



Applicable to 7.170 onwards

# Preparing for the School Workforce Census 2016 Return guide

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## School Workforce Census 2016 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 2016 Summer Release (version 7.170) 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 4).
<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 11).
<input type="checkbox"/>	Import the latest pre-defined report definitions into SIMS (please see <i>Importing Pre-Defined Report Definitions</i> on page 13).
<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 <b>Latest Pay Review Date</b> is recorded for all teachers with contracts or service agreements (please see <i>Editing Contract Details - Pay Scales</i> on page 27 and <i>Editing Service Agreement Information</i> on page 32).
<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 34).
<input type="checkbox"/>	Ensure service term definitions are correct and make any required edits (please see <i>Reviewing Service Term Definitions</i> on page 35).
<input type="checkbox"/>	Ensure that the correct <b>SWC Post</b> is selected to avoid validation error 4410 from being triggered (please see <i>Checking/Editing the SWC Post</i> on page 39).



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# 01 | Getting Started

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## 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 2016 Return, which this year takes place on Thursday 3 November.

The School Workforce Census 2016 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: 03/11/2016

Absence collected from 01/09/2015 to 31/08/2016

Continuous contracts collected from 01/09/2015 to 03/11/2016

Allowances collected from 06/11/2015 to 03/11/2016.

The School Workforce Census 2016 Return includes the following changes:

### Addition of a Pregnancy-Related Absence Code

A new absence code has been introduced, enabling an absence caused by a pregnancy-related reason to be recorded.

*NOTE: A Pregnancy related absence is treated in the same way as a sickness absence and is only included in the return if working days lost is equal to or greater than half a day.*

Category = **PRG**, Code = **PRG**, Description = **Pregnancy Related**.

If applicable, the Workforce Member Areas Details and Workforce Member Absence Details detail reports display this absence as **Pregnancy Related**.



#### More Information:

*Editing Absences Information on page 18*

### Regional Pay Ranges

Regional Pay Range is no longer collected for the School Workforce Census so the **Scale/Range** column has been removed from the Workforce Member Payment Details and Workforce Member Pay Details Comparison detail reports.

### Spot Allowances

#### Routines | Statutory Returns | School Workforce Census Tools | Setups | Employment Parameters

- If the setting for historical spot allowances is not found when the **Create & Validate** button is clicked, a dialog provides navigation instructions to the **Historical Spot Allowance Type** panel, where **Actual** or **Annual** must be specified.
- The dialog that was originally displayed when the **Create & Validate** button was clicked has been removed.
- Historical spot allowances are calculated as specified in the **Historical Spot Allowance Type** panel, i.e. **Actual** or **Annual**.
- New spot allowances (recorded after the SIMS 2016 Spring Release) are calculated as **Actual** amounts.
- The Workforce Member Allowances Details report has been amended to reflect the changes to DfE collection and spot allowances. Further information has been added to show how the allowance is calculated.



#### More Information:

*Dealing with Spot Allowances on page 31*

## Overview of the School Workforce Census Process

The following list provides a brief outline of the steps involved in producing the School Workforce Census 2016 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 2016 Summer Release (7.170) 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.

For more information about the Import Fileset functionality, please refer to the applicable preparation guide, available on our My Account website (<https://myaccount.capita-cs.co.uk>).



## Where to find More Information about Permissions

Please contact 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.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (<https://myaccount.capita-cs.co.uk>).

To find the spreadsheet, search for <sims version> sims permissions spreadsheet, e.g. 7.170 sims permissions spreadsheet.

## What Version of SIMS is Required?

To run the return, you must have the SIMS 2016 Summer Release (7.170) or later installed.

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

The version should read 7.170 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.

**School Workforce Census Settings**

Save Undo

**Data to be Exported by Default** Settings have been populated by School

Staff Workforce Area	School Area
<input checked="" type="checkbox"/> Staff Details	<input checked="" type="checkbox"/> Vacancies
<input checked="" type="checkbox"/> Contract Details	<input checked="" type="checkbox"/> Occasional Teachers Information
<input checked="" type="checkbox"/> Service Agreement Details	<input checked="" type="checkbox"/> Agency / Third Party support staff
<input checked="" type="checkbox"/> Absences	
<input checked="" type="checkbox"/> Curriculum	
<input checked="" type="checkbox"/> Qualifications	
<input checked="" type="checkbox"/> Allow editing of Base Pay	

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 purposes 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.

*NOTES: 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

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## 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. A newsfeed will be posted to the My Account website (<https://myaccount.capita-cs.co.uk>) (under **Notifications**), if updated files are available for import.

If revised files are supplied, the fileset will be available as a ZIP file, which should be downloaded from My Account, 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. For information about the latest available Fileset version, please check the applicable newsfeed on the My Account website (<https://myaccount.capita-cs.co.uk>).

## Before Importing the Revised Files

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.

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, download the required ZIP file from the My Account website (<https://myaccount.capita-cs.co.uk>) to a folder of your choice.
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.*

The screenshot shows the '1 Fileset' panel. At the top, there is a 'Choose Fileset:' text box containing the path 'D:\0400-Statutory>Returns-Autumn-2016\_Fileset.mfs'. Below this is a 'Selected Fileset' section. It contains a table with the following data:

Number:	Release Date	Title:
400	01/08/2016	Install files required for the Autumn 2016 Statutory Returns

Below the table, the 'Purpose:' is listed as 'Fileset containing all files required to produce the returns included in the Summer 2016 release.' At the bottom left, it says 'Ready to import...'. At the bottom right, there is an 'Import Fileset' button.

