

Preparation Guide

Applicable to 7.164 onwards'

Preparing for the School Workforce Census 2015 Return



School Workforce Census 2015 Return Preparation Check List

Complete	Task Description
<input type="checkbox"/>	Check with the System Administrator/Manager that you have the appropriate permissions to run the School Workforce Census and record associated data (please see <i>Setting Permissions</i> on page 3).
<input type="checkbox"/>	Upgrade to the SIMS 2015 Summer Release (version 7.164) or later as soon as possible to enable dry runs to be carried out (please see <i>What Version of SIMS is Required?</i> on page 4).
<input type="checkbox"/>	Apply the School Workforce Census licence, if not applied previously (please see <i>Applying the School Workforce Census Licence</i> on page 5).
<input type="checkbox"/>	Import revised files for validation and reports (please see <i>Importing Revised Filesets for Validation and Reports</i> on page 7).
<input type="checkbox"/>	Import the latest service term definition provided by your LA/support team, if applicable (please see <i>Importing Service Term Definitions</i> on page 10).
<input type="checkbox"/>	Import the latest pre-defined report definitions into SIMS (please see <i>Importing Pre-Defined Report Definitions</i> on page 12).
<input type="checkbox"/>	Check the personal details of all applicable members of staff to ensure that they are current and accurate (please see <i>Checking/Editing Personal Details</i> on page 15).
<input type="checkbox"/>	Check the professional detail of all applicable members of staff to ensure that they are current and accurate (please see <i>Checking/Editing Professional Details</i> on page 21).
<input type="checkbox"/>	Check the employment details of all applicable members of staff to ensure that they are current and accurate (please see <i>Checking/Editing Employment Details</i> on page 23).
<input type="checkbox"/>	Ensure that the Latest Pay Review Date is recorded for all teachers with contracts or service agreements (please see <i>Editing Contract Details</i> on page 25 and <i>Editing Service Agreement Information</i> on page 31).
<input type="checkbox"/>	Ensure that duplicate teacher/support staff records are not included in the return (please see <i>Excluding Teacher/Support Staff Records from the Return</i> on page 33).
<input type="checkbox"/>	Ensure service term definitions are correct and make any required edits (please see <i>Reviewing Service Term Definitions</i> on page 33).
<input type="checkbox"/>	Ensure that the correct SWC Post is selected to avoid validation error 4410 from being triggered (please see <i>Checking/Editing the SWC Post</i> on page 37).

C | Contents

01	Getting Started	1
	How has the School Workforce Census Changed since Last Year?	2
	Overview of the School Workforce Census Process.....	3
	Setting Permissions.....	4
	Running and Editing the Return	4
	Importing Revised Files	4
	Where to find More Information about Permissions.....	4
	What Version of SIMS is Required?.....	4
	Applying the School Workforce Census Licence	5
	Changing the School Workforce Census Settings	5
02	Importing Files and Definitions.....	7
	Importing Revised Filesets for Validation and Reports	7
	Importing the Revised Files	8
	Importing Lookup Files.....	9
	Importing Service Term Definitions	10
	Importing Pre-Defined Report Definitions	12
	Report Related Permissions	13
03	Preparing Staff Level Information.....	15
	Checking/Editing Personal Details.....	15
	Checking Basic Details	16
	Editing Personal Information	17
	Editing Absences Information	18
	Editing Address Details	20
	Checking/Editing Professional Details	21
	Checking/Editing Employment Details.....	23
	Editing Employment Dates	24
	Editing Contract Details – Salary Ranges	25
	Editing Contract Details – Pay Scales	27
	Editing Service Agreement Information	31
	Excluding Teacher/Support Staff Records from the Return	33
	Reviewing Service Term Definitions	33
	Checking/Editing the SWC Post	37
	Mapping Subjects to DfE Subject Codes	39
04	Preparing School Level Information.....	41
	Checking Establishment Details.....	41
	Checking School Address, Telephone and Email Information.....	42
05	What Next?	44
	Where Can I Get More Information.....	44
	Index	45

01 | Getting Started

Introduction	1
How has the School Workforce Census Changed since Last Year?	1
Overview of the School Workforce Census Process	3
Setting Permissions.....	3
What Version of SIMS is Required?	4
Applying the School Workforce Census Licence	5
Changing the School Workforce Census Settings.....	5

Introduction

This preparation guide has been produced to help you to identify the most common tasks that need to be carried out before running the School Workforce Census 2015 Return, which this year takes place on Thursday 5 November.

The School Workforce Census 2015 Return is required to be run by English schools in the maintained sector. These include Community, Foundation, Voluntary Aided and Voluntary Controlled schools, as well as Academies Free Schools and Pupil Referral Units.

NOTES: The content of the graphics (dates, names, etc.) are examples only of what you might expect to see when using SIMS to prepare for the forthcoming School Workforce Census Return.

This guide covers the preparations required for the School Workforce Census only.

How has the School Workforce Census Changed since Last Year?

Routines | Statutory Returns | School Workforce Census

Census Date: 05/11/2015

Absence: 01/09/2014 to 31/08/2015

Continuous Contracts: 01/09/2014 to 05/11/2015.

The School Workforce Census 2015 Return includes the following:

Changes to the Pay Details Panel

- The **Pay Details** panel has been split into two grids:
 - **Non-Leadership** grid displays staff with Non-Leadership posts and includes the following changes:
 - Non-Leadership **Pay Scale/Range** (e.g. **TE, NJ**, etc.)
 - The **Scale** column has been renamed to **Scale/Range**
 - The **Regional Spine** column has been renamed to **Region**
 - The **Spine Point** column has been removed.
 - The new **Leadership** grid displays staff with Leadership posts and includes the following information:
 - Leadership Pay **Scale/Range** (e.g. **LD**)
 - Leadership **Minimum** and **Maximum** pay (calculated from SIMS Personnel)
 - Leadership **Pay Framework (Pre 2014 or 2014)**.

School Workforce Return Post for Classroom Teacher

The **TCH** (SWR Post for Classroom Teacher) has been re-introduced.



More Information:

Checking/Editing the SWC Post on page 37

Changes to Reports

Changes to detail reports include the following:

- Pay Details Comparison report
 - Non-Leadership information is now included.
 - The **Scale** column has been renamed to **Scale/Range**.
 - The **Region Spine** column has been renamed to **Region**.
 - The **Spine Point** column has been removed.
- Workforce Members Contract/Service Agreement Details report
 - A new field has been added (after the **Post** field) to display the corresponding contract/service agreements latest pay review date.

Latest Pay Review Date

Focus | Person | Staff - Employment Details page

The **Latest Pay Review Date** field has been added to **Contract** and **Service Agreement** details. This enables the date, which is required for the School Workforce Census, to be recorded for all teachers with contracts or service agreements.



More Information:

Editing Contract Details on page 25

Editing Service Agreement Information on page 31

Changes to Service Terms

Tools | Lookups

In the **Service Term-Allowance Categories** lookup:

- Category **PPS** (Performance Payments to Seconded Teachers) has been added.
- Categories **GTC** (GTC Subscription) and **TLR** (Teaching and Learning Responsibility Payments) are now inactive.
- **TLE** (First and second Teaching and Learning Responsibility payments, aka TLR1 and TLR2) and **TL3** (Teaching and Learning Responsibility 3 Payments) replace **TLR** (Teaching and Learning Responsibility Payments).

Overview of the School Workforce Census Process

The following list provides a brief outline of the steps involved in producing the School Workforce Census 2015 Return. If data has been regularly and accurately maintained, many of the activities in this document are unnecessary. However, it is advisable to check that the data is up-to-date.

1. Upgrade to the SIMS 2015 Summer Release (7.164) or later.
2. Check then amend the School Workforce Census settings, if required.
3. Carry out one or more dry runs to identify any errors that may exist in your data.
4. Ensure that the relevant workforce and school data exists in SIMS and that it is complete and correct.
5. Create and validate the return.
6. Resolve any validation errors/queries then validate the return again.
Repeat the resolving of errors/queries and creating and validating the return routine until you are satisfied that the content of the return is correct.
The detail reports and Summary report can be generated to assess the accuracy and completeness of the return.
7. Provide the Head Teacher with the latest copy of the reports to enable them to check the details and to authorise the return.
8. Submit the return to your Local Authority or upload the return to the DfE via the COLLECT website.

Setting Permissions

The following permissions are applicable to users who deal with returns.

Running and Editing the Return

To run and edit the School Workforce Census, you must be a member of any of the following user groups in System Manager:

- Personnel Officer
- Returns Manager.

Having these permissions also enables you to correct data related to vacancies, staff and any curriculum information (if applicable) that fails validation.

Importing Revised Files

The Import Fileset functionality enables updates to the Validation Errors Summary and the Summary report (derived from files supplied by the Statutory Body), and detail reports (provided by SIMS), to be imported into SIMS between SIMS releases. To use the Import Fileset functionality (via **Tools | Setups | Import Fileset**), you must be a member of any of the following user groups in System Manager:

- Returns Manager
- System Manager.

Where to find More Information about Permissions

Please see your System Administrator/Manager if you are not sure whether you have the required permissions. For more information, please refer to the *Managing SIMS Users, Groups and Databases* handbook.

What Version of SIMS is Required?

In order to run the return, you must have the SIMS 2015 Summer Release (7.164) or later installed.

