Department of Education & Training

Student Resource Package

Leave Portal User Guide

30/04/2015 Vs1.2

Published by the
Department of Education and
Training
Melbourne
February 2015

© State of Victoria (Department of Education and Early Childhood Development) 2015

The copyright in this document is owned by the State of Victoria (Department of Education and Training), or in the case of some materials, by third parties (third party materials). No part may be reproduced by any process except in accordance with the provisions of the Copyright Act 1968 the National Education Access Licence for Schools (NEALS) (see below) or with permission.

NEALS is an educational institution situated in Australia which is not conducted for profit, or a body responsible for administering such an institution may copy and communicate the materials, other than third party materials, for the educational purposes of the institution.

Authorised by the Department of Education and Training,
2 Treasury Place, East Melbourne, Victoria, 3002.
This document is also available on the internet at
at http://www.eduweb.vic.gov.au/srp

Contents

1 Introduction 5
1.1 Purpose 5
1.2 Navigation 5
1.2.1 Accessing the Leave Home Page 5
1.2.2 Leave Home Page Panels 5
1.2.3 The Replacements Panel 6
1.2.4 The Absences Panel 6
1.2.5 The Special Requests Panel 7
1.3 Viewing an Absence 8
1.4 Adding a Replacement 9
1.4.1 Adding a Central Payroll Replacement 10
1.4.2 Adding a Local Payroll Replacement 12
1.4.3 Adding a Local Hire Invoiced Employee Replacement 13
1.5 Monitoring the processing of leave replacement activities 16
2 Special Requests 17
3 Appendix 18
3.1 Supporting Doucmentation – Additional Hours 18

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.

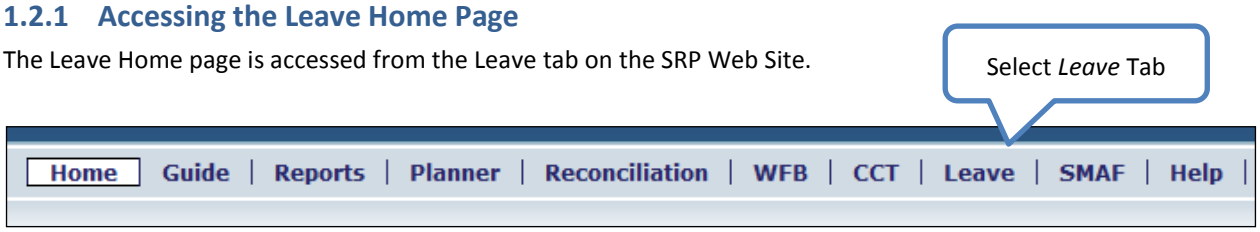


Figure 1. SRP Website Tabs

1.2.2 Leave Home Page Panels

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

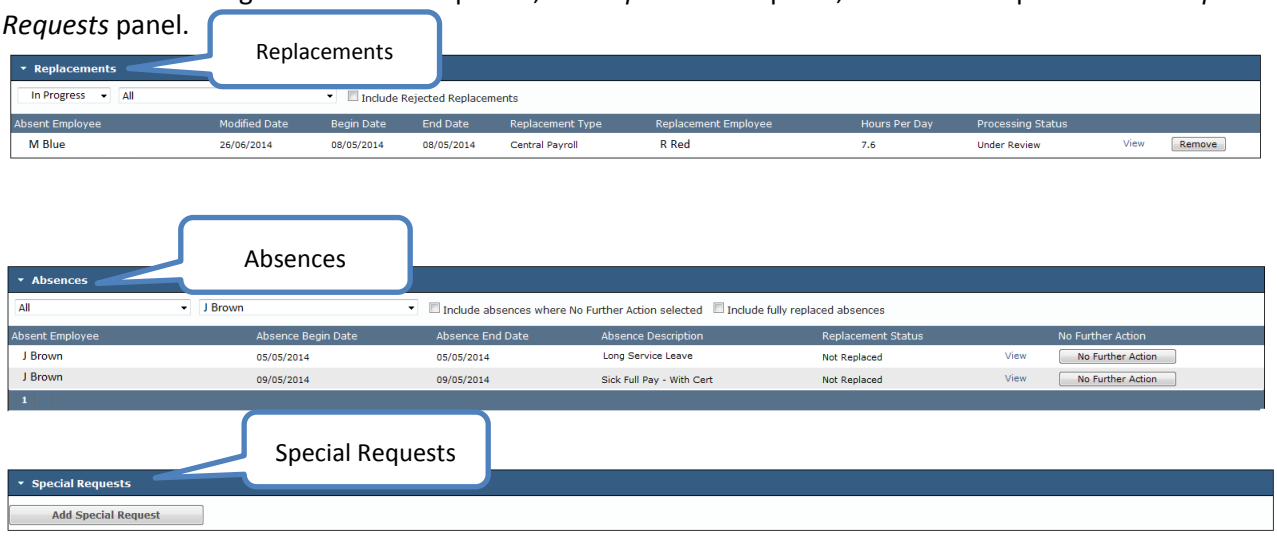
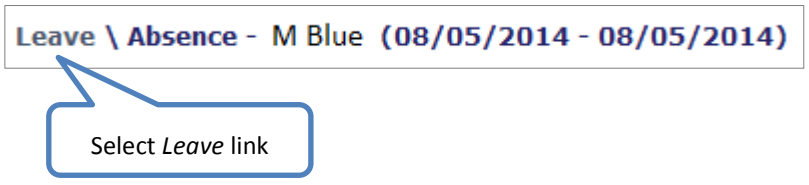


Figure 2. Leave Home Page Panels

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.

