

2013/2014 Financial Guideline-02

Operation of the Online Claims System

1. Introduction

The Department of Education and Skills have issued [Circular 0024/2013](#) 'Operational Guidelines for Boards of Management and Staff designated to operate the Online Claims system in recognised primary and post primary schools.' The purpose of this Circular is to update school management authorities and staff on the procedures and recommendations regarding the operation of the On Line Claims System (OLCS). **The procedures and recommendations outlined shall be implemented at all times.**

This Financial Guideline outlines the details of the Circular highlighting new requirements in relation to security and reporting.

2. Security Procedures

Persons authorised to use OLCS must:

- (a) keep their User ID, password, email address and other information secure at all times and not disclose them to anybody including other members of staff.
- (b) not reveal passwords to a third party.
- (c) logout of OLCS before leaving a computer unattended.
- (d) not authorise any computer programme to remember their security details.

The Esinet site is a secure site and as a security measure, if the OLCS application has not been used for more than thirty minutes, it will automatically log the user out of the system. If login details are lost or forgotten it will be necessary to authenticate the details provided when first registered on OLCS when requesting new login details.

3. Role of Boards of Management

Boards of Management:

- (a) have a responsibility to ensure that at school level the integrity of the system is maintained at all times.
- (b) should formally approve the roles of personnel involved in the On-line Claims System.
- (c) must ensure on an ongoing basis that under no circumstances should the same person in a school undertake the role of Data Entry and Approver.
- (d) should ensure that supporting documentation in relation to the data input on OLCS is retained securely in the school with the relevant personnel records i.e. medical certificates, attendance at in-service/in-career courses and applications forms for Board approved leave.

A short report should be read into the minutes of every Board of Management meeting listing the names of all substitutes and part-time teachers for whom claims have been made on the OLCS system since the last board meeting.

4. OLCS Roles

There are four distinct roles assigned to personnel at school level to operate OLCS. These roles are as follows:

(a) Data Entry

The role of the person with responsibility for Data Entry is to input the data i.e. input the details of absences of staff members, claims for casual and non-casual staff members and other details to the system.

The role of the Data Entry person is a distinct role and under no circumstances should the same person undertake a dual role on OLCS.

The Data Entry person should not be a person employed as a special needs assistant in the school.

(b) First Approver

The role of the First Approver is to verify that the data input by the Data Entry person is correct and to approve the data.

The Approver should always ensure that:

- (i) details and in particular the bank account details of teachers and special needs assistants are input correctly to the system.
- (ii) a copy of the Staff Member Set up Form is signed by the staff member and a copy retained by the school in the staff member's personnel file.
- (iii) the terms of Department Circulars relating to vetting, teacher registration, membership of single pension scheme etc are being complied with when claims are being made.

(iv) supporting documentation e.g. medical certificates and application forms for leave absences etc. have been obtained from the staff member and approved by the Board of Management where necessary prior to recording the leave details on OLCS.

(v) all absences are recorded on OLCS whether substitutable or not.

(c) Second Approver

The role of the second Approver is to approve the leave/claims in respect of the first Approver's absences and can also approve data entered by the Data Entry person.

(d) Local Administrator

The Local Administrator is an additional role assigned to the first approver in the school and his/her role is to re-assign data entry roles within the school and to set up new data entry users.

To set up a new approver the "Approver Change Request Form" should be downloaded from the Landing Page on OLCS, completed and posted to the Department of Education and Skills.

The new user ID and password is then issued to the Approver by return of post.

5. Resetting of passwords

An automated system is now available that enables school users to reset their own passwords. It is important that school users record their email address when logging in to use the automated system. This email address should only be used by the registered user.

6. Reports

There is a facility on OLCS to print reports.

If a staff member requires details of their absences the relevant report should be generated, printed and given to the staff member.

A report on all absences recorded on the OLCS should be supplied to each staff member at intervals recommended by the Board of Management of the school but at least one report should be produced in each school term. Each staff member should sign the absence report and a copy to be retained in the school.

7. Audit Trail

As with all computerised systems an audit trail of records and the dates and times of transactions are maintained on the system.

The Department is obliged to refer to An Garda Síochána, any fraudulent claims for payment in respect of Substitution or Part-time hours or any falsified records with regard to leave of absence. In these circumstances it will be a matter for An Garda

Síochána to determine what action, if any, should be taken and consequently may result in a criminal prosecution.

Further information or clarification on any of the issues raised in this Guideline can be obtained from the FSSU.

Louise McNamara
Director, FSSU

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