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.

This screenshot shows the '1 Fileset' panel after the import process. The 'Import successful.' message is now displayed at the bottom left of the panel. A small dialog box titled 'SIMS .net import complete' is overlaid on the bottom right. The dialog box contains the text 'Import successful. Please close SIMS .net and re-open it' and an 'OK' button.

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.

- 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.

### Import Lookups

Import

1 Select File    2 Lookups present in the file    3 Lookup values present in the file    4 Exception Log

---

#### 1 Select File

File Name

Select File

---

#### 2 Lookups present in the file

Lookup Code	Lookup Description	Lookup Mode
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#### 3 Lookup values present in the file

Code	Description	Active	System	Display Order
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5. 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.*

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 and click the **Save** button.
7. 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.



## 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.

1. 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.



## 02| Importing Files and Definitions

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.

The screenshot shows the 'Import Service Terms' window with the following sections:

- 1 Select File:** A text box for 'File Name' containing 'C:\temp\pay\_related.xml' and a 'Select File' button.
- 2 Service Terms:** A table with two columns: 'Code' and 'Description'.
- 3 Superannuation Schemes:** A table with two columns: 'Code' and 'Description'.
- 4 Exception Log:** A text box for 'Exception Message' and buttons for 'Save' and 'Print'.

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

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

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.

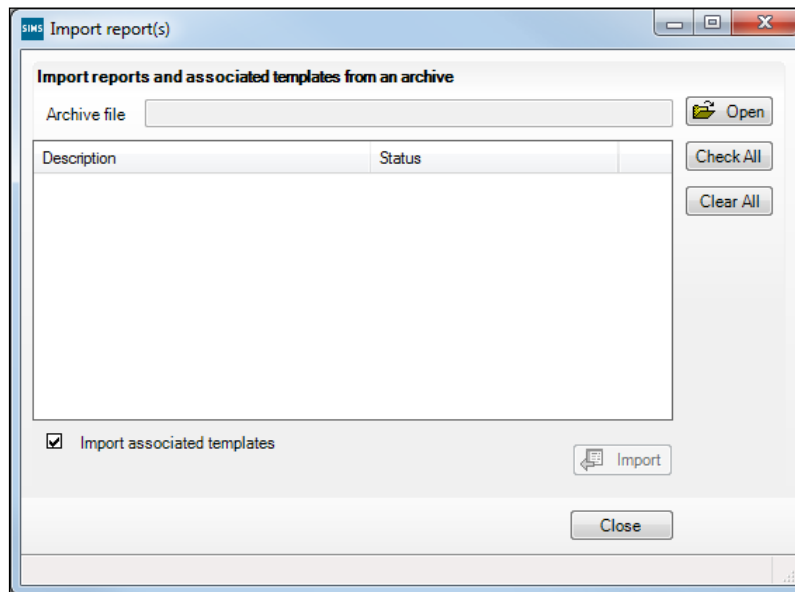
 **Completed**

## 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 to ensure the report is produced correctly.

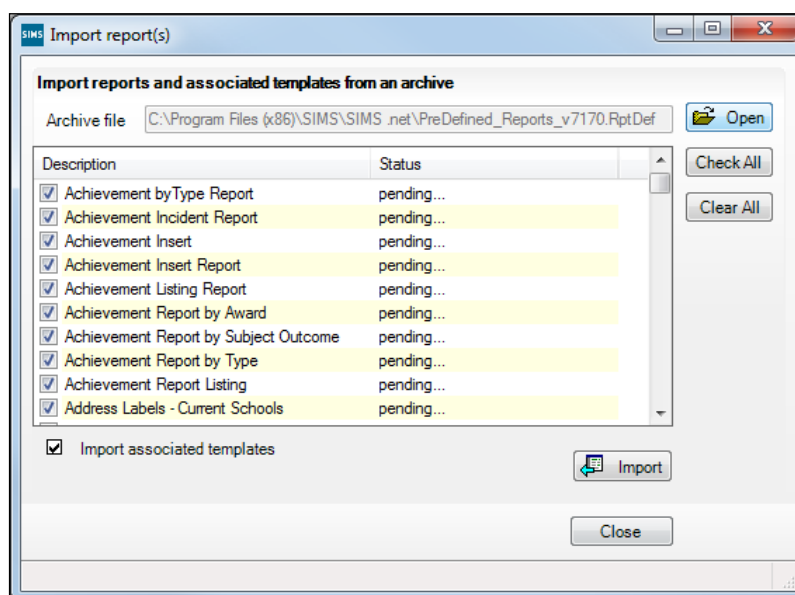
1. Select **Reports | Import** to display the **Import report(s)** dialog.



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.

## 02| Importing Files and Definitions

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.

