



2022-2023

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Insider's Guide

Everything you need to know, right here.



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Introduction

Welcome to ESI! We are delighted to partner with you and support the ESI employees that work in your organization. Our hope is that this Insider's Guide will provide helpful information to making this partnership valuable and easy for you.

We are a team of just over 30 people who are here to serve you. We work closely together across departments, but we know it can be confusing to know who to contact for what or understand just how something works with ESI. This guide will be a tool you can reference, but we welcome you to contact us anytime with questions.

Get to know our team [here!](#)



How does it work with ESI?

When you partner with us, whether for our **RetireRehire** return-to-work program or our **SubSource** substitute staffing program, ESI is the employer of record.

Think of us as an extension of your team, here to serve you and the employees. We handle everything in the service cycle and are always here to help.


ESI Service Cycle Overview



Insider's Guide to my ESI team

Your Client Manager is your advocate and works to ensure that ESI is meeting your service expectations. Bridging communications across ESI's internal teams is just one way your Client Manager is here to make your job easier.

If you are ever unsure of who to contact with any question or concern, feel free to start with your Client Manager.

 **Pro tip:** Share any of your internal staffing changes with your Client Manager, and they will make sure all ESI teams are notified. If someone new joins your team, your Client Manager will connect them to the right ESI contacts and ensure a smooth transition.




Human Resources Overview

Who do I contact for employee relation issues?

We want you to feel comfortable contacting our HR department for assistance with anything from coaching calls, block requests, removals from positions, to allegations of inappropriate conduct. But don't stop there – we like to hear the positive feedback too! It's important we keep an open line of communication as we partner together.

How are employee relation issues handled?

Our HR Best Practices guide on the next page is provided to help navigate employee relation concerns for ESI employees working in your district. Although this is not a comprehensive list, we've tried to identify the most common concerns and where they fall in our progressive discipline plan. We understand every district is unique, which is why our HR team works closely with your HR personnel.

 **Pro tip:** Use this email for HR issues to ensure that the concern is handled swiftly and confidentially by our HR team:
hr-concerns@esiaz.us




HR Best Practice Guide for Employee Relations

↓ Download a copy [here](#).




HR Best Practices


→ for Employee Relations

 **Coach – 1st Warning by District (follow up in writing as needed)**

- Failure to follow basic practices as needed for essential job function
- Lack of classroom management
- Disregarding the dress code
- Using harsh tones, lack of positive demeanor and interaction with students
- Being absent, tardy, or leaving early without notification or permission
- Not following guidelines concerning notification of an absence
- Violating other policies or practices not specifically listed

 **Written Warning and/or Block from ESI**

- Failing to report injuries timely
- Violating any safety procedures (e.g., leaving students unattended)
- Engaging in vulgar or abusive language or conduct toward students or staff
- Using technology inappropriately
- Using personal devices during instruction time or when entrusted with the supervision of students
- Treating students, staff, co-workers in a discourteous, inattentive, or unprofessional manner
- Not working well with one particular age group, classroom, or campus
- Discussing unapproved and inappropriate topics in class

 **Removal from Position**

- Being absent for three or more days without notification or permission (also referred to as a voluntary quit or job abandonment)
- When three or more administrators have negatively commented on performance or have requested that the substitute not return to the school site or district
- Excessive number of refusals to accept teaching assignments, for not reporting for an accepted assignment, for excessive number of cancellations, or for excessive tardiness
- Taking or posting pictures of and/or with students
- Dishonesty
- Disclosing confidential information
- Insubordination
- Incompetency
- Violating time reporting procedures

 **Unpaid Leave Pending Investigation/Reporting to ADE**


- Allegation of inappropriate conduct
- Allegation of physical contact with student
- Physical or verbal abuse of student or staff
- Accusation resulting in a criminal investigation
- Communicating with students, former students, or children under 18 years of age via phone, text, or social media
- Possessing, being under the influence of or partaking of intoxicants on the job
- Immorality
- Gross Misconduct

hr-concerns@esiaz.us • (480) 719-3271 • (844) 614-7784 • educationalservicesinc.com

How do I document substitute employee relation issues?

