

Education Module - School District Set Up in Enterprise

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What is the Educational Module?

The Education module is an enhanced set of features in both Enterprise as well as WebCenter, that when used in conjunction with each other, allow a school district or a staffing company to manage their substitute teacher order requests, placement and payroll.

Note The education module is an additional module that can be purchased with TempWorks Enterprise. You will need to work with your TempWorks Account Manager to ensure you have the required licensing and configurations set up before you can start using this module.

In addition, your admin will need to grant each recruiter or user that needs to set up or view the educational module specific items with the Education Module security role. Check out [Enterprise - Security Roles](#) for more information.

The educational module will require some set up in Enterprise and some in WebCenter Administration. This article will walk through the Enterprise features and highlight the setup options available.

Enterprise Setup Includes:

1. Setting up School District Records
2. Setting up Teacher/Admin Records
3. Setting up Substitute Teacher Records

This article will walk through the School District Setup. Check out [Education Module - Teacher/Admin and Substitute Record Setup in Enterprise](#) for additional setup instructions.

School District Setup

If you have started a contract with a new school district or entity, you will want to create a customer record for this district in order to keep track of substitute requests, contract requirements, and invoicing specifics.

North Shore School District (North Shore High School)
 123 Main St. ID: 4295025440
 Eagan, MN 55121 Parent ID : 4295025438
 Branch: Minneapolis

customer snapshot
 Customer Name: North Shore School Distric Customer ID: 4295025440 Branch: Minneapolis Status: Active
 Parent ID: 4295025438 Root ID: 4295025438 Notes: [Empty]
 Customer Tree: Account View

financials
 Last Payment: [Empty] YTD Sales: \$0.00
 Balance Due: \$0.00 Lifetime Sales: \$0.00
 AR Balance: \$0.00 Sales Trailing: \$0.00
 Credit Limit: \$0.00

contacts

Name	Title	Email
Carr, Coach	Gym Teacher & Ad...	carr@nsd.xom
Duvall, Ron	Principle	duvall@nsd.xom
Norbury, Sharon	Calculus Teacher &...	norbury@nsd.xom

messages

Date	Action	Message	Rep	Contact
8/27/2020	Emailed Contact	Emailed Principle WebCenter Credentials	amelia.stout	Duvall, Ron (North Shore Scl
8/27/2020	Emailed Contact	Emailed new username and password for sharon to access...	amelia.stout	Norbury, Sharon (North Sho

For more information on how to create a customer record, check out [Enterprise - Customer Record Overview](#).

Once the customer record has been created you will have 3 new educational module sections to help you track additional important information:

1. [Preferred Candidates](#)
2. [Absence Reasons](#)
3. [School Closure Schedule](#)

All of these are located on the customer record under Details > Education

Preferred Candidates

Often times a school or a specific classroom teacher will have a favorite substitute that they would like the order to go out to first. These are preferred candidates for a school.

Substitutes will need to first be added to your system as employees before you can select preferred candidates. Check out [Education Module - Teacher/Admin and Substitute Record Setup in Enterprise](#) for more information.

Note If you want preferred candidates for a specific classroom you will set up individual classrooms as departments. Check out [Enterprise - Departments](#) for more information.

North Shore School District (Mathematics 9-12)
 123 Main St.
 Eagan, MN 55121
 ID: 4295025450
 Parent ID : 4295025440
 Branch: Minneapolis

visifile
 details
 assignment restrictions
 attendance
 contact methods
departments
 interest codes
 sales & service
 education
 vendor management
 worksites
 defaults
 documents

Customer Name: North Shore School District
 Department Name: Mathematics 9-12
 Supervisor:
 Branch: Minneapolis
 Status: Active

- North Shore School District, Primary (Active)
 - North Shore School District, North Shore Elementary (Active)
- North Shore School District, North Shore High School (Active)
 - North Shore School District, Mathematics 9-12 (Active)**

To add a preferred candidate:

1. Navigate to the customer or department record you want to add a preferred candidate to
2. Select Details > Education on the left

