

Schoolliance — managed K-12 staffing, in one place.

Schoolliance is a managed service provider (MSP) and vendor management system (VMS) for K-12 staffing. Districts post jobs, staffing agencies submit vetted candidates, the MSP screens them against compliance requirements, and the platform tracks everyone from requisition through placement, timesheets, invoicing, and payment.

1 Overview

There are four kinds of users, each with their own console. Your role decides what you see and do.



MSP Admin — the Schoolliance team. Approves agencies, onboards them to districts, vets and credential-checks candidates, and runs billing & payments. Sees everything.



Agency — a staffing supplier. Manages its candidate roster and credentials, submits candidates to open jobs from districts it's onboarded to, and tracks timesheets and payments.



District — the school district. Posts jobs, accepts or declines the candidates the MSP advances, approves timesheets, and pays invoices.



Candidate — the worker. Keeps their credentials current and logs hours against their placements from a self-service portal.

2 How it works — the core workflow

Every placement follows the same path. Each step happens in a specific console:

- 1 **District posts a job** — a requisition for a role (e.g. “Special Education Teacher”) with a bill rate and start date.
- 2 **The job is distributed** — it becomes visible to agencies the MSP has *onboarded to that district*, released in waves (preferred agencies first; the MSP can widen the wave). Agencies only see jobs from districts they’re active with.
- 3 **An agency submits a candidate** — from its roster, against the open job, with a proposed bill rate and notes.
- 4 **The MSP vets the submittal** — reviewing the candidate against the job & profession requirements. A **compliance gate** blocks advancing until every required credential is met.
- 5 **The candidate is advanced to the district** — who can optionally **interview** first, then **accepts** or **declines**.
- 6 **Accepted → a placement is created** — the candidate is now working.
- 7 **Hours → timesheets** — the agency or candidate logs weekly hours; the district (or MSP) approves them, making them billable.
- 8 **Money closes the loop** — approved hours roll up into **invoices** (what the district owes) and **supplier payments** (what the agency is paid). The difference is the MSP margin.

The compliance gate is the heart of the system. A candidate can’t reach a district until the MSP has verified every credential the job and profession require — license, background check, TB clearance, and so on.

3 Signing in

Open the site and choose **Sign in**. Enter your email and password.

- **Invited users** (district, agency, candidate) receive an email invitation. Click the link, set a password, and you’re signed in automatically.
- **Agencies** can also apply from the public **Sign Up Now** form; the MSP reviews and approves before you get console access.
- **Forgot your password?** Use the “Forgot password?” link on the sign-in page — you’ll get a secure, one-hour reset link by email.

After signing in you land on your **Dashboard**, tailored to your role. Your name, settings, and sign-out are in the top-right of every page.

The  **bell** in the top bar is your notification center — it shows a count of unread items and a list of recent events (a candidate advanced, a timesheet approved, an invoice or payment, a new job, an agreement to sign). Click an item to jump straight to it; key events also arrive by email.

4 MSP admin

The MSP console runs the whole program. Sidebar sections:

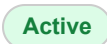
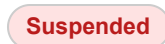
Dashboard

Program-wide health: open jobs, submittals awaiting vetting, active placements, compliance alerts, the candidate pipeline funnel, and your top agencies.

Agencies

Your supplier network. New applications appear at the top — **Approve** or **Decline** each. Approved agencies can be onboarded to districts.

Distribution

Connect agencies to districts. Pick an agency and a district and **Onboard** them — this is what makes that district's jobs visible to that agency. Toggle a relationship between  **Active** and  **Suspended**, or remove it. Suspending instantly hides that district's jobs from the agency.

Each relationship has a **distribution tier** (1–3). New jobs release in waves: tier-1 (preferred) agencies see a job first; widening the job's wave (from the Jobs page) opens it to tier 2, then 3, notifying each newly-included tier. Set an agency's tier from the Wave column.

Rate cards

Set negotiated **bill and pay rates per district × profession**. When a job is posted for that combination, its rates pre-fill from the card (still editable). Margin per card is shown, and pay can't exceed bill.

