



outsource

# InTime Contractor Guide

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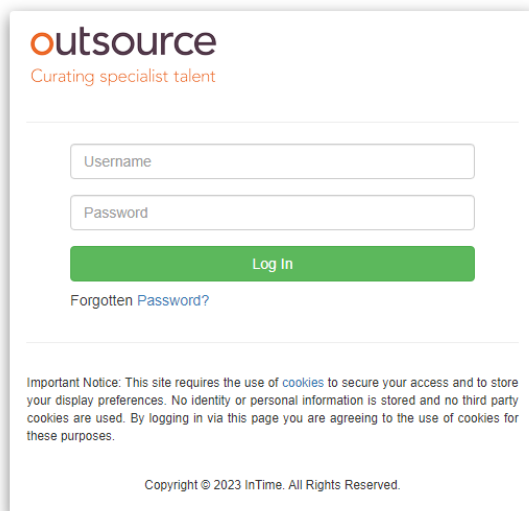
## Your self-service portal

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.
- 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.

## Accessing InTime

To get started with InTime, use the URL provided by your agency administrator. You will be prompted for your username and password, which will have been generated and sent to you directly from the InTime system or via your agency administrator.



The screenshot shows a login page for 'Outsource', with the tagline 'Curating specialist talent'. It features a 'Username' input field, a 'Password' input field, and a green 'Log In' button. Below the button is a link for 'Forgotten Password?'. At the bottom, there is an 'Important Notice' regarding cookies and a copyright notice for 2023 InTime.

**Outsource**  
Curating specialist talent

Username

Password

Log In

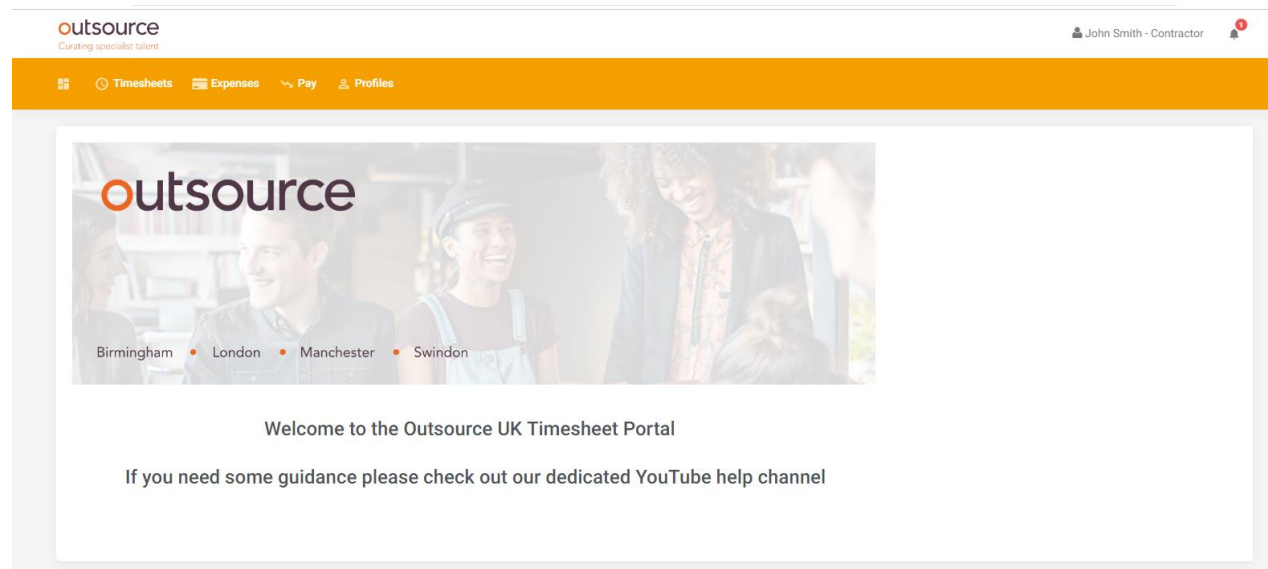
[Forgotten Password?](#)

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.

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## Your homepage.

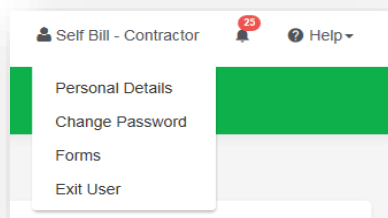
Once you have logged in you will be presented with the main InTime homepage.



The navigation menu is located across the top of the page. Please be aware that the list of items in the menu bar can vary depending on your agency's requirements.

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

- 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.
- Profiles – this gives details of your placements and associated clients.



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 InTime
- Bell Symbol – Advises you of notifications.
- Help – takes you to our on line 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: SELFB  
Accounts Ref: CS80123  
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)
5483	Submitted	Pmt1	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	60.00
5593	Submitted	TimePattern-2	Job Title	TMP (UK) Limited	25/05/2017	1600.00
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>
0000000088	19/03/2017	GBP	11,160.00	0.00	11,160.00	<a href="#">View Remittance</a>
0000000085	23/01/2017	GBP	4,720.00	0.00	4,720.00	<a href="#">View Remittance</a>
0000000083	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	09/07/2017
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	15/11/2016

### 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	Client1 Manager
TimePattern-1	Job Title	Team Leader	TMP (UK) Limited	Client1 Manager
TimePattern-2	Job Title	Team Leader	TMP (UK) Limited	Client1 Manager
Pmt1	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	525-070417120839	11,160.00
17/02/2017	525-150217105965	4,720.00
10/01/2017	525-090117175539	15,663.00
02/01/2017	525-301218111931	5,277.00

## Timesheet and expense basics

Statuses of timesheets and expense claims explained:

**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.

Timesheets
Expenses
Pay
Compliance
Profiles

### Timesheet

#### SELECT PLACEMENT

Placement

PAYE\_DAY\_1 (TMP (UK) Limited) - Paye Worker - Java Developer

#### PLACEMENT INFORMATION

Ref Code: PAYE\_Email\_App  
Job Title: Java Developer  
Job Description:  
Date Placed: 09/05/2013  
Start Date: 01/01/2013  
End Date: Unknown

#### Timesheet Period

« March 2017 »

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Client: TMP (UK) Limited  
Manager: Client1 Manager  
Consultant: Team Leader  
Alternative Managers:



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. The total hours (or hours claimed) is calculated automatically.