North Shore School District (North Shore High School)
 123 Main St.
 Eagan, MN 55121
 ID: 4295025440
 Parent ID : 4295025438
 Branch: Minneapolis

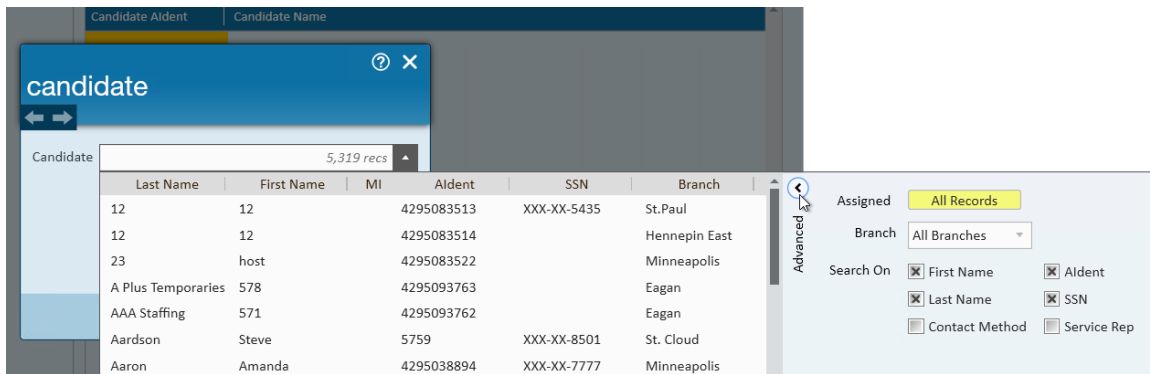
visifile
 details
 assignment restrictions
 attendance
 contact methods
 departments
 interest codes
 sales & service
education
 vendor management

Candidates
 Absence Reasons
 Calendar

candidates

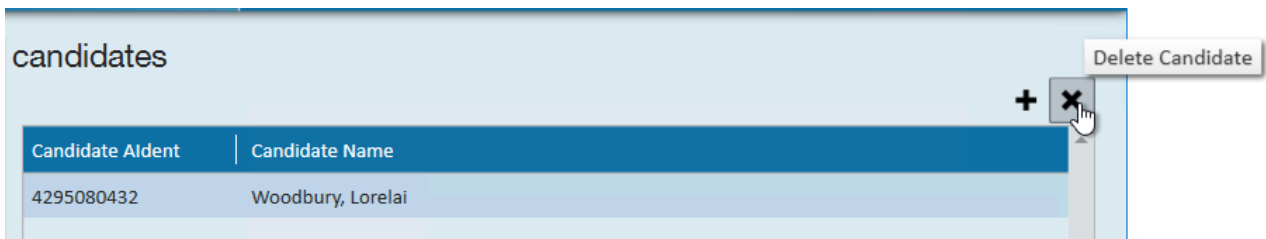
Candidate Aident	Candidate Name
4295080432	Woodbury, Lorelai

3. Select Candidates
4. Select the + in the upper right to add the Substitute
5. Type the Substitute's name (last name first) or use the drop down to select the substitute you want to set as a preferred candidate
 - o You can run a search under the advanced section of the drop down menu