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## 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 34).
- 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 13).*

## Checking Basic Details

1. Selected **Focus | Person | Staff**.
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. If the staff member is to be included in the Schools Workforce Census Return, ensure that the **Eligible for SWR** check box is selected.
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 (located 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**.
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	<input type="text"/>				

Language	Fluency	First Language
English	Mother Tongue	Y

New  
 Open  
 Delete

Attachment	Summary	Type	Owner

New  
 Open  
 Delete

Impairment	Date Advised	Affects Working Ability
Arthritis in the left knee	01/06/2011	N

New  
 Open  
 Delete

Nationality	Passport Number	Expiry Date

New  
 Open  
 Delete

Start Date	End Date	Mon	Tue	Wed	Thu	Fri
01/01/2009		PMSM	PMSM	PMSM	PMSM	PMSM

New  
 Open  
 Delete

**Dietary Needs**

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. Enter the correct date or click the **Calendar** buttons and select the correct dates, if required.
5. Check that the National Insurance Number (**NI Number**) is entered using 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. Ensure that the correct value is selected from the **Are day to day activities substantially affected by physical or mental impairment** drop-down list.

### 03| Preparing Staff Level Information

8. Ensure that any impairment has been recorded.

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.

Dialog box titled "Edit Impairment for Helen Avery".

Fields:

- 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.

Buttons: New, Open, Delete, OK, Cancel.

- a. Ensure that the **Impairment** description is correct and that the correct **Category** is selected from the drop-down list.
- b. Check the other details and use the **Notepad** options to add or edit additional information, if required.
- c. 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 only.

1. Selected **Focus | Person | Staff**.
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 **Absences** panel.

Start Date	End Date	Working Days Lost	Type	Input
25/01/2016	25/01/2016	1.00000	Unpaid, authorised absence	Unpaid
01/09/2015	01/09/2015	1.00000	Sickness	Absenc
20/09/2015	20/09/2015	1.00000	Sickness	Absenc

Buttons: New, Open, Delete, Training.

**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, Secondment, Pregnancy Related**, etc.

**IMPORTANT NOTE:** 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**.
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 Addresses**

Current Home Address Details (Validated)

Address 36 Cumberland Road  
Swindon  
SN3 1AA  
United Kingdom

Delete  
 Modify Address  
 Move House  
 Validate

Note

Start date 07/09/1993 End date

Enter additional address

Post Code Country United Kingdom Continue  
House Number/Name Advanced

☒ Search Validation Service ☒ Search Existing Addresses

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 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 **Country** field) 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**.
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 Annual College Exit - Graduate course

**Training**

Title	Start Date	End Date	Completed
Dealing with Difficult People	04/01/2016	04/01/2016	No
First Aid	28/11/2014	28/11/2014	Yes
Child Protection 2014	20/10/2014	20/10/2014	Yes
Child Protection 2012	02/07/2012	02/07/2012	Yes
Dealing with Difficult People	10/10/2011	10/10/2011	Yes

**Qualifications**

Qualification	Title	Date Awarded	Level
Nursery Studies	Nursery Assistant	20/07/2015	Certificate in Ed...

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 Date** 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.

### 03| Preparing Staff Level Information

- a. Click the **New** button, adjacent to the **Qualifications** field or highlight an existing qualification then click the **Open** button to display the **Add (or Edit) Qualifications** dialog.

The screenshot shows a window titled "Edit Qualification for Helen Avery". Inside, there are several input fields and dropdown menus. The "Qualification" field contains "Nursery Studies". The "Title" field contains "Nursery Assistant". The "Date Awarded" field contains "20/07/2015". The "Qualification Level" dropdown menu is set to "Certificate in Education or equivalent". The "Class Of Degree" dropdown menu is empty. The "Comments" field is empty. The "First Subject, Qualified" dropdown menu is set to "studies in Nursery Education - X310". The "Second Subject, Qualified" dropdown menu is empty. The "Country Of Origin" field is empty. There is a "Verified" checkbox which is currently unchecked. 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**.
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 (multiple instances)

4. If the staff member is employed primarily in a teaching capacity, select the **Teaching Staff** check box.
5. For staff members who are teachers, select the **Teacher Category** from the drop-down list. The teacher category is required for all members of staff, including non-teachers.
6. Ensure that a **Teacher Number** is entered using the correct format, e.g. 12/34567.  
An identifying teacher number is allocated to teachers on an individual basis by the DfE. A teacher number is required for all members of staff, including non-teachers.
7. If a **Teacher Number** has been entered, a **Qualified Teacher Status** must be selected from the drop-down list.

 **Completed**

## Editing Employment Dates

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

1. Selected **Focus | Person | Staff**.
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 then navigate to the **Employment Dates** table.

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

4. Click the **New** button or highlight an existing **Employment Dates** record then click the **Open** button to display the **Add (or Edit) Employment History** dialog.

**Edit Employment History for Helen Avery**

**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

5. Ensure that the **Employment Start Date** is entered in the correct format (dd/mm/yyyy).
6. Check all other details to ensure they are accurate.
7. Click the **OK** button to return to the **Employment Details** panel.

 **Completed**

## Editing Contract Details - Salary Ranges

The following contract details related to salary ranges should be checked to ensure that the correct values are collected in the return.

1. Selected **Focus | Person | Staff**.
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 then navigate to the **Contract** table.

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

New  
 Open  
 Delete  
 Clone

4. Click the **New** button or highlight an existing record and then click the **Open** button to display the **Contract Details** page.

