



QUICK REFERENCE MANUAL

FOR OLCS

Updated August 2015

Table of Contents

Introduction.....	3
Security Guidelines.....	4
Login.....	6
Timetables.....	8
Staff.....	10
Leave.....	12
New Sick Leave Arrangements.....	14
Add Substitute.....	15
Claims.....	16
Allocations.....	19
CNCA Appointments (Part-Time Hours).....	19
Reports.....	21
Local Administrator.....	23
School Closures.....	24

Introduction

Welcome to the Department of Education and Skills Online Claims System (OLCS).

The system is designed to enable schools to record all absences (Substitutable and Non Substitutable) for all Staff Members paid directly on the Departments payroll and to make claims for substitution in respect of teachers and special needs assistants.

The data input by schools, once validated, updates the Department's Payroll and Personnel systems and issues payment directly to the substitute staff members concerned, if applicable.

We have prepared the following manual to assist you in becoming familiar with the use of the Online Claims System. It is recommended the user refers to this manual to assist with any queries that arise when entering data.

In addition to this guide there is a detailed Online Help on the system. This can be accessed by clicking the Help tab which is located on the top of each screen.

Security Guidelines for Boards of Management and Staff Designated to operate the On Line Claims System in Schools

Introduction:

The On Line Claims System was introduced in Post Primary Schools on 6th November 2006 and on a phased basis in Primary Schools from April 2007 to March 2008.

Roles:

As outlined in previous documentation issued from the Department there are four distinct roles with three User IDs assigned to personnel at school level to operate the system.

These roles are as follows:

Data Entry

The role of the Data Entry person is to input the data i.e. input the details of absences of staff members, claims for casual and non-casual staff members and other details to the system.

Data Approver

The role of the Data Approver is to verify that the data input by the Data Entry person is correct and to approve the data.

Local Administrator

The role of the Local Administrator is to re-assign Data Entry roles within the school and to reset Data Entry passwords. (This role does not require an additional User ID and the role is assigned to the Data Approver role). **It is essential that the OLCS Section of the Department is notified in writing immediately if any OLCS user leaves your school or no longer requires access to OLCS so that their account may be de-activated.**

Second Approver

A Second Approver role is required to approve the leave/claims in respect of the Data Approver's absences and can also approve data entered by the Data Entry person.

User ID and Passwords:

Each of the roles has a User ID. The initial User ID for the Data Entry, Data Approver/Local Administrator and Second Approver were issued by the Department. **The User ID is specific to an individual and should be retained carefully and not disclosed to anybody. You must not ask your computer to remember your security details.**

The designated Data Entry person and Data Approver of the system should be advised to keep their passwords and other information secure at all times and not to pass them to other members of staff. If the user or approver must leave the P.C. unattended s/he should logout of OLCS.

The Esinet site is a secure site and as a security measure if you have not used OLCS for more than one hour you will be automatically logged out of the system.

If you lose your login details or forget them we may ask you to authenticate the details you provided when you registered on OLCS.

General:

To ensure the integrity of the system schools should comply with the following:

Boards of Management have a responsibility to ensure that at school level the integrity of the system is maintained at all times.

Boards of Management are advised that under no circumstances should the same person in a school undertake the role of Data Entry person and Data Approver.

The Data Entry person and Data Approver should always ensure that details of the teachers and special needs assistants are input correctly to the system. In particular they should check that bank account details are input correctly.

If a staff member requires details of their absences there are facilities on the system to print various reports. The reports should be printed by personnel designated to use the OLCS within the school and given to the staff member.

As with all computerised systems an audit trail of records and the times of transactions are maintained on the system.

Schools should ensure that documentation in relation to the completion of OLCS details are retained securely i.e. medical certs., attendance at in-service/in-career, parental leave and carer's leave for a minimum of 5 years.

The Data Entry person and Data Approver should ensure that supporting documentation e.g. medical certs etc. have been obtained from the staff member prior to recording the details on OLCS.

The Data Entry person should not be a person employed as a Special Needs Assistant in the school.