To check the version of SIMS installed, open SIMS then select **Help | About SIMS**. A dialog similar to the following graphic is displayed.

The version should read 7.164 or later.



Applying the School Workforce Census Licence

Applicable to schools using SIMS Personnel in read/write mode

A patch is available from SOLUS (Patch ID 11118) to license the SIMS School Workforce Census functionality.

The patch needs to be applied only once. If you have applied the patch in the past, it is not necessary to re-apply it for this year's return.

Changing the School Workforce Census Settings

The Returns Manager can change the School Workforce Census settings by selecting the data to be included in the return. These settings are preserved when SIMS is upgraded but can be edited by users with Returns Manager permissions, if required.

Changes to the settings may be required if:

- your school does not record contract/service agreements, as these are provided by your Local Authority. Some Local Authorities may supply contract details from an HR/Payroll system.
- SIMS Personnel is not used to record contract/service agreements but they are recorded in a different system.
- the editing of Base Pay is required before the pay details are collected for the return.

1. Select **Tools | Statutory Return Tools | School Workforce Census Settings** to display the **School Workforce Census Settings** page.

2. Ensure that the check box(es) associated with the data item(s) you want to be included in the return by default are selected.

NOTES: Staff details are always collected in the return. The **Staff Details** check box is displayed for information only and cannot be deselected.

The **Curriculum** check box is displayed for Secondary schools only. If selected, curriculum details for Teachers and Teaching Assistants is included in the return by default.

An option to **Allow editing of Base Pay** before the pay details are collected is also available. If this option is selected, the **Pay Details** panel is displayed on the **School Workforce Census Details** page when creating the return (via **Routines | Statutory Return Tools | School Workforce Census**). The panel displays the calculated values of **Base Pay** for each school workforce member of staff. The values can be edited, if required.

If the **Allow editing of Base Pay** check box is deselected, the **Pay Details** panel is not displayed when the census is run and the calculated values are collected by default.

3. If any settings have been changed, click the **Save** button.

The message displayed at the top right-hand side of the **Data to be Exported by Default** panel changes from **Settings have been preserved** to **Settings have been populated by School**.

The selected data items are reflected in the read-only **School Workforce Census Settings** panel (**Routines | Statutory Returns | School Workforce Census**). If any additional changes are required to these settings, they must be made using the process documented in this section.

02| Importing Files and Definitions

Importing Revised Filesets for Validation and Reports	7
Importing Lookup Files	9
Importing Service Term Definitions.....	10
Importing Pre-Defined Report Definitions	12

Importing Revised Filesets for Validation and Reports

Applicable to the Personnel Officer, Returns Manager and System Manager

The Validation Errors Summary and the Summary report are derived from files supplied by the Statutory Body. In addition, SIMS provides detail reports to enable the checking of data used to generate the return. These report files are initially installed automatically during the SIMS release upgrade.

Occasionally, additions or corrections are made to these files, after a SIMS release, which are required for the forthcoming return. The Import Fileset functionality is provided to enable these files to be imported into SIMS, by the Personnel Officer, Returns Manager or System Manager between the SIMS releases.

IMPORTANT NOTE: The report files are not always updated between releases. Therefore, it is not always necessary to use the Import Fileset routine.

If revised files are supplied, the fileset will be available as a ZIP file, which should be unzipped and then imported into the SIMS Document Management Server (DMS) via **Tools | Setups | Import Fileset**. Ensure that the DMS is configured correctly before attempting to import the files.

TIP: To check which version of the fileset is currently in use, select **Routines | Statutory Returns | <census name>** to display the **Census Return** browser. The **Validation Fileset ID** is displayed in the header of the browser.

To enable the file(s) to be imported successfully, ensure that the DMS is configured correctly. This is achieved via **Tools | Setups | Document Management Server**. Click the **Test server connection** button to check if the specified DMS is available for use and functioning correctly.

If the connection is unsuccessful, check the following details:

- The **Protocol** field defaults to **http** and should not be edited.
- The **Computer name** should be the name/number of the PC on which the DMS is installed.
- The **Port** number is usually 8080. The number must be between 0 and 65535.
- The **Active** check box must be selected, indicating that the server is in use.

02| Importing Files and Definitions

Click the **Test server connection** button again. If the DMS is now working correctly, click the **Save** button.



Additional Resources:

Setting up and Administering SIMS handbook

Importing the Revised Files

1. If revised files are supplied, save the required ZIP file
2. Unzip the ZIP file to a folder of your choice.
3. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page.

4. Click the **Browse** button to display the **Open** dialog.
5. Navigate to the location of the downloaded fileset. The file name is made up of the following data fields: <Fileset Number>-StatutoryReturns-<Term and Year>_Fileset.mfs.

IMPORTANT NOTE: *If more than one MFS file is displayed in the **Open** dialog, care should be taken to select the correct file.*

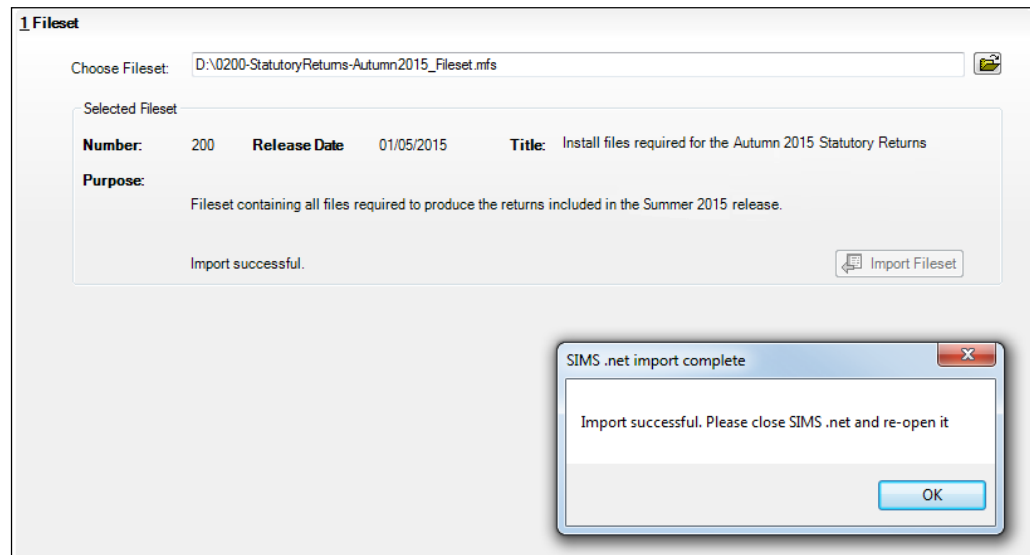
6. Highlight the file then click the **Open** button. Alternatively, double-click the required MFS file to return to the **Import Fileset** page.

NOTE: The following graphics show example data only.

Details of the selected fileset are displayed, including the version **Number** of the fileset, the **Release Date** and the fileset description (**Title**).

7. Click the **Import Fileset** button to import the fileset into the DMS.

When the import process is finished, **Import successful** is displayed at the bottom left-hand side of the **Fileset** panel and you are advised to restart SIMS. This ensures that the newly imported data will take effect.



8. Click the **OK** button then restart SIMS.
9. Run the return in the usual way.

☒ **Completed**

Importing Lookup Files

Lookups that are defined by your LA or Local Support Team can be imported into SIMS for use with the staff-related functionality. If you are importing a file from your LA or Local Support Team, save the file and the matching signature file to an appropriate location on your computer before beginning the import process.

IMPORTANT NOTE: It is no longer necessary to import the *CCS_Base_Lookups* because they are now updated automatically as part of the SIMS upgrade.

1. Select **Tools | Lookups | Import Lookups** to display the **Import Lookups** page.
2. Click the **Select File** button to display a standard Windows® **Open** dialog.
3. Navigate to the location of the .ZIP or .XML file, highlight it then click the **Open** button to populate the **Lookups present in the file** panel.

IMPORTANT NOTE: Both the file and its matching signature file must be saved to the same location.

02| Importing Files and Definitions

- To view the lookup values present in the file, highlight the required lookup. The values are then displayed in the **Lookup values present in the file** panel.

The screenshot shows the 'Import Lookups' window with four tabs: '1 Select File', '2 Lookups present in the file', '3 Lookup values present in the file', and '4 Exception Log'. The '1 Select File' tab is active, showing a 'File Name' input field and a 'Select File' button. The '2 Lookups present in the file' tab is also visible, showing a table with columns: 'Lookup Code', 'Lookup Description', and 'Lookup Mode'.

- To import the lookups, click the **Import** button.
If no problems are found, the lookups file will be imported into SIMS. These lookups are available for use once SIMS has been restarted.

NOTE: This applies to all users in SIMS at the time that the lookups are imported.

Any errors in the .ZIP or .XML file that prevent it from being imported successfully are displayed in the **Exception Log** panel.

NOTE: A faulty lookup does not prevent the other lookups from being imported, although other errors may.

- To save a copy of the Exception Log in .TXT format, click the **Save** button to display a standard Windows® **Save** dialog. Select a location, enter the required filename and click the **Save** button.
- To print a copy of the **Exception Log**, click the **Print** button.

IMPORTANT NOTE: Any changes made are not visible until all users, including yourself, have restarted SIMS. If users proceed to run the School Workforce Census without restarting SIMS, an error message is displayed.

