

# Welcome to In-Time

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Contractors guide



Connecting renewables specialists  
to **pioneering projects**



# Your self-service portal

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**Welcome to  
Taylor Hopkinson  
In-Time.**

Our online Timesheet, Expense and Document Management system. We hope you will find the following introduction and instructions helpful and comprehensive. If you have any questions or comments on the system, or require support using it, please contact [invoices@taylorhopkinson.com](mailto:invoices@taylorhopkinson.com)

## **In addition to submitting timesheets and expenses, you have access to the following functions!**

- All placement information including related contract documentation, information requests and AWR status.
- Your profile information, including the ability to update your personal information.
- Reporting of historical placement data.
- Viewing individual timesheet history.
- Action agency information requests, acceptance of contract and compliance documentation and/or submit queries using the comments feature.
- Viewing and printing payslips, self-bill invoices or advice notes and remittances.
- If you are a Limited Company contractor, the uploading of your supplier invoices against advice notes.

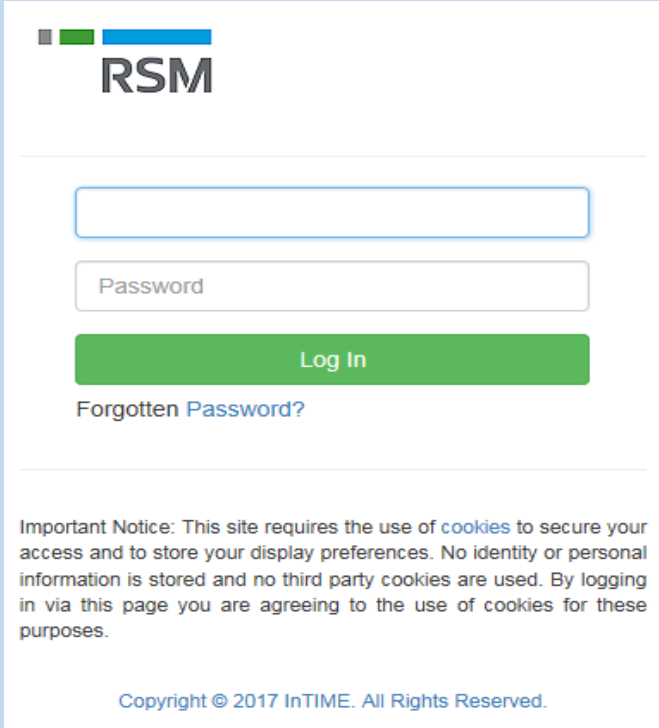
# How to access In-Time

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To get started with In-Time, click the link or use the URL below:

<https://contractors.taylorhopkinson.com>

You will be prompted for your username and password, which will have been generated and sent to you directly from the In-Time system or via your Taylor Hopkinson Administrator.



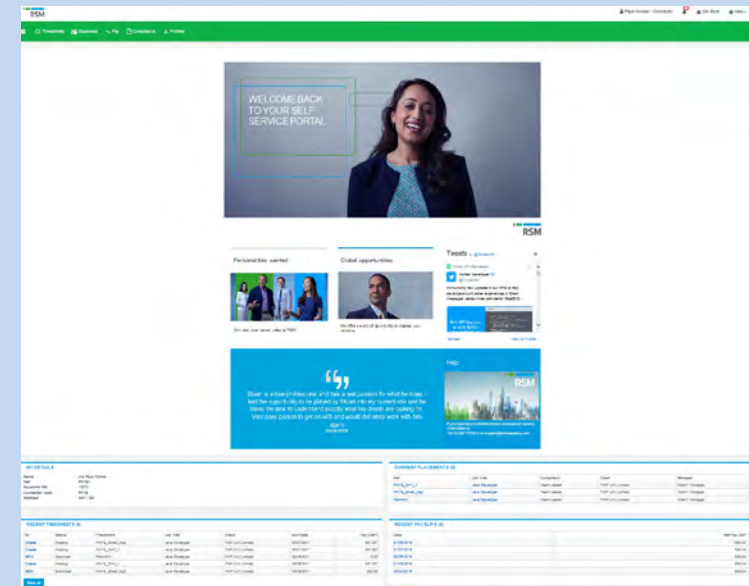
The screenshot shows a login interface for 'RSM'. At the top left is a logo consisting of three small squares (two green, one blue) followed by the text 'RSM'. Below the logo is a horizontal line. Underneath the line are two input fields: the first is empty, and the second is labeled 'Password'. Below these fields is a green button with the text 'Log In'. Under the button is a link that says 'Forgotten Password?'. At the bottom of the form area is another horizontal line. Below this line is a paragraph of text: 'Important Notice: This site requires the use of cookies to secure your access and to store your display preferences. No identity or personal information is stored and no third party cookies are used. By logging in via this page you are agreeing to the use of cookies for these purposes.' At the very bottom of the form area is a copyright notice: 'Copyright © 2017 InTIME. All Rights Reserved.'

