SBS
School Business Services

Applicable to 7.182 onwards

Preparing for the School Workforce Census 2018 Return

Preparation guide

SIMS helping schools inspire
Accredited Support

School Workforce Census 2018 Return Preparation Check List

Complete	Task Description
☐	Check with the System Administrator/Manager that you have the appropriate permissions to run the School Workforce Census and record associated data (please see *Setting Permissions* on page *3*).
☐	Upgrade to the SIMS 2018 Summer Release (version 7.182) or later as soon as possible to enable dry runs to be carried out (please see *What Version of SIMS is Required?* on page *4*).
☐	Apply the School Workforce Census licence, if not applied previously (please see *Applying the School Workforce Census Licence* on page *4*).
☐	Import revised files for validation and reports (please see *Importing Revised Filesets for Validation and Reports* on page *7*).
☐	Import the latest service term definition provided by your LA/support team, if applicable (please see *Importing Service Term Definitions* on page *11*).
☐	Import the latest pre-defined report definitions into SIMS (please see *Importing Pre-Defined Report Definitions* on page *12*).
☐	Check the personal details of all applicable members of staff to ensure that they are current and accurate (please see *Checking/Editing Personal Details* on page *15*).
☐	Check the professional detail of all applicable members of staff to ensure that they are current and accurate (please see *Checking/Editing Professional Details* on page *21*).
☐	Check the employment details of all applicable members of staff to ensure that they are current and accurate. Ensure that the teacher status has been selected (please see *Checking/Editing Employment Details* on page *23*).
☐	Ensure that the **Latest Pay Review Date** is recorded for all teachers with contracts or service agreements (please see *Editing Contract Details - Pay Scales* on page *27* and *Editing Service Agreement Information* on page *32*).
☐	Ensure that duplicate teacher/support staff records are not included in the return (please see *Excluding Teacher/Support Staff Records from the Return* on page *34*).
☐	Ensure service term definitions are correct and make any required edits (please see *Reviewing Service Term Definitions* on page *34*).
☐	Ensure that the correct **SWC Post** is selected to avoid validation error 4410 from being triggered (please see *Checking/Editing the SWC Post* on page *38*).
☐	Map subjects to DfE subject codes (please see *Mapping Subjects to DfE Subject Codes* on page *40*). Applicable to Secondary and All-Through schools only.
☐	Review school details and ensure that they are current and correct (please see *Checking Establishment Details* on page *43*).

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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 2018 Return, which this year takes place on Thursday 8 November.

The School Workforce Census 2018 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?

The School Workforce Census 2018 Return includes the following changes:

Key Dates for the School Workforce Census 2018 Return

Routines | Statutory Returns | School Workforce Census

Census date: 08/11/2018

Absence collected from 01/09/2017 to 31/08/2018

Continuous contracts collected from 01/09/2017 to 08/11/2018.

Workforce Member Contract/Service Agreement Details Report

To enable the reason for leaving (now collected for the School Workforce Census) to be displayed in the Workforce Member Contract/Service Agreement Details report, an additional column (**Reason for Leaving**) has been added next to the existing **Destination** column.

Workforce Member Professional Details Report

To enable all qualified teacher statuses to be displayed in the Workforce Member Professional Details report, two additional columns (in addition to the existing **QTS** column) have been added to the report:

- **QTLS** (qualified teacher learning and skills)
- **EYT** (early years teacher).

It is possible for a qualified teacher to have all three statuses.

Workforce Member Payment Report

To assist with pay gender gap analysis, an additional column (**Gender**) has been added to the Workforce Member Payment report.

Overview of the School Workforce Census Process

The following list provides a brief outline of the steps involved in producing the School Workforce Census 2018 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 2018 Summer Release (7.182) or later.
2. Check then amend the School Workforce Census settings, if required (please see *Changing the School Workforce Census Settings* on page *4*).
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 (please see *Preparing School Level Information* on page *43*).
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.

Additional Resources:

Producing the School Workforce Census 2018 Return handbook

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 via the **Documentation** button on the SIMS **Home Page**

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.

To find the spreadsheet, search for `<sims version> sims permissions`, e.g. `7.182 sims permissions`.

What Version of SIMS is Required?

To run the return, you must have the SIMS 2018 Summer Release (7.182) 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 7.182 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.

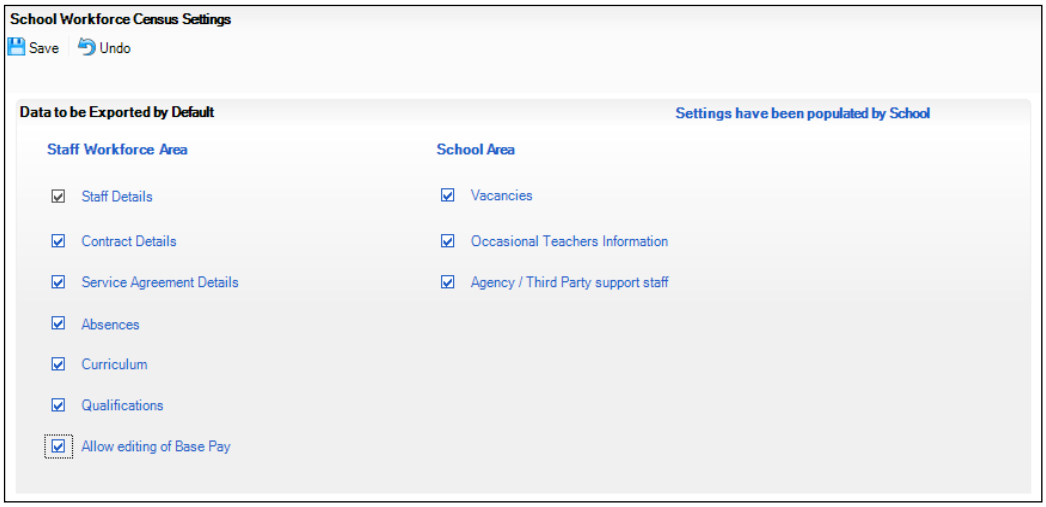
Changing the School Workforce Census Settings

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 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.*
>
> *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.

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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 (between releases) by the Personnel Officer, Returns Manager or System Manager.

NOTE: Use of the Import Fileset routine between releases is not always required.

Revised files can be:

Once the ZIP file is downloaded it should be unzipped to a folder of your choice. The Import Fileset routine can then be run by a user at the school who has the appropriate permissions.

IMPORTANT NOTE: *Ensure that the Document Management Server (DMS) is configured correctly before attempting to import the files.*

- authorised and deployed to schools via SOLUS3. The Import Fileset routine can then be run by a user at the school who has the appropriate permissions.

  IMPORTANT NOTE: *In SOLUS3, administrators must ensure that the SIMS user details (SIMS username and password) and SIMS database are set up in* ***Targets****.*

  For more information, please refer to the *SOLUS3 for Local Authorities* handbook.