Save Undo
  Help Close

1 Contract Details 2 Pay Pattern

### 1 Contract Details

Service Term: Teachers  
Post Reference: Teacher  
Post Reason:  
Contract Start Date: 01/09/2009  
Superannuation: Teachers  
Increment Date: 01/09  
Contract End Date:  
Post Offered Date:  
Contract Issued Date:  
Service Term Hours/Week: 32.5000  
Hours/Week: 32.5000  
FTE: 1.0000  
Safeguarded Salary: ☐  
Destination:  
Origin: Not known  
Is an Apprentice: ☐

Employment Type: Permanent  
Post Category / SWR Post / Payroll Post: Teacher, Other/ Classroom Teacher, main pay range/  
Financial Subgroup:  
Contract/Payroll Number: PR234123  
NI Contracted: In ☐ Out ☒  
Leave Entitlement: 0.0000  
Contract Termination Reason:  
Post Accepted Date:  
Service Term Weeks/Year: 52.1430  
Weeks/Year: 52.1430  
Pro Rata: 1.0000  
Pay Factor: 1.0000  
Latest Pay Review Date: 01/09/2015

Salary Records

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Teachers Main Scale	01/09/2015	31/08/2015	6.0	
Teachers Main Scale	01/09/2014	31/08/2015	6.0	
Teachers Main Scale	01/09/2013	31/08/2014	5.0	
Teachers Main Scale	01/09/2012	31/08/2013	4.0	

Allowances

Allowance	Start Date	End Date	Type

Role

Role	Start Date	End Date
Classroom Teacher	01/09/2009	

Suspensions

Suspensions Start on	Suspensions End on	Reason

New  
 Open  
 Delete

### 03| Preparing Staff Level Information

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

The screenshot shows the 'Edit Contract Salary' dialog box. It includes a 'Contract Salary Details' section with the following fields and values:

Field	Value
Range Type	Teacher Salary Range
Start Date	01/09/2015
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	Converted from Scale point 5.0 <gross 29/04/14 12:12:07> Cost of living increase <gross 29/04/14 16:11:02>

At the bottom of the dialog are 'OK' and 'Cancel' buttons, and an 'Annual Salary Change History' button.

- Select the appropriate **Range Type** from the drop-down list.
- 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.

- 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.

- 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.

- 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 are not taken into account. National Insurance and superannuation are always calculated for a pay scale.*

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

- 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.*

- 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.

**IMPORTANT NOTE:** The annual salary change history will not display any changes made to the salary by B2B:Personnel.







- Click the **OK** button to close the dialog.
- Click the **Save** button to return to the **Contract Details** page.

☐ Completed

## Editing Contract Details - Pay Scales

The following contract details related to pay scales should be checked to ensure that the correct values are collected in the return.

- Selected **Focus | Person | Staff**.
- Search for and highlight the required person then click the **Open** button to display the **Employee Details** page.
- Select the **Employment Details** tab then navigate to the **Contract** table.

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



### 03| Preparing Staff Level Information

4. Click the **New** button or highlight an existing **Contract** record then click the **Open** button to display the **Contract Details** dialog.

1 Contract Details 2 Pay Pattern

**1 Contract Details**

Service Term: Teachers

Post Reference: Teacher

Post Reason:

Contract Start Date: 01/09/2009

Superannuation: Teachers

Increment Date: 01/09

Contract End Date:

Post Offered Date:

Contract Issued Date:

Service Term Hours/Week: 32.5000

Hours/Week: 32.5000

FTE: 1.0000

Safeguarded Salary: ☐

Destination:

Origin: Not known

Is an Apprentice: ☐

Employment Type: Permanent

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

Financial Subgroup:

Contract/Payroll Number: PR234123

NI Contracted: In ☐ Out ☒

Leave Entitlement: 0.0000

Contract Termination Reason:

Post Accepted Date:

Service Term Weeks/Year: 52.1430

Weeks/Year: 52.1430

Pro Rata: 1.0000

Pay Factor: 1.0000

Latest Pay Review Date: 01/09/2015

**Salary Records**

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Teachers Main Scale	01/09/2015		6.0	
Teachers Main Scale	01/09/2014	31/08/2015	6.0	
Teachers Main Scale	01/09/2013	31/08/2014	5.0	
Teachers Main Scale	01/09/2012	31/08/2013	4.0	

**Allowances**

Allowance	Start Date	End Date	Type

**Role**

Role	Start Date	End Date
Classroom Teacher	01/09/2009	

**Supervisions**

Supervision Starts on	Supervision Ends on	Reason

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

5. Ensure that the applicable **Post Reference** and **Post Reason** are selected from the drop-down lists.
6. Ensure that the correct **Employment Type** is selected from the drop-down list, e.g. **Permanent**.
7. 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.
8. If the contract has ended, ensure that a **Contract End Date** is entered.
9. 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.

10. Ensure that the number of weeks per year the member of staff works is entered in the **Weeks/Year** field.
11. If the employee has protected rights in their salary, select the **Safeguarded Salary** check box. (Applicable to contracted teachers only.)
12. 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**.
13. Ensure that the employee's employment prior to joining the school is selected from the **Origin** drop-down list.
14. 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.

Click the **New** button adjacent to the **Salary Records** table or highlight an existing **Pay Scale** record then click the **Open** button to display the **Add (or Edit) Contract Scale** dialog.