The Board of Management should be made aware that a facility exists on OLCS to produce a report of all absences taken by teachers and SNAs in a defined period.

A copy of this document should be given to each member of the Board of Management.

Payroll Division.

LOGIN

Esinet Login

To login enter www.esinet.ie on the address line on the Browser. This opens the Login to Esinet Portal.
(First time login)

1. Enter User ID------(given by the Administrator in your school for Data Entry role or by the Department of Education and Skills for the Approver Role)
2. Enter Password ----- (given by the Administrator in your school for Data Entry role or by the Department of Education and Skills for the Approver Role) which must be changed after 1st Login. (The password must contain at least one numeric character).
3. Personal Question-----Leave blank on 1st Login. This will be one of three questions which will be randomly selected i.e.Date of Birth, Place of Birth, Pin number (any four digits)
4. Click Login

Self Registration

1. Personal Question. D.O.B./Place of Birth/Pin Number (All 3 questions must be answered)
2. Enter an e-mail address for the reset of your password
3. Challenge Question. Select one question from the drop down list and answer. This may be asked to verify your identity if calling your Payroll area to have your password reset.
4. Password Details. Enter old password (given by Administrator or Department). Enter new password and repeat. Your password must contain at least eight characters, one of which must be numeric and cannot be the same as a previous password.
5. Click Save.

As the login is case sensitive the same format of upper/lower case letters must be used in all logins.

(Second and subsequent logins)

1. Enter User ID
2. Enter Password
3. Answer Personal Question
4. Click Login, this brings you to the Esinet homepage and click on OLCS - On Line Claims System which opens the OLCS Landing Page with access to all applications.

Note:

If the system has not been used for more than 60 mins the user is automatically logged out.

All users will be forced to change their password every 100 days

Logout

1. Click Logout located on the blue line on the top of the screen. A logout message is displayed
2. Click Yes. A confirmation message is displayed.

Locked Out of the OLCS System

After 3 unsuccessful attempts to login to OLCS the system will lock you out. A screen will display asking the user to answer the 3 personal questions and the challenge question. Once these are answered and submitted an automated password will be returned to the user to the e-mail address supplied by the user. Please ensure that this e-mail is kept up to date.

TIMETABLES (Post Primary Schools only)

Search Timetable

Before adding a timetable a search must be performed to see this timetable does not already exist. More than one timetable may exist for any week e.g. some schools may have a different structure for Friday and will require a separate timetable from Monday to Thursday.

1. Click on the Timetable Search link on the OLCS menu option.
2. Enter the Date From and Date To or select the Status from the drop down menu and click search.
3. If the search returns the correct existing timetable click on the hyperlinked timetable ID to view the Timetable.
4. A new timetable is only required if a timeslot has changed from the existing timetable.

Add Timetable

A timetable can only be added by a user with an Approver Role.

1. Click on Add Timetable.
2. Enter name for Timetable e.g. Timetable 2015/16 or Timetable 1.
3. Enter the date effective (Please note the date effective should be the first Monday of the calendar year)
4. Select the days the Timetable is effective for (Please note that if the timeslots are not the same for everyday it will be necessary to add more than 1 timetable).
5. Enter the number of class periods.
6. Enter morning break after relevant period e.g. if there are 2 classes before break then morning break is after period 2.
7. Enter lunch break after relevant period e.g. if there are 5 classes before lunch then lunch break is after period 5.
8. Click Next
9. Enter start and end time period for each class and break. Please note the timeslots are recorded using the 24 hour clock and note that the start time of each period is the end time of the previous period.
10. Click Save

Delete Timetable

A Timetable can only be deleted if it has never been in use in the school i.e. “Awaiting Active Date”.

1. Search for the Timetable and select “Awaiting Active Date” from the status dropdown menu and click Search. The From and To dates must include the date of the Timetable to be deleted.
2. Click hyperlinked Timetable ID on the Timetable search results screen which opens Change Timetable screen.
3. Click Delete and Yes to confirm the deletion. (Note: If deleted timetable is due to deactivate a currently active timetable, it will not be deactivated)

Deactivate a Timetable

A timetable cannot be deactivated if there is only 1 active timetable unless a new one is added (See Add Timetable). A current timetable must be in use at all times.