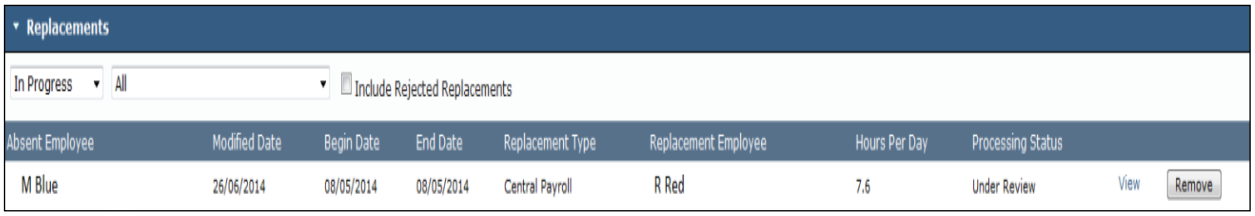
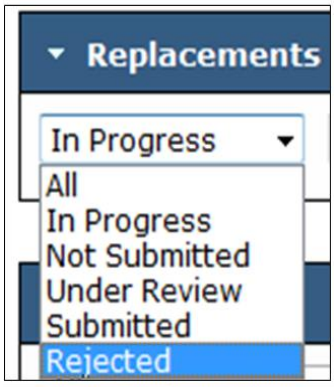


Figure 3. The Replacements Panel

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.

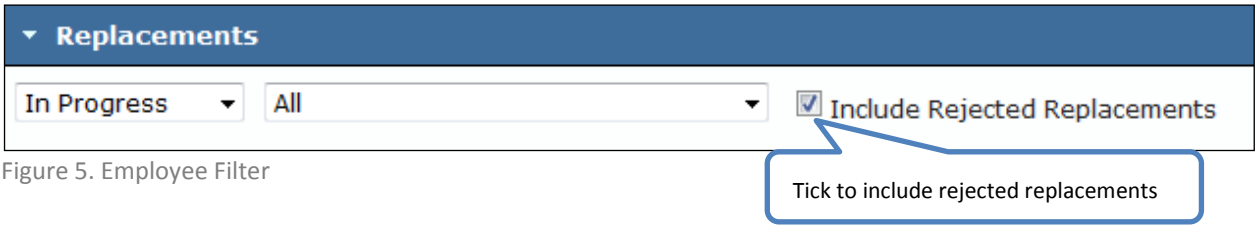


Figure 5. Employee Filter

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.

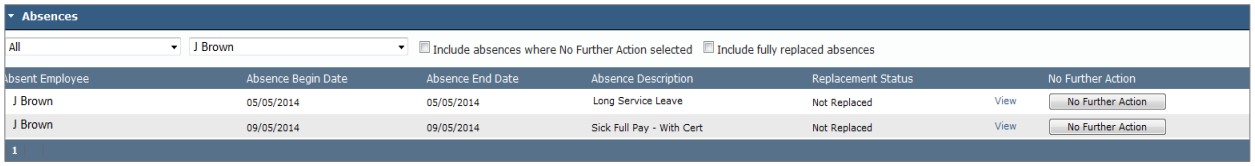


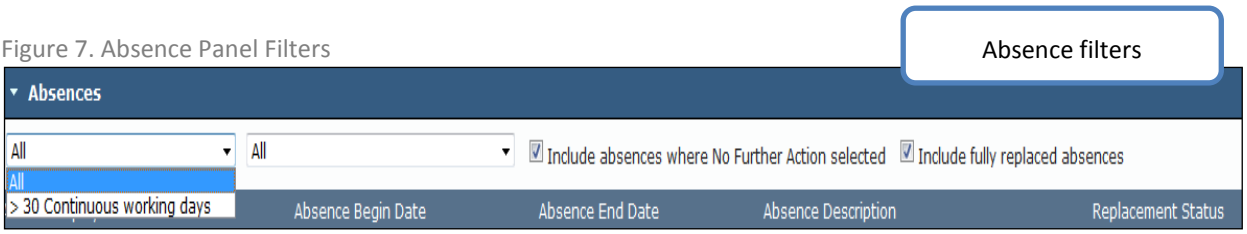
Figure 6. The Absences Panel

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.

Figure 7. Absence Panel Filters



Clicking the column heading will sort the display accordingly.