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

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

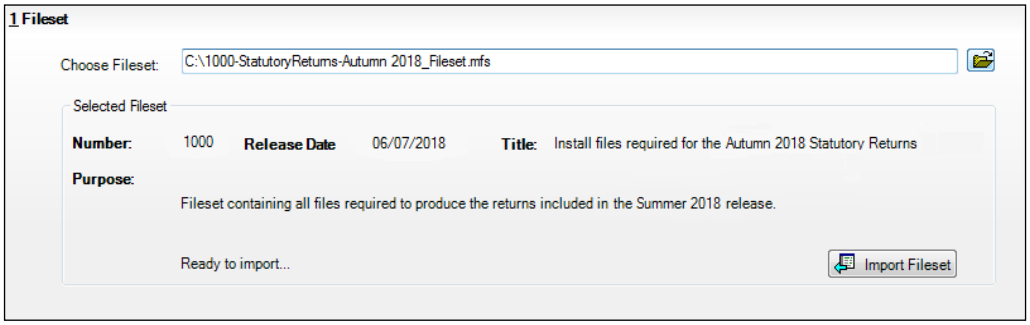
1. In SIMS, select **Tools | Setups | Import Fileset** to display the **Import Fileset** page, where the current fileset number is displayed.

2. Click the **Browse** button to display the **Open** dialog.
3. 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.*

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

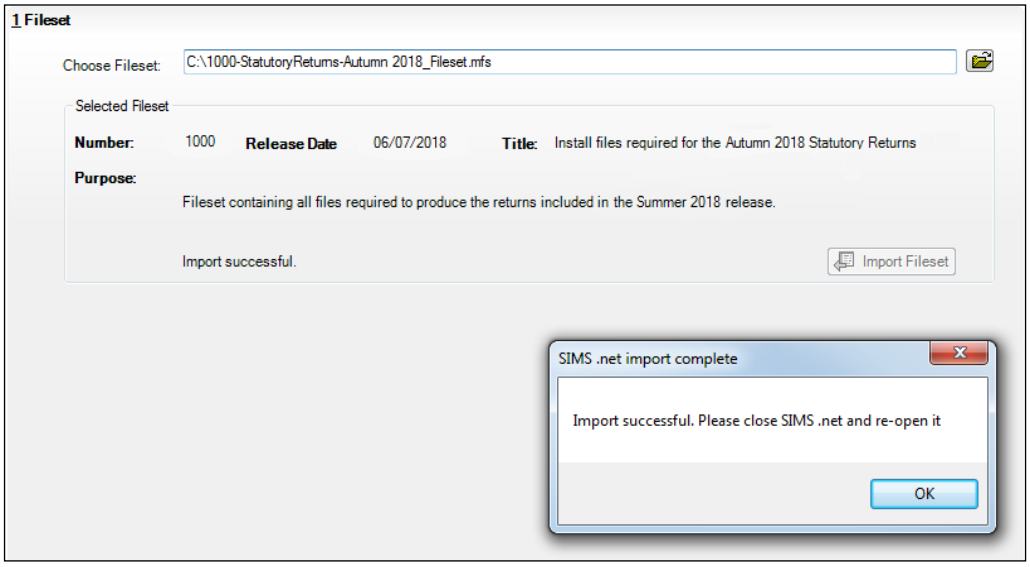
NOTE: The following graphics show example data only.



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

5. 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.



6. Click the **OK** button then restart SIMS.
7. Run the return in the usual way.

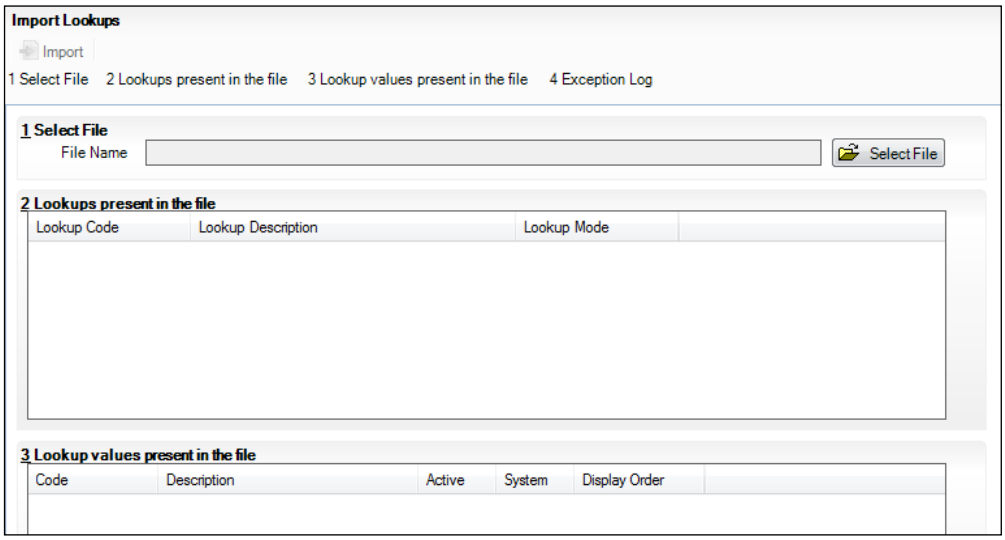
☐ **Completed**

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 the **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.*

4. 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.
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 the **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.

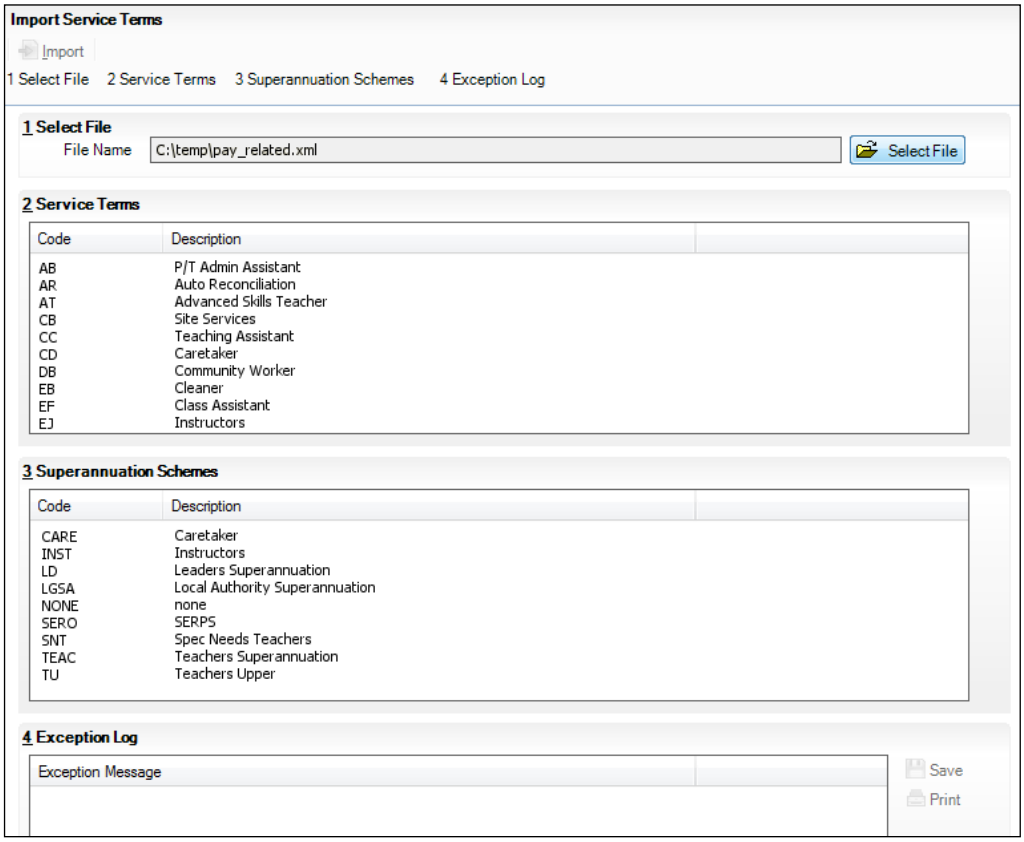
> ***IMPORTANT NOTE:*** *Any changes made are not visible until all users, including yourself, have restarted SIMS. If users proceed to run the School Workforce Census without restarting SIMS, an error message is displayed.*

