To complete a timesheet

refers to:
temp desk form → timesheets tab
vacancy form → timesheets tab
candidate form → timesheets tab → temp tab
candidate form → timesheets tab → accounts tab

see also
Completing Timesheets - hints for problems

- Either use an **Add** Timesheet button or **Expand a Provisional** in the Timesheets tab.
- Make sure the correct Vacancy and Candidate's details are selected. They will be displayed in the header bar in the following format: W2004/35 Timesheet for 'Candidate' as 'Position' at 'Company'.
- Shifts or Work Pattern Hours - dependent on being set up on the Temp Desk Settings
- A Shift view can appear showing the shifts that the candidate was expected to work. If there are any changes to be made, edit the shifts in the relevant fields (eg. From / To / Break etc) and enter any comment in the comment box if needed. An additional line may be added by clicking the Add button, and editing the new line manually. The total hours at the bottom will be entered by default into the Units Paid on the next form.
- A Shift view can appear showing the shifts that the candidate was expected to work. If there are any changes to be made, edit the shifts in the relevant fields (eg. From / To / Break etc) and enter any comment in the comment box if needed. An additional line may be added by clicking the Add button, and editing the new line manually. The total hours at the bottom will be entered by default into the Units Paid on the next form.
- Rates view:
- If a Rates Scheme has been linked to the vacancy the paybands will be displayed with all the expected hours in the top line. If the Rates Scheme uses a script to break down the shifts according to week day, week ends, bank holidays, night rates or types of shift then the appropraite number of units will be allocated to the correct pay band. A line for each day or a summary per payband is displayed.
- Check the units in the Units Paid column. It is possible to change the units paid – a warning may be displayed that the units do not match those of the shifts. The Rates of Pay are retrieved from the placement record. You can only Add rates at this stage if you have the rights.
- When you have checked that the details are correct, click on the **Next** button. A screen is then displayed with client, candidate and placement details.

- Check the details, and make any necessary changes. Any changes to client or Candidate will update the master records.
- Click on the **Save Provisional** button to save this timesheet for further editing, or click on the **Finish** button to complete the timesheet.
- A popup message is displayed, showing the timesheet number. Make a note of this and write it on the candidate's paper timesheet.
- Click **OK** and the timesheet appears in black on the Timesheet tab. Thereafter it cannot be edited (depending on Agency settings), only deleted. You are offered the option of recreating it as a Provisional, which can then be completed correctly.

see also
Timesheet Image Linking
Create provisional timesheets from placements
Online timesheets

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Back to Temp Desk

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