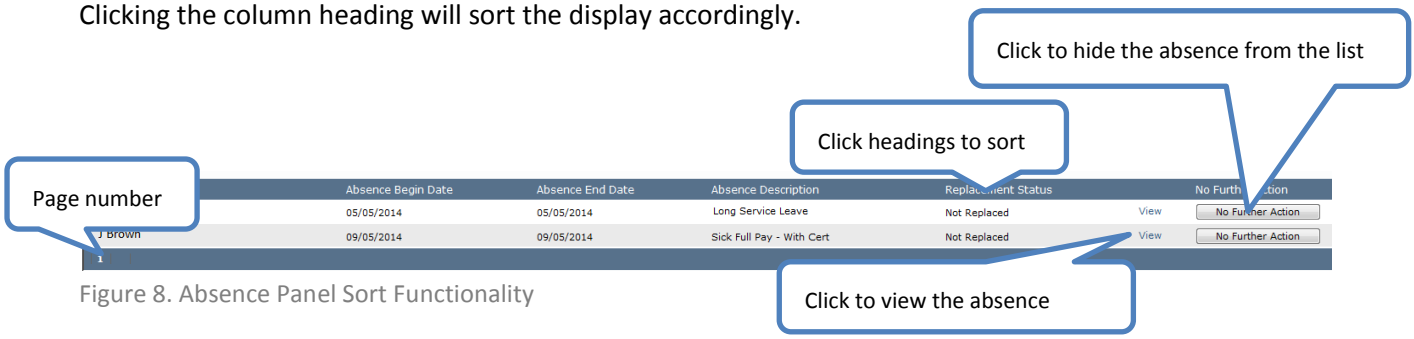


Figure 8. Absence Panel Sort Functionality

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

Leave Tab → Absences Panel → Select *View*

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

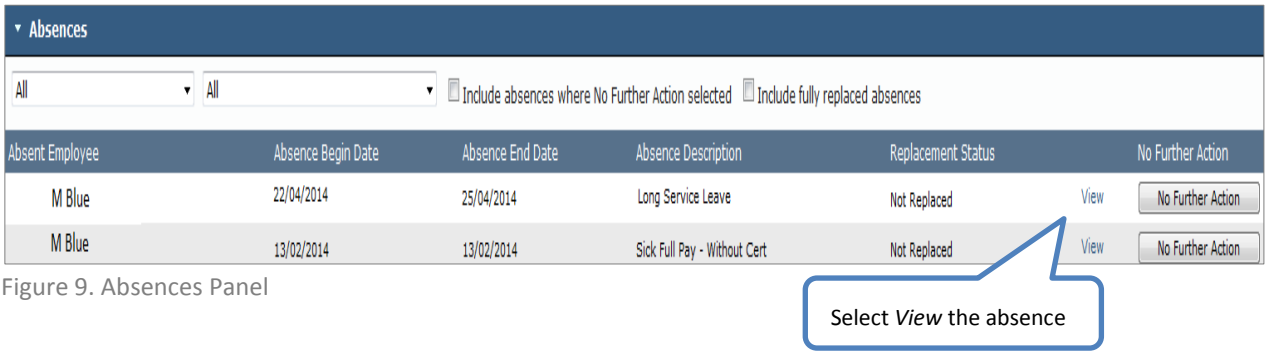


Figure 9. Absences Panel

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.

