



# Reed Education JoinedUp client guide

JoinedUp

# Introducing JoinedUp

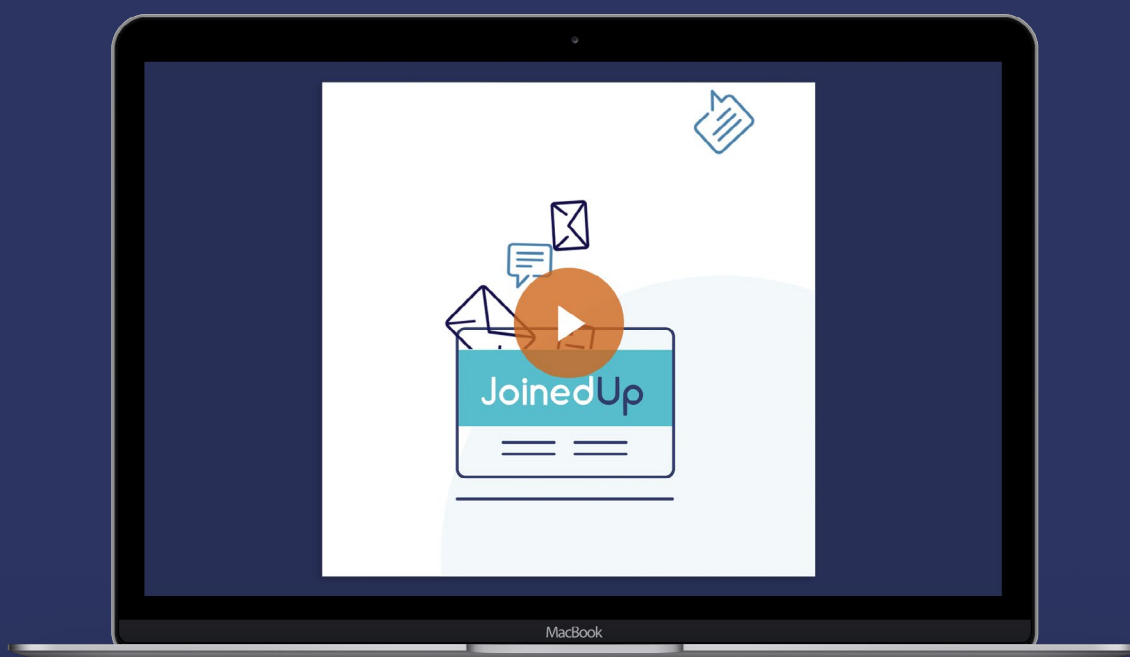
At Reed Education, we have invested in our user experience by partnering with JoinedUp to deliver a bespoke workforce management portal for schools and colleges in order to meet our goal:

“ To make recruiting for supply staff seamless and provide an easy to use system to manage the process – saving money, time and placing high-quality academic professionals fast. ”

JoinedUp gives you complete control while working with us. The user-friendly system provides a central portal for clear communication and access to our expertise.

This user guide has been designed to give you a clear understanding as how to use the system.

Watch our [introduction to JoinedUp](#):



