

# Education Module - Teacher/Admin and Substitute Record Setup in Enterprise

Last Modified on 08/27/2020 11:50 am CDT

## 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 Teacher/Admin and Substitute record setup. Check out [Education Module - School District Set Up in Enterprise](#) for additional setup instructions.

---

## Teacher/Admin Records

Teachers or admins that will requesting substitutes for their school district will need to be set up as contacts on the school district's customer record.

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 District Customer ID 4295025440 Branch Minneapolis Status Active

Parent ID 4295025438 Root ID 4295025438 Notes

Customer Tree Account View

financials

Last Payment YTD Sales \$0.00

Balance Due \$0.00 Lifetime Sales \$0.00

AR Balance \$0.00 Sales Trailing \$0.00

Credit Limit \$0.00

messages

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

To learn more about how to create contacts, check out [Enterprise - How to Add a Contact & Contact Record Must Haves](#).

Once you have set up your contacts, you will want to invite them to WebCenter so they can request substitutes, view invoices, and more through their web portal. Check out [Education Module - WebCenter Setup Overview](#) for more information.

Ron Duvall  
 North Shore School Dist... ID: 14078  
 248 Buzz Lane Branch: Minneapolis  
 Eagan, MN 55121

manage web account

A web account connects your employee to all the online services that TempWorks offers.

Username r.duvall

Password Reset Password

Status Active

Last Login Hasn't logged in yet

Linked Products

WebCenter

Product Instance HiTech

Role Education Admin

## Substitutes

Substitutes that you recruit to work will need to be added as employee records in your system so they can be assigned or offered different substitute options as they come up.

**Kevin Gnapoor**  
 543 Main St. ID: 4295093928  
 Saint Paul, MN 55121 SSN: xxx-xx-6124  
 Branch: Minneapolis

**employee snapshot**

Name: Gnapoor, Kevin  
 Email Address: kevin.gnapoor@mathletes.xom  
 Desired Location:  
 Hire Status: Eligible and Active Rate Desired:  
 Notes:

**phone/email**  
 kevin.gnapoor@mathletes.xom

**messages**

Date	Action	Message	Rep	Contact
8/27/2020	Onboarding Completed	Onboarding completed - signed paperwork and is ready to work.	amelia.stout	
8/27/2020	Email	Emailed Kevin about onboarding documents and provided him...	amelia.stout	

**employee**

customer  
 order  
 assignment  
 contact  
 pay / bill

**assignments**  
 No Records Found

**interest codes**  
 Code  
 9-12 Certification  
 Secondary Education Mathematics

To learn more about creating employee records, check out [Enterprise - How to Add a New Employee Record](#).

Once you have set up the employee's record, you will need to create a web user account for them to be able to access, review, and accept substitute positions in their web portal. Check out [Education Module - WebCenter Setup Overview](#) for more information.

**Kevin Gnapoor**  
 543 Main St. ID: 4295093928  
 Saint Paul, MN 55121 SSN: xxx-xx-6124  
 Branch: Minneapolis

**manage web account**  
 A web account connects your employee to all the online services that TempWorks offers.

**Username**: kvn.gnapoor  
**Password**: Reset Password  
**Status**: Active  
**Last Login**: Hasn't logged in yet  
**Linked Products**:  
 WebCenter  
 Product Instance: HiTech  
 Role: Sub Teacher

**visifile**

details  
 documents  
 integrations  
 assessments  
 applications/surveys  
 custom data  
 e-verify  
 first advantage  
 peopleg2  
 trak 1  
**web user account**  
 hrcenter  
 evaluations  
 messages