When a substitute incident occurs, we ask that you complete our Substitute Discipline Form with all the pertinent details.

↓ **The Substitute Discipline Form** can be downloaded [here](#).



Substitute Discipline Form

Substitute Name: Date:

Requesting School & District:

Please state the reason for the request and provide all pertinent details. Attach additional documentation as needed.

SAMPLE

What Action is Requested:

- Coaching Opportunity
- Block from the following Teacher/Grade/Class:
- Block from the following School:
- Block from the following District:
- Terminate

Name of person making request:

Title:

Signature of person making request:

Submit completed form to hr-concerns@esiaz.us



What if an ESI employee gets hurt on the job?

All ESI employees are covered by our workers' compensation plan. We use a 24/7 registered nurse triage line to assist when injuries occur.

↓ Download a copy of the Workers' Comp flyer [here](#).



Hurt on the job?

We're here to help.

ESI is committed to keeping you safe and healthy in the workplace, which is why we have partnered with TriageNow, a 24/7 Registered Nurse hotline, to help provide the appropriate care for your workplace injury. If a non-life or limb threatening injury occurs, you can speak with a Registered Nurse immediately.



What to do if you are injured:
If Life or Limb threatening, call 911.

If other, then please follow the procedure below:

Step 1

Call ESI and we will connect you to TriageNow. Select the phone menu option to "Report a Workplace Injury":
(480) 719-3271 or **(844) 614-7784**



**Step 2**
The Registered Nurse from TriageNow will gather information about your injury and your medical history to appropriately triage your injury.

**Step 3**
The Registered Nurse will provide you instructions for care or refer you to a convenient medical clinic for advanced care in your area.

**Step 4**
All injury documentation will be completed during your call and will be provided to the clinic or provider, as necessary.

Questions? You are welcome to call or text us at (480) 719-3271 or email us at hr@esiaz.us.



Employee Service Overview

Who should employees contact when they have questions?

All employee questions should be directed to ESI at (480) 719-3271 or support@esiaz.us. When employees call ESI, one of our dedicated Employee Service Representatives (or ESRs, as we lovingly call them) answers.

Our ESR team is trained to answer all general employee questions (e.g., questions related to onboarding, pay day calendars, employee portal inquiries, and much more). If they don't have the answer, they will connect to the department or team member that does. All calls and emails are documented in our ticketing system.

How does ESI's ticketing system work?

Every single employee phone call or email that is sent to ESI creates a ticket in our ticketing system. It allows us to capture all the details of the issue/question and better assist employees. Our team is able to see all inquiries and communications associated with the employee so that no matter who views the ticket, they are up to speed and can assist. We take pride in resolving all tickets with urgency and care.

Can employees go to the ESI office for help?

We welcome in-person visits only for required document drop offs with our administrative assistant. For any other questions or help, it is best for employees to contact us by calling 480-719-3271 or emailing support@esiaz.us so our ESR team can provide assistance.

Our office is open for visitors to drop off required documents by appointment only so that we can better manage the flow of our visitors. [Appointments can be made on our website](#) by clicking "Schedule Visit".

Do I have a dedicated ESR?

Each substitute district partner has a dedicated ESR that bridges communication between the district substitute coordinator and the



substitutes regarding status changes: activations, resignations, terminations, and inactivations (due to expired documents).

Your ESR provides updated rosters of active substitutes at your desired frequency (monthly, weekly, or as changes occur).

If your district utilizes an Absence Management System (AMS), your ESR manages the entry, (in)activation, and notification to the substitute in the system.

Your ESR advocates for the substitutes and keeps you in the loop to ensure everyone is supported. Your day-to-day questions regarding substitutes should be directed to your ESR.

When do I contact ESI's SubSource Program Coordinator?