☐ **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.

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 (adjacent to the **File Name** field) to display the **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.



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 the **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.

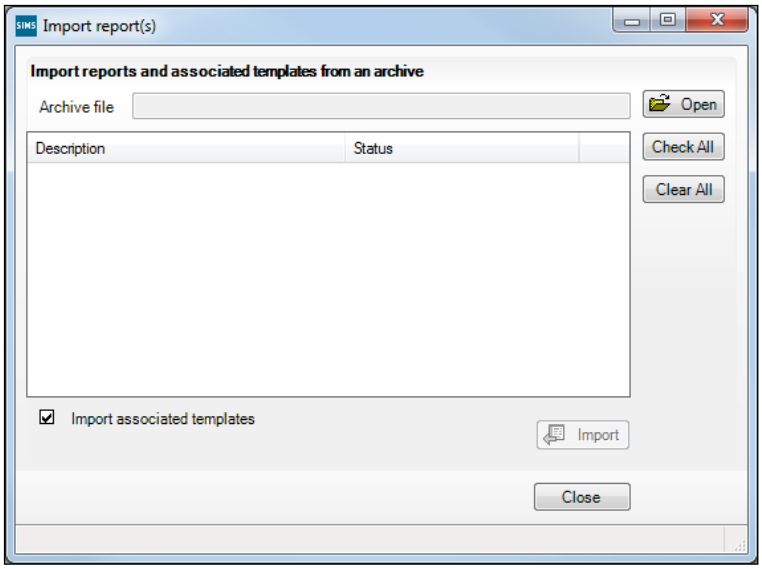
☐ **Completed**

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.

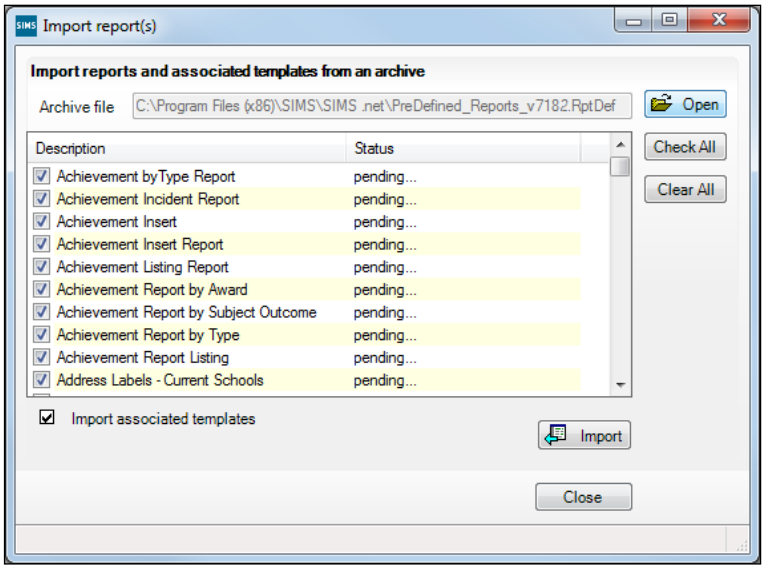


2. Click the **Open** button to display the **Select report file to import** dialog.

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.

   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. For more information, please refer to the *Adding Staff Details* chapter of the *Managing Staff* handbook.
- any leavers/contract end dates have been recorded (for more information, please see *Editing Contract Details - Pay Scales* on page *27*).
- 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.

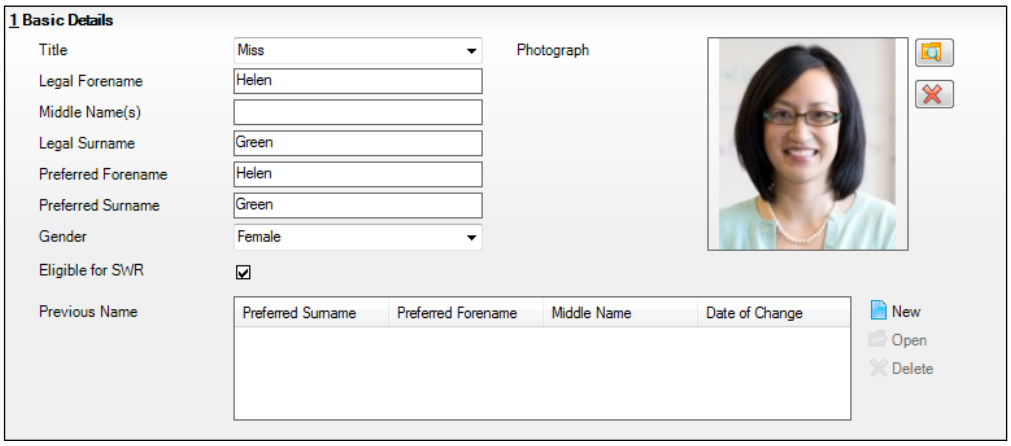
Basic staff information and contract information is included in the return for all teachers and support staff with contracts of one month or greater on census day. Minimal information is collected regarding occasional staff (staff with service of one month or less).

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* 12*).*

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.