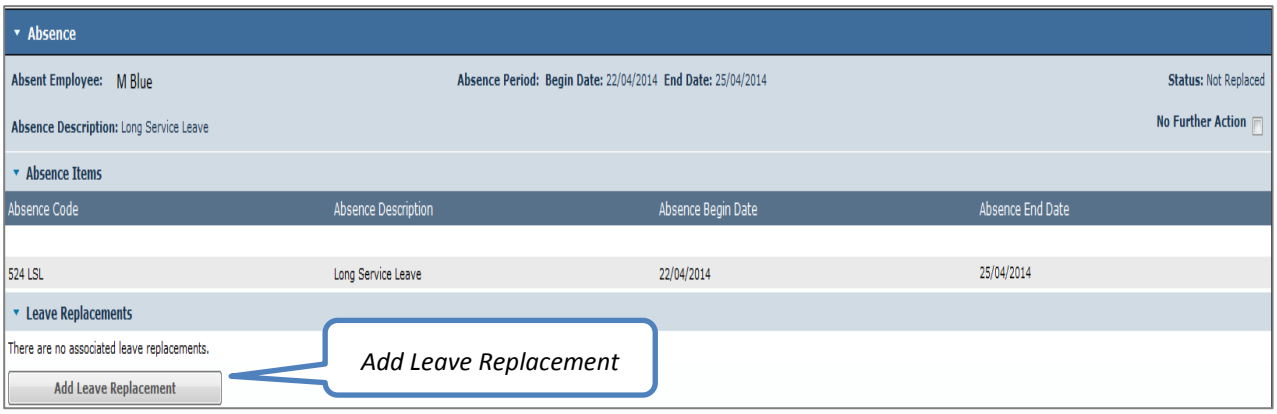


Figure 10. Add Leave Replacement Button

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**

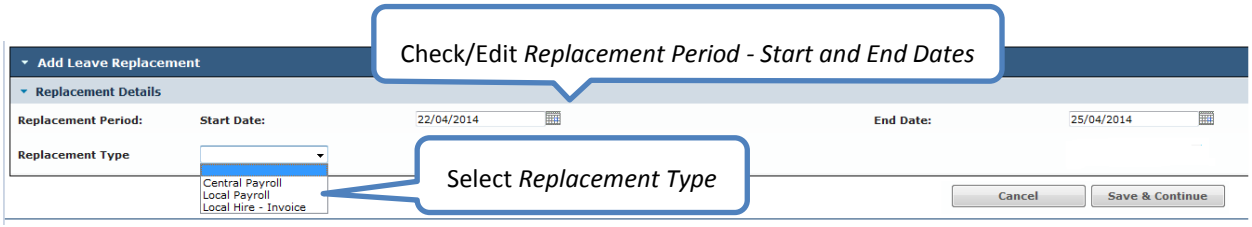


Figure 11. Add Leave Replacement Sub Panel

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:

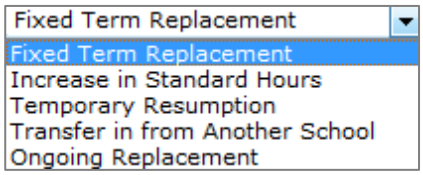


Figure 12. Replacement Method

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.

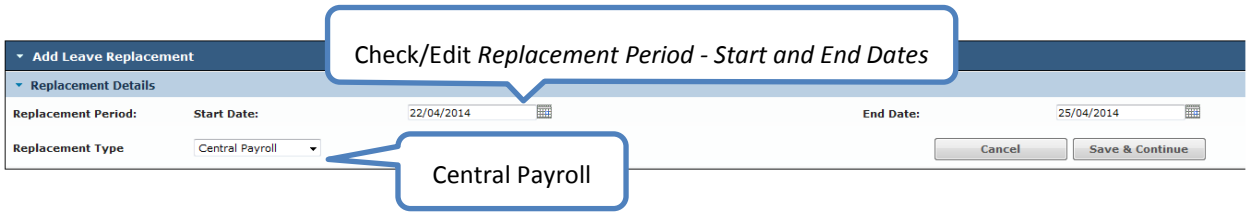


Figure 13. Central Payroll Replacement

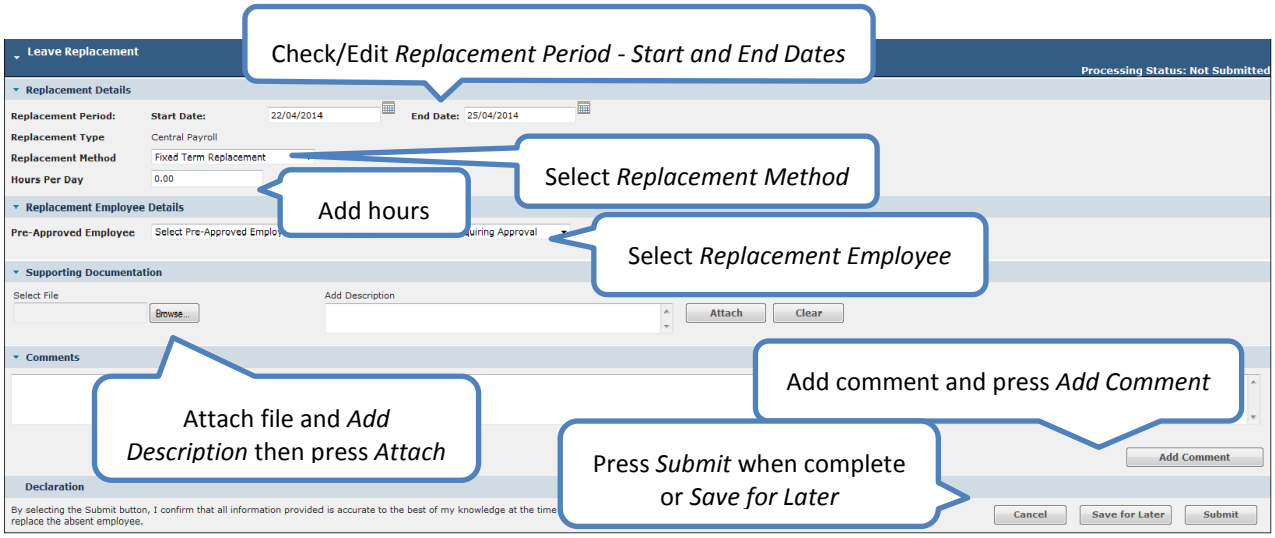


Figure 14. Leave Replacement Panel for Central Payroll

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 form the *Replacement Type* drop down list.