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

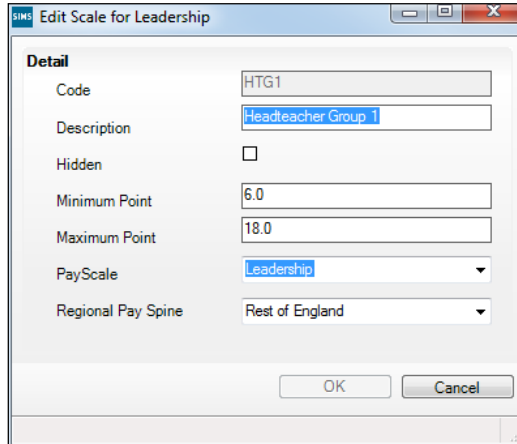
Contract Scale Details	
Scale	Headteacher Group 2
Start Date	01/09/2006
End Date	
Minimum Scale Point	8.0
Maximum Scale Point	21.0
Point	14.0
Superannuation	<input checked="" type="checkbox"/>
NI Status	<input checked="" type="checkbox"/>
Pay Scale	Leadership
Regional Pay Spine	Rest of England

Buttons: OK, Cancel

- 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.

### 03| Preparing Staff Level Information

- b. In the **Pay Awards** panel, highlight the required **Scales** record then click the **Open** button to display the **Edit Scale** dialog.

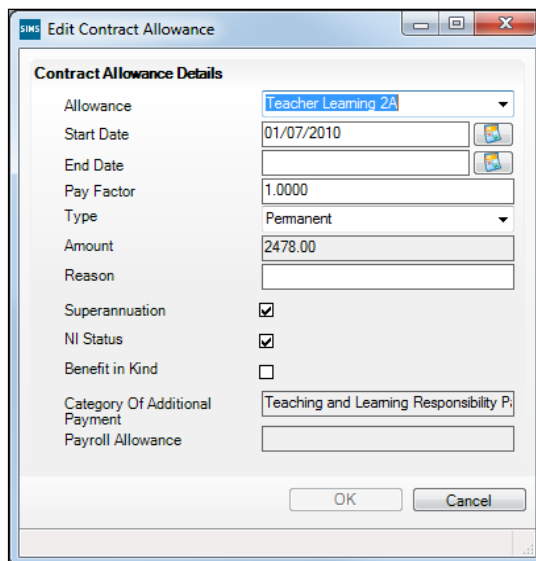


- c. Select the applicable **Pay Scale** from the drop-down list.
- d. Indicate which regional variation the pay scale is for by selecting from the **Regional Pay Spine** drop-down list.

*NOTE: Regional pay spine (range) is no longer collected for the return. However, it is advisable to ensure that records are up-to-date.*

- e. Click the **OK** button then click the **Save** button.
  - c. Click the **OK** button to return to the **Edit Contract** dialog.
15. 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.



- 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.
16. 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.
17. Click the **Save** button.

☐ **Completed**

## Dealing with Historical Spot Allowances

If the historical spot allowances type is not found when the **Create & Validate** button is clicked, a dialog is displayed, which provides navigation instructions to the location where the historical spot allowance type must be selected before proceeding. To avoid interrupting the Create and Validate routine, the historical spot allowance type should be specified before starting the return.

Where existing historical spot allowances have been recorded, you must indicate whether they have been entered as an actual or annual amount, so that SIMS deals with the values appropriately.

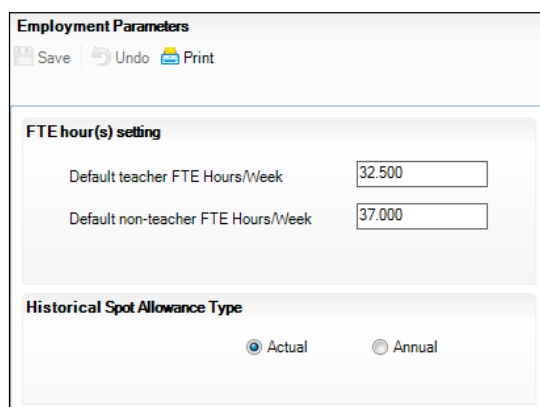
Historical spot allowances recorded before the SIMS 2016 Spring Release:

- **Actual** – if the historical spot allowance type is specified as actual, the School Workforce Census additional payment amount is the actual amount.
- **Annual** – if the historical spot allowance type is specified as annual, then School Workforce Census additional payment amount is derived from (annual allowance x pay factor)/12) x applicable months.

*NOTE: New spot allowances (recorded after the SIMS 2016 Spring Release) are calculated as actual amounts.*

### 03| Preparing Staff Level Information

1. Select **Tools | Setups | Employment Parameters** to display the **Employment Parameters** page.



**Employment Parameters**

Save Undo Print

**FTE hour(s) setting**

Default teacher FTE Hours/Week 32.500

Default non-teacher FTE Hours/Week 37.000

**Historical Spot Allowance Type**

☒ Actual ☐ Annual

2. In the **Historical Spot Allowance Type** panel, select either the **Actual** or **Annual** radio button.
3. Click the **Save** button.

 **Completed**

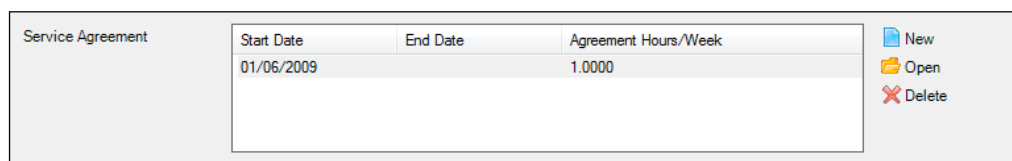
## Editing Service Agreement Information

Not applicable to third party support staff

A person can have more than one role in the school, e.g. Teaching Assistant and Midday Supervisor, or can have more than one simultaneous contract with the same school. Multiple contracts/service agreements or roles (as well as old and current contracts) will be included in the return.