 **Completed**

Importing Service Term Definitions

If your LA or Local Support Team has provided you with a service term definitions file, which includes Superannuation Schemes, National Insurance Rates, service terms, etc., it should be imported into SIMS. The file may require editing after import.

- Save the service term definitions file and the matching signature file sent by the LA or Local Support Team to an appropriate location on your computer.

2. Select **Tools | Staff | Pay Related Import** to display the **Import Service Terms** page.
3. Click the **Select File** button to display a standard Windows® **Open** dialog.
4. Navigate to the location of the .XML file, highlight it then click the **Open** button to populate the **Service Terms** and **Superannuation Schemes** panels.

Import Service Terms

Import

1 Select File 2 Service Terms 3 Superannuation Schemes 4 Exception Log

1 Select File

File Name C:\temp\pay_related.xml

2 Service Terms

Code	Description
AB	P/T Admin Assistant
AR	Auto Reconciliation
AT	Advanced Skills Teacher
CB	Site Services
CC	Teaching Assistant
CD	Caretaker
DB	Community Worker
EB	Cleaner
EF	Class Assistant
EJ	Instructors

3 Superannuation Schemes

Code	Description
CARE	Caretaker
INST	Instructors
LD	Leaders Superannuation
LGSA	Local Authority Superannuation
NONE	none
SERO	SERPS
SNT	Spec Needs Teachers
TEAC	Teachers Superannuation
TU	Teachers Upper

4 Exception Log

Exception Message

5. To import the service term definitions, click the **Import** button.
If no issues are found, the lookups file is imported into SIMS and the lookups are available for use immediately.
Any errors in the .XML file that prevent it from being imported successfully into SIMS are displayed in the **Exception Log** panel.

NOTE: If there is an error within a service term, that service term is not imported. This does not prevent other service terms in the same file from being imported.

6. To save a copy of the **Exception Log** in .TXT format, click the **Save** button to display a standard Windows® **Save** dialog. Select a location, enter the required filename then click the **Save** button.
7. To print a copy of the **Exception Log**, click the **Print** button.

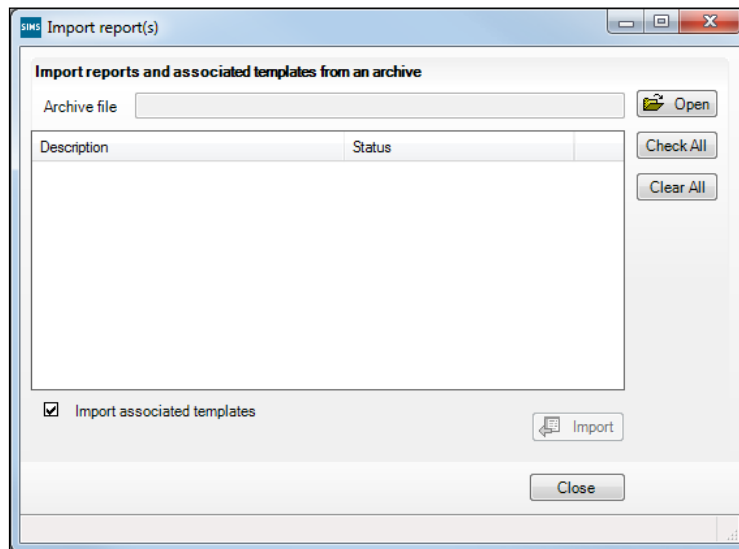
Completed

Importing Pre-Defined Report Definitions

A variety of predefined reports has been provided for use with this release of SIMS.

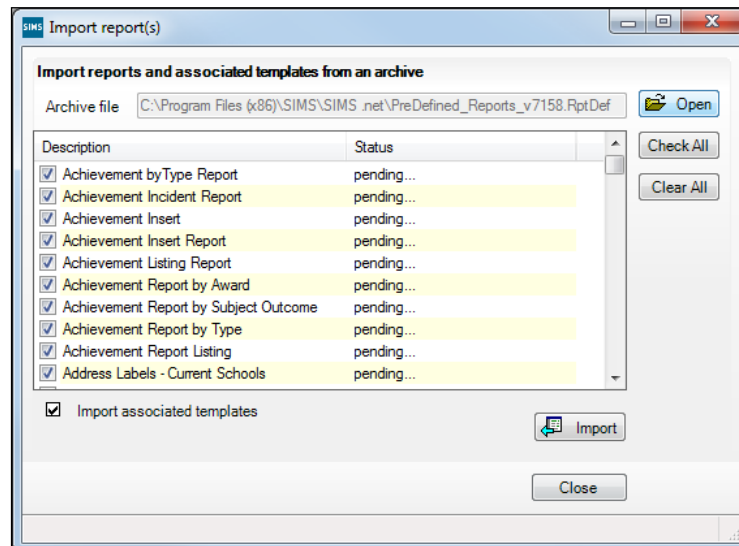
Where appropriate, you are given the option to import any documents associated with the report, e.g. Word templates, merged documents, etc. Once imported, these templates are stored, along with the actual report, on the Document Management Server (DMS). You can elect not to import these templates/merge documents, but you must ensure that a suitable alternative is available in order to ensure the report is produced correctly.

1. Select **Reports | Import** to display the **Import report(s)** dialog.



2. Click the **Open** button to display the **Select report file to import** dialog. Navigate to the application folder, typically `C:\Program Files (or Program Files (x86))\SIMS\SIMS .net` then highlight the `Predefined_Reports_<version number>.RptDef` file. The version number of the file name increments with each release of SIMS.
3. Click the **Open** button to return to the **Import report(s)** dialog. The file name and location are displayed in the **Archive file** field.

All pre-defined reports contained in the selected file are displayed in the dialog. However, you have the option to import selected reports only. If you do not wish to import a report, deselect its associated check box.



If you do not wish to import the associated templates, deselect the **Import associated templates** check box.

4. Click the **Import** button. The status of the selected report(s) changes to **Imported**.
5. Click the **Close** button to complete the process and close the dialog.



Additional Resources:

Predefined Reports Catalogue
Designing and Running Reports handbook

☐ **Completed**

Report Related Permissions

The availability of reports depends on the permissions assigned to you and whether report designs have been made public. Permissions can also be applied to specific data fields and it is therefore possible that some reports can be produced that have some blank columns.

Imported reports are stored automatically in the appropriate \Focus folder (e.g. Student, Staff, Class, etc.) in the DMS but can be copied to other folders provided you have sufficient permissions.

Pre-defined reports cannot be edited but users with appropriate permissions can delete reports.

03 | Preparing Staff Level Information

Checking/Editing Personal Details	15
Checking/Editing Professional Details.....	21
Checking/Editing Employment Details	23
Excluding Teacher/Support Staff Records from the Return	33
Reviewing Service Term Definitions	33
Checking/Editing the SWC Post.....	37
Mapping Subjects to DfE Subject Codes.....	39

Checking/Editing Personal Details

Before beginning the School Workforce Census return, ensure that all current staff are recorded in SIMS and that the information is up-to-date and accurate.

Ensure that:

- new staff have been added.
- any leavers have been recorded as such.
- any duplicated or unwanted staff records have been amended (please see *Excluding Teacher/Support Staff Records from the Return* on page 33).
- part-time details have been checked/updated for all applicable members of staff.

Basic staff information and contract information is included in the return for all teachers and support staff with contracts of one month or greater on census day. Minimal information is collected regarding occasional staff (staff with service of one month or less).

NOTES: Schools may find that a Teacher Number of eight digits is truncated to seven digits and this may affect the teacher's record adversely.

The current `RptDef` file must be imported after upgrading to the latest version of SIMS. This file contains all the up-to-date user-defined report definitions provided by Capita SIMS (please see Importing Pre-Defined Report Definitions on page 12).

Checking Basic Details

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Personal Details** tab to display the **Basic Details** panel.

4. Ensure that the **Legal Forename** and **Legal Surname** are up-to-date and accurate.
5. Ensure that the correct **Gender** is selected from the drop-down list.
6. Indicate whether the staff member should be included in the Schools Workforce Census Return by selecting or deselecting the **Eligible for SWR** check box.
7. If **Previous Name** is applicable to this member of staff, ensure that the details are entered correctly.

Click the **New** button to create a new **Previous Name** record. Alternatively, highlight an existing record then click the **Open** button adjacent to the **Previous Name** table to display the **Edit Previous Name** dialog. Edit the details, as required.

 **Completed**

Editing Personal Information

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Personal Details** tab then navigate to the **Personal Information** panel.

