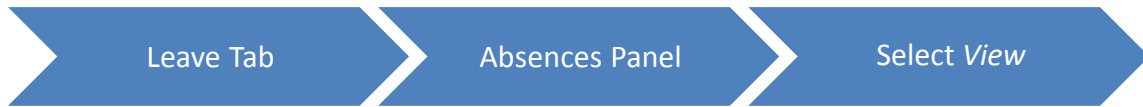
From within the panel click the *View* link to see the detail of the absence.

**NOTE:** When viewing the detail of an absence more than one absence line may be displayed. This is because a number of individual absences that are end on end, covering continuous working days are displayed in the *Absence* panel as a group (an absence group). Selecting the *View* link will display the individual items that make up the group.

### 1.2.5 The Special Requests Panel

See section 2 Special Requests.

### 1.3 Viewing an Absence



The *Absences* panel below displays absences for employee M Blue. To view the detail of an absence select the View link (coloured blue).

Absent Employee	Absence Begin Date	Absence End Date	Absence Description	Replacement Status	No Further Action
M Blue	22/04/2014	25/04/2014	Long Service Leave	Not Replaced	<a href="#">View</a> <input type="button" value="No Further Action"/>
M Blue	13/02/2014	13/02/2014	Sick Full Pay - Without Cert	Not Replaced	<a href="#">View</a> <input type="button" value="No Further Action"/>

Figure 9. Absences Panel

Select View the absence

Selecting the Long Service Leave item to view will display the *Absence* sub panel. From this panel a replacement can be assigned to the absence using the *Add Leave Replacement* button.

Absence Code	Absence Description	Absence Begin Date	Absence End Date
524 LSL	Long Service Leave	22/04/2014	25/04/2014

Figure 10. Add Leave Replacement Button

## 1.4 Adding a Replacement



Clicking on the *Add Leave Replacement* button will then display the *Add Leave Replacement* sub panel. In this panel you must select the *replacement type* and the *replacement period* start and end dates, these default to the absence start and end dates.

**Note:** Dates need to be amended when

- you have more than one person replacing the leave event
- the replacement has worked different hours per day
- replacement days are not consecutive
- replacement is not a central employee so public holiday or term breaks have not been replaced

Check/Edit Replacement Period - Start and End Dates

Replacement Period: Start Date: 22/04/2014 End Date: 25/04/2014

Replacement Type

Central Payroll  
Local Payroll  
Local Hire - Invoice

Select Replacement Type

Cancel Save & Continue

Figure 11. Add Leave Replacement Sub Panel

### Replacement Types

- Central Payroll (credit) replacements are identified by any of the following methods using data from *eduPay*:
  - **Fixed Term Replacement:** Employee has a start date and an end date on their contract in *eduPay*.
  - **Increase in Standard Hours:** Increased working hours of an existing central employee.
  - **Temporary Resumption:** Employee has temporarily resumed from their unpaid leave to fill a vacancy.
  - **Transfer from another school:** Employee has transferred in the current year and has a return to base school job data record in *eduPay*.
  - **Ongoing Replacement:** Employee has a start date but no end date on their contract in *eduPay*.
- Local Payroll (cash) replacements are identified as a local employee who has been paid through CASES21 local payroll. Timesheets are required.
- Local Hire – Invoice Replacements are identified as an agency replacement paid via a creditor invoice through CASES21. Timesheets and invoices are required.



### 1.4.1 Adding a Central Payroll Replacement

To add a central payroll replacement select *Central Payroll* from the drop down list in the *Add Leave Replacement* sub panel, ensure the replacement dates are as intended and press the *Next* button.

The *Leave Replacement* panel for Central Payroll will be displayed.

How to navigate the *Leave Replacement* panel for central payroll replacements:

1. Check or edit the replacement period dates.
2. Select a *Replacement Method* from the drop down list:

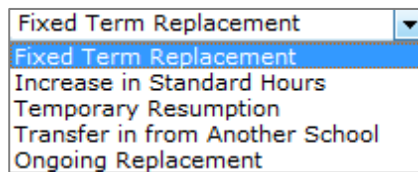


Figure 12. Replacement Method

3. Enter the hours per day (in the example, a full day or 7.6 hours).
4. Select a replacement employee from the *Pre –Approved Employee* or the *Employee Requiring Approval* list.

