Student Resource Package
Leave Portal User Guide
## Contents

1. **Introduction** .......................................................................................................................... 8
   1.1 Purpose .................................................................................................................................. 8
   1.2 Navigation .............................................................................................................................. 8
       1.2.1 Accessing the Leave Home Page .................................................................................. 8
       1.2.2 Leave Home Page Panels ............................................................................................ 8
       1.2.3 The Replacements Panel ............................................................................................... 9
       1.2.4 The Absences Panel ....................................................................................................... 10
       1.2.5 The Special Requests Panel ......................................................................................... 11
   1.3 Viewing an Absence ................................................................................................................ 12
   1.4 Adding a Replacement .......................................................................................................... 13
       1.4.1 Adding a Central Payroll Replacement ....................................................................... 14
       1.4.2 Adding a Local Payroll Replacement ........................................................................... 17
       1.4.3 Adding a Local Hire Invoice Employee Replacement ............................................... 18
   1.5 Monitoring the processing of leave replacement activities .................................................. 20
   1.6 Removing a Replacement ..................................................................................................... 20
2. **Special Requests** .................................................................................................................... 22
   2.1 Types of Special Requests .................................................................................................... 22
   2.2 Special Circumstances – Making a Submission ................................................................... 22
   2.3 Special Circumstances – Assigning a Replacement .............................................................. 24
   2.4 Long Term Part Time Sick Leave – Making a Submission .................................................... 26
   2.5 Long Term Part Time Sick Leave – Associating absences with the recurrence pattern ........ 27
3. **Appendix** .................................................................................................................................. 30
   3.1 Cash Payment Report .......................................................................................................... 30
   3.2 Supporting Documentation – Additional Hours ................................................................. 31
1. Introduction
This guide is produced by the Schools Finance & Resources Branch (SFRB) of the Department of Education and Training. SFRB is responsible for the management of the Student Resource Package.

For policy information see the SRP Guide.

1.1 Purpose
The purpose of this guide is to assist schools in the use of the leave portal. All leave replacements both long term and short term are to be handled through the leave portal as are salary mischarges related to leave. Cut off dates apply for the submission of leave replacements. These dates are displayed on the SRP portal home page.

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.

Select Leave Tab

Select 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

⚠️ In this panel the remove button is not available when the processing status is Submitted. Removing a submitted leave replacement will result in the reversal of any reimbursement related to the submitted replacement. In the case of reimbursement by cash this will be recovered from the next quarterly cash grant.

Removal of submitted replacements is undertaken elsewhere see section 1.6 Removing a Replacement.

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 or 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 Panel](image)

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.

![Absence Panel Filters](image)

Figure 7. Absence Panel Filters

Clicking the column heading will sort the display accordingly.

![Absence Panel Sort Functionality](image)

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).

![Absences Panel](image)

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.

![Add Leave Replacement](image)

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

![Add Leave Replacement Sub Panel](image)

**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.

- **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:

![Replacement Method](attachment:ReplacementMethod.png)

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 list. If the replacement employee you are looking for is not in the Pre-Approved Employee list proceed to step 5.

The list of employees presented in this drop down box 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. If the replacement employee is not available in the *Pre-Approved Employee* list you can select the employee from the *Employee Requiring Approval* list. When selecting an employee from the *Employee Requiring Approval* list, you must also provide a comment and supporting documentation explaining how the selected employee replaces the absent employee during the period specified.

**Some common scenarios where an employee may be a valid replacement but not fall in the pre-approved list are:**

- An employee was hired, had a time fraction increase or transferred from another school outside the pre-approved window. An acceptable comment would read: “Replacement Employee A was hired for the entire year to replace Absent Employee B who we knew was taking long service leave from the start of term 2 to the end of the year”

- The replacement was funded with extra hours without a time-fraction change. If a central employee has worked additional hours and a one off payment has been made, attach a copy of the transaction from eduPay.

- A fixed term employee is hired for the entire year to replace multiple staff member absences of which this is one. In this scenario, a check will be made to validate that the employee is used to replace multiple employees throughout the year.