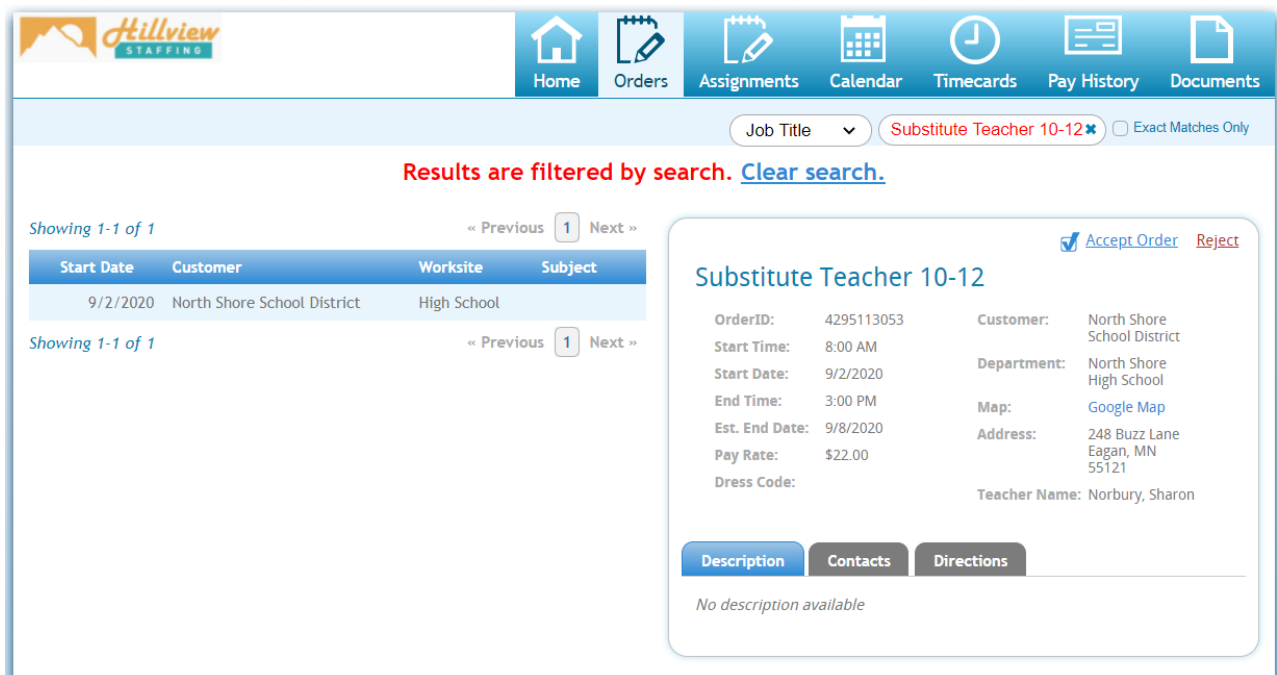
6. Select save

To remove a preferred candidate select the candidate and choose the X in the upper right:



What Happens Next?

When an order is placed for a substitute teacher for this customer or department record, the substitute will see the request in their WebCenter Portal where they can choose to accept or reject it:

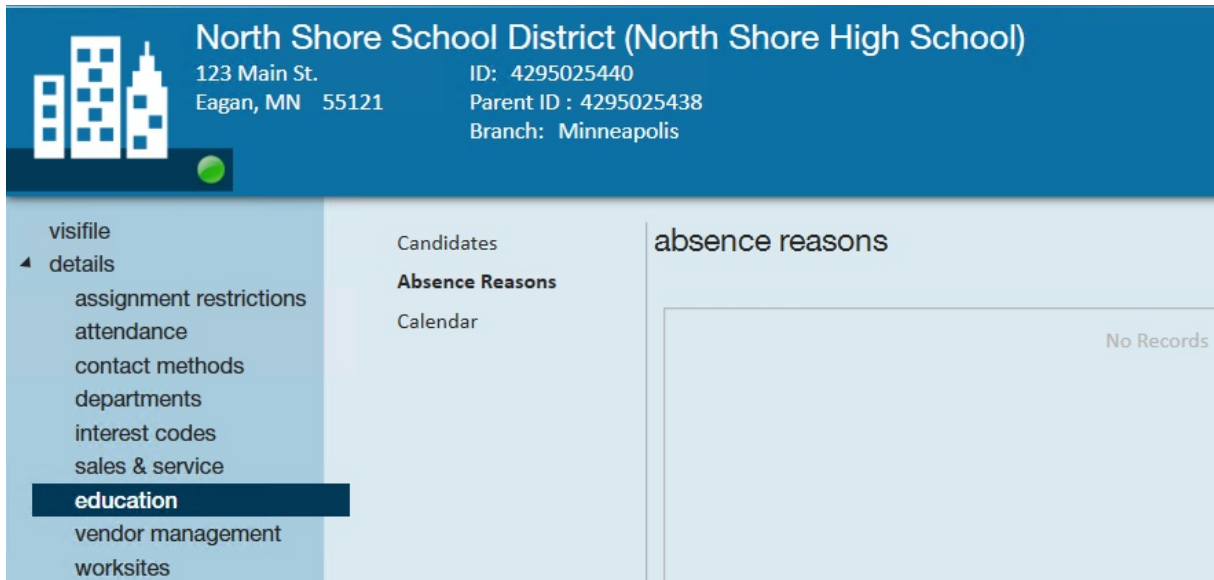


Absence Reasons

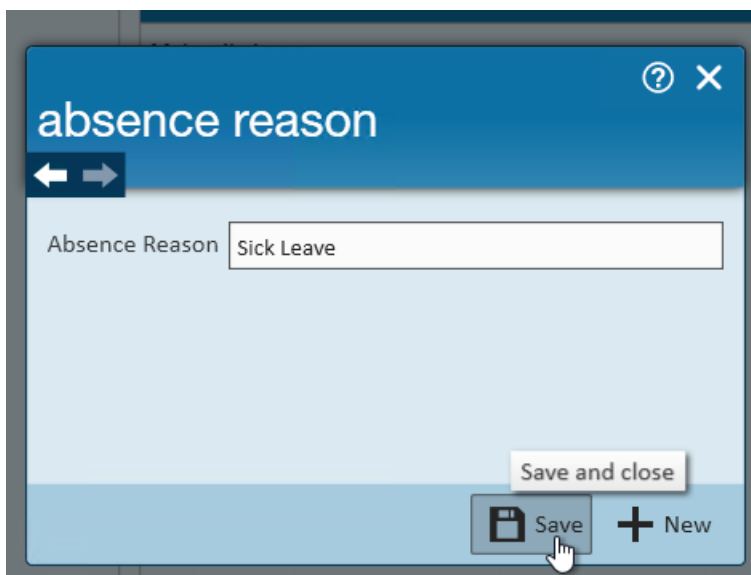
You can set specific absence reasons that admins or teachers can choose from when requesting a substitute. This gives you and the substitute an understanding as to why the sub is needed. If you are utilizing the Absence Reason field on the job order, you will need to add the reason options on the customer record here.

To Add an Absence Reason:

1. Navigate to the customer or department record you want to add a preferred candidate to
2. Select Details > Education on the left
3. Select Absence Reasons



4. Select the + in the upper right to add a new reason
5. Enter the reason



6. Select Save

What Happens Next?

If the Absence reason is selected as a field that will be displayed on the WebCenter job order form it must be set up under the Customer/Department Education section.

Absence Reasons can be added to the order form for Teachers or Admins to select from when requesting a sub:

New Order Request

Department Name --select one--

Teacher Name --select one--

Absence Reason --select one--

Job Title --select one--

Requested Sub --select one--

Absence Start Date

Start Sub Date

Absence End Date

End Sub Date

Start Sub Time

End Sub Time

Supervisor --select one--

Submit Request

Check out [Education Module - WebCenter Substitute Request Setup & Overview](#) & [WebCenter Admin - Configuring WebCenter Order Requests](#) for more information.

School Closure Schedule

If you need to keep track of days the school is closed, you can use the calendar section under education to keep track of days when the school might be closed. If you add in the dates that the school is closed, this will prevent teachers or admins from requesting substitutes those days.

Note The school calendar automatically assumes that school is Monday - Friday unless manually designated as available those days.

To Locate the School Closure Calendar:

1. Navigate to the customer or department record you want to add a preferred candidate to
2. Select Details > Education on the left

3. Select Calendar

North Shore School District (North Shore High School)
123 Main St. ID: 4295025440
Eagan, MN 55121 Parent ID : 4295025438
Branch: Minneapolis

visifile
details
assignment restrictions
attendance
contact methods
departments
interest codes
sales & service
education
vendor management

Candidates
Absence Reasons
Calendar

	Day	Week	Month	Timeline
30 Aug - 5 Sep	Sunday 30	Monday 31	September	
5 - 12 Sep	6	7	8	9