The list of employees presented in these drop down boxes is dependent on the replacement method selected in step 2. There will be a pre-approved employee if the following criteria are satisfied:

- **Fixed Term Replacement:** Replacement’s contract is effective less than 30 days before the leave commences.
- **Increase in Standard Hours:** Replacement hours increased less than 14 days prior to the leave commencing or been given a one off payment for additional hours for the leave dates. (see appendix 1)
- **Temporary Resumption:** Replacement resumed employment less than 30 days prior to the leave commencing.
- **Transfer from another school:** Replacement transferred into the school less than 14 days prior to the leave commencing.
- **Ongoing Replacement:** Ongoing replacements will always require approval.

5. Where required attach supporting documentation and/ or insert a comment.

- If a replacement employee is selected from the employee requiring approval list either supporting documentation or supporting comments must be added.
- If a pre-approved replacement employee is selected supporting documentation and comments are not required.
- If a central employee has worked additional hours and a one off payment has been made, attach a copy of the transaction from eduPay or a screen shot of the payslip with banking details not visible.

After adding an attachment press the *Attach* button and similarly after adding a comment press the *Add Comment* button.

6. To submit the replacement, press the *Submit* button or press *Save for Later* to save to add further information.

The screenshot shows the 'Add Leave Replacement' form. A callout box at the top points to the 'Start Date' and 'End Date' fields, containing the text 'Check/Edit Replacement Period - Start and End Dates'. Another callout box points to the 'Replacement Type' dropdown menu, which is set to 'Central Payroll', containing the text 'Central Payroll'. The form includes fields for 'Start Date' (22/04/2014) and 'End Date' (25/04/2014), and buttons for 'Cancel' and 'Save & Continue'.

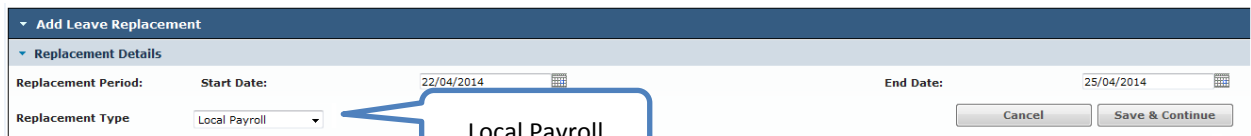
Figure 13. Central Payroll Replacement

The screenshot shows the 'Leave Replacement' form. A callout box at the top points to the 'Start Date' and 'End Date' fields, containing the text 'Check/Edit Replacement Period - Start and End Dates'. Another callout box points to the 'Replacement Method' dropdown menu, which is set to 'Fixed Term Replacement', containing the text 'Select Replacement Method'. A third callout box points to the 'Hours Per Day' field, which is set to '0.00', containing the text 'Add hours'. A fourth callout box points to the 'Pre-Approved Employee' dropdown menu, containing the text 'Select Replacement Employee'. A fifth callout box points to the 'Supporting Documentation' section, containing the text 'Attach file and Add Description then press Attach'. A sixth callout box points to the 'Comments' section, containing the text 'Add comment and press Add Comment'. A seventh callout box points to the 'Submit' button, containing the text 'Press Submit when complete or Save for Later'. The form includes fields for 'Start Date' (22/04/2014) and 'End Date' (25/04/2014), and buttons for 'Cancel', 'Save for Later', and 'Submit'. The 'Processing Status' is 'Not Submitted'.