**Explanations like these are not sufficient and would lead to the rejection of the replacement:**

- “Employee is a fixed term employee”

- “Double Charge”

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.

![Central Payroll Replacement]

**Figure 13. Central Payroll Replacement**

![Leave Replacement panel for a Central Payroll replacement]

**Figure 14. Leave Replacement panel for a Central Payroll replacement**
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 Leave Replacement panel for local payroll will be displayed.

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 from the local payroll employee drop down list. Note the information provided alongside the employee selection dropdown. This information provides the date and time when the system last retrieved local payroll data from CASES21. The list will only contain local payroll employee information loaded into CASES21 prior to this date / time.
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.
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.

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 Invoice 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.

The Leave Replacement panel for local hire invoice replacement will be displayed.
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. Note the information provided alongside the *Search* button. This information provides the date and time when the system last retrieved invoice data from CASES21. The list will only contain invoices entered into CASES21 prior to this date / time.

The tick box *Only Show Service Providers (89204)* can be used to limit the search to service provider invoices. Note that the invoice information now displays the invoice balance.

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

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.

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.
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 24 below)

1.6 Removing a Replacement

Having assigned a replacement to an absence there are two places where the replacement may be removed.

1. In the Replacements panel replacements that have not been submitted (processing status is other thanSubmitted) may be removed by selecting the Remove button. In this panel any replacement that has a processing status of Submitted will not have the Remove button available (Fig 24 above). Submitted replacements cannot be removed from this panel.

2. To remove a replacement with a status of submitted;
   a. Find the replacement record in the Replacements panel and select View.
   b. The Leave Replacements panel will be presented.
   c. The details in this panel are presented in read only mode and cannot be altered.
   d. A Remove button is located at the bottom of the panel and can be selected to remove the submitted replacement. See Fig 25. Below.
   e. A pop up message will ask “Are you sure you want to remove this item?”
f. If the answer is yes, you will be reminded that removing a leave replacement will result in the reversal of any reimbursement related to the submitted replacement. In the case of reimbursement by cash this will be recovered from the next quarterly cash grant.

Figure 25 Removing a Submitted Replacement
2 Special Requests

The Special Requests panel (Fig 26 below) provides a facility to track progress of special request approvals. The two drop down lists provide options to select an employee and / or to select the type of special request. A tick box in the panel which when ticked will display special requests which include non working days. These take into account part time staff who have leave only entered for days of their absence which may not be identified as continuous. To work around this special requests are added for the non work days in the gap.

2.1 Types of Special Requests

The Special Requests Panel provides a facility to submit requests where

a) special circumstances apply – This includes
   - AEU Meeting
   - Panel Member (Merit Protection Board)

b) where long term part time leave is in consideration.

Special requests for long term part time leave 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 long term part time leave in question. The service request can be lodged at:

Hotline: 1800 641 943

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

Schools may undertake Special Circumstances requests themselves by following the instructions below.

2.2 Special Circumstances – Making a Submission

1. To add a new special request click on the Add Special Request button in the Special Requests panel.

   Figure 26. Special Requests Panel

2. Select the Special Request Type “Special Circumstances”

   This includes
   - AEU Meeting
   - Panel Member (Merit Protection Board)
3. Select the absent employee from the *Absent Employee* dropdown list.

4. Enter the begin and end dates of the absence.

5. Click on the *Next* button and a number of panels are displayed. The *Special Requests* panel (Fig 28 below) is presented again where employee selection and date range can be amended if necessary.

6. In the *Special Circumstances Type Details* panel, select the *Special Circumstances Type* from the drop down list.

7. From the *Partial Days* window select the appropriate option for the entry of absent days / hours. If a selection other than “None” is made, provision is made for the corresponding entry of hours. For example if “Begin and End Days” is selected, windows are displayed for the entry of begin day and end day hours (Fig 30 below)
8. It is mandatory to attach a supporting document or documents. A meaningful document description must also be entered.
   - For AEU attendance a letter of approval from the Schools Recruitment Unit must be attached.
   - For Merit Protection Board attendance a letter or email from the MPB to the school or a letter from the Principal on school letterhead may be attached.