# Your homepage

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The menu bar options will include the following as shown below:

- A multi square icon – taking you back to your homepage.
- Timesheets – this provides access to new, draft and previously submitted timesheets, and a timesheet search function.
- Expenses – which allows you to submit new and access historical expense claims.
- Pay – provides ability to access invoices and credit notes.
- Compliance – to facilitate information requests and submit documentation.
- Profiles – this gives details of your placements and associated clients.



Once you have logged in you will be presented with the main In-Time homepage.

The navigation menu is located across the top of the page.



Self Bill - Contractor 25 ? Help ▾

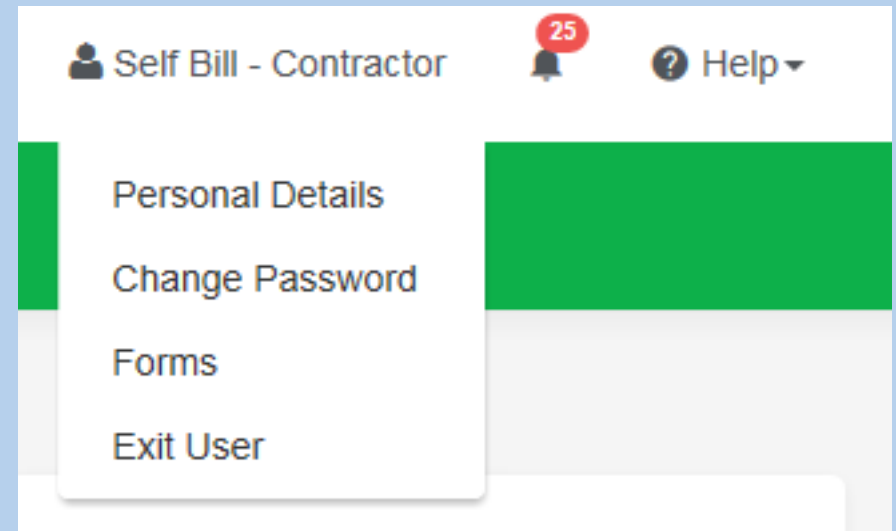
Timesheets Expenses Pay Compliance Profiles

## Your homepage

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### In the top right-hand corner of your screen:

- Your name – Click on this, options appear for you to:
  - Update your personal details
  - Change password
  - Request forms for holidays and address changes
  - Exit In-Time
- Bell Symbol – Advises you of notifications.
- Help – takes you to our online documentation help bank.



# Your dashboard

As you scroll down your homepage, your personal dashboard will provide you with a real-time status of your current placement information, timesheets, expenses, and contract documentation that you can easily access directly from the dashboard.

MY DETAILS

Name:

Mr Self Bill

Ref:

SELPB

Accounts Ref:

C000123

Contractor Type:

LTD

Self Bill:

Yes

Address:

No 1, high street, Town, County, NR2 2LP.

RECENT TIMESHEETS (5)

ID	Status	Placement	Job Title	Client	End Date	Pay (GBP)
5453	Submitted	Post1	Test	3RD_RATE_CLIENT	25/05/2017	90.00
5522	Submitted	SB_DAY_2	Home Care Worker	TMP (UK) Limited	25/05/2017	95.00
5589	Submitted	TimePattern-1	Job Title	TMP (UK) Limited	25/05/2017	90.00
5563	Submitted	TimePattern-2	Job Title	TMP (UK) Limited	25/05/2017	100.00
5451	Submitted	CONSULTANT_APPROVAL	Network Technician	TMP (UK) Limited	25/05/2017	720.00

Show all

\* Estimated value based on contracted hours and default rate

RECENT PURCHASE INVOICES & CREDITS (5)

Invoice Number	Invoice Date	Currency	Net	VAT	Gross	Paid
0000000093	12/05/2017	GBP	500.00	0.00	500.00	
0000000091	02/05/2017	GBP	9,605.20	0.00	9,605.20	<a href="#">View Remittance</a>
0000000096	10/03/2017	GBP	11,190.00	0.00	11,190.00	<a href="#">View Remittance</a>
0000000095	23/01/2017	GBP	4,720.00	0.00	4,720.00	<a href="#">View Remittance</a>
0000000093	09/10/2016	GBP	1,200.00	0.00	1,200.00	<a href="#">View Remittance</a>

\* Please view the remittance to check the clearing date for the payment.