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

1. Selected **Focus | Person | Staff**.
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 then navigate to the **Service Agreement** table.



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

New Open Delete

Click the **New** button or highlight an existing service agreement record then click the **Open** button to display the **Add (or Edit) Service Agreement** dialog.

**1 Service Agreement Details**

Service Start Date: 01/06/2009

Service End Date:

Offered Date:

Accepted Date:

QTS Status: With QTS

Reason: Supply

Sourced By: Local Authority

Service Type: Vice Agreement with Local Authority

FTE Hours/Week:

Weeks/Year: 38.0000

Agreement Hours/Week: 1.0000

Total Pay (annual equivalent):

Daily Rate: ☒

SW/C Base Pay (annual equivalent):

SW/C Additional Payment Amount: 0.00

Latest Pay Review Date:

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

Notepad: Guitar lesson to Yr 3 to Yr 5 pupils

4. Ensure that the **Service Start Date** is entered in the correct format (dd/mm/yyyy). (Not required for centrally employed staff.)
5. Ensure that the **Service End Date** is entered in the correct format (dd/mm/yyyy). (Required for all current members of staff on a fixed term contract and Leavers.)
6. Check that the correct School Workforce Post has been selected from the **SWC Post** drop-down list.

**IMPORTANT NOTE:**

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.

7. Check that the correct **Service Type** has been selected from the drop-down list. (Required for teachers with service agreements.)

8. If applicable, ensure that the full time equivalent has been entered in the **FTE Hours/Week** field.
9. 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.)
10. 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.)
11. 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**.
12. 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.*

13. For staff members who are not paid a daily rate, enter any additional payment amount in the **SWC Additional Payment Amount** field.
14. 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.
15. 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).
  - c. Click the **OK** button to return to the **Edit Service Agreement** dialog.
16. 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**.
2. Search for then select the required person to display the **Employee Details** page.
3. Ensure that the **Personal Details** tab is selected.

4. In the **Basic Details** panel, ensure that the **Eligible for SWR** check box is deselected. This removes the member of staff from the return.

**1 Basic Details**

Title: Mr

Legal Forename: Carl

Middle Name(s): Thomas

Legal Surname: Brooks

Preferred Forename: Carl

Preferred Surname: Brooks

Gender: Male

Eligible for SWR: ☐

Previous Name

Preferred Surname	Preferred Forename	Middle Name	Date of Change

Photograph

New  
Open  
Delete

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 11), or it can be entered manually.



### Additional Resources:

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

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

Ensure that the up-to-date pre-defined reports have been imported (please see *Importing Pre-Defined Reports* on page 39).



### 03| Preparing Staff Level Information

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						
<ul style="list-style-type: none"> <li>Achievement Incidents</li> <li>Behaviour Incidents</li> <li>Detention</li> <li>Detained Student</li> <li>Learnwise User</li> <li><b>Service Term</b></li> <li>Application</li> <li>Admission Groups</li> <li>Admission Enquiry</li> <li>Current &amp; Previous School</li> <li>Course Classification</li> <li>Courses For Student</li> <li>Admission Prospective P</li> </ul>	Name	Focus	Owner	Supplier	Updated	Version
	ST Allowances	Service ...	Imported	CES Reporting Services	23/07/2013	
	ST Definition	Service ...	Imported	CES Reporting Services	23/07/2013	
	ST Pay Scale Definitions	Service ...	Imported	CES Reporting Services	23/07/2013	
	ST Post Definitions	Service ...	Imported	CES Reporting Services	23/07/2013	

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**:

- f. Select **Tools | Staff | Pay Related** to display the **Find Service Term** browser.
- g. Search for then select the required service term.
- h. 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		
<b>AT: Advanced Skills Teacher</b>		
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	
<b>Superannuation:</b>		
TEAC	Teachers	8.05
<b>Financial Sub-groups</b>		
<b>LD: Leadership</b>		
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	
<b>Superannuation:</b>		
TEAC	Teachers	8.05
<b>Financial Sub-groups</b>		
<b>MW: Manual Staff</b>		
Spinal Progression: F	Salaried: F	
Increment Mth: 0	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				
<b>AT: Advanced Skills Teacher</b>				
Scale		Points	Region	National Scale
AST	Advanced Skills Teacher	1.0 - 27.0	Rest of England	Advanced Skills Teachers
<b>LD: Leadership</b>				
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
<b>MW: Manual Staff</b>				
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
<b>NJ: NJC - APT &amp; C Staff</b>				
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			
<b>AT: Advanced Skills Teacher</b>			
Post		Category	SWR Post
AST	ADVANCED SKILLS TEACHER	Teacher, Other	Excellent Teacher
<b>LD: Leadership</b>			
Post		Category	SWR Post
HT	Headteacher	HT Headteacher	Head Teacher
DH	Deputy Head	Teacher, Other	Head Teacher
<b>MW: Manual Staff</b>			
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
<b>NJ: NJC - APT &amp; C Staff</b>			
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



#### Additional Resources:

SIMS Pre-Defined Reports Catalogue



Completed

## Importing Pre-Defined Reports

*NOTE: The availability of reports depends on your permissions.*

1. Select **Reports | Import** to display the **Import report(s)** dialog.
2. Click the **Open** button then locate the predefined reports. The location might vary but is usually C:\Program Files\SIMS (x86)\SIMS .net.
3. Highlight the required file, which is named according to the version of SIMS, e.g. PreDefined\_Reports\_v7170.RptDef then click the **Open** button to return to the **Import report(s)** dialog. The file name and location you have specified are displayed in the **Archive file** field.
4. Where the specified file contains more than one report, you have the option to import selected reports only. If you do not wish to import a report, deselect the check box adjacent to the description.

