Hobson Prior Contract Management Portal:
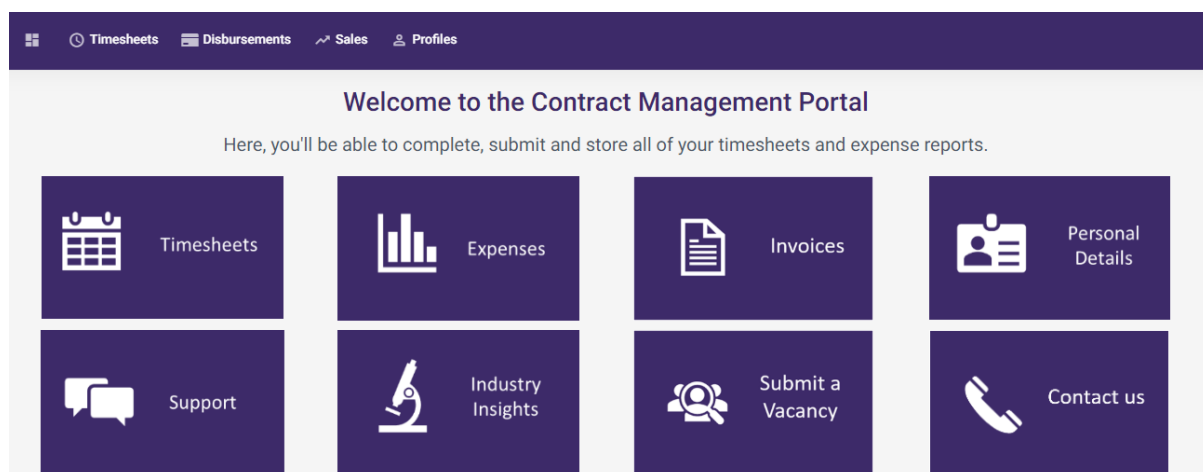
Timesheet Management Guide – Daily Rate

contractsupport@hobsonprior.com

Exceptional People

Introduction to the Hobson Prior Contract Management Portal

For the duration of your Assignment you will use the Contract Management Portal to:

- Submit your timesheets for approval
- Submit your expenses for approval
- View your invoices and payments, (if you are operating via your own PSC)
- Amend your personal details
- Access industry insights and exciting vacancies
- Earn rewards by submitting friends to our Refer a Contractor Scheme

Contents

Logging onto The Contract Management Portal

We will register your details for the Contract Management Portal ahead of the start of your assignment. You will receive a welcome email containing your username and a separate email containing your temporary password.

Once the email has been received, you will need to click on **'Login Here'**, which will direct you to the portal.

The portal will notify you that your temporary password has expired and you will need to create a new password.

The rules for creating a secure password on the portal are as follows:

- Your password must be between 8 and 50 characters long and contain at least three of the following:
  - Numbers
  - Upper case letters
  - Lower case letters
  - Symbols

- The password can not contain:
  - Spaces
  - Alphabetical sequences (eg. abcd…)
  - Numerical sequences of length 3 (eg. 123…)
  - Qwerty keyboard sequences (eg. asdfg…)
  - Four repeated characters (eg. 0000)
  - Accented letters e.g. á é
  - The following characters: £ ¬ € < >

Timesheet Management

Timesheets need to be entered weekly onto the Hobson Prior Portal for the client's approval.

The standard process is to submit timesheets is via online authorisation through the portal.

The client authorising manager will be sent a notification email and can log into the Hobson Prior Portal to approve your hours. If the client manager is unable to access the system, you can also download a PDF copy of your timesheet, which you can send back to Hobson Prior with the manager's manual signature:

Creating Your Timesheet

- Click on the Timesheets icon
- Click the drop-down arrow and select your current placement
- In Timesheet Period, select the week ending date of the week you need to submit; your timesheet will then be displayed on the screen below
- Enter your full days worked by typing 1 into the standard daily column
- If you worked less than 1 day, enter the nearest ¼ day. For example, if you worked half a day you would enter 0.50
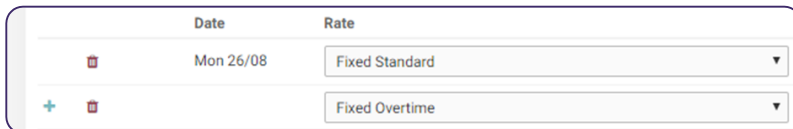- The system will automatically calculate the total units at the bottom of the page