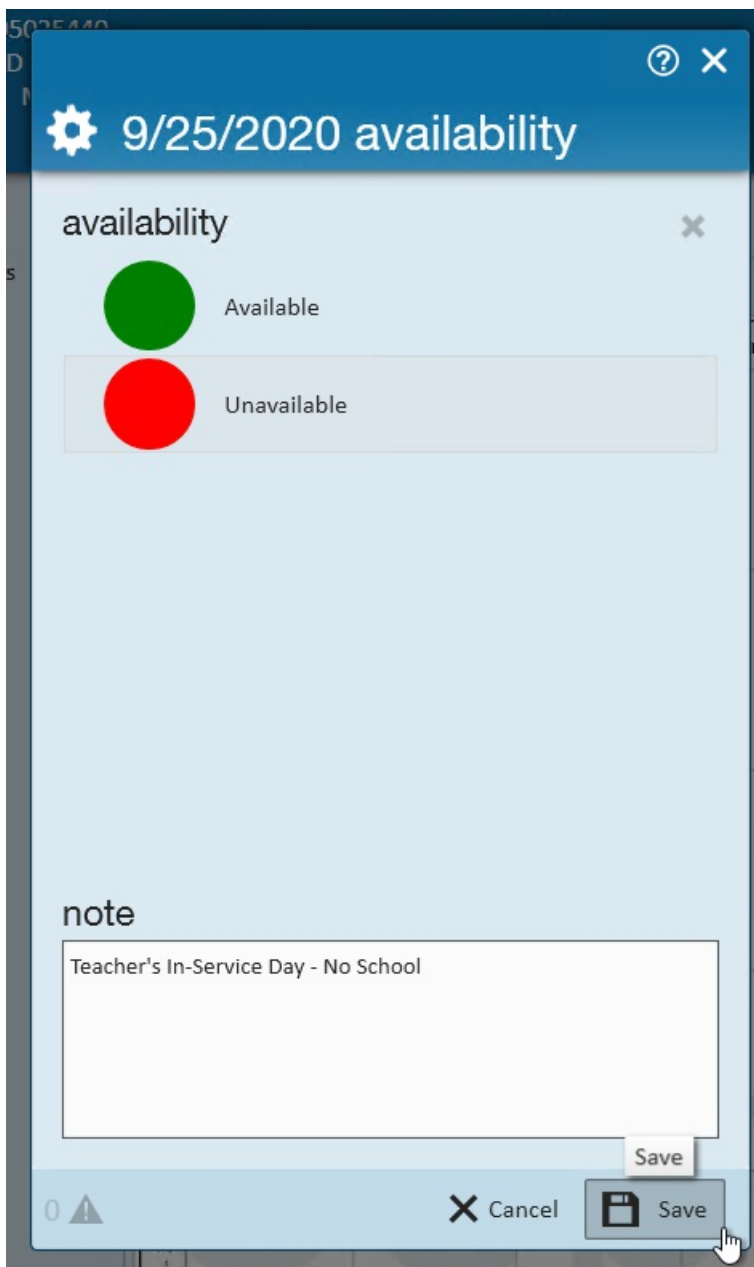
To Enter a Single Closure Date:

1. Double click on the day you want to add a closure

September 2020 9/4/2020

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 Aug - 5 Sep	30	31	September 1	2	3	4	5
5 - 12 Sep	6	7	8	9	10	11	12

2. Select Unavailable
3. Enter any additional notes



4. Select Save

To Enter a Reoccurring Closure Date:

1. Select the + in the upper right to add a new reoccurring closure

New Recurring Availability

Day Week Month Timeline September 2020 9/25/2020

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30 Aug - 5 Sep	30	31	September 1	2	3	4	5
6 - 12 Sep	6	7	8	9	10	11	12