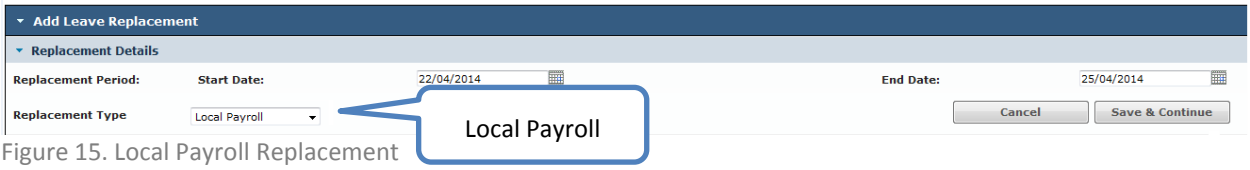


Figure 15. Local Payroll Replacement

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

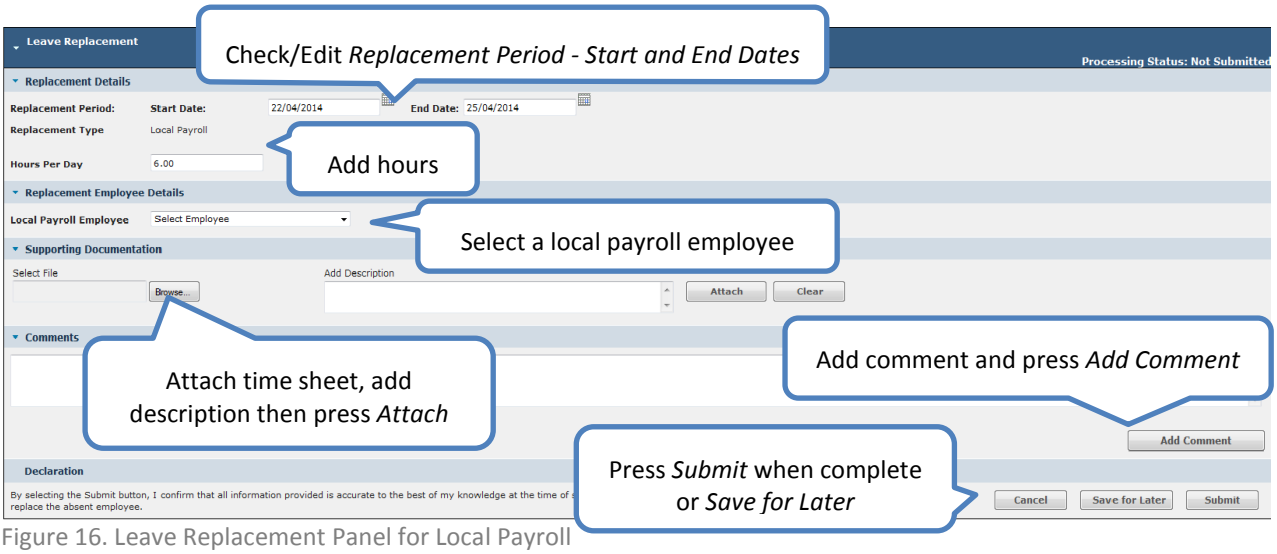


Figure 16. Leave Replacement Panel for Local Payroll

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.

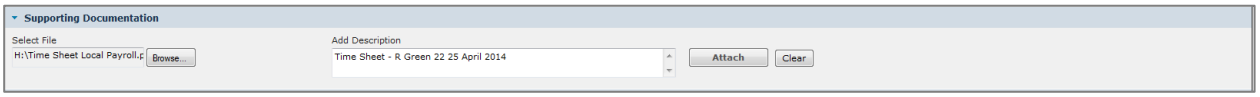


Figure 16. Supporting Documentation for Local Payroll

6. 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.

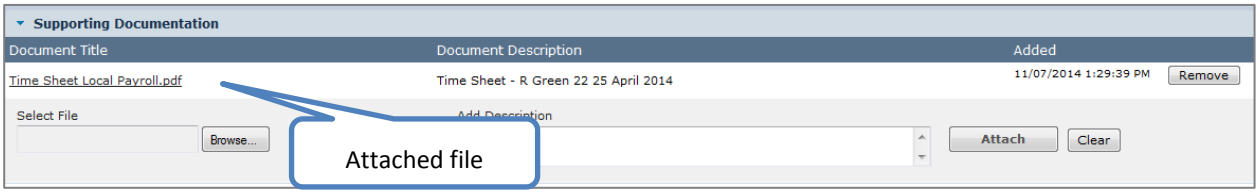


Figure 17. Attached File

7. 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.