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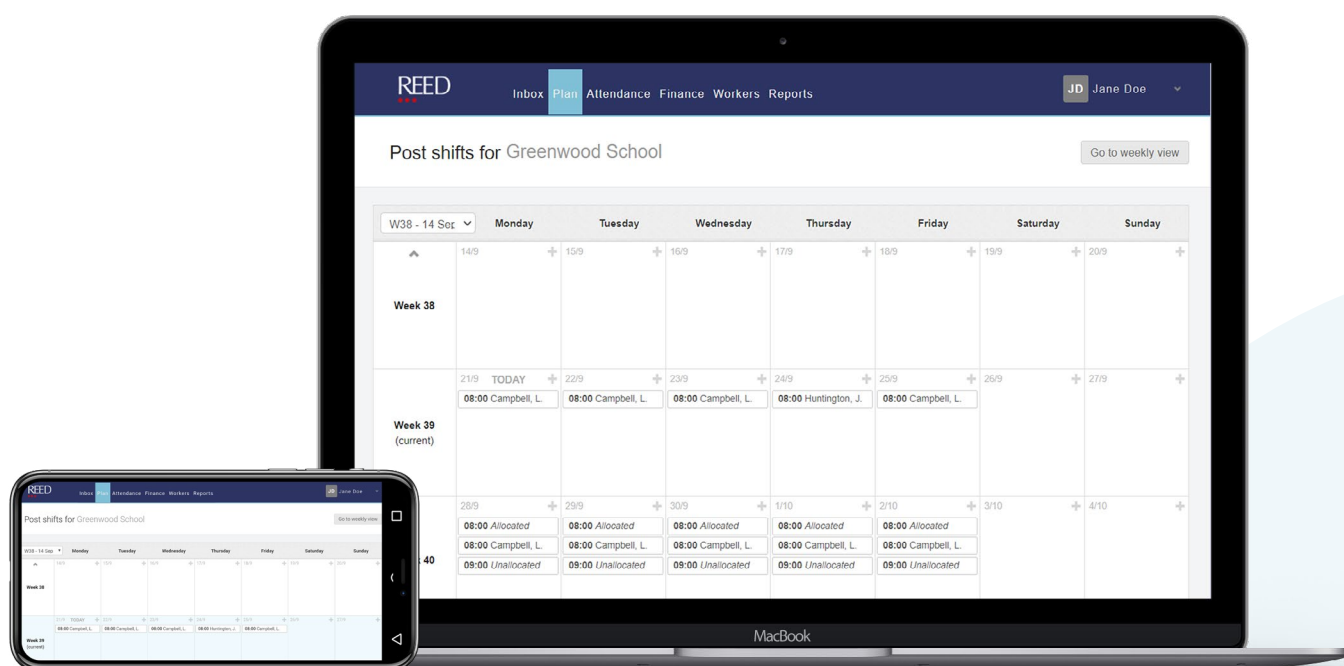


# About JoinedUp

JoinedUp gives you greater control when it comes to selecting and booking supply teachers and education professionals to work in your school or college, with consolidated management information and compliance checks all easily viewable.

Everything at your fingertips, all on one system:

- Book your supply staff online through JoinedUp and make changes as and when you wish
- See all your shifts on one screen, by week or month. This includes previous, current, and cancelled shifts, plus all queries and messages raised against shifts
- See more than just a name: view supply teachers' profiles and skill sets prior to arrival at your school
- Compliance checks for all supply staff in one place
- One communication channel: contact Reed Education and your booked professionals through JoinedUp
- View, amend and authorise timesheets for all booked supply staff
- See all financial reports regarding your shifts
- Whether you are on a laptop, tablet or mobile device, you can always stay up-to-date