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.

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"/>		

Buttons: Cancel, Save As Draft, Save And Submit

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.*

### 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.

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.

Search:

Buttons: 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/Freque
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

Buttons: Submit, Print Report, Print Detail Report, CSV, Default CSV, Reset Columns

Previous 1 Next

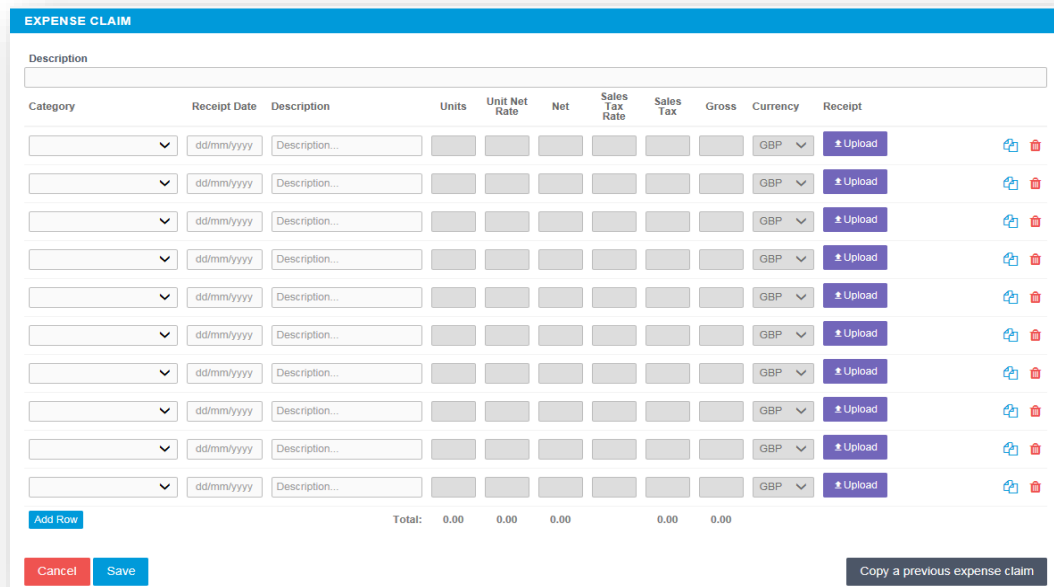
## Submitted timesheets

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.

## 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.



The screenshot shows an 'EXPENSE CLAIM' form. At the top is a blue header bar with the title 'EXPENSE CLAIM'. Below the header is a 'Description' label and a text input field. The main part of the form is a table with the following columns: Category, Receipt Date, Description, Units, Unit Net Rate, Net, Sales Tax Rate, Sales Tax, Gross, Currency, and Receipt. There are ten rows in the table, each with a dropdown menu for Category, a date input for Receipt Date, a text input for Description, and numeric input fields for Units, Unit Net Rate, Net, Sales Tax Rate, Sales Tax, and Gross. The Currency column has a dropdown menu set to 'GBP'. Each row has a purple 'Upload' button and a red 'Delete' button. At the bottom of the table is a 'Total' row with values: 0.00, 0.00, 0.00, 0.00, 0.00. Below the table are three buttons: 'Add Row' (blue), 'Cancel' (red), and 'Save' (blue). At the bottom right is a button labeled 'Copy a previous expense claim'.

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		

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.

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 Client1 Manager

Consultant:

Team Leader

Additional Details

EXPENSE CLAIM - 955 - DRAFT

PERIOD: 12/6/17 - 18/6/17

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

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

Edit

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.

## Invoice and billing

If you are a Limited Company contractor and don't have a self-bill agreement in place, you will receive an Advice Note from the agency. 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.

Search Advice Notes

Q SEARCH OPTIONS

Main

Date Ranges

References

Client

Search

Q

Manager

Search

Q

Worker

Search

Q

Provider

Search

Q

Consultant

Search

Q

Sent Status

All

▼

Paid Status

All

▼

Exported Status

All

▼

Perm Invoice

All

▼

Credited Status

All

▼

Supplier Invoice Status

Not Uploaded

▼

Search

Reset All

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.

Search:

Select All Select None Choose Columns

Show 10 entries

Invoice Number	Invoice Sales Tax Code	Invoice Sales Tax Rate	Invoice Sales Tax	Invoice Paid	Invoice Document	Primary Recipient
					Upload	Email:Advice unknown:demo@e
			0.00		Upload	Email:Advice unknown:demo@e

Showing 1 to 2 of 2 entries - 0 rows selected

Download As Zip Print Selected Report CSV Download Schedule

Previous 1 Next

### 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"/>	26/6/2017 <input type="button" value="📅"/>	<input type="text" value="2000.00"/>	T0 (None) <input type="button" value="v"/>	0.0%	<input type="text" value="0.00"/>

Description	Accepted	Paid	Upload Date
<input type="text"/>			26/6/2017

#### Invoice File

Upload New File

- In the Your Invoice Number field, enter your own invoice reference.
- In the Your Invoice Date field, set the date of your invoice.
- The Net field is pre-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.
- 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.

**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.