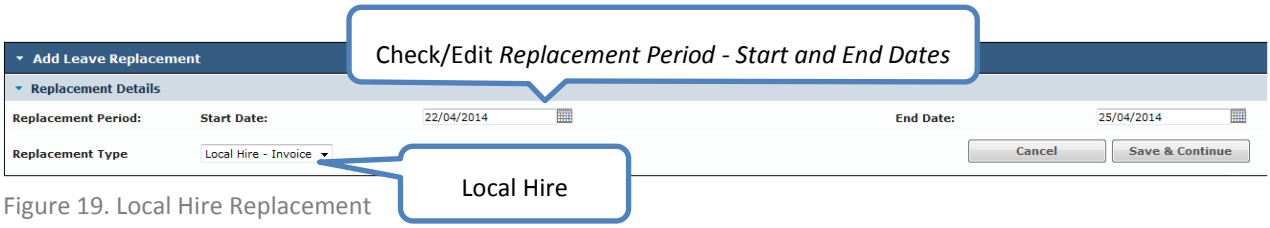


Figure 19. Local Hire Replacement

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

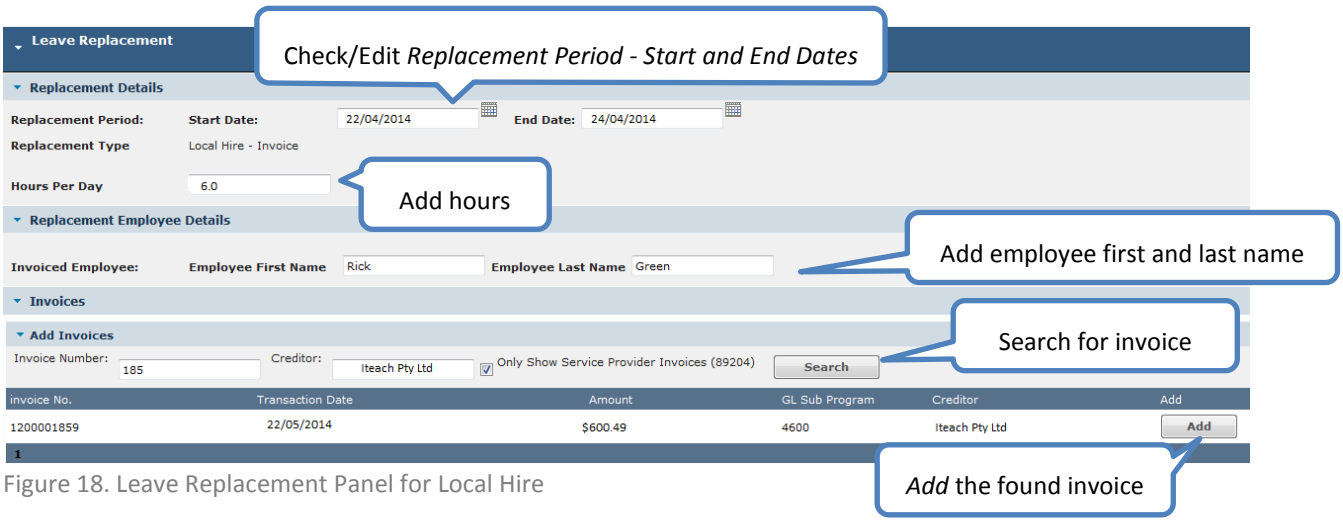


Figure 18. Leave Replacement Panel for Local Hire

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.

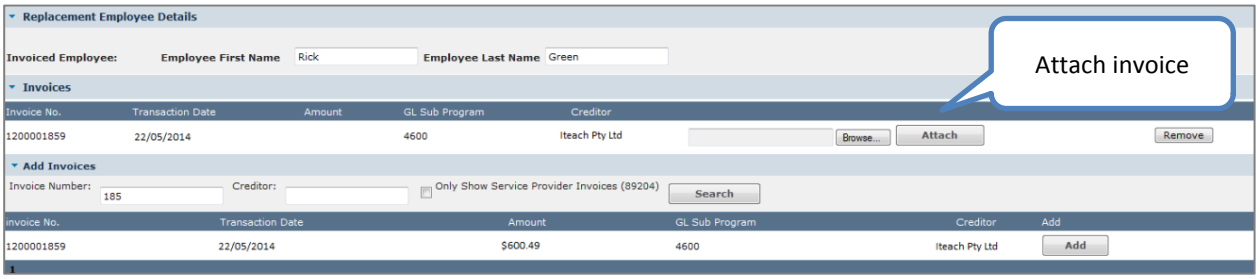


Figure 21. Attach Invoice

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.

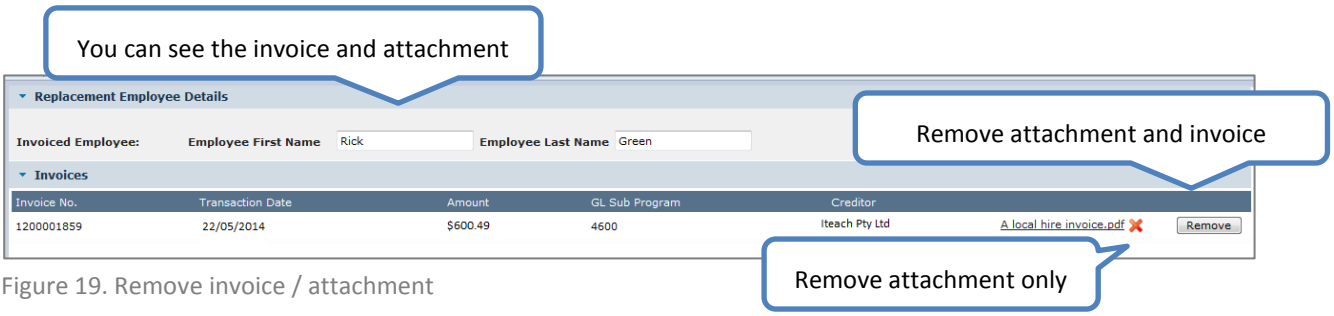


Figure 19. Remove invoice / attachment

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.