1. Click on Deactivate Timetable.
2. Highlight the timetable you wish to deactivate and click deactivate.
3. Enter the date you wish to deactivate the timetable from (Please note that a timetable can only be deactivated from a Monday in the future).
4. Click Deactivate

STAFF

Search Staff Member.

Before adding a new staff member a search must be performed to see that they do not already exist on the Departments database. If the staff member has been previously paid through the Payroll please ask them to confirm their PPSN.

1. Click on Search under Staff on the OLCS menu which opens the Staff Search screen.
2. Enter the PPSN of the Staff Member and click Search. If the search is successful the Staff Member will be returned in the Staff Search Results. If no results are found the options given are New Search or Add Staff .The new Staff Member can be added from here or from the Add Staff on the OLCS Menu on the left of the screen as detailed in Add Staff Member.

Add Staff Member

A new staff member can only be added by a user with a Data Entry Role. Only casual and non-casual staff members will be set up using this process.

1. Click on Add under Staff on the OLCS menu.
2. Enter the PPSN of the staff member and click Search.
3. If the search returns no records then click Add Staff.
4. Complete all personal details on page 1 and click Next which will open the bank account details screen
5. Enter the BIC and IBAN details and click on get Financial Institute Name.
6. Click Next.
7. Tick Staff Member Type i.e. Teacher or SNA/Child Care Worker. Leave Pre 1999 Employment details blank. Complete employment status (Registration details). Tick PRD. Secondary Employment e.g. Main or Subsidiary Employer.
8. Click Next
9. Complete Declaration in accordance with the Public Service Pensions Act 2012 page and click save.
10. If satisfied with all the information entered click on send to Approver or if an amendment is required click on amend. Once details are sent to Approver a confirmation message is displayed. Click ok. This gives the option to print a copy of the details entered. When the statement is printed a copy is given to the Staff Member for verification and a copy is retained in the school.

Change Staff Member Details.

Only a person with data entry rights can change the details of a casual non casual staff member

1. Click on Search under Staff on the OLCS menu, enter the PPSN of the staff member, click Search then click the hyperlinked PPSN in the staff search results screen.
2. All personal details can be changed except for the PPSN
3. All Financial Institute details can be changed.
4. When all changes are made click Save to open the Change Staff Member Successful screen and click **Send to Approver**. A confirmation message is displayed, click Ok, this gives the option to print an updated Staff Member Statement.

Approve Staff Member

A new staff member can only be approved by a user with an Approver Role.

1. Click on the Approver's Worklist.
2. Click Staff tab to view all staff members "Awaiting School Approval".
3. Click hyperlinked staff member PPSN on the worklist to view staff member details and click Next at the end of each screen to move on.
4. On the last screen "for Approver Use Only" please answer all questions.
5. Once satisfied with all details the Approver clicks Save which opens the Change Staff Member Successful screen.
6. Click Send to DES to validate the Staff Member or click Reject to return the Staff Member's details to the Data Entry persons Error Report for further change.

Delete Staff Member

A Staff Member who has been added in error can be deleted by the Data Entry Person provided they have not been allocated a Department payroll number.

1. Click on the hyperlinked staff member PPSN on the Work in Progress Worklist or the Staff tab of the Errors Report Worklist to view the Staff Member's details and click Delete. A delete /confirmation message is displayed.
2. To fast track the deletion, tick the checkbox and click Delete. A delete/confirmation message is displayed.

LEAVE

Add Leave

A new leave record can only be added by a user with a Data Entry Role. Leave records e.g. Maternity leave may be added for dates in the future.

1. Click Add under leave on the OLCS menu
2. Enter start and end date and click Next
3. Select the staff member on leave, the leave category and sub category and click Next.
4. If the leave sub category is certified illness click Next and then click Add Certificate.
5. Enter the certificate Start and End date which must correspond with the dates on the leave record. Click Add. This generates a certificate number which should be recorded on the back of the hard copy certificate and filed.
6. Where **Sick** leave is entered in excess of 31 days e.g. 01st March - 15th April two separate certificates need to be recorded in this case 01st March – 31st March and then from 01st April – 15th April. Please note an OHS reference number is also required in this instance.
7. Click Next and Add to store the certificate. A Confirmation message is displayed.