Figure 14. Leave Replacement Panel for Central Payroll

## 1.4.2 Adding a Local Payroll Replacement

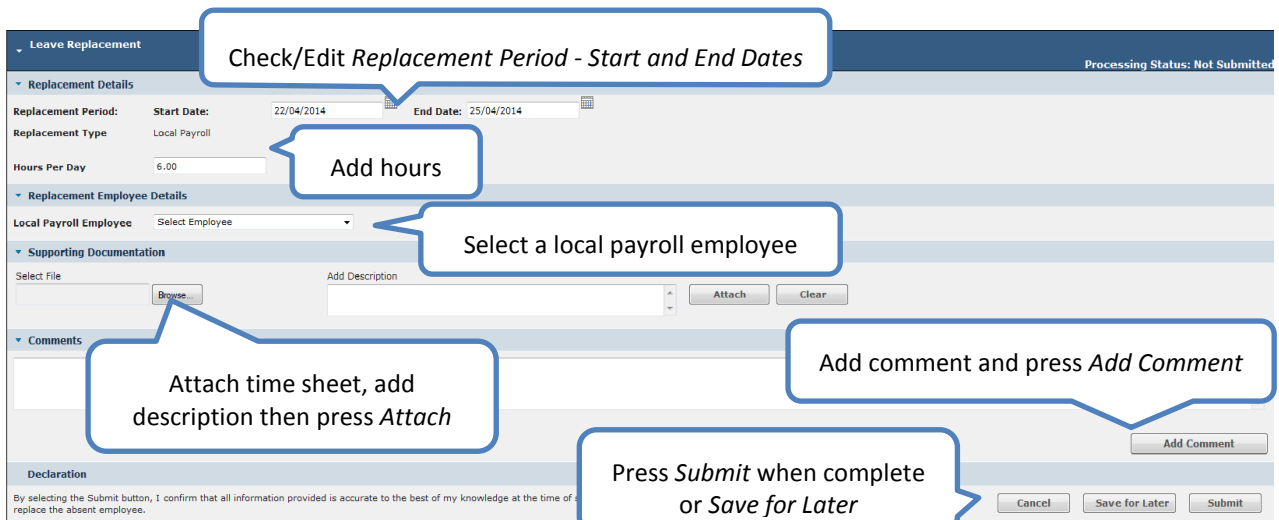
Using the above example (adding a replacement for M Blue, Long Service Leave) in the *Add Leave Replacement* panel select the *Local Payroll* option from the *Replacement Type* drop down list.



The screenshot shows the 'Add Leave Replacement' panel. Under the 'Replacement Details' section, the 'Replacement Type' dropdown menu is set to 'Local Payroll'. The 'Start Date' is 22/04/2014 and the 'End Date' is 25/04/2014. There are 'Cancel' and 'Save & Continue' buttons at the bottom right.

Figure 15. Local Payroll Replacement

The *Leave Replacement* panel for local payroll will be displayed.

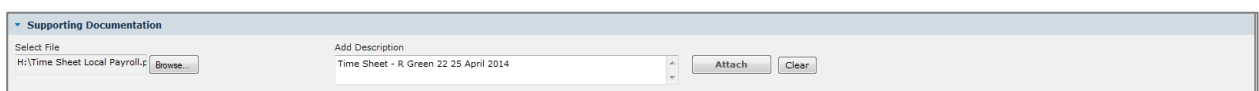


The screenshot shows the 'Leave Replacement' panel for local payroll. Callouts indicate the following steps: 'Check/Edit Replacement Period - Start and End Dates' (pointing to the date fields), 'Add hours' (pointing to the 'Hours Per Day' field), 'Select a local payroll employee' (pointing to the 'Local Payroll Employee' dropdown), 'Attach time sheet, add description then press Attach' (pointing to the 'Browse...' button), 'Add comment and press Add Comment' (pointing to the 'Add Comment' button), and 'Press Submit when complete or Save for Later' (pointing to the 'Submit' button). The 'Processing Status' is 'Not Submitted'.

Figure 16. Leave Replacement Panel for Local Payroll

How to navigate through the *Leave Replacement* panel for local payroll replacements:

1. Check and / or edit the replacement period dates.
2. Enter the hours per day (in the example, a full day or 6.0 hours.)
3. Select the replacement employee for from the local payroll employee drop down list.
4. For a local payroll replacement employee supporting documentation must be attached in the form of an authorised time sheet. Press the *Browse* button to search for the attachment.
5. Add a meaningful description for the file and press the *Attach* button.



The screenshot shows the 'Supporting Documentation' section. The 'Select File' field contains 'H:\Time Sheet Local Payroll.p' and the 'Browse...' button is visible. The 'Add Description' field contains 'Time Sheet - R Green 22 25 April 2014'. There are 'Attach' and 'Clear' buttons.

Figure 16. Supporting Documentation for Local Payroll

- Once the file is attached the file name and description will be visible in the *Supporting Documentation* panel. The Remove button can be used to remove the file if required.