9. Comments in support of the submission may be entered in the Comments panel (this is not mandatory).

10. From the Declaration ribbon, information entered can be submitted, saved for later or cancelled. Click on the Submit button to submit the information.

2.3 Special Circumstances – Assigning a Replacement.

The outcome of a submission is displayed in the Special Requests panel under the heading Request Status. As these submissions undergo an approval process within the department the outcome of the submission is not immediate.
Initially the status of the submission will be marked “Requires Validation”

If approved, the submission will be marked as “Approved”

Once “Approved”, the absence will appear in the in the Absences panel on the leave home page (see Fig 37 below). To add and submit a replacement for reimbursement follow the procedure described in section 1 of this user guide.
2.4 Long Term Part Time Sick Leave – Making a Submission

This is a special arrangement where an employee having taken a block of leave greater than 30 continuous school days is returning to school under an agreed part time arrangement. Requests must be submitted for approval by SRAB management and must be supported by appropriate documentation. If the submission is approved and replacements are to be placed against absences the absences must first be entered in eduPay. Only absences entered in eduPay will be displayed in the leave portal.

1. To add a new special request click on the Add Special Request button in the Special Requests panel.

Figure 38. Special Requests Panel.

2. Select the special request type Long Term Part Time Sick Leave and enter the begin and end dates. Press Save & Continue to progress to the next panel.

Figure 39. Special Requests - Long Term Part Time Sick Leave selected.

3. In the Special Requests panel check / edit the begin and end dates and tick the Recurrence Pattern for the recurring absences. For example, if the employee is to be absent on each Tuesday the Tuesday tick box must be ticked.

Figure 25. Special Requests and LTPT Sick Leave Details panels.

4. Add supporting documents to the Supporting Documents panel.
   - A letter from the principal supporting the request on school letterhead and documentation from the medical professional.
   - Press the Browse button to view and select a file.
   - In the Add Description window add a meaningful description of the file.
• Press the Attach button to attach the file.
• The Clear button can be used to clear or remove the file if need be.

5. From the Declaration ribbon the information may be Submitted, Saved for later or cancelled. Press the Submit button to submit the request noting the declaration.

6. Having submitted the request the initial status of the record in the Absences Panel on the leave home page will be “Awaiting Approval”. Once approved the status will move to “Approved”. If there is a problem with the submission that requires addressing the status will move to “Requires Change”. This will be accompanied by a message in the comments box indicating the nature of the problem.

2.5 Long Term Part Time Sick Leave – Associating absences with the recurrence pattern.

1. From the Special Requests Panel identify the Approved request and select View.

2. On the Special Requests page the Add Absences panel will display the recurrence pattern and the period as approved. A Search button is available to search for absences that match dates with the recurrence pattern. In the example below a recurrence pattern of Monday, Tuesday, Thursday and Friday has been approved for the period 21/07/2014 to 03/10/2014.
3. Absences that match the recurrence pattern and fall within the date range will be automatically ticked by the system in the Recurrence Matched column as shown below.

4. To confirm that ticked absences are those against which a replacement may be placed tick the relevant tick box in the far right column. To select all absences tick the box in the header ribbon as shown below.

5. Press the Add button to add those absences ticked in the far right column.

6. The status of the request in the leave portal will move to Requires Validation and once validated will move to Approved.

7. These absences can be viewed in the Absences panel in the leave home page and are available to have replacements entered against them and submitted as described in section 1 of this document.

Figure 45. Add Absences panel – absences matched to the recurrence pattern.

Figure 46. Approved absences entered in eduPay are visible in the Absences panel
Service Desk Call / Request (Section 2)

Make Submission (Section 2)

Associate Absences (Section 2)

On "Approval" add & submit a replacement (Section 1)
3 Appendix

3.1 Cash Payment Report

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.
3.2 Supporting Documentation – Additional Hours

On the Positive Input TAB Click on the icon as circled 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