Pipeline

The submittal board, by stage. Click a candidate to open the **vetting drawer** — it lists every requirement (from the job and the profession) checked against the candidate's credentials:

STATUS	MEANING
Met	A verified, unexpired credential satisfies the requirement.
Pending	Credential present but not yet verified.
Expired	Credential exists but has lapsed.
Missing	No matching credential on file.

Advance to district is locked until *all* requirements are met. You can **Reject** at any time.

Candidates

Every candidate's credentialing status. Click one to open its credentials and **Verify** or **Reject** each — this is how pending credentials become “Met” in the gate. Where the agency or candidate has uploaded a proof document (PDF or image), a **View document** link opens it.

Compliance

An ongoing watch list of **active workers whose credentials are expiring** (within 30 days) or already lapsed. Expired workers can't accrue billable hours — timesheet entry is blocked until the credential is renewed and re-verified. **Run expiry check** sweeps now, alerting the agency and candidate and flagging lapsed credentials; a daily job does the same automatically.

Assignments

Manage active placements: **extend** the end date, **end** one (completed, ended-early, or no-show, with a reason), and tick **backfill** to re-open the job and fill the seat with a replacement. Each placement also carries an **onboarding/offboarding checklist** (I-9, background, orientation, badge, payroll; and on exit, final timesheet, equipment return, exit notes).

Timesheets, Invoices, Payments

Approve submitted hours; generate consolidated **invoices** per district from approved timesheets; generate **supplier payments** per agency. Margin (bill – pay) is shown throughout.

Agreements

Issue contracts to agencies or districts — title, version, terms, effective date. The counterparty reviews and **signs** in-platform (a typed-name electronic signature, recorded with a timestamp). Track who has signed and who is still pending.

Analytics

Program reporting beyond the dashboard tiles: **fill rate**, average **time-to-fill**, active placements, total billed and margin, **spend by district**, and **supplier performance** (fill rate, billed, paid, and margin per agency).

Developers

Connect external tools. Generate read-only **API keys** for the public API (/api/v1 jobs, placements, submittals; the key is shown once). Register **webhooks** to receive signed event POSTs (submittal created/advanced, placement created, timesheet approved) — see *docs/integrations.md* for signature verification.

Users & Activity

Users lists everyone — invite new district/agency users, enable/disable accounts, or **impersonate** a user to see exactly what they see (a banner shows you're impersonating; "Stop impersonating" returns you to your admin session). **Activity** is the audit trail: who advanced, approved, onboarded, or placed, and when.

5 Agencies

Dashboard

Your pipeline at a glance — open jobs to fill, submittals in flight, active placements, timesheets awaiting approval — plus **Your district network**: the districts you're onboarded to. *You only see jobs from districts you're active with*, so if a job seems missing, check here.

My candidates

Build your roster. **Add candidate** to create one, then click a candidate to manage their **credentials** — add license, background check, TB clearance, etc. New credentials start **Pending** until the MSP verifies them. **Upload the proof document** (PDF or image, up to 10 MB) on each credential with the ↑ button — the MSP reviews it during verification. From the same drawer you can **Invite to portal** so the candidate can self-manage credentials and log their own hours.

Jobs & submitting

- 1 Open **Jobs** — you'll see open requisitions from your active districts.
- 2 Click **Submit candidate** on a job, choose a candidate, set a proposed bill rate, add availability/notes, and submit.
- 3 Track progress under **My submittals** as it moves Submitted → In vetting → With district → Accepted.

A submittal can't pass the MSP's compliance gate unless your candidate's required credentials are verified — keep credentials current to avoid delays.

Timesheets & Payments

Log weekly hours against your active placements; once the district approves them they become billable. **Payments** shows what the MSP has paid your agency for approved hours.

Agreements

Any contracts the MSP sends you appear under **Agreements**. Open one to read the terms and **sign** by typing your full name — an electronic signature recorded with a timestamp.

6 Districts

Dashboard

Your open jobs, candidates awaiting a decision, timesheets to approve, and open invoices — plus the decision queue.