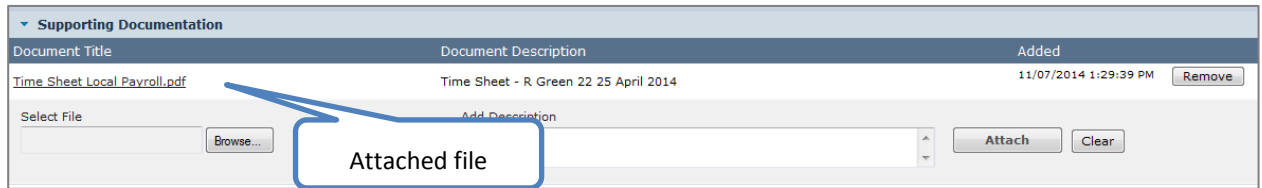


Figure 17. Attached File

- To submit the replacement, press the *Submit* button or press *Save for Later* to save to add further information.

### 1.4.3 Adding a Local Hire Invoiced Employee Replacement

Using the above example (adding a replacement for M Blue, Long Service Leave) in the *Add Leave Replacement* panel select the *Local Hire - Invoice* option from the *Replacement Type* drop down list.

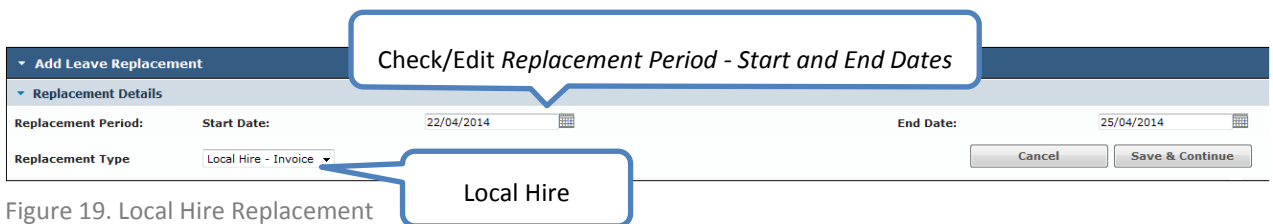


Figure 19. Local Hire Replacement

The *Leave Replacement* panel for local hire – invoice will be displayed.

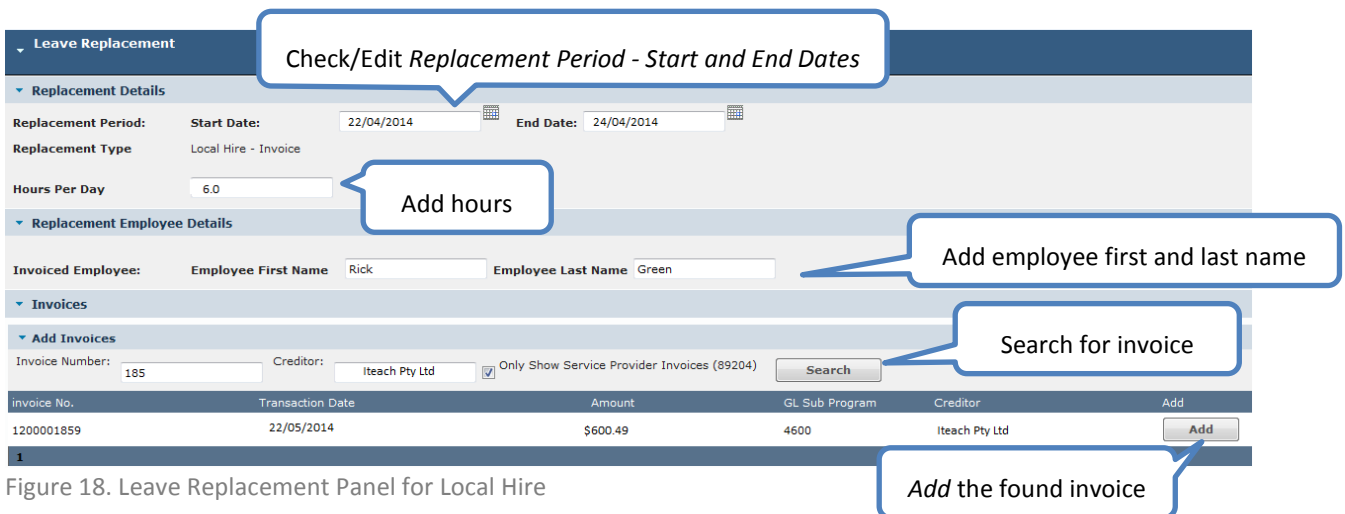


Figure 18. Leave Replacement Panel for Local Hire

How to navigate through the *Leave Replacement* panel for Local Invoice:

1. Check and / or edit the replacement period dates.
2. Enter the hours per day (in the example, a full day or 6.0 hours).
3. Add the first name and last name of the invoice replacement employee.
4. For an invoice replacement employee the relevant invoice will have to be found using the search function. You can search using the invoice number or the creditor name.