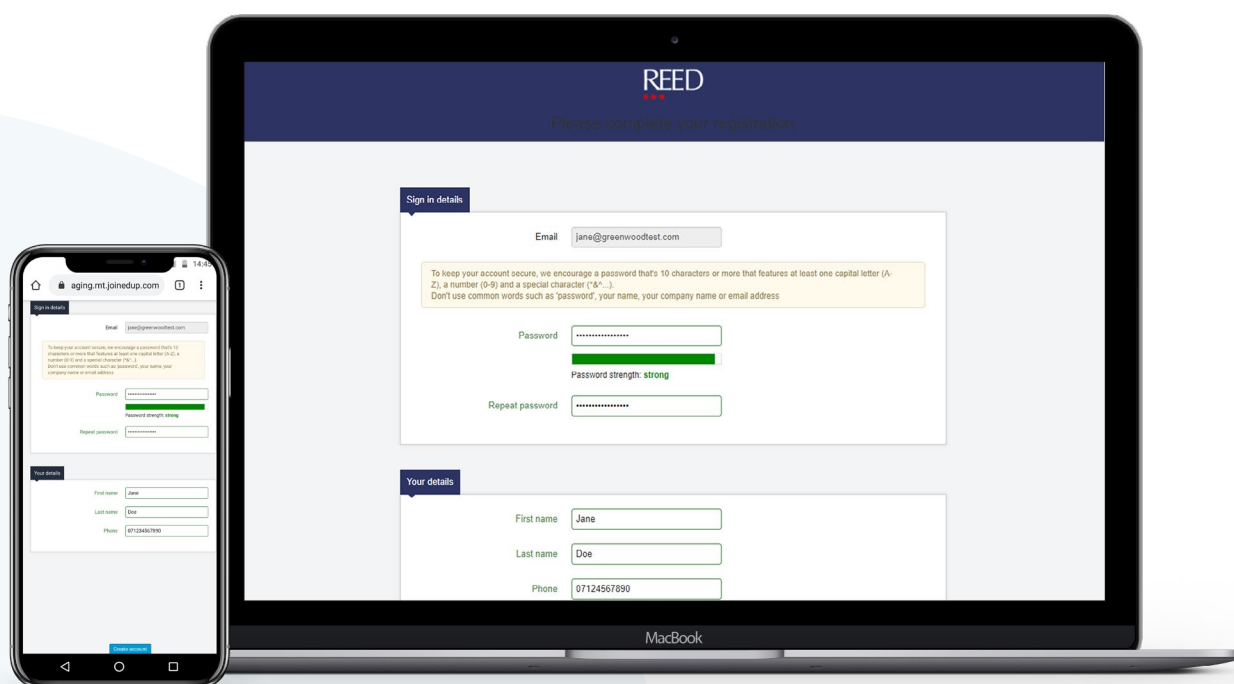


# Getting started and setting up

From headteachers and curriculum leaders, to finance and office staff, multiple school staff members can have different access levels to JoinedUp. We will take the time to consult with you to find out who needs access to which functions.

Be ready to start working in three simple steps:

- 1 We will create your basic profile and send you a link to get you started – you will find this in your email inbox from [system@joinedup.reed.com](mailto:system@joinedup.reed.com).
- 2 Click the link, set up your password, and populate the required personal information.
- 3 That's it, you are ready to go! Whenever you want to access the system, just go to [app.joinedup.com](http://app.joinedup.com) and sign in on your laptop, tablet or mobile device. We recommend you bookmark the webpage for future use.



# Create a shift

To place an order, first click on 'Plan' on the top banner menu, and then select 'Post shifts' which will take you to your shift calendar.

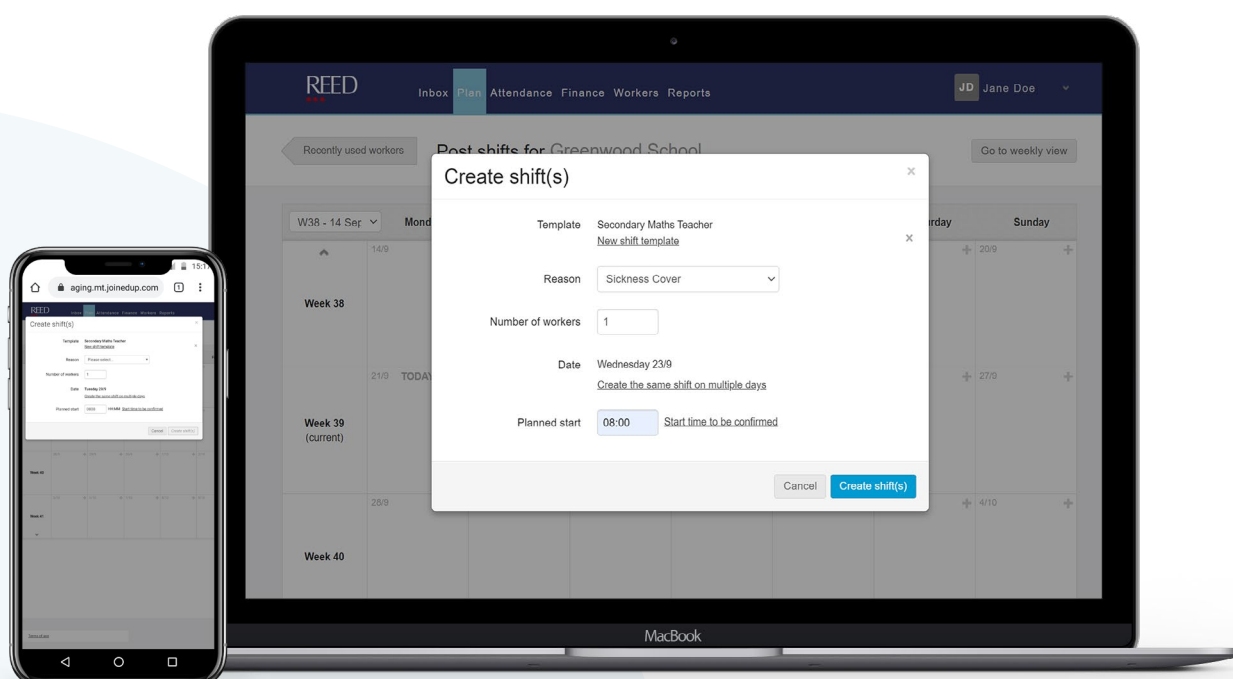
Place orders in three simple steps:

- 1 Select the '+' button on the day you want the order to start.
- 2 Select the shift template for the role you are looking to fill and then enter a start time and reason for the shift.
- 3 By clicking 'Create shift(s)', your order will be submitted directly to the Reed Education team.



Our library of shift templates cover all roles inside an education establishment, and have been designed to save you time when booking academic and non-academic staff.

Your Reed Education consultant can now see your order and find the best candidate for your shift. The order will appear on your calendar and you can see in real time its status and who is assigned to the order.



# Online shift calendar

To see your ordered shifts' statuses, first click on 'Plan' on the top banner menu, and then select 'Post shifts' which will take you to your shift calendar. You can view your calendar in a weekly or monthly view, depending on your preference.

Easily check live orders at a glance with our shift statuses:

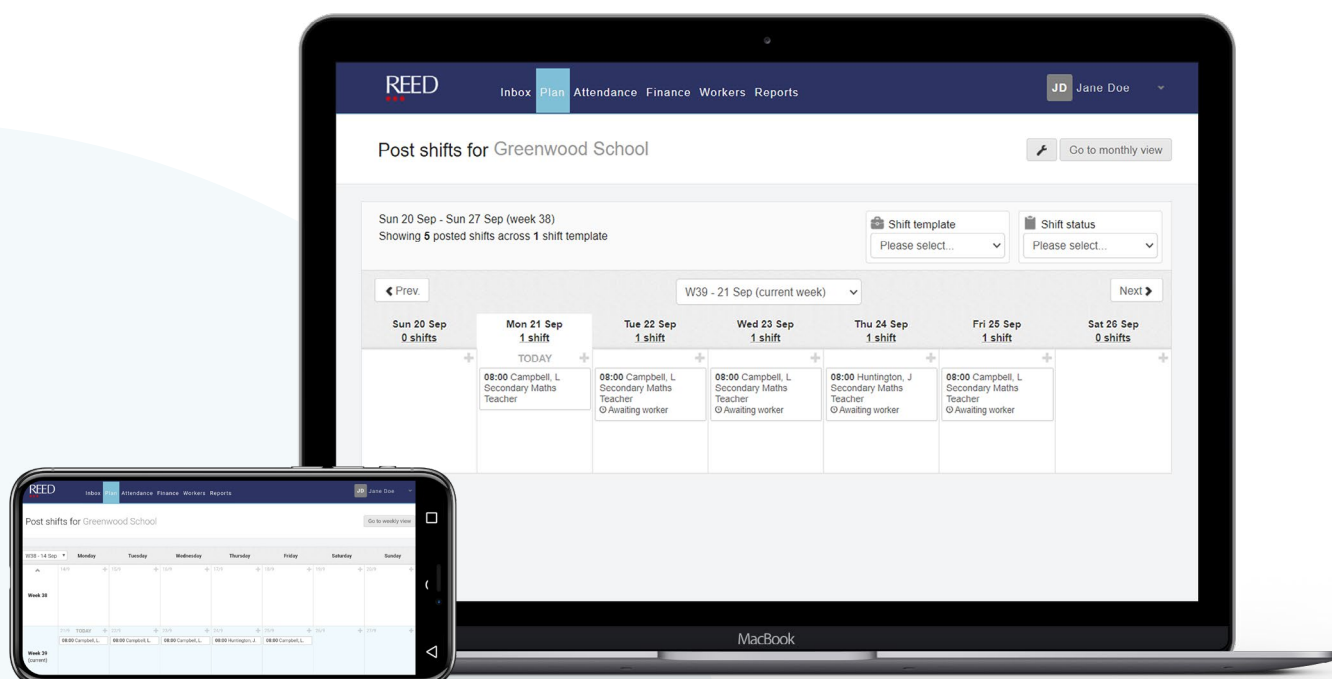
**Unallocated** – The shift has been received but no worker has been matched against the shift.