Think of our SubSource Program Coordinator as your sub coordinator counterpart here at ESI. While our ESR team is focused on your day-to-day needs and assisting employees, our SubSource Program Coordinator's area of expertise is on the coordination and set up of district systems and preferences.

Here are a few of the ways ESI's SubSource Program Coordinator supports you and the subs:

- **Absence Management System (AMS) configuration assistance**
 - pay rates
 - district reports
 - welcome letters
 - web alerts
 - escalated troubleshooting
- **Special positions coordinating/tracking**
 - RescueSubs (Want to learn more? Contact us!)
 - Summer school opportunities
- **Payrate tracking**
- **Stipend/incentive tracking**
- **Mass communication coordination to active sub roster**
 - Special programming
 - Updated pay rates



SubSource Overview

What is SubSource?

SubSource is ESI's program to staff substitutes in partner school districts all across Arizona. Districts partner with ESI to outsource their entire pool of substitutes. ESI can manage all certified subs, classified subs, or both, but all positions of the same type must be treated the same.

ESI helps substitutes navigate the subbing world by providing:

- orientation and training specific for substitutes
- professional development for those who are new to education and those seeking to develop their skillset
- access and troubleshooting your Absence Management System (AMS) platform
- notifications about district offerings (long term assignments, special events, training opportunities, etc.)
- answers to questions regarding pay or employment
- opportunities to connect with other substitutes
- general support and customer service



What do substitutes need to be hired by ESI?

Substitute Checklist

↓ Click [here](#) to download the Substitute Checklist. This checklist is provided to all substitute candidates when they apply with us.

6 Steps to Start Substituting with ESI

We are delighted you want to join ESI! Schools can't wait to have your help and we will do our absolute best to get you hired quickly. Most substitutes are cleared to begin working in 1-3 weeks. Why so long? ESI must make sure every person we hire is safe and completely qualified. The biggest delay is usually missing credentials or misplaced emails. **Pro tip: Keep an eye on your email. We'll keep in touch this way.**

- ### 1 Complete Part I of ESI Application Online

Go to educationalservicesinc.com » Click on the **Apply Now** button.
- ### 2 Complete Part II of ESI Application

Sent via email with the subject line, "Part II of your Application"
- without this, your application is incomplete.
- ### 3 Reference Check

Your references are emailed a short form to fill out. Be sure to provide the correct email addresses so there's no delay.
- ### 4 Submit Required Employment Documents

These can be uploaded or presented in-person:

 - Valid IVP Fingerprint Clearance Card (required for all substitutes – must be IVP) [More info](#)»
 - Valid AZ Teacher or Substitute Certificate (required for Certified Substitute positions) [More info](#)»

Federal requirement to present these documents in-person to ESI:

 - [E-Verify/I-9 Acceptable Documents](#).
 - Required to verify U.S. employment eligibility
 - We'll let you know if you can provide these to your district instead.
- ### 5 Complete Background Check Online

Sent via email from Crimcheck with the subject line, "Background Authorization Request from Educational Services, LLC (ESI)". We're screening for criminal history, not a credit check. This is independent of the IVP Card. Our concern is the safety of the students we serve.
- ### 6 Complete Employment Forms Online

If you've been approved for hire, you'll receive an email with the subject line, "ACTION REQUIRED: Online Employment Forms for ESI".

 - New employees register as a new user.** If you're a previous ESI employee, use existing login.
 - Fill out tax withholding, direct deposit, emergency contact info, and other important employment forms.**

Welcome Aboard! The ESI hiring team will review all your forms and documents, and if complete, you will receive a Welcome Letter from ESI with important information on how to begin working as a substitute!
Questions? Contact onboarding@esiaz.us or call 480-719-3271 or 844-614-7784.



Who assists substitutes with the hiring process?