Please note that Unpaid Leave must be entered at least 4 weeks in advance so that the deduction meets the relevant payroll to avoid overpayment of salary.

Search Leave

Both data entry personnel and Approvers can Search leave. Users can only search for leave records related to their school. Leave records are not recorded for substitutes or staff that have CNCA Appointments only.

1. Click Search under leave on the OLCS menu for previously added leave.
2. Enter the search criteria (e.g. by staff member, by dates or by leave category). At least one of the fields on the screen must be populated.
3. Click Search. This returns all leave records meeting the search criteria.

Change Leave

A leave record can only be changed by a user with a Data Entry Role. If the leave record is attached to a claim or the Leave status is Processed, Part Processed or Verified by DES it cannot be changed/deleted.

1. Click Search under leave on the OLCS menu.
2. Select the absent staff members name and click search.
3. Click on the hyperlinked start date of the leave requiring change on the Leave Search Results screen.
4. Change details as required. (Note: the start date of the leave record cannot be changed. The record must be deleted and a new record added).
5. Click Next and Save. A confirmation message is displayed.

Extend an existing leave record

1. Search staff member on leave. In the leave search results click on the hyperlinked Start Date to change the existing leave record.
2. Extend the end date and click Next. Click Save at the end of next screen.
3. If the leave record to be extended is Certified Sick Leave click Next and Add Certificate.
4. A new Certificate must be added for the extended period of the leave.
5. Enter the Start and End Date of the extended record. Click Add.
6. Click Next at the end of the screen and click Save at the end of the following screen.

Delete Leave

A leave record can only be deleted by a user with a Data Entry Role where the leave has been entered for the incorrect staff member or incorrect dates and there are no claims attached.

- A **paid** leave record may be deleted once there are no claims attached.
- An **unpaid** leave record may be deleted where the status of the leave is Verified by DES.
- An **unpaid** leave record cannot be deleted and replaced on the closing date of your Payroll (these dates are displayed on the Landing Page).
- If the leave record has a **claim attached** it cannot be deleted by a school user. Where this arises please contact the relevant payroll area in the Department.

1. Click Search under Leave on the OLCS menu. Select the Staff Member and click Search.
2. Click on the hyperlinked start date on the leave search results screen.
3. Click Next which will display a Delete Leave Record screen where you must confirm if you wish to delete the leave.
4. A Confirmation message is displayed once the leave is deleted.

Cancel Leave (Department User Only)

A leave record that has the status of Processed or Part Processed cannot be cancelled by a school user.

In order to have the record cancelled complete the “Cancel Staff Member on Leave” request form which is located on the OLCS landing page in the Download Document Section and return to the relevant payroll in the Department.

Find Past Staff

To add a leave record for a staff member who has ceased employment in your school:

1. Click on ADD under Leave on the OLCS menu
2. Click Find Past Staff which is next to the Staff Member drop down list on the Leave Add screen.
3. Enter the PPSN and click Search. This returns the past staff member in the search results.
4. Click on the hyperlinked PPSN. The staff member will be available for selection from the top of the Staff member drop down list on the Staff Leave Search screen.

NEW SICK LEAVE ARRANGEMENTS

Extend Sick Leave

1. Click Search under leave on the OLCS Menu
2. Select the Staff Member on leave and click Search
3. Click on the hyperlinked start date of the leave to be changed and the Change Leave Record screen is displayed
4. Change the end date of the leave to the required date and click next
5. Add a new medical certificate for the extended dates of the leave (i.e. if the previous leave had an end date of Friday the new cert must have a start date of the Saturday). Click add.
6. Click next at end of screen and then click save at end of following page. A confirmation message is displayed.
7. If the sick leave record is exceeding 28 days in the past year a referral must be made to Medmark to obtain an OHS number. This number is required to save the leave successfully.