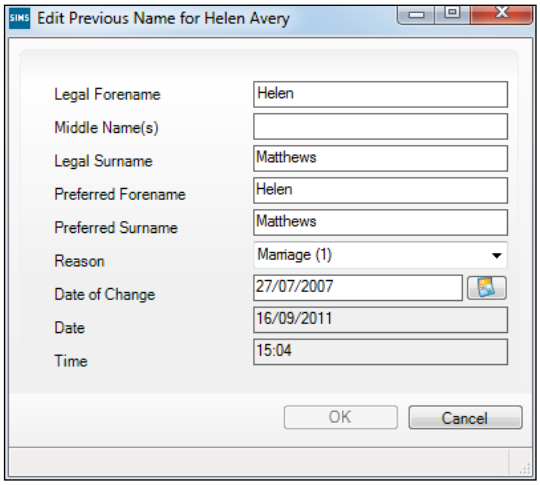


4. Ensure that the **Legal Forename** and **Legal Surname** are up-to-date and accurate.
5. Ensure that the correct **Gender** is selected from the drop-down list.

> *NOTE: To assist schools with the government requirement that companies with more than 250 employees be able to provide evidence of the gender pay gap, the employee's gender has been added to the Salary Information report (via **Reports | Personnel | Salary Information**). The report can be exported to Excel, where full analysis can be carried out.*

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.

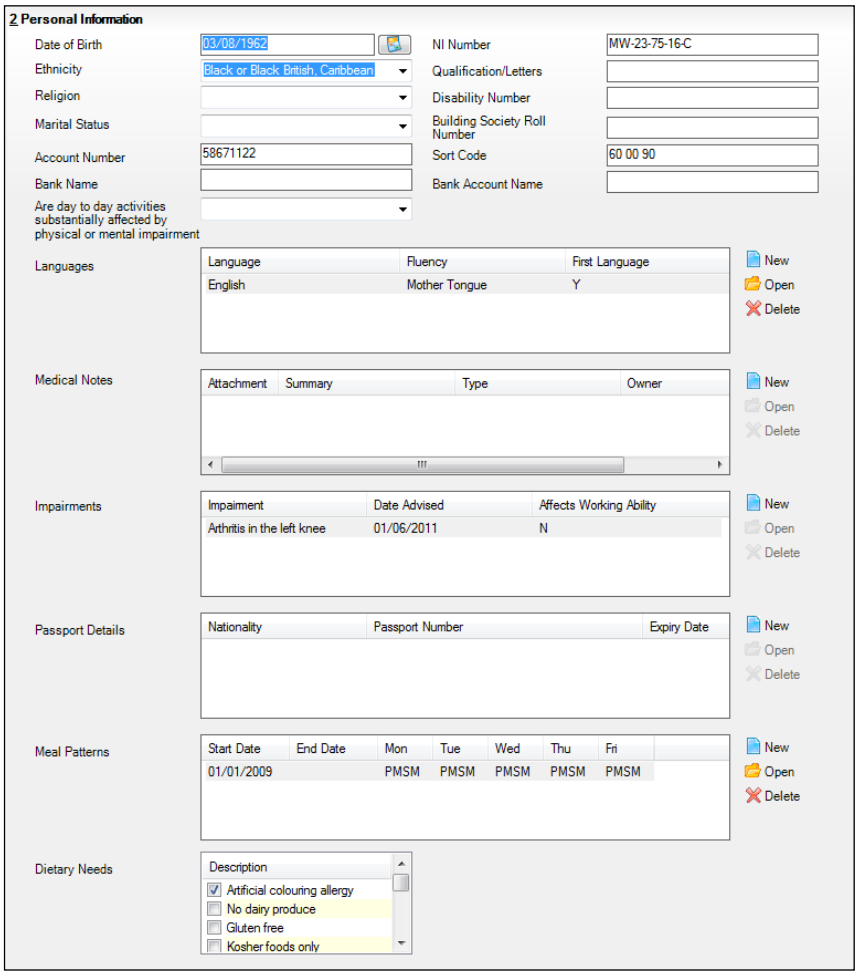


☐ **Completed**

Editing Personal Information

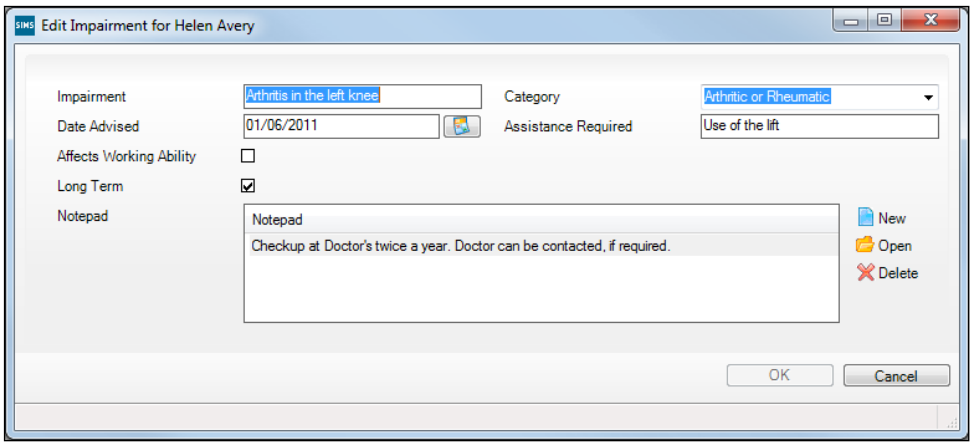
1. Selected **Focus | Person | Staff**.
2. Search for and highlight the required person, then click the **Open** button to display the **Employee Details** page.
3. Select the **Personal Details** tab then navigate to the **Personal Information** panel.
4. Ensure that the **Date of Birth** is correct. 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.



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.



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.

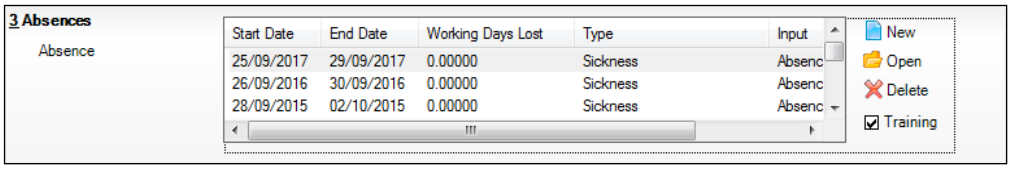
c. Click the **OK** button to return to the **Personal Information** panel.