Our Hiring Specialist team walks substitute candidates through the hiring process step-by-step. They facilitate the expeditious processing of candidates, coordinate the acquisition of required employment documents, including but not limited to, fingerprint cards, teaching certificates, employment eligibility identity documents, and any miscellaneous requirements for specialized positions.

Each sub district has a dedicated Hiring Specialist that provides status updates to the district sub coordinator on candidates and their progress in the hiring process. Once a substitute completes the ESI hiring process, their care and support is transitioned to the ESR team as a new ESI employee.

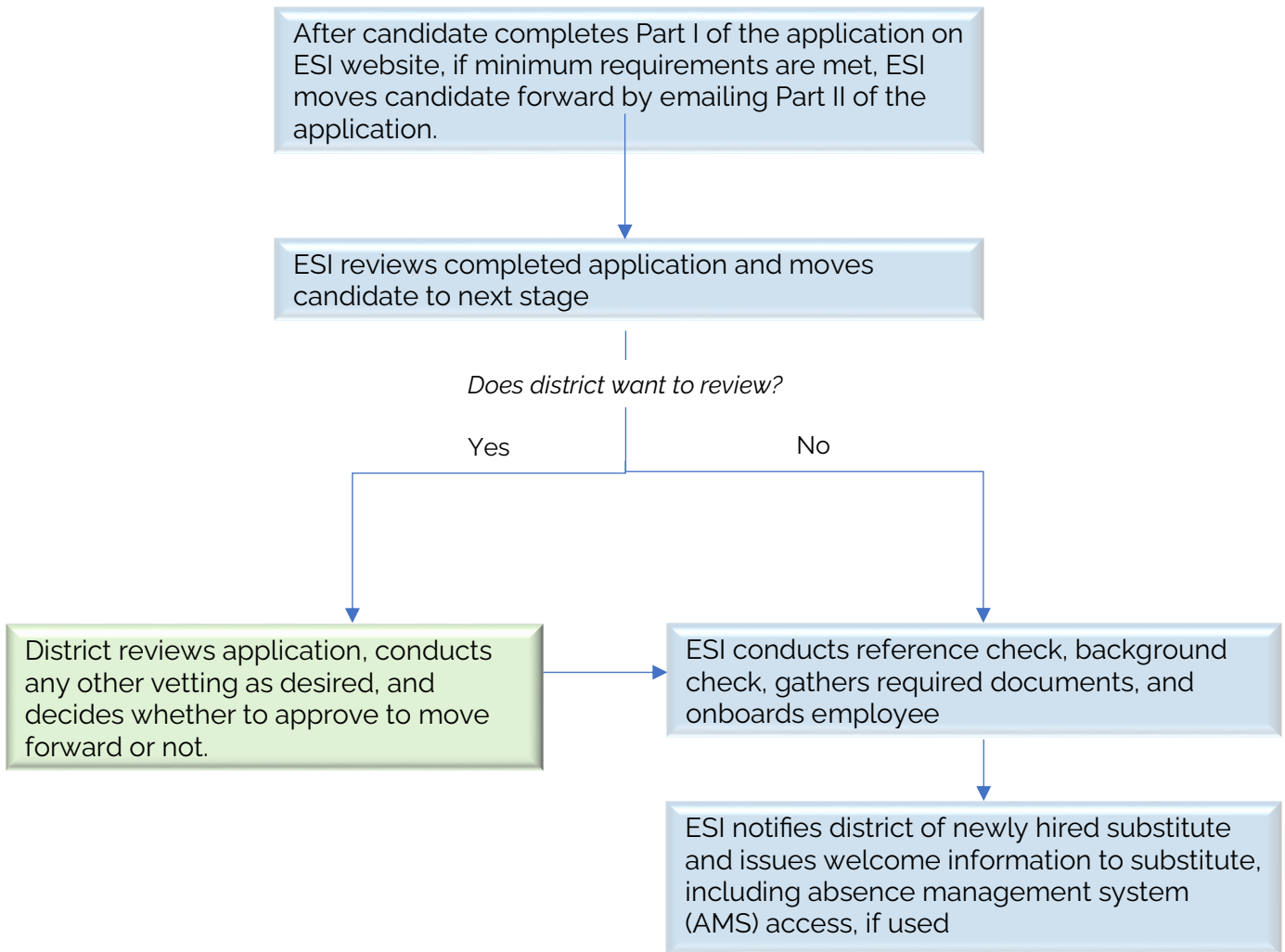
Can the district be involved in the hiring process?