The tick box *Only Show Service Providers (89204)* can be used to limit the search to service provider invoices.

5. After you have found the relevant invoice and creditor press the *Add* button.

The screenshot shows the 'Replacement Employee Details' panel. Under the 'Invoices' section, there is a table with columns: Invoice No., Transaction Date, Amount, GL Sub Program, and Creditor. The first row shows Invoice No. 1200001859, Transaction Date 22/05/2014, Amount 4600, and Creditor Iteach Pty Ltd. To the right of this row are buttons for 'Browse...', 'Attach', and 'Remove'. A callout bubble labeled 'Attach invoice' points to the 'Attach' button.

Figure 21. Attach Invoice

6. The invoice itself needs to be attached using the *Browse* button to find the file. Then press the *Attach* button to attach the invoice.

The screenshot shows the 'Replacement Employee Details' panel. The 'Invoices' table now includes a file attachment: 'A local hire invoice.pdf' with a red 'X' icon. A callout bubble labeled 'You can see the invoice and attachment' points to the table row. Another callout bubble labeled 'Remove attachment and invoice' points to the 'Remove' button next to the attachment. A third callout bubble labeled 'Remove attachment only' points to the red 'X' icon.

Figure 19. Remove invoice / attachment

Once attached the invoice information including the file attachment is visible in the *Replacement Employees Details* sub panel.

To remove the attachment and the selected invoice information press the *Remove* button. To only remove the attached file click the cross symbol.

The screenshot shows the 'Supporting Documentation' panel. It has a 'Select File' section with a file 'H:\Time Sheet.pdf' and a 'Browse...' button. An 'Add Description' field contains 'Time Sheet for Rick Green'. There are 'Attach' and 'Clear' buttons. A callout bubble labeled 'Attach time sheet, add description then press Attach' points to the 'Attach' button. Below is a 'Comments' section with an 'Add Comment' button. At the bottom is a 'Declaration' section with a text area and 'Cancel', 'Save for Later', and 'Submit' buttons. A callout bubble labeled 'Press Submit when complete or Save for Later' points to the 'Submit' button.

Figure 20. Attach timesheet and Submit

Press *Submit* when complete or *Save for Later*

7. For local hire - invoice employees supporting documentation must be attached. In the example above a time sheet for Mr Green is attached.
8. To submit the replacement, press the *Submit* button or press *Save for Later* to save to add further information.

## 1.5 Monitoring the processing of leave replacement activities



Having added a replacement to an absence and submitted it for processing, the processing status can be viewed on the leave home page in the *Replacements* panel. (See Figure 3)

Schools will receive cash reimbursements as offline payments and cash payment reports will now list the leave replacements individually. Click on the report tab and open the Cash Payment Report and select the date of the payment.

The screenshot shows the Student Resource Package (SRP) interface. The top navigation bar includes links for Home, Guide, Reports, Planner, Admin, and Records. Below the navigation bar, there is a search bar and a dropdown menu for Corporate Reports, QCG / CCT, and Workforce. The main content area is titled "No School Selected [change]". Under the "Management Reports" section, there are several links: Budget Management, Salaries Fortnightly Transaction, Employee Charging History, Salary Mischarging Correction, Credit Cash Transfer Status, and School Budget Management Variance. Under the "Cash Reports" section, there are two links: Cash and Cash Payment Statement. The "Cash Payment Statement" link is highlighted with a red circle.

These payments will show as a total on the cash report under offline payments.

For central replacements view the next published version of the employee charging report.

## 2 Special Requests

Special requests are to be initiated by schools first submitting a service call to the SRP support team who will follow up with instructions relevant to the specific special circumstances in question. The service request can be lodged at:

Hotline: 1800 641 943

E-mail: [studentresourcepackage@edumail.vic.gov.au](mailto:studentresourcepackage@edumail.vic.gov.au)

Service Gateway: [servicedesk.education.vic.gov.au](https://servicedesk.education.vic.gov.au) or [ [Log a Call](#) ]