Where a Staff Member exceeds their entitlement to sick leave on full pay

1. Extend the sick leave record as above
2. Where the Staff Member is exceeding their entitlement to sick leave on full pay you will be asked has a referral been made to Medmark for Critical Illness – Yes or No
3. If “No” is answered to this question the system will automatically split the sick leave record to the appropriate rate of pay e.g. Sick Leave Half Pay or TRR Leave.
4. If “Yes” is answered to the Critical Illness question an OHS Referral Number and an OHS Approval Number must be entered in order for the system to award Critical Illness Full Pay.
5. If a referral for Critical Illness is made to Medmark and the medical criteria is not met the Employer has the option, having considered the questions asked on the system, to award Critical Illness in exceptional circumstances.

Where a Staff Member is on Half Pay or TRR Rate of Pay

1. Where a Staff Member has a record of Sick Leave Half Pay or TRR Rate of Pay and continues to be absent a new leave record must be recorded from the next day (i.e. if the previous leave had an end date of Friday the new cert must have a start date of the Saturday).

For further information on entering Sick Leave please refer to the OLCS Help Menu located on the navy toolbar at the top of each page and select OLCS Revised Sick Leave Arrangements

ADD SUBSTITUTE TO SCHOOL SUBSTITUTE LIST

Add/View & Remove Current Substitute

Substitute has been previously set up. See Add Staff Member.

To add to the Substitutes List:-

1. Search for the substitute under Staff on the OLCS menu
2. Enter PPSN and click Search. The staff members personal details are returned.
3. Tick the radio button on the Staff Results screen and click the Add to Substitute List. The Confirmation message is displayed.
4. Substitutes can be viewed by clicking the View Current Substitutes on the OLCS menu. This screen can also be used for adding substitutes to the list by clicking Add to List button.
5. To remove a substitute from the list, tick the check box and click Remove. Substitutes who have unprocessed claims cannot be removed and no check box will be displayed.

CLAIMS

Please note that the closing date and payment date for latest payroll periods are highlighted on the homepage of OLCS.

Add Claim

A claim can only be added by a user with a Data Entry Role.

1. Click on Add under Claims on the OLCS menu. This opens the Staff Leave Search screen.
2. Select the staff member from the drop down list. Click Search which returns all leave records previously added for that staff member.
3. Tick the Radio button beside the appropriate Leave Record
4. Click on Add Claim to Grid. This opens the grid which contains a list of previously added Substitutes in a drop down list. Select the week required from the calendar drop down list and Click on Select Week.
5. Complete the Claim Grid by selecting the relevant substitute for the class period/day requiring Substitution.
6. Where a registered teacher is not available, an unregistered teacher may be employed under the limited exceptions for no more than 5 consecutive school days and the “5 day rule” box must be ticked. **Please note that the “5 day rule” box for Post Primary Teachers is only displayed once Calculate Claim has been selected.**
7. When the grid has been completed, two options are available:
 - i. Click Save. The record is saved to the Work in Progress Worklist
 - ii. Click Calculate Claim. Tick the radio button and Send to Approver
8. All claims saved to the Work in Progress can be sent to the Approver by ticking the tick box(s) or by clicking the Select All option.

Copy Claim

1. If the staff member on leave record consists of a number of weeks and the claim details are the same a claim can be copied from one week to the next.
2. To copy a claim the initial week of the claim must be processed (payment generated by Department’s payroll).
3. Follow steps from 1 to 3 above.
4. Click Add Claim to Grid. This opens the grid with the previously processed week with contents greyed out.
5. Select the start date of the next week from the calendar drop down list at top of screen and click Select Week.
6. Click Copy Claim. The claim details from the previous week will be populated into the selected week.
7. Click Calculate Claim, tick the radio button and then click Send to Approver.

Search for a Claim

1. Click on Search under Claims on the OLCS menu.
2. Enter the search criteria. Click Search. Claims with matching criteria are returned.
3. Click on the hyperlinked Claim ID to view the claim details.