2 Personal Information

Date of Birth	<input type="text" value="03/08/1962"/>		NI Number	<input type="text" value="MW-23-75-16-C"/>															
Ethnicity	<input type="text" value="Black or Black British, Caribbean"/>			Qualification/Letters	<input type="text"/>														
Religion	<input type="text"/>			Disability Number	<input type="text"/>														
Marital Status	<input type="text"/>			Building Society Roll Number	<input type="text"/>														
Account Number	<input type="text" value="58671122"/>			Sort Code	<input type="text" value="60 00 90"/>														
Bank Name	<input type="text"/>			Bank Account Name	<input type="text"/>														
Are day to day activities substantially affected by physical or mental impairment																			
Languages	<table border="1"> <thead> <tr> <th>Language</th> <th>Fluency</th> <th>First Language</th> </tr> </thead> <tbody> <tr> <td>English</td> <td>Mother Tongue</td> <td>Y</td> </tr> </tbody> </table>				Language	Fluency	First Language	English	Mother Tongue	Y	<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>								
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Passport Details	<table border="1"> <thead> <tr> <th>Nationality</th> <th>Passport Number</th> <th>Expiry Date</th> </tr> </thead> <tbody> <tr> <td colspan="3"> <div> <div></div> <div></div> <div></div> </div> </td> </tr> </tbody> </table>				Nationality	Passport Number	Expiry Date	<div> <div></div> <div></div> <div></div> </div>			<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>								
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Meal Patterns	<table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> </tr> </thead> <tbody> <tr> <td>01/01/2009</td> <td></td> <td>PMSM</td> <td>PMSM</td> <td>PMSM</td> <td>PMSM</td> <td>PMSM</td> </tr> </tbody> </table>				Start Date	End Date	Mon	Tue	Wed	Thu	Fri	01/01/2009		PMSM	PMSM	PMSM	PMSM	PMSM	<input type="button" value="New"/> <input type="button" value="Open"/> <input type="button" value="Delete"/>
Start Date	End Date	Mon	Tue	Wed	Thu	Fri													
01/01/2009		PMSM	PMSM	PMSM	PMSM	PMSM													
Dietary Needs	<table border="1"> <thead> <tr> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Artificial colouring allergy</td> </tr> <tr> <td><input type="checkbox"/> No dairy produce</td> </tr> <tr> <td><input type="checkbox"/> Gluten free</td> </tr> <tr> <td><input type="checkbox"/> Kosher foods only</td> </tr> </tbody> </table>					Description	<input checked="" type="checkbox"/> Artificial colouring allergy	<input type="checkbox"/> No dairy produce	<input type="checkbox"/> Gluten free	<input type="checkbox"/> Kosher foods only									
Description																			
<input checked="" type="checkbox"/> Artificial colouring allergy																			
<input type="checkbox"/> No dairy produce																			
<input type="checkbox"/> Gluten free																			
<input type="checkbox"/> Kosher foods only																			

4. Ensure that the **Date of Birth** is correct. To edit, enter date or click the **Calendar** button then select a date.
5. Check that the National Insurance Number (**NI Number**) is entered in the correct format, e.g. MW-23-75-16-C.
6. Ensure that the staff member's **Ethnicity** is selected from the drop-down list.
7. Select the correct description from the **Are day to day activities substantially affected by physical or mental impairment** drop-down list.

03| Preparing Staff Level Information

- Click the **New** button adjacent to the **Impairments** table to create a new record. Alternatively, highlight an existing **Impairment** record then click the **Open** button to display the **Edit Impairment** dialog.

Impairment: Arthritis in the left knee
Date Advised: 01/06/2011
Category: Arthritic or Rheumatic
Assistance Required: Use of the lift
Affects Working Ability: ☐
Long Term: ☒
Notepad: Checkup at Doctor's twice a year. Doctor can be contacted, if required.

- Ensure that the **Impairment** description is correct and that the correct **Category** is selected from the drop-down list.
- Check the other details and use the **Notepad** to add or edit additional information, if required.
- Click the **OK** button to return to the **Personal Information** panel.

☒ Completed

Editing Absences Information

Absence information is not required for centrally employed staff. Details are collected for teaching contracted teachers and teaching assistants.

- Selected **Focus | Person | Staff** to display the **Employee Details** browser.
- Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
- Select the **Personal Details** tab then navigate to the **Absences** panel.

3 Absences		Start Date	End Date	Working Days Lost	Type	Input	New Open Delete Training <input type="checkbox"/>
Absence		09/07/2014	09/07/2014	1.00000	Unpaid, authorised absence	Unpaid	
		14/09/2011	15/09/2011	1.00000	Sickness	Absenc	
		18/09/2006	18/09/2006	1.00000	Self-certificated	Self-cer	

IMPORTANT NOTE: Ensure that the **Training** check box is deselected. This removes training absence records from the list, making it easier to locate non-training absence records.

4. To edit an absence record, highlight the record then click the **Open** button to display the **Edit Absence** dialog.

5. Check the **Start Date** and **End Date** of the absence. Enter the correct date or click the **Calendar** buttons and select the correct dates, if required.
6. Ensure that the total number of **Working Days Lost** is entered in the correct format, e.g. 1.5000.
7. Ensure that the correct **Type/Reason** for the absence is selected from the drop-down list, e.g. **Sickness, Maternity/Paternity Leave, Training**, etc.

IMPORTANT NOTE: In order for annual leave and certificated sick leave to be reported correctly in the absence reports, ensure that annual leave is recorded by selecting the **Annual Leave** check box.

8. Click the **OK** button to return to the **Absences** panel.

 **Completed**

Editing Address Details

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Personal Details** tab then navigate to the **Addresses** panel.

4. Check that the **Post Code** and **House Number/Name** exist and that they are valid. If you have Windows® Internet Explorer®, these details can be checked by clicking the **Address** button to display the address location on a map.

NOTE: British Forces Post Office numbers can now be added as post codes.

5. If you have edited the address, click the **Save** button.
6. If the staff member has an additional current address, i.e. a **Second Home**, enter the additional address then click the **Continue** button (adjacent to the address) to display the **New Address Details** panel.
7. Enter the remaining address details and the **Address Type** then click the **Save** button to refresh the display.

☐ **Completed**

Checking/Editing Professional Details

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Professional Details** tab to display the **Professional** panel.

1 Professional

HLTA Status ☐ TA Status ☐

HLTA Date QTS Route

Training

Title	Start Date	End Date	Completed
Child Protection 2012	02/07/2012	02/07/2012	Yes
Academy Status	04/01/2012	04/01/2012	Yes
Recording Pupil Assessments	31/10/2011	31/10/2011	Yes
Child Protection	28/08/2011	28/08/2011	Yes

Qualifications

Qualification	Title	Date Awarded	Level
Bachelor of Educ...	BEEd	01/07/1985	BEEd or other first...

Buttons: New, Open, Delete, Create

4. If the staff member is a Higher Level Teaching Assistant, ensure that the **HLTA Status** check box is selected. (Required for contracted teachers and contracted teaching assistants and other contracted support staff who are aged 18 or over.)
5. Enter the date that the HLTA status was achieved in the **HLTA Dates** field or click the **Calendar** buttons and select the correct dates. (Required for contracted teachers and contracted teaching assistants and other contracted support staff.)
6. If the member of staff is a Teaching Assistant, ensure that the **TA Status** check box is selected.
7. If the staff member has Qualified Teacher Status, ensure that appropriate route is selected from the **QTS Route** drop-down list, e.g. **Graduate Teacher Programme, Flexible routes**, etc. (Mandatory for all teachers, including those working towards QTS.)

8. Ensure that the **Qualifications** record is correct and up-to-date.
 - a. Click the **New** button, adjacent to the **Qualifications** field, to create a new qualification record. Alternatively, highlight an existing qualification then click the **Open** button to display the **Edit Qualifications** dialog.

The screenshot shows a window titled 'Edit Qualification for Helen Avery'. It contains a form with the following fields and values:

- Qualification: Bachelor of Education
- Title: BEd
- Date Awarded: 01/07/1985
- Qualification Level: combined with teacher qualifications
- Class Of Degree: Upper second class honours
- Comments: (empty)
- First Subject, Qualified: Others in Education - X900
- Second Subject, Qualified: Mathematics - G100
- Country Of Origin: British
- Verified: ☒

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- b. Edit the **Qualification** description, if incorrect.
 - c. Ensure that the applicable **Class of Degree**, e.g. **First class honours**, is selected from the drop-down list.

IMPORTANT NOTE: *Class of Degree is collected for new teachers where their employment start date is 1 August onwards.*

- d. Ensure that the correct **First Subject Qualified** and the **Second Subject Qualified** are selected from the drop-down lists.
 - e. If the qualification has been verified, e.g. the paper certificate has been checked, select the **Verified** check box.
 - f. Click the **OK** button to return to the **Professional** panel.

☒ **Completed**

Checking/Editing Employment Details

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Employment Details** tab to display the **Employment Details** panel.

1 Employment Details

Teaching Staff ☒ Teacher Number

Teacher Category Qualified Teacher Status

Staff Code Employee/Payroll No.

Employment Dates

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
07/09/1993		06/08/1992	06/08/1992	Housewife	

Check

Check	Clearance Date	Clearance Level
List 99	26/03/2006	List 99 Cleared
CRB Check	05/09/2002	CRB Enhanced Clearance

Contract

Status	Start Date	Post	Service Term	Scale Point
	01/09/2011	Midday Supervisor	NJC - APT & C Staff	11
	07/09/1993	Midday Supervisor	Manual Staff	1

Service Agreement

Start Date	End Date	Agreement Hours/Week
01/06/2009		1.0000

Buttons: New, Open, Delete (repeated for each section)

4. If the staff member is employed primarily in a teaching capacity, select the **Teaching Staff** check box.
5. A **Teacher Number** should be entered, if available, using the correct format, e.g. 12/34567. (Mandatory for all members of staff, including non-teachers, if applicable.)
6. Select the **Teacher Category** from the drop-down list. (Required for all teachers and teaching assistants, if applicable.)
7. Select a **Qualified Teacher Status** from the drop-down list, if appropriate. This is mandatory if a **Teacher Number** is entered.

 **Completed**

Editing Employment Dates

The employment dates must be checked for all teachers, contracted teaching assistants and other contracted support staff.