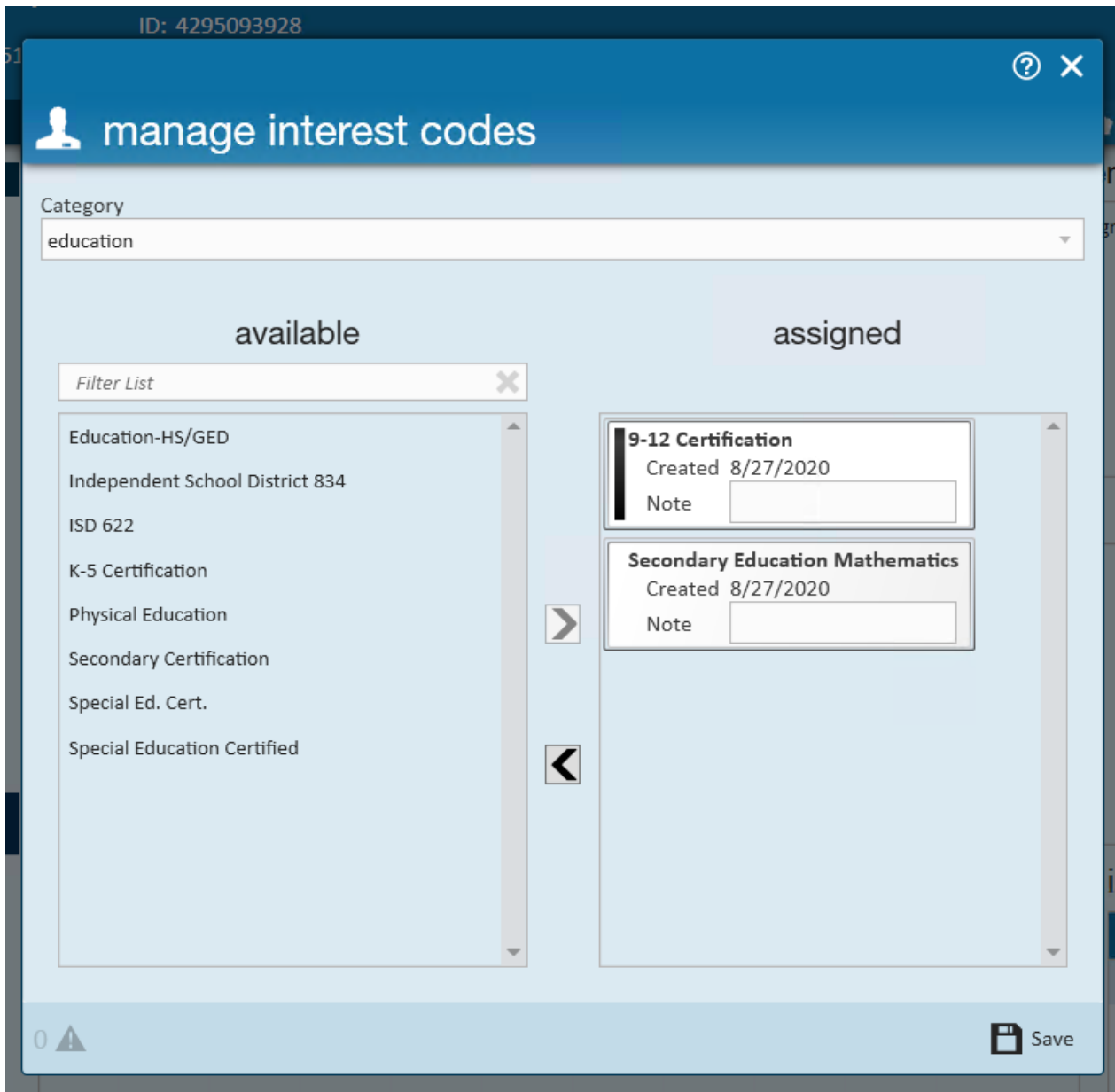
### Additional Considerations

Consider the following optional items that you may want to add to your employee's record to get the full education

module experience.

### Consider adding Interest Codes:

Interest codes can help make sure your substitutes have the correct certifications and are being offered the correct jobs. If a substitute request



To learn more about interest codes, check out [Enterprise - Managing Employee Interest Codes](#).

### Utilize Required Documents

Required documents, like interest codes, can be used to limit which substitute jobs are available and ensure you have the necessary required documentation on file before they accept or go to a job.

The screenshot displays the HRCenter interface for document management. On the left is a navigation menu with categories like 'visifile', 'details', 'aca', 'activity tracker', 'assignment restrictions', 'contact methods', 'candidacy', 'direct hire', 'education', 'interpersonal', 'interview questionnaire', 'past jobs', 'required docs', 'test scores', 'transportation', 'unemployment', 'work experience', 'work interests', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', and 'calendar'. The main area has filters: 'Show only active documents', 'Show only expired documents', and 'Show only documents that expire in 7 days'. Below these is a table of documents:

Document	Category	Received	Expires
Name: Background Check		Received: 8/24/2020	Expires: 8/27/2021
Category			
Name: I-9		Received: 8/24/2020	Expires: 8/27/2021
Category			

On the right, the 'Document Information' panel shows details for the selected document: 'Background Check'. It includes checkboxes for 'Active' and 'Required', a dropdown for 'Name' (Background Check), a dropdown for 'Category', and input fields for 'Requested', 'Received' (8/24/2020), 'Issued', and 'Expires' (8/27/2021). There are also fields for 'License Number', 'Authority' (ALL), 'Notes', and 'Status' (Clear). At the bottom, there is a 'Link an Existing Document' section with a search and add button.

## Set Up HRCenter for Customized Onboarding

Consider having a specific onboarding workflow or workflows for your substitutes that will include any necessary documents they need to sign or give them a chance to upload their certification documents to be saved on their file.

Check out [HRCenter Overview](#) for more information.

## Related Articles