**IMPORTANT NOTE:** If you are re-importing a report, the existing report is overwritten and, therefore, any changes made to the original are lost.

5. If you do not wish to import the associated templates (e.g. Word templates), deselect the **Import associated templates** check box.
6. Click the **Import** button.
7. When the import is complete, click the **Close** button.



### Additional Resources:

*Designing and Running Reports handbook*

## 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** was re-introduced in the 2015 return because for example, there are some unqualified teachers who are not on the Main pay range or the Upper pay range.*

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

## Checking the Current School Workforce Census Post Value

1. Select **Focus | Person | Staff**.
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 then navigate to the **Contract** table.

Contract	Status	Start Date	Post	Service Term	Point/Salary	New Open Delete Clone
		01/09/2009	Teacher	Teachers	4.0	

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

Edit Contract for Belinda Bates

Save Undo Help Close

1 Contract Details 2 Pay Pattern

**1 Contract Details**

Service Term	Teachers	Employment Type	Permanent
Post Reference	Teacher	Post Category / SWR Post / Payroll Post	Teacher, Other/ Classroom Teacher/
Post Reason		Financial Subgroup	
Contract Start Date	01/09/2009	Contract/Post/Number	PR234123

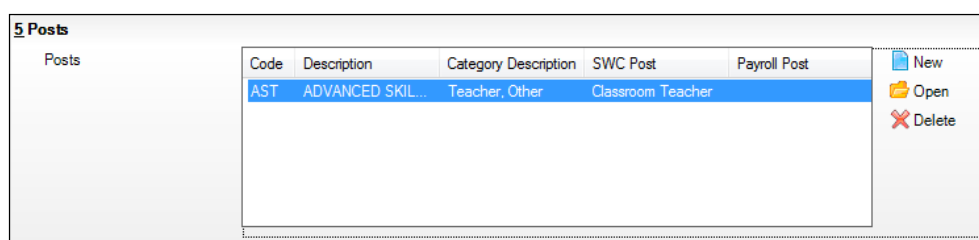
5. Check that a **Post Reference** has been selected from the drop-down list. It might be necessary to add an applicable **Service Term** if it does not already exist.
6. Click the **Save** button to return to the **Employee Details** page.
7. Re-open the contract then check the read-only entry in the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

☐ Completed

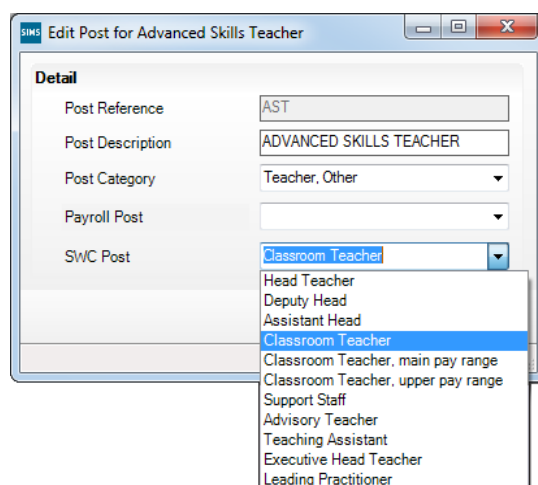
## Changing the School Workforce Census Post

If the School Workforce Census Post needs to be changed:

1. Ensure that all staff (including yourself) have closed the **Employees Details** page.
2. Select **Tools | Staff | Pay Related** to display the **Find Service Term** browser.
3. Search for and highlight the required service term then click the **Open** button to display the **Service Term Details** page.
4. Navigate to the **Posts** panel.



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



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

☐ Completed

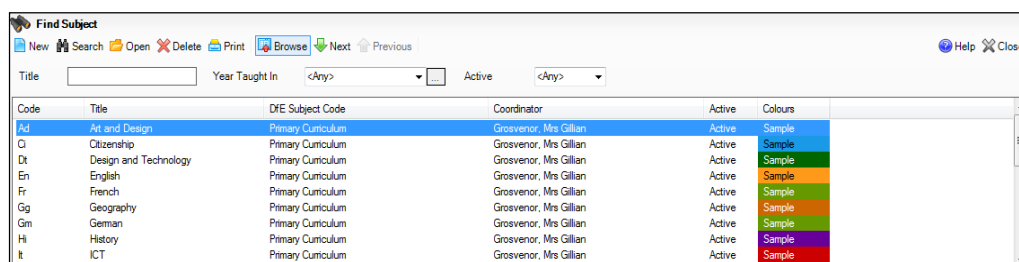
## Mapping Subjects to DfE Subject Codes

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.