Employment Start	Leaving Date	Cont Service Start	LA Start	Previous Employer	Next
07/09/1993		06/08/1992	06/08/1992	Housewife	

1. Click the **New** button adjacent to the **Employment Dates** table to create a new employment history record. Alternatively, highlight an existing **Employment Dates** record then click the **Open** button to display the **Edit Employment History** dialog.

Details

Employment Start Date: 07/09/1993

Date of Leaving:

Continuous Service Start Date: 06/08/1992

Local Authority Start Date: 06/08/1992

Previous Employer: Housewife

Next Employer:

Notes:

OK Cancel

2. Ensure that the **Employment Start Date** is entered in the correct format (dd/mm/yyyy).
3. Check all other details for accuracy.
4. Click the **OK** button to return to the **Employment Details** panel.

☐ Completed

Editing Contract Details – Salary Ranges

1. Selected **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Select the **Employment Details** tab to display the **Employment Details** panel.
4. Click the **New** button adjacent to the **Contact** field or highlight an existing record and then click the **Open** button to display the **Contract Details** page.

1 Contract Details

Service Term	Leadership	Employment Type	Permanent
Post Reference	Headteacher	Post Category / SWR Post / Payroll Post	Teacher, Other/ Head Teacher/
Post Reason		Financial Subgroup	
Contract Start Date	01/09/2000	Contract/Payroll Number	PR341100
Superannuation	Teachers	NI Contracted	In <input type="checkbox"/> Out <input checked="" type="checkbox"/>
Increment Date		Leave Entitlement	0.0000
Contract End Date		Contract Termination Reason	
Post Offered Date		Post Accepted Date	
Contract Issued Date		Service Term Weeks/Year	52.1430
Service Term Hours/Week	32.5000	Weeks/Year	52.1430
Hours/Week	32.5000	Pro Rata	1.0000
FTE	1.0000	Pay Factor	1.0000
Safeguarded Salary	<input type="checkbox"/>		
Destination			
Origin	Not known		

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Leadership	01/01/2014		57520.00	57520.00
Headteacher Group 2	01/09/2006	31/12/2013	18.0	
Headteacher Group 2	01/09/2005	31/08/2006	17.0	
Headteacher Group 2	01/09/2004	31/08/2005	16.0	

New Open Delete

5. Click the **New** button adjacent to the **Salary Records** field or highlight an existing record and click the **Open** button to display the **Add/Edit Contract Salary** dialog.

Edit Contract Salary

Contract Salary Details

Range Type	Teacher Salary Range
Start Date	01/04/2014
End Date	
Minimum	21804.00
Maximum	31868.00
Annual Salary	29733.00
Actual Salary	29733.00
Superannuation	<input checked="" type="checkbox"/>
NI Status	<input checked="" type="checkbox"/>
Pay Scale	Teachers Main
Regional Pay Spine	Rest of England
Notes	<p>Converted from Scale point 5.0</p> <p><gross 29/04/14 12:12:07> Cost of living increase</p> <p><gross 29/04/14 16:11:02></p>

Annual Salary Change History

OK Cancel

6. Select the appropriate **Range Type** from the drop-down list.
7. Select the **Start Date** for the pay range by clicking the **Calendar** button and selecting the dates. Alternatively, enter the date in dd/mm/yyyy format.

*NOTE: The first time that a pay range is added to a staff member's contract, the **Start Date** defaults to the **Employment Start Date**. If any subsequent contracts are added, the **Start Date** defaults to the **Contract Start Date**.*

A range will be terminated automatically when you apply a new range, when you enter a contract end date and when you enter a date of leaving.

The **Minimum** and **Maximum** will be populated automatically according to the service term selected.

8. Enter the staff member's **Annual Salary** in the field. This must be within the stated range.

The **Actual Salary** is calculated automatically, based on the annual salary, full time equivalent and weeks worked per year pro rata.

9. If the superannuation scheme is to be applied to this contract, select the **Superannuation** check box.

NOTE: If the check box is selected, it is assumed that the employer makes superannuation contributions at the relevant rate. If it is deselected, no superannuation contributions are made.

10. If the pay is subject to National Insurance contributions, select the **NI Status** check box.

NOTE: When salary commitment is calculated in FMS, these check boxes will not be taken into account. National Insurance and superannuation will always be calculated for a pay scale.

The **Pay Scale** and **Regional Pay Spine** default from the service term selected and are not editable here.

11. Any **Notes** can be entered, as required. If the salary has been converted from a pay scale, the details are entered here.

*NOTE: On saving the changes, the username, date and time of any updates to the salary are recorded in the **Notes** field. Any changes made to the salary via **Tools | Staff | Salary Update** are also recorded here.*

12. If you wish to view the history of changes to the annual salary, click the **Annual Salary Change History** button. The Annual Salary Change History can be printed, if required. Click the **OK** button to close the dialog.

IMPORTANT NOTE: The Annual Salary Change History will not display any changes made to the salary by B2B:Personnel.

13. Click the **OK** button to save the details and return to the **Contract Details** page.

☐ Completed

Editing Contract Details – Pay Scales

1. Click the **New** button adjacent to the **Contract** table to create a new record.

Contract	Status	Start Date	Post	Service Term	Point/Salary	
		01/09/2013	Teacher	Teachers	6.0	New
		01/09/2001	ADVANCED SKI...	Advanced Skills Teacher	14.0	Open
						Delete
						Clone

Alternatively, highlight an existing **Contract** record then click the **Open** button to display the **Edit Employment History** dialog.

Edit Contract for Anita Abell

Save Undo Help Close

1 Contract Details 2 Pay Pattern

1 Contract Details

Service Term: Teachers Employment Type: Permanent

Post Reference: Teacher Post Category / Sw/R Post / Payroll Post: Teacher, Other/ Classroom Teacher, main pay range/

Post Reason: Contract Start Date: 01/09/2013 Financial Subgroup: Contract/Payroll Number: PR323232

Superannuation: Teachers NI Contracted: In ☐ Out ☒

Increment Date: 01/09 Leave Entitlement: 0.0000

Contract End Date: Contract Termination Reason: Post Accepted Date:

Post Offered Date: Service Term Hours/Week: 32.5000 Service Term Weeks/Year: 52.1430

Contract Issued Date: Hours/Week: 32.5000 Weeks/Year: 52.1430

FTE: 1.0000 Pro Rata: 1.0000

Safeguarded Salary: ☐ Pay Factor: 1.0000

Destination: Latest Pay Review Date: 14/07/2015

Origin: Not applicable - change of contract

Salary Records

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Teachers Main Scale	01/09/2013		6.0	

Allowances

Allowance	Start Date	End Date	Type
-----------	------------	----------	------

Role

Role	Start Date	End Date
Classroom Teacher	01/09/2013	

Suspensions

Suspensions Starts on	Suspensions Ends on	Reason
-----------------------	---------------------	--------

Some fields are populated automatically, including the **SWC Post** and **Service Term Hours/Week**.

2. Ensure that the applicable **Post Reference** and **Post Reason** are selected from the drop-down lists.

03| Preparing Staff Level Information

3. Ensure that the correct **Employment Type** is selected from the drop-down list, e.g. **Permanent**.
4. When the first contract is entered for a member of staff, the **Contract Start Date** defaults to the **Employment Start Date**. This can be edited by clicking the **Calendar** button and selecting the date.
5. If the contract has ended, ensure that a **Contract End Date** is entered.
6. Ensure that the number of hours per week the member of staff works is entered in the **Hours/Week** field. The actual amounts paid are calculated using the number of hours worked and the pay rates applicable to the employee.
7. Ensure that the number of weeks per year the member of staff works is entered in the **Weeks/Year** field.
8. If the employee has protected rights in their salary, select the **Safeguarded Salary** check box. (Applicable to contracted teachers only.)
9. If a contract end date has been entered, ensure that a **Destination** is entered from the drop-down list, e.g. **Remaining in the same LA - primary school**.
10. Ensure that the employee's employment prior to joining the school is selected from the **Origin** drop-down list.
11. Enter the **Latest Pay Review Date** (in dd/mm/yyyy format) or select required date from the **Calendar** button. This date is collected in the School Workforce Census and applies to for all teachers with contracts or service agreements.
12. Click the **New** button adjacent to the **Salary Records** table to display the **Add Contract Scale** dialog, where a new **Pay Scale** record can be created.

Alternatively, highlight an existing **Pay Scale** record then click the **Open** button to display the **Edit Contract Scale** dialog.

The screenshot shows the 'Edit Contract Scale' dialog box. It contains the following fields and values:

Contract Scale Details	
Scale	Headteacher Group 2
Start Date	01/09/2006
End Date	
Minimum Scale Point	8.0
Maximum Scale Point	21.0
Point	14.0
Superannuation	<input checked="" type="checkbox"/>
NI Status	<input checked="" type="checkbox"/>
Pay Scale	Leadership
Regional Pay Spine	Rest of England

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- a. Ensure that the correct scale **Point** is entered.
- b. The **Pay Scale** and **Regional Pay Spine** fields are populated automatically. If the incorrect value is displayed:
 - a. Select **Tools | Staff | Pay Related** then select the applicable service term to display the **Service Term Details** page.
 - b. In the **Pay Awards** panel, highlight the required **Scales** record then click the **Open** button to display the **Edit Scale** dialog

- c. Select the applicable **Pay Scale** from the drop-down list.
 - d. Indicate which regional variation the pay scale is for by selecting from the **Regional Pay Spine** drop-down list.
 - e. Click the **OK** button then click the **Save** button.
 - c. Click the **OK** button to return to the **Edit Contract** dialog.
13. Click the **New** button adjacent to the **Allowances** table to create a new record.