☐ **Completed**

Editing Absences Information

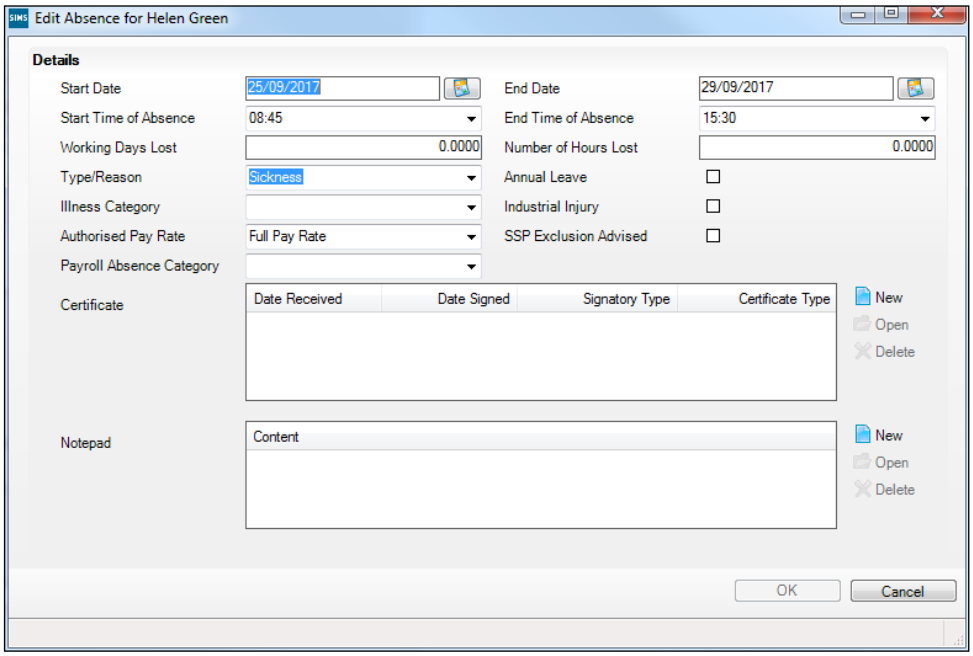
Absence information is not required for centrally employed staff. Details are collected for teaching contracted teachers and teaching assistants only.

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.



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`, if applicable.
7. Ensure that the correct **Type/Reason** for the absence is selected from the drop-down list, e.g. **Sickness**, **Secondment**, **Pregnancy Related**, etc.

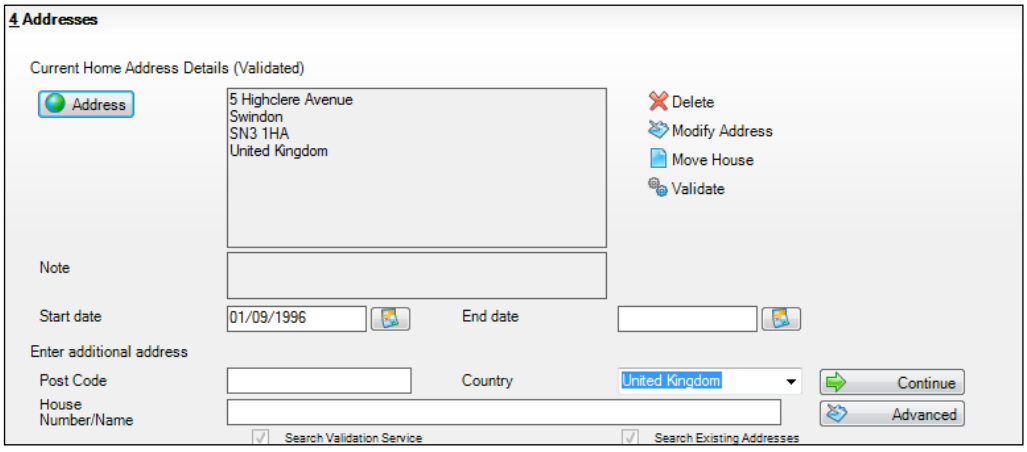
> ***IMPORTANT NOTE:*** *For annual leave and certificated sick leave to be reported correctly in the absence reports, ensure that annual leave is recorded by selecting the* ***Annual Leave*** *check box.*

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

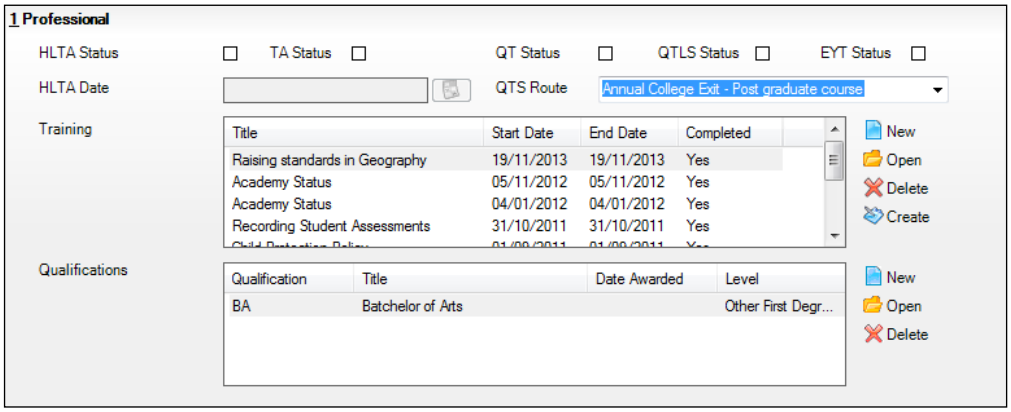
> *NOTE: British Forces Post Office numbers can be added as post codes.*

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.



4. If the staff member is a Higher Level Teaching Assistant, ensure that the **HLTA Status** check box is selected.

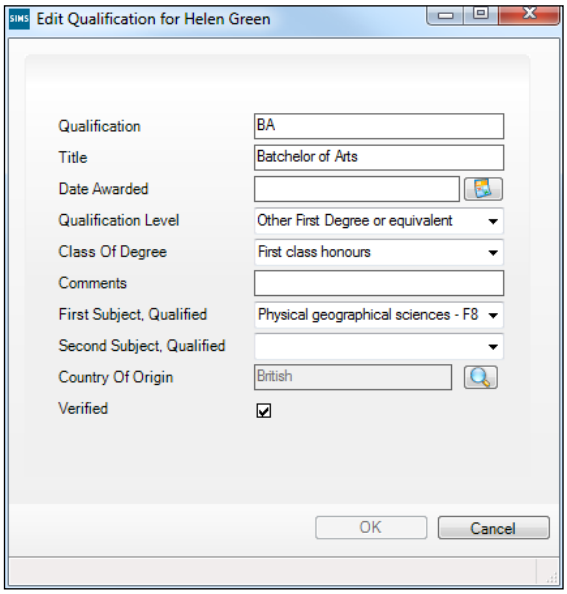
> *NOTE: Required for contracted teachers and contracted teaching assistants and other contracted support staff who are aged 18 or over.*

5. If the **HLTA Status** check box has been selected, enter the date that the HLTA status was achieved (dd/mm/yyyy). Alternatively, select the required date from the Calendar.
6. If the member of staff is a Teaching Assistant, ensure that the **TA Status** check box is selected.
7. Select the **QT** Status (Qualified Teacher), **QTLS** Status (Qualified Teacher Learning and Skills) and/or **EYT** Status (Early Years Teacher) check boxes, if applicable.

