



Work Order Completion Instructions

[Overview](#)

Our new system has been significantly enhanced over the prior process by becoming totally electronic, including interfacing directly with FAMIS. Following is an overview of the basic steps that will occur from this point forward to enable you to refer and sign up a consultant. Please do not attempt to complete any of the required steps out of order. The system will prompt you via email as to when each step should occur.

1. Register and set up a user account on the School Professionals DOE website.
2. Enter a work order for your consultant.
3. The completed work order will be automatically sent to FAMIS and a Purchase Order will be generated. (You will no longer create your own PO.)
4. You or the appropriate PO approver will log into FAMIS to approve the PO and select the appropriate budget line.
5. The requested consultant will receive an email from School Professionals directing him/her to register online with us.
6. Once the consultant is registered, you will receive a confirmation email that will describe the remaining on-boarding procedures, which include reviewing documentation to complete the consultant's I-9 document, which proves his/her right to work in the United States.
7. Both you and the consultant will receive an email authorizing the start of work. You may not have the consultant begin work prior to receiving this email. *As a condition of the new contract there will be absolutely no retroactive pay provided. Therefore, you must follow the required steps to on-board a consultant prior to the start of their assignment. There will be no exceptions!* To allow time for these steps to take place, you should plan on entering a work order *at least 4 business days prior to the planned start date of a new assignment.*
8. Each week, the consultant will record their hours electronically through either the Internet or via telephone. The person specified in the work order to approve the hours each week will receive a weekly email asking for confirmation. In addition, the person specified in the work order to certify hours in FAMIS will need to do that weekly in FAMIS, as well. This will be the only invoice approval process necessary. Reports will be available on the School Professionals web site showing weekly spending against total encumbered funds. Assuming time slip approvals are timely, consultants will be paid weekly on Friday for the prior week's work. Payment will be made through direct deposit or cash card at the consultant's option. This will all be explained to them during their on-line registration process.
9. Should the project run longer than anticipated, work orders can be extended and PO's increased through the School Professionals web site.

[Detailed Work Order Creation Steps](#)

Follow the step-by-step instructions indicated. Each page gives you a choice to go back to the prior page ("Back"), clear the current page ("Undo") or continue to the next page ("Next").

Step 1: Enter information about the Consultant's position. The Consultant's worksite Location Code automatically defaults to your Location Code. If the worksite Location Code is going to be different from your Location Code, simply delete your code from the field and enter the correct worksite Location Code. The Location Code we require for FAMIS is a 6-character code that is a combination of the District Code first (2 digits), followed by the Location Code within the District (4 characters). If you are unsure of the code, please confirm it with your budget support person. You can also type a portion of the school or department name or number, or part of the worksite Location Code, into the empty field and then click the Search button. Select the worksite Location Code from the list provided.

If the Location Code is not listed, click the "Add New" button and enter the 6-character worksite Location Code (the 2-digit District Code followed by the 4-character Location Code). Next enter the entire address, including a "Location Description." For schools, the "Location Description" relates to the school name and number. For Offices and Departments, it relates to the specific department or office. When finished click the Save button.

After you have selected, or added, the worksite Location Code and clicked "submit", the address will auto-populate. Click on the "Edit Address" button if you need to make any corrections to this address. Once the Location Code for the worksite facility is completed, add in a job title and a one to two paragraph job description for our records and then click next.

Step 2: Tell us how the consultant is to be sourced. If the consultant has worked for you in a consulting role before, click on the "Search for Returning Consultant" button. Then type their name in the open field and click the "Submit" button. Press the "Select" button next to the appropriate Consultant. In the case of consultants with common names, look at the other identifying information to determine which name to select. If they are not on the list or they have not worked for you before, you will need to add them to the system by clicking the "Add a New Consultant" button and filling in all the requested information. If you wish School Professionals to recruit a consultant for you, click the "School Professionals to Recruit" button. You may order only *one* consultant per work order. However, FAMIS will allow you to group more than one work order under a single Purchase Order.

Step 3: Tell us who the candidate will report to, who will approve their hours and who will certify in FAMIS. Click on the down arrow to the right of the empty "Person to Report To" field. Tell us who will approve the hours worked each week and provide an alternate, backup approver in case the main approver is unavailable. Also indicate who will certify the charges in FAMIS. Note that you will be listed in each drop down box along with others connected to the Location Code. If you need to add a new user to the list, click on the "Add User" button and complete the pop up screen that appears. You can also edit any incorrect information for any user by clicking on the "edit" button.

Step 4: Tell us when you need them. Select the start and end dates by clicking in the calendar button and selecting the proper date. Remember no order can extend beyond the end of the fiscal year, which is June 30th. Select their work hours using the drop down boxes. If your consultant will be working different hours on different days or will be working on the weekend, click the special link. Note consultants can work a maximum of 7 hours in a day. If their shift is over 5 hours, they are also required to have a non-paid meal break of at least 30 minutes. Be sure to include the meal break in your schedule.

Step 5: Tell us how much to pay them. Enter an hourly rate in the "Hourly Pay Rate" field. If you only know a daily or annual rate for the candidate, use the "hourly pay rate calculator" to determine the hourly rate. Click the radio button at the top to select the type of calculator you need (daily or annual). Then enter in either a daily or annual salary rate. For daily rates, also indicate the hours worked per day using the drop down arrow. The hourly pay rate will be calculated automatically and auto-entered into the "Hourly Pay Rate" field. An hourly PO bill rate will be auto-entered based on the

markup allowed under our contract with the DOE to cover payroll taxes and other costs. (Note, if School Professionals is recruiting a consultant for you, this pay rate step will not be shown at this time.)

Step 6: Waiver needed (if applicable). If based on the schedule and pay rate per hour the consultant is projected to earn over \$500 a day or \$30,000 in a calendar (as distinct from a fiscal) year, you will need to submit a waiver request to DHR. Answer the questions related to your consultant and then type in the reason you are requesting a waiver. Note the waiver limit may be reached by the consultant working on more than one assignment in a year. The user who schedules the consultant last needs to request the waiver. Your order will be placed on hold until the waiver is approved.

Final Step: Please review your order before it is submitted. Review all the information you entered and click the appropriate "edit" button if any information needs to be changed. Under the terms of the Professional Service Contract, a consultant may not be scheduled to earn more than \$50,000. There is no waiver available for this type of situation. Your order will not be processed until you either reduce the pay rate per hour or the number of hours, so that the consultant falls under the \$50,000 threshold. You can contact DHR for instructions on how to contract for a consultant over \$50,000, which will be outside this contract.

Repeat this process and create a new work order for each consultant you want to hire.

Several things will now happen. Our system will automatically interface with FAMIS to create a PO for you (you will no longer create your own PO). Our system will email you notification when this is done. You will also see the new PO in FAMIS. You or the appropriate PO approver will then need to log into FAMIS to approve the PO and select the appropriate budget line from which to encumber the funds. Note: You may group multiple consultants on the same PO if desired. Just follow the prompts in the FAMIS system.

Once we are notified that the PO has been approved, we will contact your requested consultant to get them to complete their required information on line. We will notify you by email when that has been done and explain to you the remaining on boarding procedure, which will include your reviewing documentation to prove their right to work in the United States (I-9 procedures). **Do not have the consultant begin work until you and the consultant receive an email authorizing the start of the assignment.**

We look forward to working with you. If you have any questions, please contact our Customer Support Unit at questions@schoolprofessionals.com or contact 212 916-0804.