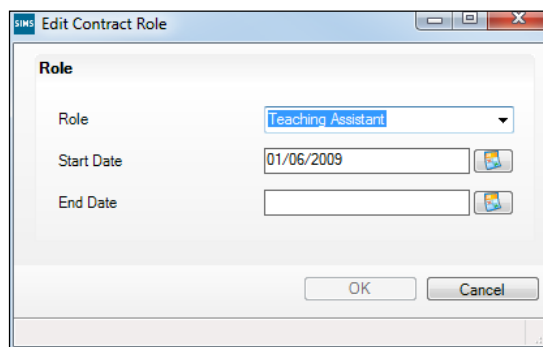
Alternatively, highlight an existing **Allowances** record then click the **Open** button to display the **Edit Contract Allowance** dialog.

03| Preparing Staff Level Information

- a. Ensure that the applicable **Allowance** is selected from the drop-down list.
- b. Ensure that all other allowance details are current and complete.
- c. Click the **OK** button to return to the **Edit Contract** dialog.

NOTE: There is new functionality in SIMS to help deal with spot allowances when creating the School Workforce Census. If your school uses spot allowance, please refer to the Producing the School Workforce Census 2015 Return handbook.

14. Click the **New** button adjacent to the **Role** table to create a new record.
Alternatively, highlight an existing **Role** then click the **Open** button to display the **Edit Contract Role** dialog.






- a. Select the applicable **Role** from the drop-down list.
 - b. Ensure that the **Start Date** for this role is entered in the correct format (dd/mm/yyyy).
 - c. Click the **OK** button to return to the **Edit Contract** dialog.
15. Click the **Save** button.

☐ Completed

Editing Service Agreement Information

The following service agreement details should be checked to ensure that the correct values are collected in the return.

Service Agreement	Start Date	End Date	Agreement Hours/Week	
	01/06/2009		1.0000	 New  Open  Delete

1. Click the **New** button adjacent to the **Service Agreement** table to create a new record.

Alternatively, highlight an existing service agreement record then click the **Open** button to display the **Edit Service Agreement** dialog.




Edit Service Agreement for Helen Avery

Save Undo Help Close

1 Service Agreement Details

1 Service Agreement Details




Service Start Date	01/06/2009	Service End Date	
Offered Date		Accepted Date	
QTS Status	With QTS	SWC Post	Classroom Teacher
Reason	Supply	Source Name	
Sourced By	Local Authority		
Service Type	Vice Agreement with Local Authority		
FTE Hours/Week		Agreement Hours/Week	1.0000
Weeks/Year	38.0000	Daily Rate	<input checked="" type="checkbox"/>
Total Pay (annual equivalent)		SWC Additional Payment Amount	0.00
SWC Base Pay (annual equivalent)			
Latest Pay Review Date			

Role	Start Date	End Date	
Peripatetic Teacher (unattached)	01/06/2009		 New  Open  Delete

Notepad

Notes

Guitar lesson to Yr 3 to Yr 5 pupils

 New
 Open
 Delete

2. Ensure that the **Service Start Date** is entered in the correct format (dd/mm/yyyy). (Not required for centrally employed staff.)
3. Ensure that the **Service End Date** is entered in the correct format (dd/mm/yyyy). (Required for all current members of staff and Leavers.)

4. Check that the correct School Workforce Post has been selected from the **SWC Post** drop-down list.

IMPORTANT NOTES:

*To avoid the validation error 4410 (post is missing or invalid) being triggered during the Create and Validate process, the correct **SWC Post** must be selected.*

***Classroom Teacher (TCH) SWC Post** has been re-introduced because some teachers are not Classroom Teacher, upper pay range or Classroom Teacher, main pay range.*

5. Check that the correct **Service Type** has been selected from the drop-down list. (Required for teachers with service agreements.)
6. If applicable, ensure that the full time equivalent has been entered in the **FTE Hours/Week** field.
7. Enter the number of weeks worked per year, as stated in the service agreement, in the **Weeks/Year** field. (Required for all members of staff except agency/service agreement teachers who are on a Daily Rate.)
8. Enter the number of hour worked per weeks as stated in the service agreement in the **Agreement Hours/Week** in the field. (Required for all members of staff except agency/service agreement teachers who are on a Daily Rate.)
9. For members of staff who are not paid a daily rate, enter the pre-tax annual salary of the staff member in the **SWC Base Pay (annual salary equivalent)** field. This is not mandatory if the member of staff is an Agency/SA teacher who is on a **Daily Rate**.
10. If the person is on a daily rate of pay, select the **Daily Rate** check box. (Required for agency/service agreement teachers. Not required for centrally employed staff.)

*NOTE: Those providing a service for which there is no charge should not have the **Daily Rate** check box selected, e.g. governors and volunteers.*

11. For staff members, who are not paid a daily rate, enter any additional payment amount in the **SWC Additional Payment Amount** field.
12. Enter the **Latest Pay Review Date** (in dd/mm/yyyy format) or select required date from the **Calendar** button. This date is collected in the School Workforce Census and applies to for all teachers with contracts or service agreements.
13. Click the **New** button to add a **Role**.
Alternatively, highlight an existing **Role** then click the **Open** button to display the **Edit Service Agreement Role** dialog.
 - a. Ensure that the applicable **Role** is selected from the drop-down list.
 - b. Ensure that **Start Date** is entered in the correct format (dd/mm/yyyy).
14. Click the **Save** button.

☐ **Completed**

Excluding Teacher/Support Staff Records from the Return

If there are teachers or support staff who have been entered in error (such as duplicates) or records that are not required to be collected for the return, it is recommended that you carry out the following action to ensure that these records are not included in the School Workforce Census return.

1. Select **Focus | Person | Staff** to display the **Employee Details** browser.
2. Search for then select the required person to display the **Employee Details** page.
3. Select the **Personal Details** tab to display the **Basic Details** panel.
4. Ensure that the **Eligible for SWR** check box is deselected. This removes the member of staff from the return.

5. Click the **Save** button.

 **Completed**

Reviewing Service Term Definitions

A service term helps to define a staff contract. It contains generic information including the number of hours worked per week, weeks worked per year, etc. Some service terms have scales defined within them, which determine the annual salary or hourly rate payable and allow spinal progression, where an employee's salary increments annually.

Service term information can be imported from a file provided by your LA or Local Support Team (please see *Importing Service Term Definitions* on page 10), or it can be entered manually.



Additional Resources:

Defining Superannuation, Service Terms and Training Event Details chapter in the *Managing Staff* handbook

03| Preparing Staff Level Information

Four reports are available in SIMS to facilitate the preparation for the School Workforce Census.

1. Select **Reports | Run Report** to display the **Report Browse**.
2. In the report navigation tree, select **Focus | Service Term**.

The names of the four service term reports are displayed in the right-hand panel.

Report Browse

3. Double-click the required report name to generate the report, which is displayed in Microsoft Word.

▪ **ST Allowances Report**

WATERS EDGE PRIMARY SCHOOL		
Service Term Allowance Definitions		
AT: Advanced Skills Teacher		
Allowance	Allowance	Category
LD: Leadership		
Allowance	Allowance	Category
MW: Manual Staff		
Allowance	Allowance	Category
NJ: NJC - APT & C Staff		
Allowance	Allowance	Category
TE: Teachers		
Allowance	Allowance	Category
MGT1	Management 1	Management Allowances
MGT2	Management 2	Management Allowances
MGT3	Management 3	Management Allowances
MGT4	Management 4	Management Allowances
TL1B	Teacher Learning 1B	Teaching and Learning Responsibility Payments

The default **Category** of **Other** is displayed in the report if a category has not been allocated to the allowance.

To allocate **Categories** to **Allowances**:

- a. Select **Tools | Staff | Pay Related** to display the **Find Service Term** browser.
- b. Search for then select the required service term.
- c. In the **Allowances** panel, highlight an allowance then click the **Open** button to display the **Edit Allowance for Teachers** dialog, where a category can be allocated to an allowance.