Change a Claim

Please note that no change can be made to a “Processed” record. A Claim cannot be changed if it has been sent to the Approver or DES. It must first be recalled/ Rejected by the Approver and may then be accessed in the Error Report. Only claims with a status other than “Processed” will be returned.

1. Click on the hyperlinked Claim ID which requires amendment from the Work in Progress where the claim has not been sent for Approval or from the Error Report where the claim has been recalled from DES or rejected by the Approver.
2. The grid with the existing claim is displayed. Make appropriate changes.
3. Click Save or click Calculate Claim which validates the claim. Tick the check box and click Send to Approver.

Delete a Claim

Please note that no deletion can be made to a “Processed” record. A Claim cannot be deleted if it has been sent to the Approver or DES. It must first be recalled/ Rejected by the Approver and may then be accessed in the Error Report. Only claims with a status other than “Processed” will be returned.

1. Tick the tick box of the claim to be deleted from the Work in Progress where the claim has not been sent for Approval or from the Error Report where the claim has been recalled from DES or rejected by the Approver.
2. Click on Delete.
3. A confirmation message is displayed.

Approve a Claim

1. The Approver clicks on the Approver’s Worklist on the OLCS menu.
2. Click on the Claims tab of the Worklist.
3. To view the claim, click on the hyperlinked Claim ID and click Send to DES. Click Reject if you are not satisfied and the claim is returned to the Data Entry Error Report Worklist.
4. If you do not wish to view the claim two options are available:-
 - i. Tick the checkbox beside the claim on the Worklist and click Send to DES.
 - ii. Select “Check All” and click Send to DES. **It is mandatory to complete the checks in relation to specific circulars so that the claims will progress to DES.**
5. A confirmation message is displayed.

Recall a Claim from the Department

1. The Approver clicks on the Approver’s Worklist on the OLCS menu.
2. Click on the Claims tab of the Worklist.
3. Select Recall from the drop down list and click Select.
4. All claims where a recall can be requested are displayed.
5. Tick the check box of the claim to be recalled and click Recall from DES. A confirmation message is displayed. Recalled claims will be returned to the Error Report Worklist the

following day. Only claims with a status other than “Processed” will be returned. Claims cannot be recalled on the closing date of a Payroll. Closing dates of payroll are displayed on the Landing Page.

Cancel Claim (Department User Only)

A claim that has the status of Processed cannot be cancelled by a school user.

In order to have the claim cancelled complete the appropriate request form “Cancel Primary Claim” or “Cancel Post Primary Claim” which are located on the OLCS landing page in the Download Document Section and return to the relevant payroll in the Department.

Find Past Staff

To add a claim against a leave record of a staff member who has ceased employment in your school:

1. Click on ADD under Claims on the OLCS menu
2. Click Find Past Staff which is next to the Staff Member drop down list on the Claims Search screen.
3. Enter the PPSN and click Search. This returns the past staff member in the search results.
4. Click on the hyperlinked PPSN. The staff member will be available for selection from the top of the staff member drop down list on the Staff Leave Search screen.

ALLOCATIONS

Time Allocations

1. Click Time Allocations Search on the OLCS menu.
2. Select the School Year and Position Type from the drop down menus and click Search.
3. The Time Allocation Search Results screen is displayed with the relevant information.

CNCA Appointments (Part-Time Hours)

Add Casual/Non Casual Appointment

In order to add a CNCA Appointment a Time Allocation is required.

1. Click on Add under Appointments on the OLCS menu.
2. Enter the PPSN and click Search which will return the staff member in the search results.
3. Tick the Radio button and click Add Appointment.
4. Select Position Type from the drop down list.
5. Select Status of Non Casual from the drop down list.
6. Select the relevant week from the drop down calendar list and click Select Week to display the daily grid.
7. Complete the grid by entering the relevant number of hrs/mins per day for that week.
8. Click Send to Approver and a confirmation message is displayed.

Search Casual/Non Casual Appointment

1. Click on Search under Appointments on the OLCS menu.
2. Enter the search criteria. Click Search. Appointments with matching criteria are returned.
3. Click on the hyperlinked Start Date to view the details.