CONTRACT DOCUMENTS (5)

Name	Status	Created	Due
Agency terms	QUERIED	20/05/2017	08/07/2017
Agency Terms	ACCEPTED	01/02/2017	
New Holiday	ACCEPTED	30/12/2016	
Agency terms	ACCEPTED	14/12/2016	
Criminal Waiver Document	QUERIED	15/11/2016	18/11/2016

CURRENT PLACEMENTS (5)

Ref	Job Title	Consultant	Client	Manager
SB_DAY_2	Home Care Worker	Team Leader	TMP (UK) Limited	Contract Manager
CONSULTANT_APPROVAL	Network Technician	Team Leader	TMP (UK) Limited	Client Manager
TimePattern-1	Job Title	Team Leader	TMP (UK) Limited	Client Manager
TimePattern-2	Job Title	Team Leader	TMP (UK) Limited	Client Manager
Post1	Test	Test Consultant	3RD_RATE_CLIENT	Client Manager3

RECENT EXPENSES (2)

ID	Status	Placement	Claim Date	Claim Currency	Pay (GBP)
29399	Submitted	CONSULTANT_APPROVAL	12/05/2017	GBP	200.00
29398	Submitted	CONSULTANT_APPROVAL	11/05/2017	GBP	100.00

RECENT REMITTANCES (5)

Date	Reference	Total
05/05/2017	525-030517113402	9,605.20
07/04/2017	525-070417120536	11,190.00
17/02/2017	525-150217105955	4,720.00
10/01/2017	525-090117175539	15,003.00
02/01/2017	525-301216111931	5,277.50

# Timesheets

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## Timesheet and expenses basics

### Statuses of timesheets and expense claims explained:

- All Missing: Timesheets that should be received during a specified date range but have not yet been created.
- Draft: Saved but not yet submitted. There are no draft expenses.
- Submitted: Created and submitted for approval. Submitted timesheets and expenses cannot be modified so please ensure the details are correct before submitting.
- Approved: Approved by your manager for payment.
- Rejected: Rejected by your manager. This is usually because of incorrect hours or expense lines. The manager may have provided a comment as to why the timesheet or expenses was rejected. Once rejected, the timesheet becomes a draft for editing and resubmitting. Expenses can be edited via the expenses Rejected menu option.

## Entering your timesheet

To begin, hover over Timesheets from the main menu bar at the top of the screen and select **Create**.

You will then be prompted to select the placement from the drop-down box to enter time against, as well as the week ending date. You can use the provided calendar popup to help you select the correct date.

The screenshot shows the 'Timesheet' entry form. At the top is a green navigation bar with icons for Timesheets, Expenses, Pay, Compliance, and Profiles. The main form has a 'SELECT PLACEMENT' section with a dropdown menu currently showing 'PAYE\_DAY\_1 (TMP (UK) Limited) - Paye Worker - Java Developer'. Below this is a 'Placement' label. To the right is a 'Timesheet Period' section with a calendar popup for March 2017. The calendar shows days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and dates (1-31). Below the calendar, there is a table for 'PLACEMENT INFORMATION' with fields: Ref Code (PAYE\_Email\_App), Job Title (Java Developer), Job Description, Date Placed (09/05/2013), Start Date (01/01/2013), and End Date (Unknown). At the bottom right, there is a section for 'Client: TMP (UK) Limited', 'Manager: Client Manager', 'Consultant: Team Leader', and 'Alternative Managers:'. A 'Paid' checkbox is also visible next to the calendar.



## Timesheets

After selecting the period you will be presented with a blank timesheet form similar to the screen shot shown below:

Enter **Hours/Units/Time** as applicable for the period selected. The basic rate is selected by default here, so you can start entering your time for each of the days.