> ***IMPORTANT NOTES:*** *The School Workforce Census now collects Teacher status rather than* ***Teacher Category*** *(located on the* ***Employment Details*** *tab).*
>
> *Members of staff can hold more than one Teacher status.*

8. If the staff member has Qualified Teacher Status, ensure that applicable 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.)
9. Ensure that the **Qualifications** record is correct and up-to-date.

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.



b. Ensure that the **Qualification** description is correct.

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.

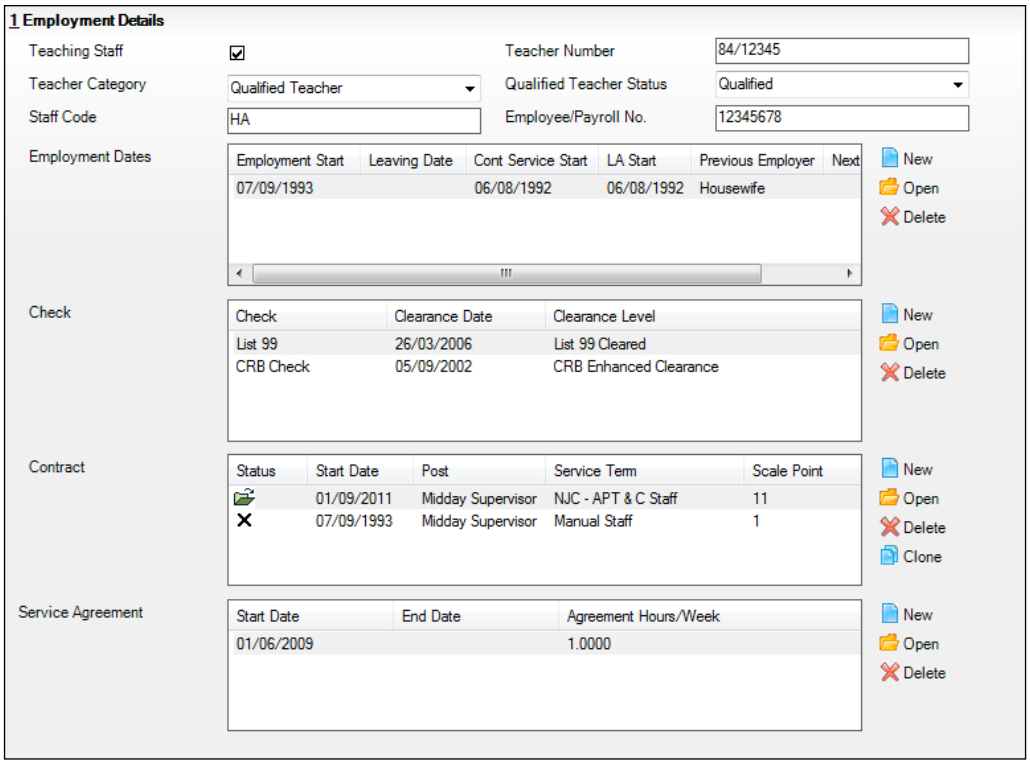
e. If the qualification has been verified, e.g. the paper certificate has been checked, select the **Verified** check box.

f. Click the **OK** button to return to the **Professional Details** page.

☐ **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.



> *NOTE: **Teacher Category** is no longer collected for the School Workforce Census; instead teacher status should be recorded via the **Professional** tab.*

4. If the staff member is employed primarily in a teaching capacity, select the **Teaching Staff** check box.
5. Ensure that a **Teacher Number** is entered using the correct format, e.g. 12/34567.

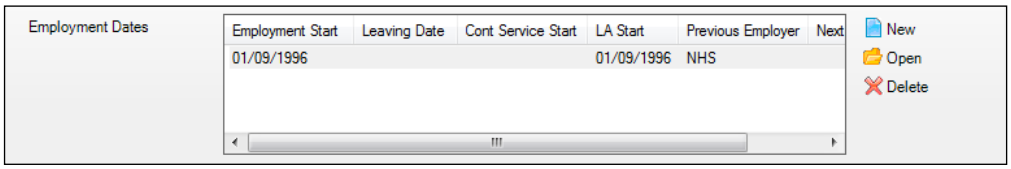
   An identifying teacher number is allocated to teachers on an individual basis by the DfE. A teacher number is required for all members of staff, including non-teachers.
6. If a **Teacher Number** has been entered, a **Qualified Teacher Status** must be selected from the drop-down list.

☐ **Completed**

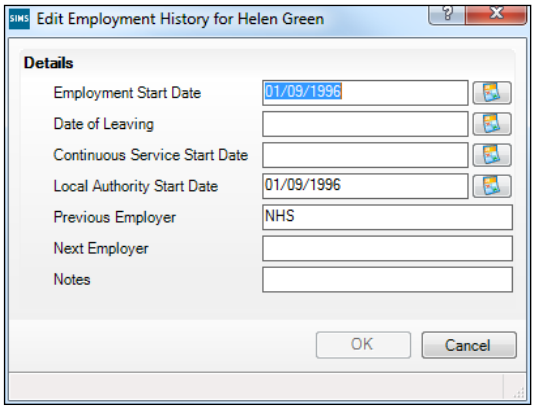
Editing Employment Dates

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.



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.