■ **ST Definition Report**

WATERS EDGE PRIMARY SCHOOL			
AT: Advanced Skills Teacher			
Spinal Progression:	F	Salaried:	T
Increment Mth:	0	Teacher:	T
Hrs / Wk:	27.5000	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	T
Points, Max:	27.0	Interval:	1.0
Superannuation:			
TEAC	Teachers	8.05	
Financial Sub-groups			
LD: Leadership			
Spinal Progression:	F	Salaried:	T
Increment Mth:	0	Teacher:	T
Hrs / Wk:	26.2500	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	T
Points, Max:	43.0	Interval:	1.0
Superannuation:			
TEAC	Teachers	8.05	
Financial Sub-groups			
MW: Manual Staff			
Spinal Progression:	F	Salaried:	F
Increment Mth:		Teacher:	F
Hrs / Wk:	37.5000	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	F
Points, Max:	1.0	Interval:	1.0

■ **ST Pay Scale Definitions Report**

WATERS EDGE PRIMARY SCHOOL				
Pay Scale Definitions				
AT: Advanced Skills Teacher				
Scale		Points	Region	National Scale
AST	Advanced Skills Teacher	1.0 - 27.0	Rest of England	Advanced Skills Teachers
LD: Leadership				
Scale		Points	Region	National Scale
HTG4	Headteacher Group 4	14.0 - 25.0	Rest of England	Leadership
HTG5	Headteacher Group 5	18.0 - 29.0	Rest of England	Leadership
MW: Manual Staff				
Scale		Points	Region	National Scale
GR 1	Grade 1	1.0 - 1.0	Rest of England	Other
GR 2	Grade 2	1.0 - 1.0	Rest of England	Other
GR 3	Grade 3	1.0 - 1.0	Rest of England	Other
GR 4	Grade 4	1.0 - 1.0	Rest of England	Other
NJ: NJC - APT & C Staff				
Scale		Points	Region	National Scale
SC 2	Scale 2	11.0 - 13.0	Rest of England	National Joint Council (Local Government Services)
SC 3	Scale 3	14.0 - 17.0	Rest of England	National Joint Council (Local Government Services)

■ **ST Post Definitions Report**

WATERS EDGE PRIMARY SCHOOL			
Service Term Post Definitions			
AT: Advanced Skills Teacher			
Post		Category	SWR Post
AST	ADVANCED SKILLS TEACHER	Teacher, Other	Excellent Teacher
LD: Leadership			
Post		Category	SWR Post
HT	Headteacher	HT Headteacher	Head Teacher
DH	Deputy Head	Teacher, Other	Head Teacher
MW: Manual Staff			
Post		Category	SWR Post
CARE	Caretaker	Not inc on Form 7/PLASC	Support Staff
KITC	Kitchen Staff	Not inc on Form 7/PLASC	Support Staff
MID	Midday Supervisor	Not inc on Form 7/PLASC	Support Staff
ASCK	Assistant Cook	Not inc on Form 7/PLASC	Support Staff
ASCA	Assistant Caretaker	Not inc on Form 7/PLASC	Support Staff
HDCK	Head Cook	Not inc on Form 7/PLASC	Support Staff
CLEA	Cleaner	Not inc on Form 7/PLASC	Support Staff
NJ: NJC - APT & C Staff			
Post		Category	SWR Post
ADMN	Admin Clerk	AC Other Admin/Clerical	Support Staff
LAB	Lab Assistant	TE Laboratory Assistant/Tech	Support Staff
TECH	Technology Technician	TE Laboratory Assistant/Tech	Support Staff

☐ Completed

Checking/Editing the SWC Post

To avoid the validation error 4410 (post is missing or invalid) being triggered during the Create and Validate process, ensure that the **SWC Post** (SWR Post) is specified.

*NOTE: The SWC Post of **(TCH) Classroom Teacher** has been re-introduced in the 2015 Return because there are some unqualified teachers for example who are not on the Main pay range or the Upper pay range.*

*Schools do not need to reverse the changes made last year because all three codes (**Classroom Teacher, Classroom Teacher:main pay range, Classroom Teacher:upper pay range**) are now acceptable.*

To check the current School Workforce Census Post value:

1. Select **Focus | Person | Staff** to display the **Find Staff** browser.
2. Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
3. Click the **Employment Details** tab then navigate to the **Contract** panel.

Status	Start Date	Post	Service Term	Point/Salary
	01/09/2009	Teacher	Teachers	4.0

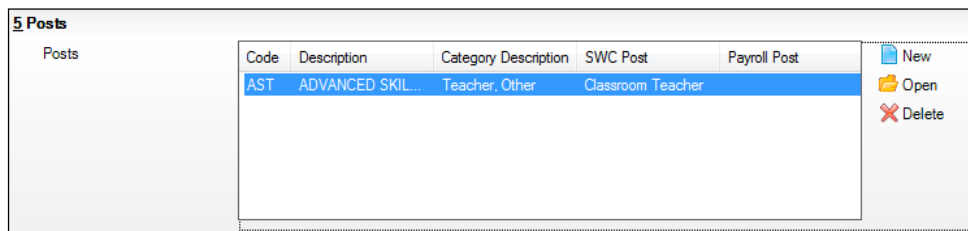
4. Highlight the applicable **Contract** then click the **Open** button to display the **Edit Contract** dialog.

5. Check that a **Post Reference** has been selected from the drop-down list. It may be necessary to add an applicable **Service Term** if it does not already exist.
6. Click the **Save** button to return to the **Employee Details** page.
7. Re-open the contract then check the read-only entry in the **Post Category/SWR Post/Payroll Post** field.

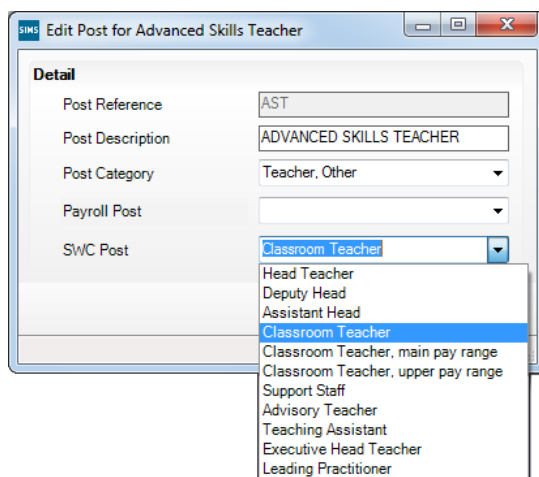
03| Preparing Staff Level Information

If the School Workforce Census Post needs to be changed:

1. Select **Tools | Staff | Pay Related** to display the **Find Service Term** browser.
2. Search for and highlight the required service term then click the **Open** button to display the **Service Term Details** page.
3. Navigate to the **Posts** panel.



4. Highlight the applicable record then click the **Open** button to display the **Edit Post** dialog.



5. Select the applicable value from the **SWC Post** drop-down list, i.e. **Classroom Teacher, main pay range** or **Classroom Teacher, upper pay range**.
6. Click the **OK** button to return to the **Service Term Details** page then click the **Save** button.

☐ Completed

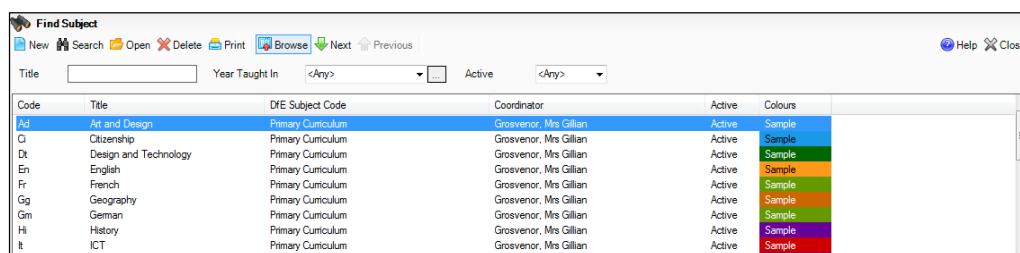
Mapping Subjects to DfE Subject Codes

Applicable to Secondary phase schools only

In the School Workforce Census, curriculum information is collected on the subjects taught by teachers in Secondary schools. This information is usually entered into SIMS via Academic Management or into Nova then transferred over into SIMS. To enable curriculum information to be recorded accurately, it is necessary to map all the subjects taught in school to DfE subject codes.

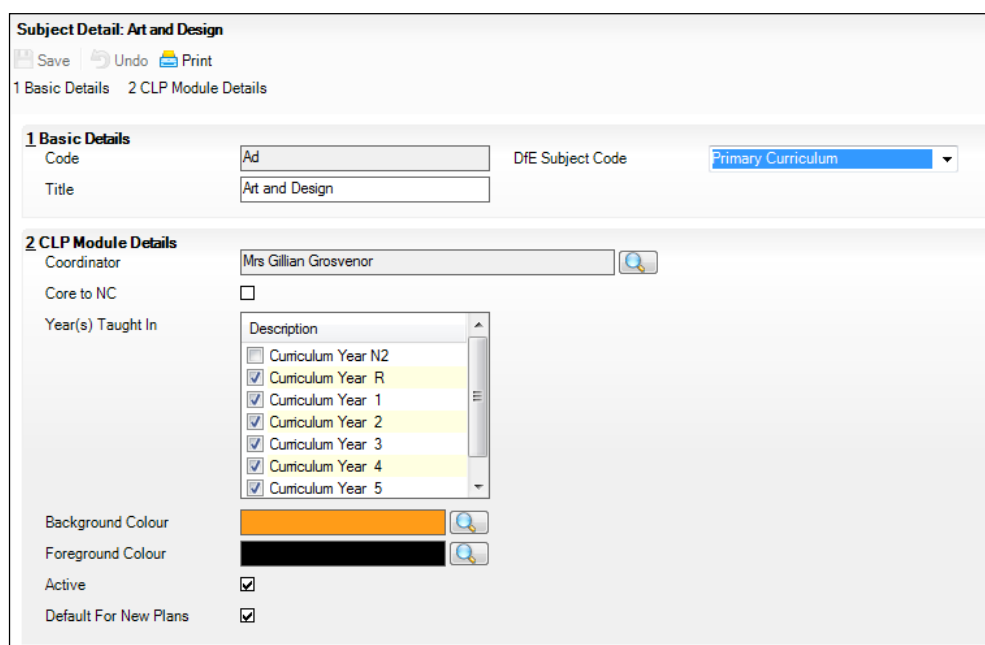
NOTE: One curriculum record will be generated when more than one Nova subject is mapped to the same DfE subject.