Posting a job

From **Jobs**, choose **Post a job**: title, profession, school, schedule, start date, and bill rate. It posts as [Open](#) and is distributed to your onboarded agencies.

Decisions

Candidates the MSP has vetted and advanced land here. Review each and **Accept** (creates a placement) or **Decline** — you only ever see candidates who already cleared compliance. You can also **Interview** first: schedule a time and notes, then record the outcome (a pass keeps them ready to accept; a fail declines them).

Assignments & Agreements

Assignments lets you manage your active placements — extend, end, or work the onboarding/offboarding checklist. **Agreements** holds any contracts the MSP has sent you to review and sign.

Refer an agency

Know a staffing agency you'd like to work with? Use **Refer an agency** on your dashboard. It enters the MSP's review queue, attributed to you.

Timesheets & Invoices

Approve submitted hours to make them billable. **Invoices** shows consolidated bills from approved timesheets, with line-item detail.

7 Candidates

If your agency invites you to the portal, you get a self-service console.

Dashboard

Your active placements, hours awaiting approval, approved hours, and a credential summary. A banner warns you if any credential needs attention.

My profile

View and manage your **credentials**. Add a credential (type, name/number, expiration) and **upload its document** (PDF or image) with the ↑ button — it starts **Pending** until the MSP verifies it to **Verified**. Keeping these current is what lets your agency submit you to jobs; if one is expiring or lapsed, you'll be alerted.

Timesheets

Log your weekly hours against a placement. They go to the district for approval; you'll see the status update.

8 Account & security

- **Settings** (top-right gear) — update your name, and change your password. Passwords need at least 8 characters with a letter and a number.
- **Password reset** — “Forgot password?” on sign-in emails a one-hour, single-use link.
- **Sessions** — you stay signed in via a secure, http-only session cookie; signing out ends it everywhere on that browser.
- **Account status** — only the MSP can enable, disable, or invite accounts.

9 Glossary

MSP	Managed Service Provider — the team running the staffing program (Schoolliance).
VMS	Vendor Management System — the software agencies and districts work in.
Submittal	An agency putting one candidate forward for one job.
Vetting	The MSP's review of a submittal against compliance requirements.
Compliance gate	The rule that blocks a candidate from reaching a district until all required credentials are verified.
Placement	An accepted candidate who is now working at a district.
Onboarding	The MSP connecting an agency to a district so it can see and submit to that district's jobs.
Margin	Bill amount (to district) minus pay amount (to agency).
Rate card	Negotiated bill/pay rates for a profession at a district; defaults a job's rates.
Release wave / tier	The order in which a job is opened to agencies — lower tiers (preferred) see it first.
Agreement	A contract issued by the MSP and e-signed by an agency or district.
Webhook	A signed event notification the platform POSTs to an external system.

10 FAQ

An agency can't see a district's jobs.

The agency isn't onboarded to that district, or the relationship is suspended. The MSP fixes this in **Distribution**.

A candidate can't be advanced to the district.

One or more required credentials aren't *verified*. Check the vetting drawer — add/verify the missing credentials.

Hours aren't showing on an invoice.

Only **approved** timesheets are billable. The district (or MSP) must approve them first.

How do I let a candidate manage their own credentials?

From **My candidates**, open the candidate and choose **Invite to portal**.

I forgot my password.

Use “Forgot password?” on the sign-in page; the reset link is valid for one hour.

An agency is onboarded but still can't see a new job.

Distribution releases in waves. If the agency is tier 2 or 3, the job opens to them only after the MSP widens its wave (from the Jobs page).

A placed worker's timesheet is blocked.

One of their credentials has expired. Renew and re-upload it, then the MSP re-verifies it — see the **Compliance** page.

Where do I upload a credential document?

On each credential row (agency: **My candidates**; candidate: **My profile**) use the ↑ button to upload a PDF or image, or ↺ to replace it.

Schoolliance — K-12 managed staffing. This guide covers the platform as shipped; features may evolve.
Need help beyond this guide? Contact your MSP administrator.