5. Ensure that the **Employment Start Date** in 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.

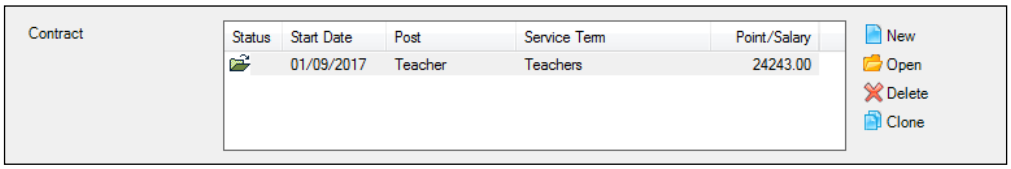
☐ **Completed**

Editing Contract Details - Salary Ranges

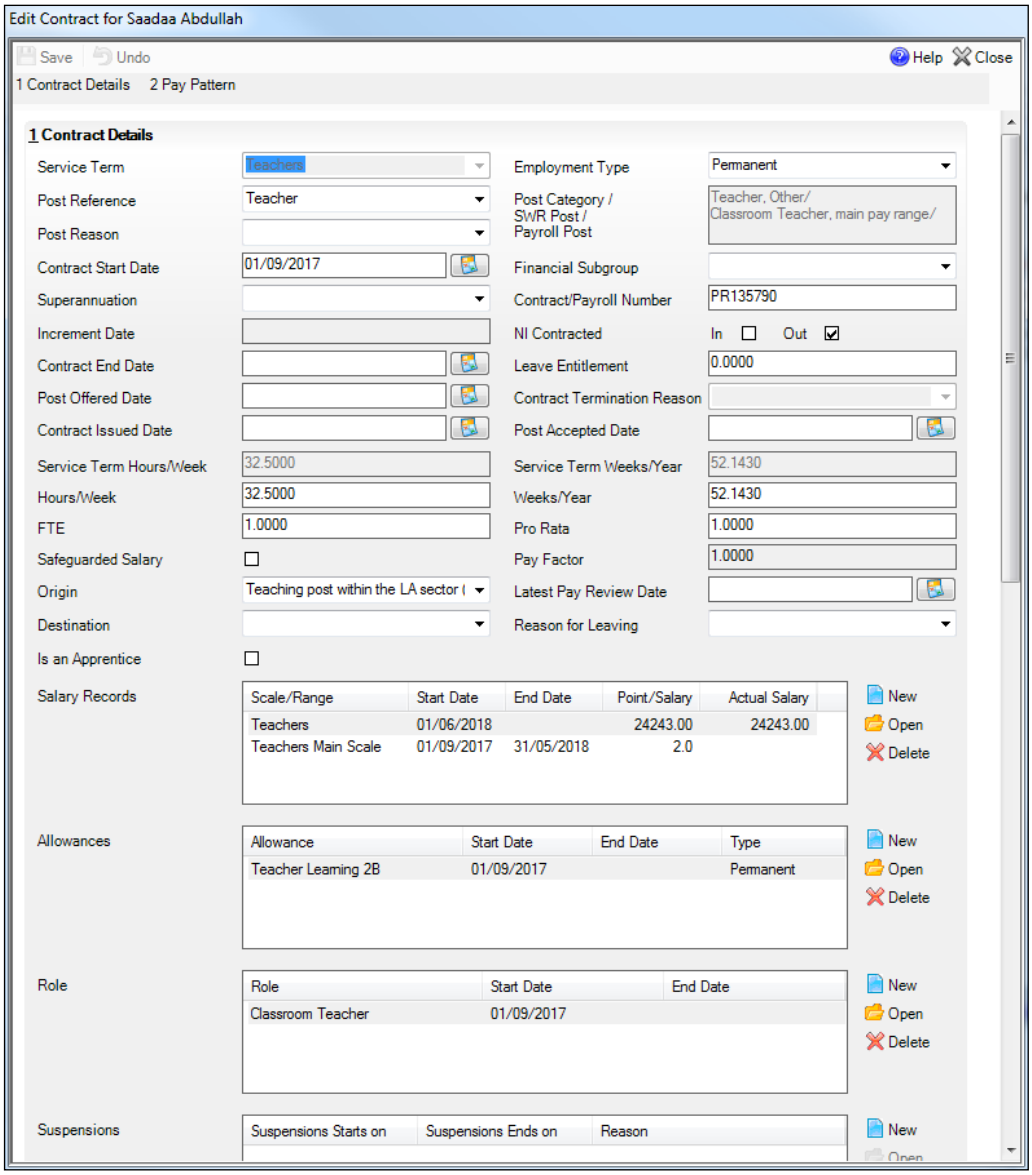
The following contract details related to salary ranges should be checked to ensure that the correct values are collected in the return.

1. Selected **Focus | Person | Staff**.
2. Search for and highlight the required person, then click the **Open** button to display the **Employee Details** page.

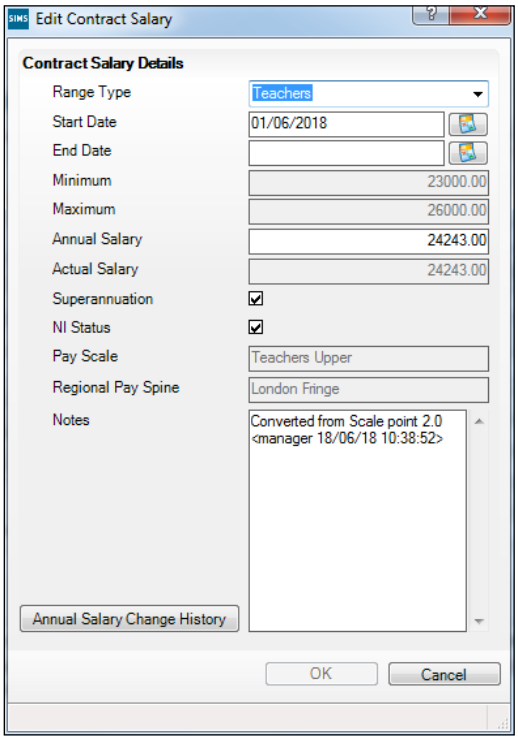
3. Select the **Employment Details** tab then navigate to the **Contract** table.



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



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



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 or when you enter a date of leaving.

The **Minimum** and **Maximum** salary are populated automatically according to the service term selected.

8. Enter the staff member's **Annual Salary**. 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 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.

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.

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

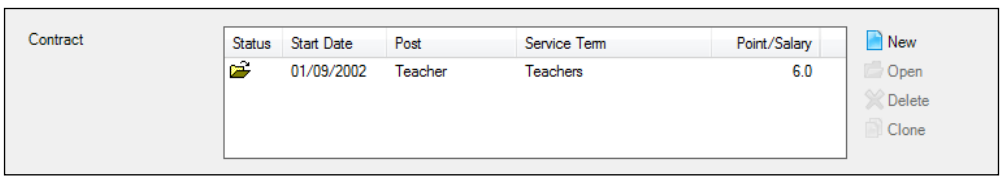
13. Click the **OK** button to return to the **Edit Contract** dialog.
14. Click the **Save** button to return to the **Employment Details** page.