Absolutely! We like to say that there is a spectrum of involvement where you can choose how much or how little to be involved in the hiring process. As an example, some districts choose to let ESI handle everything from start to finish, while other districts prefer to do some portion of the vetting.

We use an applicant tracking system called JazzHR which provides you with access to view candidates and participate in the vetting process, if desired. Contact our hiring team to learn more about this option.



What happens behind the scenes in the hiring process?



I-9 / E-Verify Documents


ESI employees complete Form I-9 as part of their online onboarding, however, the supporting I-9 identification documents for employment authorization must be presented in-person per DHS guidelines.

Employees are always welcome to present their documents to us at our ESI office in Scottsdale by making an appointment [here](#), but we know it's not convenient for all our employees.

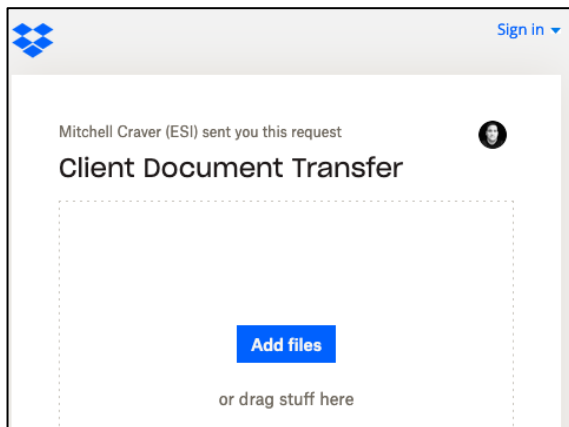
As a courtesy to the ESI employees working in your organization, you have the option to assist by being our authorized representative to accept I-9 documents on our behalf.

Documents may be securely uploaded directly to us via our **Client Document Transfer** link:


www.dropbox.com/request/4NEm2GOFb21VGKX4yEh4

 **Pro tip:** Bookmark this link for easy access.

It should look like this (no need to sign in).



1. Visit our secure [Dropbox link](#)
2. Click **Add files**
3. Select which files from your computer that you want to upload to us
4. You can add more than one file by clicking **+Add more files**
5. Enter **your** first name, last name, and email address
6. Click **Upload**

 Please be advised this client link should only be used by client personnel – it should never be distributed or used by employees.

RetireRehire Program Overview

What is RetireRehire?

RetireRehire is ESI's return-to-work program that allows individuals to retire from ASRS and return to work, continuing in their same position without any restrictions, while collecting their ASRS pension and a salary from ESI.

Who do I contact with retiree questions?

Our team of RetireRehire specialists work closely with you and your retirees to usher you both through the return-to-work process seamlessly.

What is the Position Request Portal (PRP)?

The Position Request Portal (PRP) is the online system where you will enter a retiree's position information.

Here are some quick links to guides that will show you how to use the PRP system:

- [How to Create a Position Request for a New Employee](#) (PDF)
- [How to Create a Position Request for a Returning Employee](#) (PDF)
- [How to Create a Position Request on the PRP](#) (video)
- [How to Revise an Existing Position Request](#) (PDF)
- [How to Revise an Existing Position Request](#) (video)



What is an Employee Cost Agreement (ECA)?

The Employee Cost Agreement (ECA) is an online document that is created from the position information you entered into the PRP. The ECA gives a total cost breakdown for the retiree, including gross wages and fees. The designated signatory to approve ECAs from your organization will receive an email notification when there is an ECA to sign. The e-signature platform we use is called HelloSign.