2. Select the start and end date for this reoccurring closure

edit recurrence

recurrence rules

Start Date: 11/1/2020 End Date: 12/18/2020

Recurs every 2 week(s) on

Sun Mon Tue Wed Thu Fri Sat

availability

Available

Unavailable

note

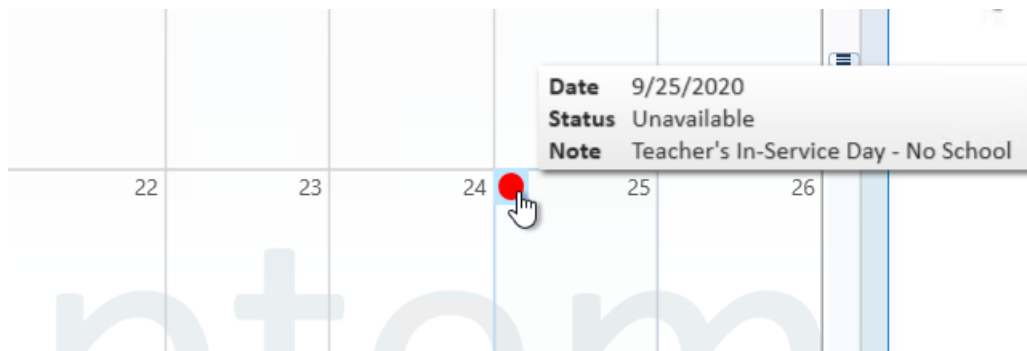
School program - no subs needed

0

3. Select the days the school is closed
4. Select Unavailable
5. Enter any additional details under notes
6. Select save

Reviewing & Editing School Schedule:

Dates with school closure will show with a red dot. You can hover over this dot to see more details:



Click on the dot to edit the information.

What Happens Next?

This calendar can be used as a reference point for your recruiters or account managers. However, you can also set up this option to stop any substitute requests from teachers or admins on the unavailable days.

Here is an example of a warning when filling out a Substitute request via WebCenter:

New Order Request
✕

Department Name	<input type="text" value="Independent School District 83"/>
Worksite	<input type="text" value="Andersen Elementary"/>
Teacher Name	<input type="text" value="Mankowski, Kathy"/>
Supervisor	<input type="text" value="Roberts, Hugh"/>
Start Sub Date	<input type="text" value="12/27/2017"/>
Start Sub Time	<input type="text" value="08:00"/>
End Sub Date	<input type="text" value="12/29/2017"/>
End Sub Time	<input type="text" value="08:00"/>
Absence Start Date	<input type="text" value="12/27/2017"/>
Absence Start Time	<input type="text" value="08:00"/>
Absence End Date	<input type="text" value="12/29/2017"/>
Absence End Time	<input type="text" value="16:00"/>
Job Title	<input type="text" value="Teacher"/>
Absence Reason	<input type="text" value="Sick"/>
Requested Sub	<input type="text" value="Jorgenson, Melissa"/>

Date of the request is during a closure date, 2017-12-27.
Submit Request

For more information on the request process, check out [Education Module - WebCenter Substitute Request Setup & Overview](#).

Additional Setup Suggestions

The rest of the customer record can be set up just like you would set up any other customer record after a contract has been signed. Consider the following options to help make things easier for your team.

Consider Utilizing Rate Sheets

If you have a contract where substitutes will be paid specific wages for specific jobs, you can utilize rate sheets to help keep track and attempt to make substitute requests a little more standardized.

criteria	
Employee	Any
Job Title	Substitute Teacher 10-12
Customer	North Shore School District
Shift	Any
Work Site	High School
Branch	Any
Vendor	Any
Apply to Departments	<input type="checkbox"/>

rates			
Pay Rate	\$20.00	Bill Rate	\$29.00
Overtime Pay Rate	\$30.00	Overtime Bill Rate	\$43.50
Doubletime Pay Rate	\$40.00	Doubletime Bill Rate	\$58.00
Unit Pay Rate	\$0.00	Unit Bill Rate	\$0.00
Other Agency Pay	\$0.00	Multiplier Code	None
OT Factor	1.5000	Worker Comp Code	MN 8810
		Estimated Margin	31.03%

Rate sheets can be applied to orders that meet the criteria listed at the top. Check out [Enterprise - How to Create and Utilize Rate Sheets](#) for more information.