Change a Casual/Non Casual Appointment

A Casual/Non Casual Appointment cannot be changed if it has been sent to the Approver or DES. It must first be Recalled/Rejected by the Approver and may then be accessed in the Error Report or by searching for the Appointment.

1. Click on the hyperlinked Start Date to view the details in the error report
2. Make necessary changes and click Save.
3. A confirmation message is displayed. The record is automatically sent to the Approver's Worklist.

Recall a Casual/Non Casual Appointment

1. Click Approvers Worklist and select the Appointments tab.
2. Choose Recall from the drop down list and click Select. This returns all appointments which can be recalled. An appointment cannot be recalled on the payroll closing date.
3. Tick the check box of the appointment to be recalled and click Recall from DES.
(Recalled appointments will be returned to the Error Report Worklist the following day)
4. A confirmation message is displayed.

Delete a Casual/Non Casual Appointment

A Casual/Non Casual Appointment cannot be deleted if it has been sent to the Approver or DES. It must first be Recalled/Rejected by the Approver and may then be accessed in the Error Report.

1. Click on the hyperlinked Start Date to view the details in the error report.
2. Click Delete to remove appointment.
3. A confirmation message is displayed.

Approve an Appointment

1. The Approver clicks on the Approver's Worklist on the OLCS menu.
2. Click on the Appointments tab of the Worklist.
3. To view the Appointment, click on the hyperlinked Start Date. Click Send to DES. **It is mandatory to complete the checks in relation to specific circulars so that the Appointment will progress to DES.**
4. Click Reject if you are not satisfied and the Appointment is returned to the Data Entry Error Report Worklist.
5. If you do not wish to view the Appointment tick the checkbox(s) on the Worklist and click Send to DES. **It is mandatory to complete the checks in relation to specific circulars so that the Appointment will progress to DES.**
6. A confirmation message is displayed

Cancel Casual/Non-Casual Appointment (Department User Only)

An Appointment that has the status of Processed cannot be cancelled by a school user.

In order to have the appointment cancelled complete the "Cancel Casual/Non Casual Appointment" form which is located on the OLCS landing page in the Download Document Section and return to the relevant payroll in the Department.

OFFLINE REPORTS

Please note these reports run overnight

1. Click Reports Generator under Reporting on the OLCS menu.
2. Select the Report Name from the drop down menu.
3. Click Once Off or Recurring. (If Once Off leave Frequency blank)
4. Select Report Frequency. If recurring weekly the user must select the day of the week the Report should run. If monthly the user must select the monthly recurrence patterns.
5. Click Next.
6. If Recurring is selected enter Range of Recurring Start and End Date. This date must be today's date or a future date and will run on the selected date within each week(s)/ month(s).
7. Enter the Report Start and End Date. These dates may be the same as the recurring dates or past dates which can be used to access historical data. Click Next.
8. Click Save.
9. A confirmation message is displayed
10. The Report is processed over night and can be viewed next day by accessing the Report Window.

View Report

1. All Reports are generated in PDF format. In order to View/Print a Report an Adobe Acrobat Reader must be installed.
2. Go to Offline Reports and select Reports Window. This shows all completed Reports.
3. Click on the hyperlinked Report Name to View/Save/Print the Report.
4. Click Close to return to Reports Window.

Delete Report

1. Click Reports Window under Offline Reports.
2. Tick the checkbox of the report that is no longer required and click Delete.
3. A confirmation message is displayed.

Online Reports

Claims/Appointments/Leave Keyed

This Report is to assist the Data Entry person to access data keyed for a specific period.

1. Under the heading Online Reports Click Claims/Appointments/Leave keyed.
2. Input PPSN if the report is required for one staff member and From Date and To Date for the period in which Claims/Appointments/Leave was **keyed**. If the report is to cover all staff members then the PPSN is not input.
3. Click on drop down menu to choose either Claims/Appointments/Leave.
4. Click on Search.
5. Results of all data keyed for the specified period will returned.