Important: The signed ECA is our green light to set up payroll for the employee, so it's important to review and sign the ECA when you receive it, so there's no delay in employee payment.

You will use the information on the ECA to create the Purchase Order (PO). More information on Purchase Orders can be found in the [Billing Section](#) of this guide.



How does hiring work with RetireRehire employees?

Checklist for You

↓ Click here to download the [Checklist for You](#). We'll work together to get your retiree on board with ESI.



5 Easy Steps to Hiring through the RetireRehire Program

These are the simple steps to hiring through ESI's RetireRehire program.

Follow the steps below:

- 1 Meet with employee**
 - Review program requirements
 - Discuss benefit options
 - Discuss pay
- 2 Contact ESI Program Specialist (at least 2 weeks prior to start date)**

Have relevant information ready:

 - Employee Name
 - Employee Phone Number
 - Employee E-mail
 - Employee Start Date
- 3 Create contract in Position Request Portal**
 - Create contract in [Position Request Portal \(PRP\)](#)
- 4 Sign Employee Cost Agreement**
 - Sign at least 3 days prior to start date
 - Employee will not be paid until ESI receives signed Employee Cost Agreement
- 5 Create PO based on Employee Cost Agreement and provide to ESI**

Note: If this contract is under the Mohave Consortium, PO must be sent to Mohave (orders@mesc.org) for approval prior to sending PO to ESI. Please send only Mohave approved POs to ESI.

Note: If this contract is under the 1GPA Consortium, PO can be sent directly to ESI.

Questions? Contact contracts@esiaz.us or call 480-719-8276.

Checklist for Retirees

↓ This [Checklist for Retirees](#) is provided to all return-to-work retirees. Our specialists walk employees through the process of joining ESI as a retiree and handle the entire onboarding process.

7 Easy Steps to Joining the RetireRehire Program with ESI



Before you begin, make sure you have your current employer's approval and an official retirement date set with ASRS. To participate in the RetireRehire program, you will become an ESI employee.

Follow the steps below to join ESI:

- 1 Apply for RetireRehire Program**
 - Go to educationalservicesinc.com » Click on the **Apply Now** button.
 - Use a personal email that you check frequently
 - Complete screening questions
- 2 Submit Required Employment Documents**

These can be **uploaded** or **presented in-person**:

 - Valid IVP Fingerprint Clearance Card (required for all school-based positions) [More info](#)
 - Position-specific credentials

Federal requirement to present these documents in-person to ESI:

 - [E-Verify/I-9 Acceptable Documents](#)
 - Required to verify U.S. employment eligibility
 - We'll let you know if you can provide these to your employer instead.
- 3 Complete Background Check Online**

Sent via email from from Crimcheck with the subject line, "Background Authorization Request from Educational Services, LLC (ESI)". We're screening for criminal history, not a credit check. This is independent of the IVP Card. Our concern is the safety of the communities we serve.
- 4 Complete Employment Forms Online**

If you've been approved for hire, you'll receive an email with the subject line, "ACTION REQUIRED: Online Employment Forms for ESI".

 - Register as a new user. If you're a previous ESI employee, use existing login.
 - Fill out tax withholding, direct deposit, emergency contact info, and other important employment forms.
- 5 Receive e-mail confirmation once you have completed the hiring process**
- 6 Sign offer letter via HelloSign**
- 7 Get to work on your start date!**

Questions? Contact contracts@esiaz.us or call 480-719-3271.

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Payroll Overview

Who do I contact with questions on payroll?

Contact our payroll team concerning any payroll or related inquiries at payroll@esiaz.us.

When are ESI paydays?

ESI pays biweekly and it differs by district/location. Payday Calendars that show pay periods and pay dates can be found on our website <https://www.educationalservicesinc.com/employee-resources/payday-calendar>

What if an ESI employee's pay is incorrect?