Timesheets

TIMESHEET - NOT STARTED

	Date	Rate	Start	Break	Finish	Hours	Units	Comment	
🗑	Mon 16/09	Fixed Standard ▾					1		
+ 🗑		Fixed Overtime ▾					5.5		
+	Tue 17/09	Fixed Standard ▾					0.5		

RATE INFORMATION

Rate	Period	Pay	Total Units	Total Pay
Fixed Standard	Daily	GBP300.00	3.00	GBP900.00
Fixed Overtime	Daily	GBP37.50	5.50	GBP206.25
				GBP1,106.25

Adding Non-Standard Hours

If you have additional non-standard rates written in your Assignment Schedule, you will have the ability to add additional lines into your timesheet:

- Submit your standard time as normal
- On the left-hand side next to each day there will be a plus button; this will bring up an additional row showing any non-standard rates agreed for your Assignment
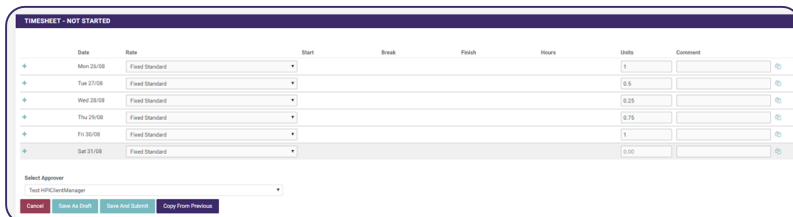
		Date	Rate
	🗑	Mon 26/08	Fixed Standard ▼
+	🗑		Fixed Overtime ▼

- Select the relevant rate and enter the number of additional hours

PLEASE NOTE, any non-standard hours must be agreed in advance with the client prior to carrying out the Services

Submitting Your Timesheet for Online Approval

- Check your timesheet is correct
- Select your timesheet approver from the approver drop down list
- Select **'Save and Submit'**

TIMESHEET - NOT STARTED

	Date	Rate	Start	Break	Finish	Hours	Units	Comment
+	Mon 26/08	Fixed Standard					1	
+	Tue 27/08	Fixed Standard					0.5	
+	Wed 28/08	Fixed Standard					0.25	
+	Thu 29/08	Fixed Standard					0.75	
+	Fri 30/08	Fixed Standard					1	
+	Sat 31/08	Fixed Standard					0.00	

Select Approver
Test HPIClientManager

Cancel | Save As Draft | Save And Submit | Copy From Previous

Once the timesheet has been submitted to the client authorising manager will be notified via email to approve your timesheet online. You will receive an email notification to advise whether your timesheet has been approved or rejected.

Submitting Your Timesheet for Paper Approval

- Check your timesheet is correct
- Select your timesheet approver from the approver drop down list
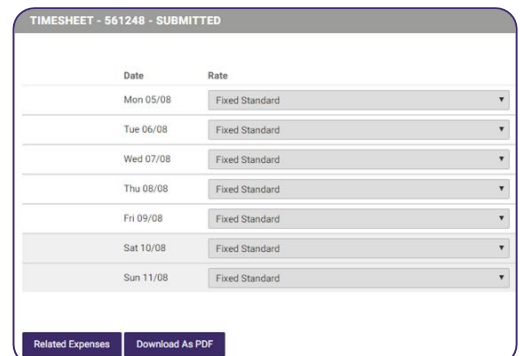- Select **'Save and Submit'**
- Confirmation will come up that the timesheet has been submitted and you will have the option to select 'Download as PDF'

- Print the PDF and obtain the client authorising manager's signature
- Email a copy of the signed timesheet to TimesheetApproval@hobsonprior.com

TIMESHEET - 561248 - SUBMITTED

Date	Rate	
Mon 05/08	Fixed Standard	▼
Tue 06/08	Fixed Standard	▼
Wed 07/08	Fixed Standard	▼
Thu 08/08	Fixed Standard	▼
Fri 09/08	Fixed Standard	▼
Sat 10/08	Fixed Standard	▼
Sun 11/08	Fixed Standard	▼

Related Expenses | Download As PDF

Submitting a '0' hour timesheet

If you are unable to provide Services for a week due to illness or holiday, you must submit a '0' hour timesheet.