**Allocated** – Your Reed Education consultant has provisionally matched a worker to the shift.

**Named worker** – A professional has been named and confirmed for the shift.



Monthly view gives you a high-level overview of the shifts that are due to be completed at your school or college. Weekly view has more options to drill down further into the detail of the shifts.



# Compliance and vetting information

Click on 'Workers' in the top banner menu to view a list of education professionals who have worked for you in the past on JoinedUp, or who have been allocated to work at your institution in the future.

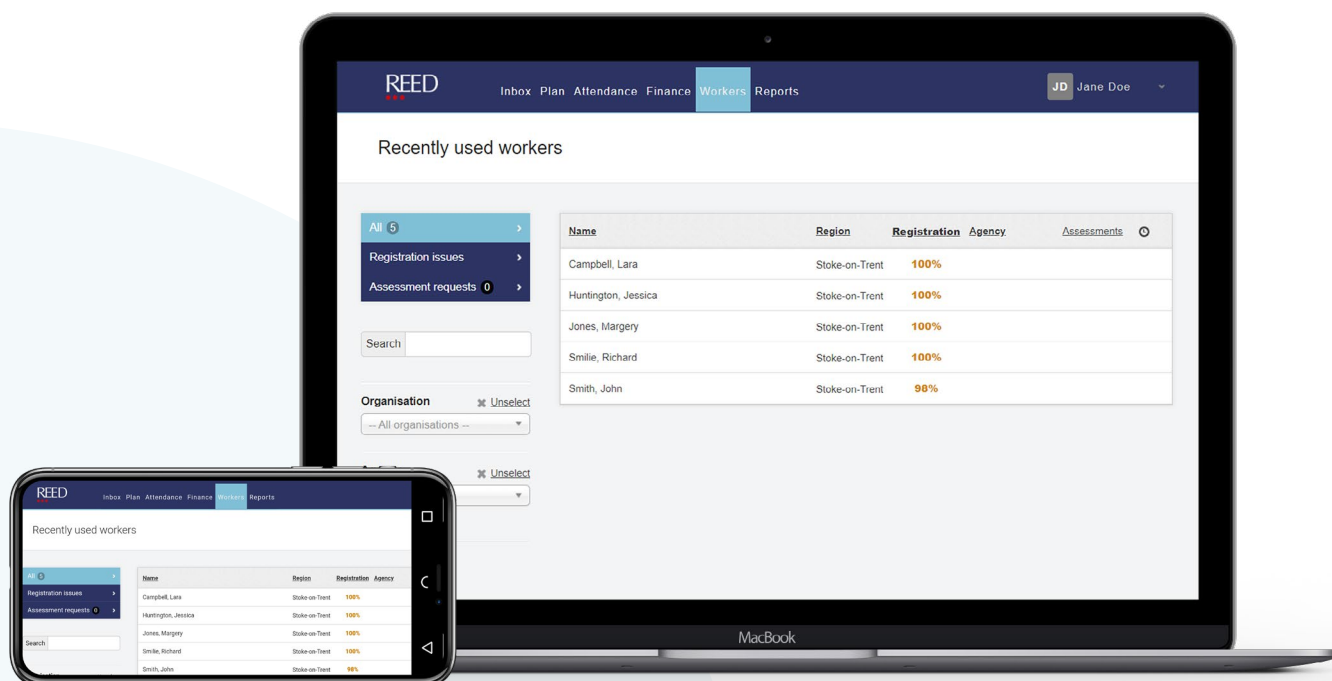
To view an education professional's full profile, click on the worker's name.