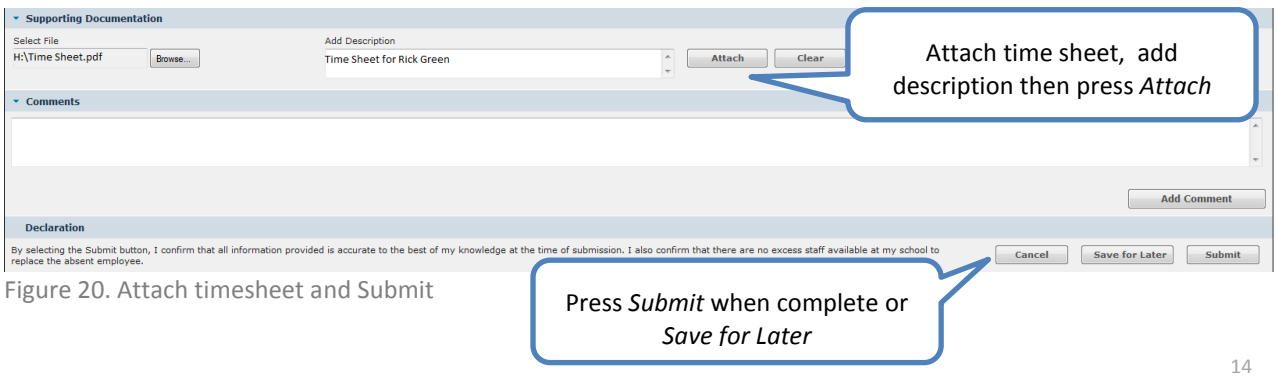


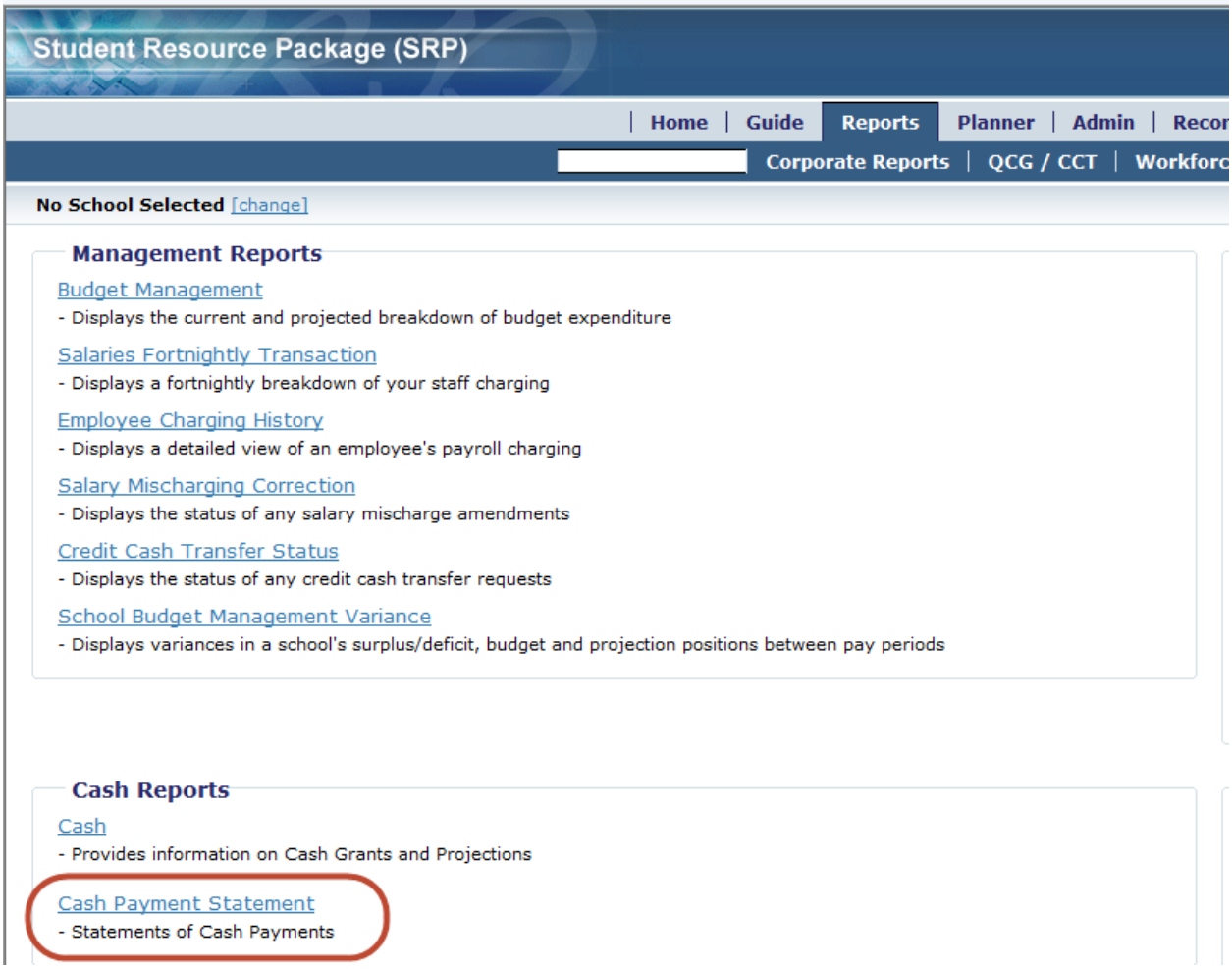
Figure 20. Attach timesheet and Submit

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.



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

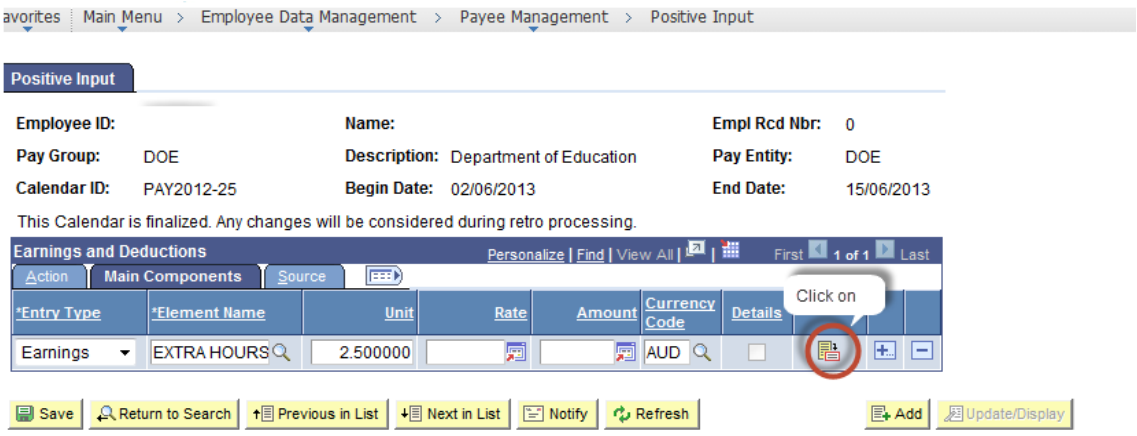
E-mail: studentresourcepackage@edumail.vic.gov.au