Sick Leave Individual Report

1. Under the heading Online Reports click Sick Leave Individual Report.
2. Input PPSN, enter From Date and To Date for period required.
3. Click Search.
4. A record of all sick leave between these dates will be displayed.
5. If PPSN is input and no dates are entered a report of all sick leave records spanning the past 4 years will be displayed.

Sick Leave Letters

This letter can be generated and issued to the absent staff member (if required)

1. Under the heading Online Reports click Sick Leave Letters.
2. Enter PPSN and Click Next
3. Select Letter Type from Drop Down menu
4. Click Print and the letter will be displayed.

LOCAL ADMINISTRATOR

Account Locked.

Where a Data Entry Person who has a previously recorded email address has 3 incorrect attempts at login an automatic email with a randomly generated password will be sent to the email address on record. The new password will be contained within double quotes. An e-mail also generates to the Approver to inform them that the data entry account password has been reset. If this is in order no further action is required. If this is not in order please contact the Department.

Where a Data Entry Person with no email address on record has 3 incorrect attempts at login their password can be reset as follows:-

1. Click on Users (side menu)
2. Enter the User Id in the Login field or PPSN of person whose account is locked.
3. Click Search.
4. Click on the radio button and click Reset User Password.
5. Enter New Password (must consist of at least 8 characters one of which must be numeric e.g. january1) and confirm. As the password is case sensitive the same format of upper/lower case letters must be used by the Data Entry Person when they attempt to login. On login they will be required to change their password.

Reset User Account.

Where the Personal details of the Data Entry Person do not match those recorded at the time of self-registration the users account must be reset prompting the user to Self-Register.

1. Click on Users (side menu)
2. Enter the User ID in the Login field or PPSN of person whose account is to be reset.
3. Click Search.
4. Click on the radio button and click Reset User Account.
5. Tick the Confirmation box.
6. Enter New Password (must consist of at least 8 characters one of which must be numeric e.g. january1) and confirm. The Data Entry Person will now need to complete Self-Registration.

Add A New User.

1. Click on Users (side menu)
2. Enter PPSN and click search.
3. A Message with no results found will be displayed. Click New.
4. Re-enter PPSN and complete user details on Section 1.
5. At Section 2 the Login Id for the new user is displayed. Enter a Password for this user. (must consist of at least 8 letters and 1 numeric e.g. january1).
6. At Section 3 Select User Role(s) and Click Add Role.
7. Section 4 displays the Role(s) added. If the incorrect role has been selected it can be removed
8. Click Add once you are satisfied the correct role(s) have been selected.
9. A Confirmation message is displayed.

SCHOOL CLOSURES

OLCS currently displays all school closures which have been defined by the Department. If a school has closure dates other than those defined by the Department i.e. Summer/Voluntary/Exceptional closures/Polling Day they should be recorded on the Add School Closure Screen.

Add School Closures.

1. Click on Add under School Closure on the OLCS menu.
2. Select the Closure Type and Academic Year. Enter the Start and End Date of the School Closure.
3. Click Add.
4. A School Closure confirmation message is displayed.

Note: - The Claim Grid is disabled for the summer holidays. If a school has entered the dates of their own summer holidays, then these will replace the standard dates entered by the Department.

Search School Closures.

1. Click on Search under School Closures on the OLCS menu.
2. Select the Academic Year and click Search.
3. The School Closures results screen is displayed. This shows all school closures which have been entered by the school and all Department standard school closures.

Change School Closures.

Only School Closures which have been entered by the school can be changed.

1. Click on Search under School Closures on the OLCS menu.
2. Select the Academic Year and click Search.
3. Click on the hyperlinked Closure. This opens the Change School Closure Screen.
4. Enter the new School Closure dates and click Save.
5. A Change School Closure Confirmation message is displayed.

Delete School Closures.

Only School Closures which have been entered by the school can be deleted.

1. Click on Search under School Closures on the OLCS menu.
2. Select the Academic Year and Click Search.
3. Click on the hyperlinked Closure which opens the Change School Closure Screen.
4. Click Delete. A message is displayed "Are you sure you want to delete this school closure from OLCS?" Click Yes.
5. A Delete School Closure Confirmation message is displayed.