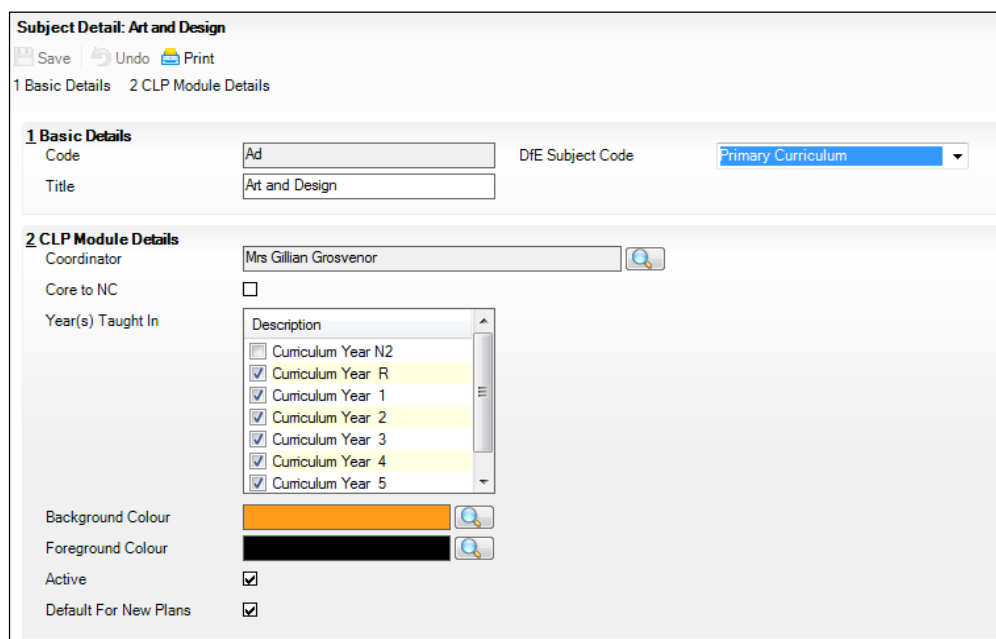
*NOTE: One curriculum record will be generated when more than one Nova subject is mapped to the same DfE subject.*

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: ☒

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.....45

Checking School Address, Telephone and Email Information.....46

## 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	N1 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
Date Name Changed	
Date Number Changed	
Date Number Changed	
Special Class or Unit	<input type="checkbox"/>
Main Contact	Mrs G Grosvenor

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 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 **Email** Address
  - School **Telephone** Number.
1. Select **Focus | School | School Details** to display the **School Details** page.
  2. Click the **Contact Details** hyperlink to display the **Contact Details** panel.

3 Contact Details			
Telephone	<input type="text" value="00234 851234"/>	Fax	<input type="text" value="786542"/>
Email	<input type="text" value="office@ga.org.uk"/>	Website	<input type="text" value="http://www.theschool.co.uk"/>

3. Ensure that a **Telephone** number has been recorded (including the STD code).
4. 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.
5. Click the **Save** button, if changes have been made.

☐ **Completed**

# 05 | What Next?

## Where Can I Get More Information .....47

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 2016 Summer Release (7.170) before completing the School Workforce Census 2016 Return. However, it is advisable to check whether a later version of SIMS is available and then upgrade to the current release of SIMS, if required.

You should now be ready to produce the final School Workforce Census 2016 Return. For specific instructions, please refer to the *Producing the School Workforce Census 2016 Return* handbook.

## Where Can I Get More Information

In addition to this preparation guide, the following information is also available:

- *Producing the School Workforce Census 2016 Return* handbook  
This handbook outlines how to produce the School Workforce Census in SIMS.
- *School Workforce Census 2016 Validation Errors and Resolutions* document  
This guide provides suggestions on how to resolve any validation errors or queries.
- *Managing Staff* handbook  
This handbook provides details about the processes that relate to Service Terms, etc.
- The School Workforce Census information provided by the DfE useful (<http://www.gov.uk/guidance/school-workforce-census>).

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button (located on the top right-hand side of the SIMS **Home Page**), select the required category and then select the document you require.

Documentation is also available from the My Account website (<https://myaccount.capita-cs.co.uk>).

1. Click **Knowledge Base** and then **SIMS Publications** (located in the **Popular Searches** list on the right-hand side) to display a list of all SIMS publications.
2. To refine the search further, click **Documents** (located in the filter list on the left-hand side).
3. Select the required **Document type** (click **Show more** to view additional options, e.g. quick reference sheets, frequently asked questions, etc.).

The search results are displayed automatically.

### Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

- The search results can be refined further by using the advanced filters, e.g. **Sort by relevance** or **Sort by last modified**, **File type** and date range.
- Surround a phrase with "double quotes" to return results containing that exact phrase.
- Prefix words with + to make them essential.

For example: "end of year procedures" +primary

### Problem Solving

The My Account website also includes **Hot Topics** (a collection of articles from our **Knowledge Base** and other resources surrounding popular topical subjects such as preparing for the new school year) and the **Knowledge Base** (answers for queries already logged with our customer support desk, which can be searched for by keywords or Knowledge Base ID).

**IMPORTANT NOTE:** *If you receive support from a Local Authority or third party support team check with them before using any of the solutions.*

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Contact the Service Desk today on  
**0345 222 1551 • option 2**

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