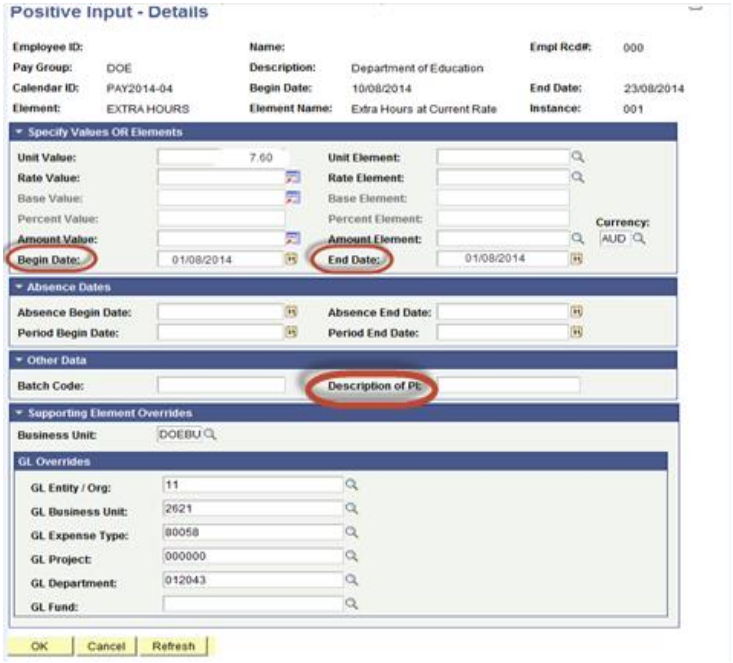
Service Gateway: servicedesk.education.vic.gov.au or [Log a Call]

3 Appendix

3.1 Supporting Doucmentation – Additional Hours

Click on the icon below



The Positive Input – Detail Panel opens

Enter begin and end dates for the time of the replacement and in the Description of the PI (positive input) type in Leave Replacement