Use Customer Interest Codes to Limit Substitute Requests Shown

You can use required interest codes to limit which substitutes see which sub requests.

North Shore School District, North Shore High School

Substitute Teacher 10-12
0 of 1 positions filled

Customer ID: 4295025440
Order ID: 4295113053
Branch: Minneapolis

- visifile
- details
- adjustments
- attendance
- interest codes**
- invoice recipients
- education
- po setup
- required documents
- vendors

interest codes Detailed View

Secondary Education Math

Created: 8/27/2020
Required: [X]
Note

Set up an interest code on the customer record will default it to all the future substitute requests. Otherwise, you can set up required interest codes on the order itself. Check out [Enterprise - How to Manage Interest Codes on the Customer](#) for more information.

Only substitutes that have the matching interest code will be shown the request in their WebCenter Portal:

The screenshot shows the Hillview Staffing WebCenter Portal interface. At the top, there is a navigation bar with icons for Home, Orders, Assignments, Calendar, Timecards, Pay History, and Documents. Below the navigation bar, a search filter is applied: 'Substitute Teacher 10-12' with an 'Exact Matches Only' checkbox. A message states 'Results are filtered by search. Clear search.' Below this, a table shows one result for 'Substitute Teacher 10-12' with columns for Start Date, Customer, Worksite, and Subject. To the right of the table, a detailed view for the selected job is shown, including OrderID, Start Time, Start Date, End Time, Est. End Date, Pay Rate, Dress Code, Customer, Department, Address, and Teacher Name. There are buttons for 'Accept Order' and 'Reject'.

Utilize Customer Defaults to Make Requests Easier

Customer defaults can set multiplier codes, worker comp codes, and more to help automatically populate orders making it easier when substitute requests come in from WebCenter.

The screenshot shows the customer profile page for North Shore School District (North Shore High School). The header includes the school name, address (123 Main St., Eagan, MN 55121), ID (4295025440), Parent ID (4295025438), and Branch (Minneapolis). The main content area is divided into three sections: 'visifile' with a sidebar menu (details, defaults, asg allocations, people net, rate sheet, documents, integrations, invoice history), 'Accruals (0)' with sub-sections for Multiplier Codes (2), Required Documents (0), Shifts (2), Worker Comp Codes (0), and Job Descriptions (0); and 'multiplier codes' with checkboxes for 'Use Customer Specific Settings' (checked) and 'Apply Multiplier Codes to Departments' (unchecked). A table below shows multiplier codes with columns for Code, Priority, and Default Set By.

Code	Priority	Default Set By
None	1	System
1.53	2	Customer

Check out [Enterprise - How to Set up Customer Defaults](#) for more information.

If your contracts specify specific rates for different substitutes, you can also utilize rate sheets. Check out [Enterprise - How to Create and Utilize Rate Sheets](#) for more information.

Don't Forget to Setup Invoice Preferences

When you sign a contract with the school district, you will want to confirm how they want to receive their invoices. Are their PO numbers or cost centers that need to be matched? Do they want invoices separated by school or job title? Who should receive this information?

North Shore School District (North Shore High School)
123 Main St. Eagan, MN 55121
ID: 4295025440
Parent ID : 4295025438
Branch: Minneapolis

visifile
▶ details
▶ defaults
documents
▶ integrations
▶ invoice history
▶ invoice setup
 adjustments
 billing setup
 credit and payroll
 misc
 peo setup
 po setup
▶ evaluations
messages
payment history
tasks

billing schedule
Billing Frequency: Weekly Bill On...

invoicing
 Apply All Billing To Parent
 Invoice Department Separately

Style: Invoice S Type
Invoice Method: Print Only
Email Template: Invoice to Contact
Currency: USD
Invoice Handling:
CC: Email Address

Create Separate Invoices For Each
 Department Branch
 Order Worksite
 Assignment Supervisor
 Employee ID Job Title
 Week End Sub-entity
 Cost Center Division
 PO Department Address
 Shift PayCode

Check out [Enterprise - How to Manage Billing Setup on a Customer](#) for more information on the options available.

Related Articles