If an employee has an error on their pay, direct the employee to email payroll@esiaz.us or call us directly (480) 719-3271. We'll reach out to you if we need to confirm any changes.

How are salaried RetireRehire employees paid?

Salaried employees' biweekly pay is divided evenly among the number of pay periods that fall between the employee's start and end date of their salaried position. There is no year-end lump sum payment that occurs to cover summer months.

How are hourly RetireRehire employees paid?

ESI requires all RetireRehire hourly employees to submit a supervisor signed timesheet for any hours worked for their position. If an employee is fulfilling a position not listed on their offer letter, you will need to add it into the Position Request Portal (PRP) as a revision, prior to payment being issued from ESI for that work.



How are substitute employees paid?

If you are a district that utilizes an absence management system, your ESI payroll coordinator will customize and pull a substitute payroll report directly from your system, given the appropriate access. We'll ask you to review and validate it before we move forward. Once approved, we import the report directly into our payroll system to process payroll for your district. If you do not have an absence management system, we'll provide you with a payroll report template to complete and submit to ESI payroll each pay period.

What if a substitute needs to be paid for something not in the absence management system?

If a substitute employee needs to be paid for something not included in the sub pay report (e.g., additional hours, stipends, etc.), this needs to be sent directly to the payroll team via email, and must include employee name, reason for payment, hours/units, and pay amount (rate or lump sum).

How does paid sick time work for ESI employees?

Review our Paid Sick Time Policy posted on our site that provides guidance on how it works. Full details are available for employees in their Employee Handbook.

https://www.educationalservicesinc.com/sites/default/files/uploads/documents/employee-forms/Paid_Sick_Time_Policy.pdf



Billing Overview

How will we receive ESI invoices and related files?

ShareFile is the secure system that ESI uses to share all billing files and ACR reports with you.

Our billing team will set up users in your organization that need access to these files. Your username is your email address, and you will set up your own password. Passwords can be reset at any moment by clicking the "Forgot Password?" link on the login page.

1. All ACR reports and billing files are uploaded to the ShareFile portal within a week after the payday occurs.
2. You will receive an email notification when a file has been uploaded.
3. Log directly into Sharefile after you receive the email notification to download the files. Keep in mind that the notification email may not show all files, so it's best to always log into the Sharefile portal directly.

 **Pro tip:** Have your IT department whitelist this email: noreply@sf-notifications.com and the ShareFile link <https://educationalservices.sharefile.com> so that you don't have any trouble accessing these important files. We recommend bookmarking the site for your easy access as well.

When can we expect our ESI invoice?

You can expect to receive your invoice 1-4 business days after the payday occurs. Your invoice will be part of the billing files uploaded to ShareFile. Payday schedules can be accessed on our site: <https://www.educationalservicesinc.com/employee-resources/payday-calendar>



How does the Alternate Contribution Rate (ACR) work with ESI?

ASRS employers are required to pay the ACR, regardless of whether the retiree is employed directly or through a leasing firm such as ESI.

Per ASRS, remittance of the ACR payments is due by 14 calendar days after the last day of the applicable pay period that is subsequent to payment to the leasing company. In other words, you, as the ASRS employer, should treat the day you receive the invoice from ESI as the pay period end date. Therefore, the ACR for the work performed during the invoice pay period is **due within 14 days after you receive the invoice from ESI**. [ASRS](#) allows this flexibility so that you may timely remit ACR payments, with the understanding that you are dependent on the information from a third party.

Where do we send Purchase Orders?

Purchase orders should be created based on the Employee Cost Agreement (ECA).

- POs for 1GPA Partners should be sent to purchasorders@esiaz.us
- POs for Mohave ESC Partners should be sent directly to MESC orders@mesc.org

Any changes to an employee's position request may require an updated Purchase Order.

Billing E-Mail: billing@esiaz.us

Payment Remittance

Send Checks to:
Educational Services, LLC
ATTN: Billing Department
14614 N Kierland Blvd
Suite N230
Scottsdale, AZ 85254