In the profile, use the menu on the left-hand side to navigate through aspects of their personal profile, including:

- Timesheets
- Shift attendance statistics
- Skills and experience

The skills and experience section contains a copy of the worker's Central Register Certificate (CRC). The REED CRC contains:

- Photographic identification
- Confirmation of qualifications and experience
- Details of their DBS





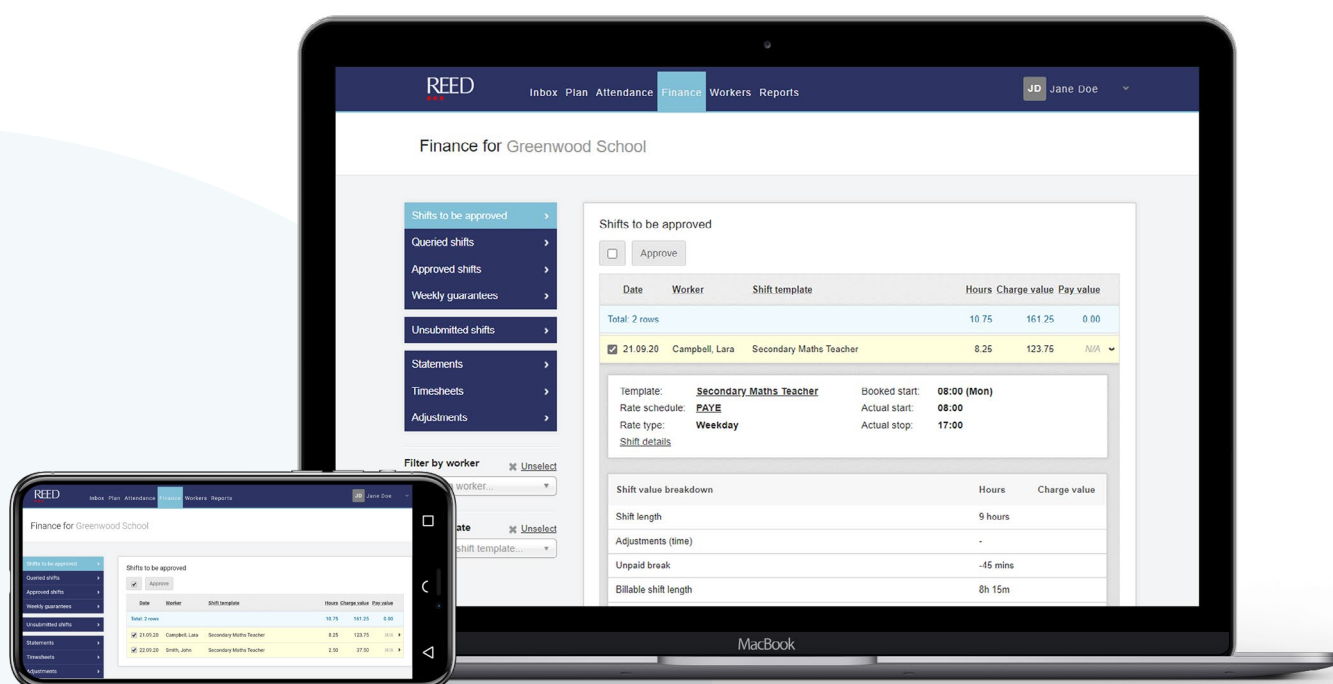
# Authorising timesheets

Click on 'Finance' in the top banner menu to view all activities related to timesheets. Use the menu on the left-hand side to navigate to shifts at different stages of the confirmation process.

**Shifts to be approved** – Here you can check completed shifts.

If you are happy with the details, you can approve the shift for payment. You can do this by clicking on the tick box by the individual shift, or select multiple shifts, and then click 'Approve'.

If there is a timesheet with incorrect details, you can raise a query to make amendments. To do this, click on the shift, then select '+ Raise a query'.



# Timesheet management

You can quickly and easily review historic timesheets and follow-up on any queried shifts and adjustments.

**Approved shifts** – All historic shifts that have been approved will be in this folder. You can filter by the worker, shift template and week to find the shift you are looking for.