- Select the Timesheets icon
- Select your current placement and the relevant period ending date
    - If you are on a daily rate, you will need to enter '0' in the unit's column
    - If you are on an hourly rate, you will need to enter the start, break and finish time as '0'
- Click **'Save and Submit'**

Checking Your Timesheet's Status

There are several ways you can check the status of a timesheet:

1. Review recent timesheets list

- Scroll to the bottom of the homepage to see a list of your recent timesheets

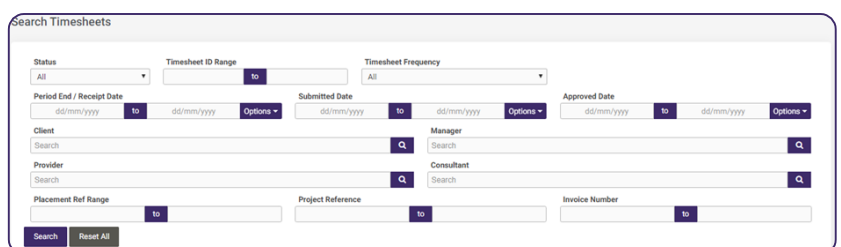| ID	Status	Placement	Job Title	Client	End Date	Pay (GBP)
Create	Missing	BH-6243	Test HPE MSP	Randstad Sourceright GmbH	06/10/2019	2153.76*
567746	Approved	BH-6175	HPE Man CO SEK TEST	Test HPE SEK Test	06/10/2019	165.36
567701	Submitted	BH-6174	HPE Man Co EU Hourly	TEST HPE TEST	06/10/2019	826.06
567705	Draft	BH-6175	HPE Man CO SEK TEST	Test HPE SEK Test	29/09/2019	939.40*

RECENT TIMESHEETS (30)

- The status column will confirm if the timesheet is in Missing, Draft, Submitted, Approved or Paid status
    - If the timesheet is missing you can click on 'Create' in the ID column, this will take you directly to the timesheet entry screen
    - If the timesheet is in 'Draft' you can select the number in the ID column, this will take you to the timesheet and you can submit it for approval
    - Once you have submitted your timesheet, the status will change to 'Submitted'
    - Once the client authoriser has reviewed and accepted the timesheet, the status will change to 'Approved'
- If you are operating via your own PSC the status will also confirm when an invoice has been paid and display a link to your Self-Bill Invoice

2. Timesheets tab

- At the top of the homepage, select the timesheets tab
- On the drop-down menu, you have the option to select 'Draft', 'Unauthorised', 'Approved', and 'Rejected' timesheets
- Select the relevant status you are looking for example 'Unauthorised' will take you to a list of timesheets in the Unauthorised status

3. Timesheet Search

- At the top of the homepage, select the timesheets tab
- Select 'Search' to bring up a broad range of search criteria for you to use

Resubmitting a Rejected Timesheet

If your timesheet has been rejected, you will receive an email from the portal to notify you of this. The timesheet will automatically revert to a 'Draft' status and will appear on the homepage under 'Recent Timesheets'.

RECENT TIMESHEETS (10)

ID	Status
568091	Draft

- Select the Timesheet ID to open the draft timesheet
- Make the required corrections
- Select 'Save and Submit'

Alternatively, you can go to the timesheets tab, on the drop-down list you will see the draft marked as (1)

Select the Timesheet ID to open the draft timesheet

- Make the following corrections
- Select 'Save and Submit'

Timesheets

Create

Drafts **1**
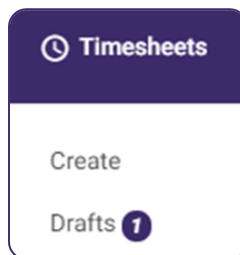
Disbursement Management

Completing Your Disbursement

You will be sent a disbursement claim form prior to the start of your assignment. To make a disbursement claim this form needs to be completed and uploaded with any supporting receipts onto the Hobson Prior Portal for the client authorising manager to approve.

Expenses

To create a Disbursement Claim you will need to:

- Complete the Hobson Prior Disbursement Claim form
- Click on the **Expenses** icon

- Click the drop-down arrow and select your current placement
- In Disbursement Period, select the week ending date of the week you need to submit; your Disbursements will then be displayed on the screen below
- You would need to enter a description for your expense claim (Example September Disbursements)
- Click on 'Select Approver', and choose the clients authorising manager
- Under the category section select General Disbursements
- Enter the Receipt Date, Description and total claim value in the Gross section (If your PSC is VAT registered this will automatically add onto the self-bill invoice)
- **Do not amend the 'Currency' section.** If you have receipts in currencies other than your standard contracted currency, please apply the exchange rate prior to entering the Gross figure into the system.
- Click 'Upload' to attach your Disbursement Claim form and related receipts. PLEASE NOTE these need to be combined into one PDF document.
- At the bottom of the page you will be able to find the total amount entered
- Select 'Save' to save the disbursement claim in a draft status
- Select 'Submit' to notify the client's authorising manager will be notified via email to approve your disbursement online. You will receive an email notification to advise whether your disbursements have been approved or rejected.
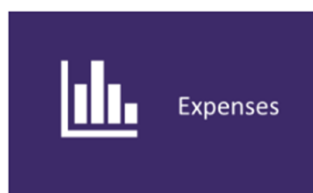
Checking the Status of your Disbursement Claim