1. Select **Tools | Setups | Subjects** to display the **Find Subject** browser. A combination of subject **Title**, **Year Taught In** and **Active** status can be used to refine the search for the required subject. Alternatively, the fields can be left blank to list all subjects.
2. Click the **Search** button to display a list of subjects that match the search criteria.



Code	Title	DfE Subject Code	Coordinator	Active	Colours
Ad	Art and Design	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Ci	Citizenship	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Dt	Design and Technology	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
En	English	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Fr	French	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Gg	Geography	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Gm	German	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
Hi	History	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample
It	ICT	Primary Curriculum	Grosvenor, Mrs Gillian	Active	Sample

3. Highlight the required subject then click the **Open** button to display the **Subject Detail** page.



Subject Detail: Art and Design

Save Undo Print

1 Basic Details 2 CLP Module Details

1 Basic Details

Code: Ad DfE Subject Code: Primary Curriculum

Title: Art and Design

2 CLP Module Details

Coordinator: Mrs Gillian Grosvenor

Core to NC: ☐

Year(s) Taught In:

Description:

- ☐ Curriculum Year N2
- ☒ Curriculum Year R
- ☒ Curriculum Year 1
- ☒ Curriculum Year 2
- ☒ Curriculum Year 3
- ☒ Curriculum Year 4
- ☒ Curriculum Year 5

Background Colour:

Foreground Colour:

Active: ☒

Default For New Plans: ☒

03| Preparing Staff Level Information

4. Ensure that the applicable **DfE Subject Code** is selected from the drop-down list.
5. Check the other details displayed to ensure that they are correct.
6. Click the **Save** button.

*NOTES: Secondary schools are not permitted to edit the subject **Code** or **Title** if a subject is used by more than just Curriculum and Lesson Planner. If Secondary schools want to edit these elements, they must do so using the normal procedures in Nova (please refer to the Getting Started with Nova handbook).*

When these subject codes are exported to Nova, it will recognise that changes have been made and will seek confirmation from the Nova user that the corresponding Nova Subject Code should also be updated.

☐ **Completed**

04 | Preparing School Level Information

Checking Establishment Details.....41

Checking School Address, Telephone and Email Information.....42

Checking Establishment Details

The establishment details should be checked to ensure that they are complete and accurate before running the School Workforce Census.

1. Select **Focus | School | School Details** to display the **School Details** page.
2. Check that the details displayed in the **Establishment** panel are correct.

1 Establishment	
School Name	WATERS EDGE PRIMARY SCHOOL
LA	823 Central Bedfordshire
Establishment Number	2999
Unique Reference Number	
School Phase	Primary
School Type	Infant and Junior School 5-11
School Governance	Community
Intake Type	Comprehensive
Previous School Name	
Previous Estab Number	
Previous URN Number	
Boarding Pupils	<input type="checkbox"/> Nursery Class <input checked="" type="checkbox"/>
Head Teacher	Mrs Gillian Grosvenor
Curriculum Years	N2 6
Pupil Genders	Coeducational
Gender on entry to school	Coeducational
NC Year Start Date (dd/mm)	1 / 9
Extended Services	<input type="checkbox"/> Before school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> After school childcare and/or activities for school-age children (term-time) <input type="checkbox"/> Childcare and/or activities, for school-age children during school holidays <input type="checkbox"/> Childcare integrated with a nursery education place for three and four year old...
No. of Childcare Places	0
No. of Childcare Nursery Places	0

3. Ensure that the **School Name** and **School Type** have been entered correctly.

NOTE: The **School Name**, **LA** number, **Establishment Number** and **School Phase** were set up when SIMS was installed. If these details are incorrect, please contact your Local Support Unit for assistance.

Information for Academies:

Academies should ensure that the following information is recorded, if applicable:

- The **School Type** and **School Governance**.
Select **Academies** from both drop-down lists.
- The school's **Previous Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Date Number Changed**.
If the DfE establishment number has changed for sponsor-led Academies, the academy should record the previous establishment number and the date the number changed.
- The **Previous URN Number** and **Date Number Changed**.

IMPORTANT NOTE: These data items must be entered for all academies, because the date the URN changed is interpreted as the date the academy opened. If this date is not entered, some of the historical information from before that date will be included in the School Workforce Census incorrectly, e.g. a member of staff who left before the academy opened.

4. Click the **Save** button to save any changes, if applicable.



Completed

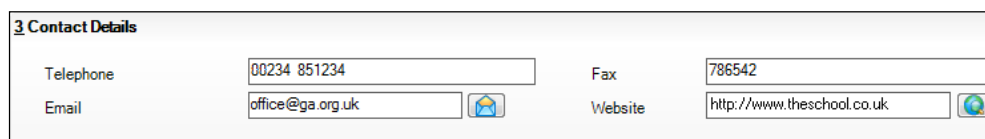
Checking School Address, Telephone and Email Information

The following school contact details are collected for the return and therefore need to be checked to ensure that they are up-to-date and correctly recorded in SIMS:

- School **Current Address Details** information (including Post Code)
 - School **Email** Address
 - School **Telephone** Number.
1. Select **Focus | School | School Details** to display the **School Details** page.
 2. Click the **Address** hyperlink to display the **Address** panel.

Ensure that the school address is correct and complete.

3. If necessary, click the **Modify Address** button then make the required changes.
 - A **Building Name** or **Building Number** should be included in the address to avoid errors. If appropriate, *Main Office* can be entered in the **Building Name** field.
 - Ensure that a **Post Code** is entered.
4. Click the **Contact Details** hyperlink to display the **Contact Details** panel.



The screenshot shows a web form titled "3 Contact Details". It contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Telephone" and contains the text "00234 851234". The top-right field is labeled "Fax" and contains the text "786542". The bottom-left field is labeled "Email" and contains the text "office@ga.org.uk". The bottom-right field is labeled "Website" and contains the text "http://www.theschool.co.uk". Each field has a small icon to its right: a telephone handset for Telephone, a fax machine for Fax, an envelope for Email, and a globe for Website.

5. Ensure that a **Telephone** number has been recorded (including the STD code).
6. Ensure that the school's official communications **Email** address has been recorded correctly (it must include the @ character together with a minimum of one full stop).
The email address must be the account used on a regular basis. It must also be accessible to the Head Teacher as it might be used for future DfE correspondence.
7. Click the **Save** button, if changes have been made.

 **Completed**

05 | What Next?

After carrying out the preparation routines documented in this guide, ensure that any subsequent changes at your school (e.g. changes to staff detail, service terms, etc.) are recorded accurately in SIMS.

You must upgrade to the SIMS 2015 Summer Release (7.164) before completing the School Workforce Census 2015 Return. However, it is advisable to check whether a later version of SIMS is available then upgrade to the current release of SIMS, if necessary.

You should now be ready to produce the final School Workforce Census 2015 Return. For specific instructions, please refer to the *Producing the School Workforce Census 2015 Return* handbook.

Where Can I Get More Information

- A wide range of documentation is available from within SIMS via the **Documentation Centre** and can be accessed by clicking the **Documentation** button located at the top right-hand side of the SIMS Home Page. Once open, click the required category button and then select the required document.
- In addition to this preparation guide, a handbook outlining how to produce the School Workforce Census (via **Routines | Statutory Returns | School Workforce Census**) and a Validation Errors and Resolutions document (which provides suggestions on how to resolve any validation errors or queries) are available:
 - *Producing the School Workforce Census 2015 Return* handbook
 - *School Workforce Census 2015 Validation Errors and Resolutions* document.

You may also find the information in the *Managing Staff* handbook helpful, as it provides details about the processes that relate to Service Terms, etc.

- There is a comprehensive online help system available in SIMS, accessed by clicking the applicable **Help** button or by pressing **F1** from anywhere in the software.
- You may also find the School Workforce Census information provided by the DfE useful (<https://www.gov.uk/school-workforce-census>).

Index

A

absences	18
deselecting training	18
latest pay review date	27, 31
academy information	41
address details	20

C

contract information	25, 27
----------------------------	--------

D

daily rate	31
duplicate records	33

E

eligibility for SWC	
removing	33
employment details	23, 24
contract details	25, 27
employment dates	24
service agreement information	31
excluding	
teachers and support staff from SWC ..	33

F

filesets	
importing	7
permissions	4

I

importing	
fileset	7
lookup files	9
pre-defined report definitions	12
service term definitions	10

L

licence	5
---------------	---

M

mapping	
subjects to DfE subject codes	39

P

pay scale	27, 31
permissions	
setting	4
personal details	15
absence information	18
address details	20
basic details	16
personal details	17
post	27, 31, 37
professional details	21

R

reginal pay spine	31
removing	
eligibility for SWC	33
reports	
permissions	13
pre-defined report definitions	12
service term reports	33
role	24, 31

S

salary range	25
school telephone and email details	42
service agreement	31
service term definitions	
establishment details	41
importing	10
reports	33
reviewing	33
setting	
permissions	4
School Workforce Census	5
subject codes	39
SWC post	
editing	37



Contact the Service Desk today on
0845 300 8179 • option 2

or email us on
**misservicedesk@
schoolbusinessservices.co.uk**