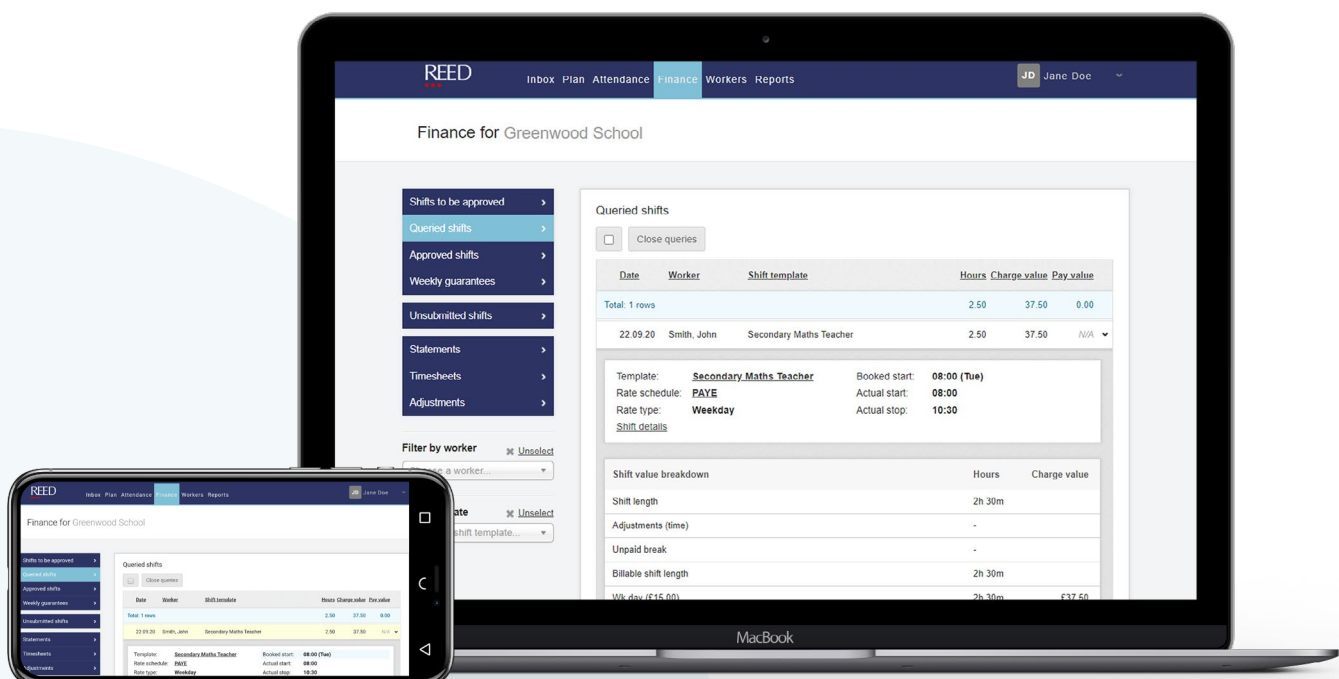
**Queried shifts** – Shifts in a queried state will be in this folder. Once resolved by your Reed Education consultant, the query will be closed. The reviewed shift details will then need to be approved by your school or college.

**Adjustments** – Shifts that have been approved, but later found to be incorrect, can be adjusted. Adjusted shifts will appear in this section for you to review.



JoinedUp operates a site lock process.

All timesheets need to be approved or rejected in order to lock the site. Only when the site is locked will all timesheets be processed for payment for that week. Adjustments after site lock can be made for the next week's payroll.



# Financial reports

Click on the 'Reports' section in the top banner menu and then select 'Financial reports' to view reporting options for each site, shift template and worker.

You can choose the timeframe you want to review and export all reports to Excel. This will give you a line-by-line breakdown of all shifts worked in a format that is easy to interrogate and adapt to suit your needs.

## Management Information

**Dashboards** – JoinedUp is designed to be able to find the information you want at a glance. The in-system dashboards provide you with instant visibility on filled and outstanding shifts for the day or week.

**Custom reports** – The reporting functionality allows you to set up reports which can pull through the granular detail of every shift within the search criteria. If you cannot find the data you are looking for, please speak to your consultant, as we may be able to create a custom report for you.