There are several ways in which you can check the status of a disbursement:

1.   Review recent expenses list

- Scroll to the bottom of the homepage to see a list of your recent disbursement claims

ID	Status	Placement	Claim Date	Claim Currency	Pay (GBP)
1502965	Approved	BH-5896	15/09/2019	GBP	300.00
1519919	Approved	BH-5896	15/09/2019	GBP	300.00
1519918	Draft	BH-5896	08/09/2019	GBP	800.00
1449045	Invoiced: HPI-PI-0000780 (Paid:09/09/2019)	BH-6238	01/09/2019	GBP	300.00
1452735	Submitted	BH-6239	01/09/2019	GBP	300.00

RECENT EXPENSES (17)

- The status column will confirm if the claim is in Draft, Submitted, Rejected, Approved or Invoiced status
    - If the claim is in 'Draft' you can select the number in the ID column, this will take you to the draft claim and you can submit it for approval
    - Once you have submitted your disbursement claim, the status will change to 'Submitted'
    - If your disbursement has been rejected you can select the number in the ID column, edit the claim and resubmit it for approval.
    - Once the client authoriser has reviewed and accepted the claim, the status will change to 'Approved'
- If you are operating via your own PSC the status will also confirm when an invoice has been paid and display a link to your Self-Bill Invoice

2. Disbursements Tab

- Select the Disbursements tab at the top of the homepage
- On the drop-down menu, you have the option to select 'Drafts', 'Unauthorised', 'Approved', and 'Rejected'
- Select the relevant status you are looking for example 'Unauthorised' will take you to a list of timesheets in the Unauthorised status

3. Disbursement Search

- At the top of the homepage, select the Disbursement tab
- Select 'Search' to bring up a broad range of search criteria for you to use

Resubmitting a Rejected Disbursement

If your disbursement has been rejected, you will receive an email from the portal to notify you of this. The disbursement will automatically revert to a **'Draft'** status. This will appear on the homepage under **'Recent Expenses'**.

- Select the **'Disbursement ID'** to open the draft disbursement
- Select **'Edit'** at the bottom and make the required corrections
- Select **'Save and Submit'**

ID	Status	Placement	Claim Date	Claim Currency	Pay (GBP)
1549241	Draft	BH-6188	29/09/2019	GBP	200.00

RECENT EXPENSES (18)

Alternatively, you can go to the disbursements tab, on the drop-down list you will see the draft marked as (1)

- Select the **'Disbursement ID'** to open the draft disbursement
- Select **'Edit'** at the bottom and make the required corrections
- Select **'Save and Submit'**

Disbursements

Create

Drafts 1
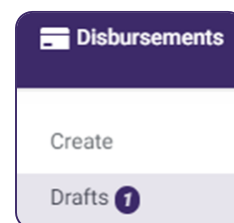
Amending Personal Details in the Contract Management Portal

The Hobson Prior Portal enables you to amend your personal details online

- Login to the Hobson Prior Portal
- Select the Personal Details icon
- Make the changes and select 'Save'
- Hobson Prior will receive a notification from the portal for us to approve or reject the request
- When you next log in to the portal, you will have a notification in the top right-hand corner to confirm the approval or rejection of this request.

Amending Your Personal Service Company bank details in the Contract Management Portal

- Login to the Hobson Prior Portal
- Select the Personal Details icon
- Select 'View Bank Details'
- Make the changes and select 'Save'
- Hobson Prior will receive a notification from the portal for us to approve or reject the request

For us to approve this you will need to fill out a 'Consultancy Details Form' and provide us with an updated 'Bank Statement' so we can verify the account details are in your company's name.

Hobson Prior will email these documents to you, once we receive the change request of new bank details in the system. When you next log in to the portal, you will have a notification in the top right-hand corner to confirm the approval or rejection of this request.

PLEASE NOTE, if you are operating via an umbrella or management company. You will need to contact them regarding updating your bank details.