If you require additional rates, click on **the green plus** to add a shift and select the appropriate item from the additional rate drop-down.

You can click on **Save As Draft** to store the timesheet which will allow you to return to this information to edit.

Once you have completed your timesheet click on the **Save And Submit** button, your timesheet will be sent to your Manager for approval.

**Please note:** You will not be able to make any further edits once the timesheet has been submitted for approval.

**TIMESHEET - NOT STARTED**

Date	Rate	Start	Break	Finish	Hours	Units	PO	Comment
Mon 20/03	Basic					<input type="checkbox"/>		
Tue 21/03	Basic					<input type="checkbox"/>		
Wed 22/03	Basic					<input type="checkbox"/>		
Thu 23/03	Basic					<input type="checkbox"/>		
Fri 24/03	Basic					<input type="checkbox"/>		
Sat 25/03	Basic					<input type="checkbox"/>		
Sun 26/03	Basic					<input type="checkbox"/>		

## Draft timesheets

If you have created timesheets and saved them previously without submitting, you can still access them by selecting Drafts from the Timesheet menu, or from your dashboard. You will then be taken to the timesheet form described in the Entering your timesheet section. Please refer to these instructions to edit and submit your draft timesheet.

**Draft Timesheets**

Search:

Select All Select None Choose Columns Show 10 entries

ID	Submit	Worker	Worker Type	Worker Ref	Worker Ext Ref	Ltd Tax Code	Ltd Company Name	Worker Invoice Period	Timesheet Start	Payroll/Freq
1675	<input type="checkbox"/>	Worker, Paye	PAYE	PAYE1						
1676	<input type="checkbox"/>	Worker, Paye	PAYE	PAYE1						
4504	<input type="checkbox"/>	Worker, Paye	PAYE	PAYE1						

Showing 1 to 3 of 3 entries

Previous 1 Next

If you have multiple draft timesheets you wish to submit for approval, tick the box in the Submit column against the applicable timesheet and click on **Submit**. If you need to access a specific timesheet, click on the number in the ID column to view, edit, or submit.

## Submitted timesheets

If you need to check the status of your submitted timesheets, you can use your dashboard and see the status, or use the **Unauthorised, Approved or Rejected** options from the Timesheets menu.

By clicking the timesheet ID you can also see a detailed view of that timesheet. Note that you can only modify rejected timesheets.



# Expenses

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## Entering your expenses

Go to the [expenses](#) menu at the top of the screen and hit [create](#), you will then be prompted to select the client and placement you wish to claim against. You will now be presented with a blank expenses claim form.

Select the correct type of expense and description from the provided dropdowns. Once you have filled in all the required fields hit save. You will then get a summary of your expenses. If you need to edit your claim please click the [Edit button](#) option. Once you have finished your claim, click Submit.

## Submitted expenses

If you need to check details of your submitted expense claim, or to see if your manager has approved them, click [Unauthorised, Approved or Rejected](#) on the Expenses menu.

You can now view the status and summary of your submitted expense claim. By clicking the relevant expense item you will be able to see a detailed view of the expense. Note that you will only be able to modify rejected expense claims.

Category	Receipt Date	Description	Units	Unit Net Rate	Net	Sales Tax Rate	Sales Tax	Gross	Currency	Receipt
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
	dd/mm/yyyy	Description...							GBP	Upload
Total:			0.00	0.00	0.00		0.00	0.00		

View Expenses

Placement Approvals History

**PLACEMENT INFORMATION**

Ref Code: CONSULTANT\_APPROVAL  
Job Title: Network Technician  
Job Description: add NARRATIVE: \*\*\*\*\*  
Date Placed: 2016-06-09  
Start Date: 2015-05-01  
End Date: 4321-11-11

**PARTICIPANTS**

Agency: Demo Agency  
Contractor: Mr Self Bill  
Client: TMP (UK) Limited  
Manager: Mr Client Manager  
Consultant: Team Leader

EXPENSE CLAIM - 955 - DRAFT PERIOD: 12/6/17 - 18/6/17

ID	Category	Receipt Date	Description	Unit	Unit Net Rate	Net	Sales Tax Rate	Sales Tax	Gross	Pay Net
32821	Hotel	13/06/2017	hotel	1	100.00	100.00	0%	0.00	100.00	100.00

\* Any currency conversion is approximate until the invoice(s) are generated or the item is exported.

# Invoices

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## Invoice & billing

If you are a Limited Company contractor and don't have a self-bill agreement in place, you will receive an **Advice Note**. The advice note will contain all the details needed to create an invoice. Typically, it will contain timesheet details and expense claims.

From the menu bar, select **Pay** and then List Advice Note.

The screenshot displays the 'Search Advice Notes' interface. At the top, there is a title bar 'Search Advice Notes' and a 'Q SEARCH OPTIONS' header. Below this, there are three tabs: 'Main' (selected), 'Date Ranges', and 'References'. The 'Main' tab contains several search and filter fields:

- Client:** A search input field with a magnifying glass icon.
- Worker:** A search input field with a magnifying glass icon.
- Consultant:** A search input field with a magnifying glass icon.
- Manager:** A search input field with a magnifying glass icon.
- Provider:** A search input field with a magnifying glass icon.
- Sent Status:** A dropdown menu with 'All' selected.
- Paid Status:** A dropdown menu with 'All' selected.
- Exported Status:** A dropdown menu with 'All' selected.
- Perm Invoice:** A dropdown menu with 'All' selected.
- Credited Status:** A dropdown menu with 'All' selected.
- Supplier Invoice Status:** A dropdown menu with 'Not Uploaded' selected.

At the bottom of the search options, there are two buttons: 'Search' (in a purple box) and 'Reset All' (in a grey box).

# Invoices

## Uploading your invoice!

Instead of sending your invoices to us by email, we would like to invite you to upload them against your timesheet via the In-Time portal! Please note we can still accept invoices via email for now if this is your preference.

Use the filters to search for advice notes waiting for you to create an invoice against. For example, by leaving the filters at their defaults and selecting **Search**, the system will return all advice notes; or you could search for just the advice notes that do not have an uploaded invoice against them by selecting **Supplier Invoice** status: Not Uploaded.

In the list of advice notes, scroll along until you see the invoice document column click **Upload** to upload an invoice to match the advice note.

- In the Your Invoice Date field, set the date of your invoice.
- The Net field is prep-populated with the amount from the advice note.
- The Sales Tax Code field is pre-populated with the information from the placement.
- The Sales Tax Amount is pre-populated based on the Net and Sales Tax Code fields.

Search:

Select All Select None Choose Columns Show 10 entries

Invoice Number	Invoice Sales Tax Code	Invoice Sales Tax Rate	Invoice Sales Tax	Invoice Sales Tax	Invoice Paid	Invoice Document	Primary Recipient
						<a href="#">Upload</a>	Email:Advice unknown.demo@
			0.00			<a href="#">Upload</a>	Email:Advice unknown.demo@

Showing 1 to 2 of 2 entries - 0 rows selected Previous 1 Next

[Download As Zip](#) [Print Selected](#) [Report](#) [CSV](#) [Download Schedule](#)

### Supplier Invoice

#### ADVICE NOTE

Advice Note Number	Sender	Consolidated By	Consolidated Entity	Advice Note Date	Uploaded Date
0000000066		worker	Advice Note	03/05/2017	N/A
Net	Currency	Recipient			
2000.00	GBP	Advice			

#### SUPPLIER INVOICE

Invoice Number	Invoice Date	Net	Sales Tax Code	Sales Tax Rate	Sales Tax Amount
<input type="text"/>	20/6/2017	2000.00	TO (None)	0.0%	0.00
Description	Accepted	Paid	Upload Date		
<input type="text"/>			26/6/2017		

Invoice File

Upload New File

[Upload](#) [Delete](#)

[Save](#)

- If required, enter a description for the invoice.
- Click Upload to search for the invoice on your computer click open and it will automatically upload.
- When the file is uploaded, a purple line appears across the screen.
- Click Save and the Invoice details are saved.

# Your profile

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## Viewing profile information

There are two types of profile information available, they are:

- **Select Clients from the Profiles menu**, this provides details relating to all clients who you are assigned to.
- **Select Placements from the Profiles menu**, this will provide you a list of all active placements that you are responsible for. You can obtain more information relating to the placement by clicking on details report. This will show all details such as the agency, Worker, Manager and Consultant associated with the placement as well as any reference codes, start and finish dates, job descriptions and contract documents.

# Get in touch

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**To find out more or to speak to one  
of our experts please contact:**

[enquire@taylorhopkinson.com](mailto:enquire@taylorhopkinson.com)

+44 (0) 141 468 4900