☐ **Completed**

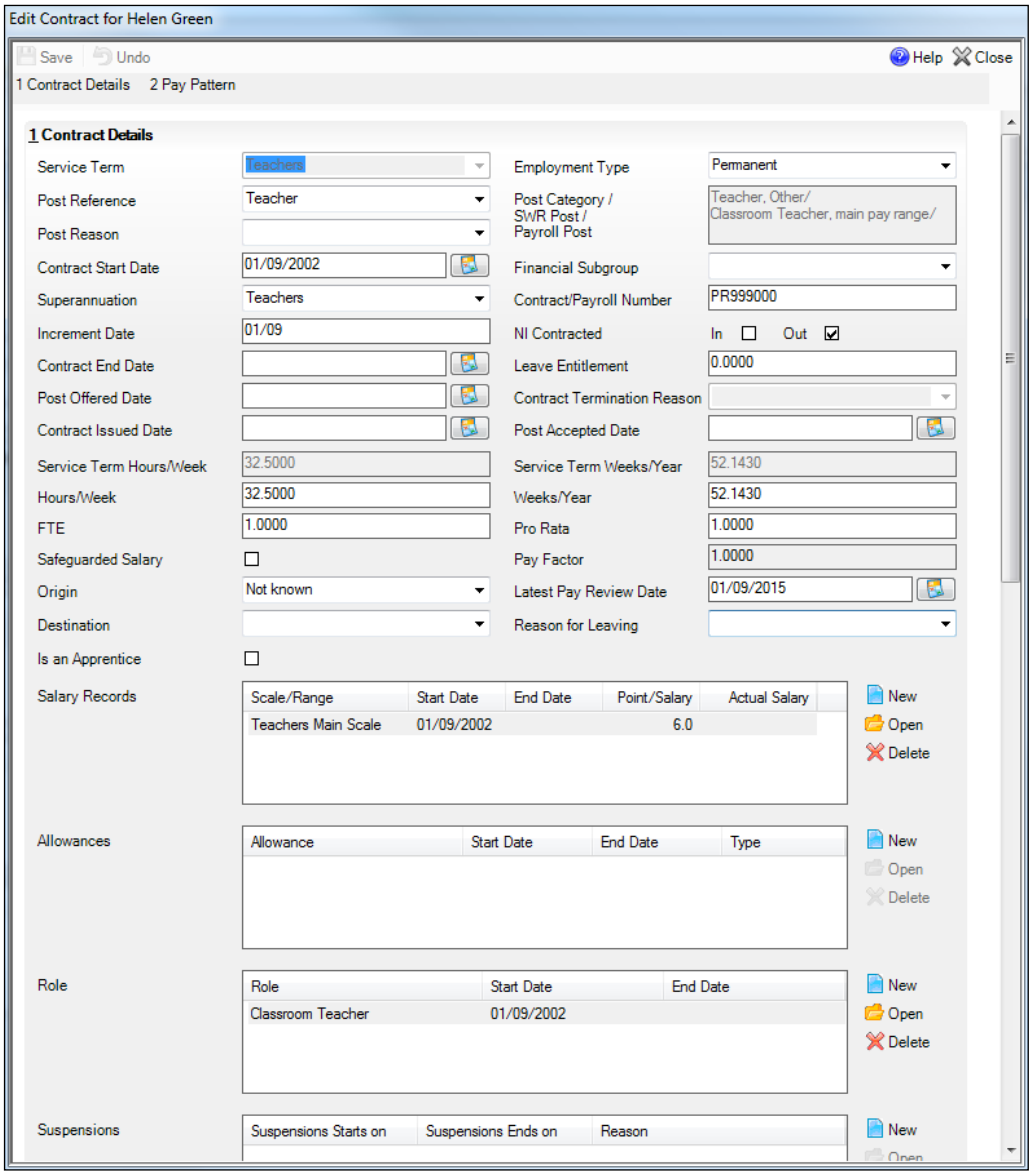
Editing Contract Details - Pay Scales

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

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 and then navigate to the **Contract** table.



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



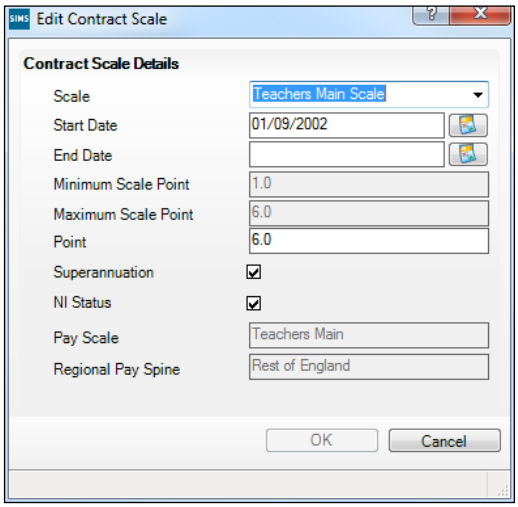
Some fields are populated automatically, including the **SWC Post** and **Service Term Hours/Week**.

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:
    a. ensure that the leaver's **Destination** (e.g. **Remaining in the same LA - primary school**) has been selected from the drop-down list.
    b. ensure that a **Reason for Leaving** (e.g. **Left for other teaching post**) has been selected from the drop-down list.

    It is advisable to enter the reason for leaving when entering the leaver's destination because a blank **Reason for Leaving** field will trigger a validation error when completing the School Workforce Census.
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** or highlight an existing **Pay Scale** record and then click the **Open** button to display the **Add** (or **Edit**) **Contract Scale** dialog.

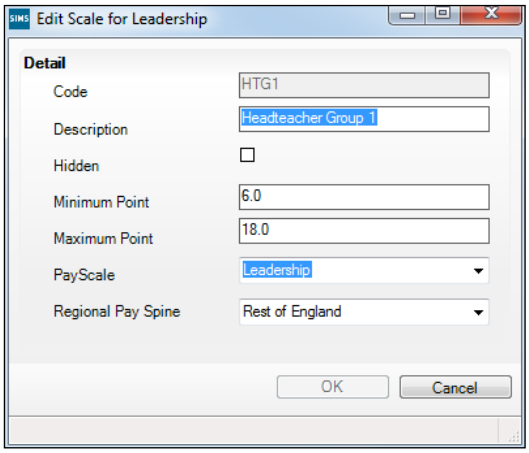


a. Ensure that the correct scale **Point** is entered.

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.

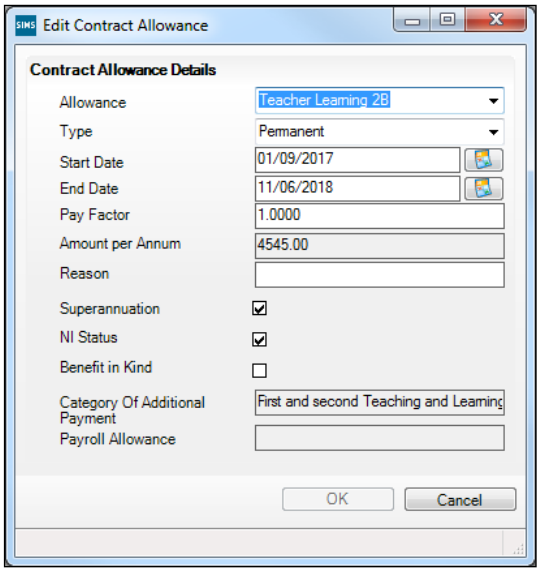
> *NOTE: Regional pay spine (range) is no longer collected for the return. However, it is advisable to ensure that records are up-to-date.*

   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.



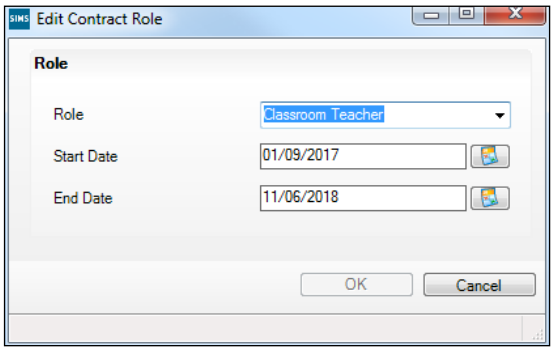
a. Ensure that the applicable **Allowance** is selected from the drop-down list.

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**

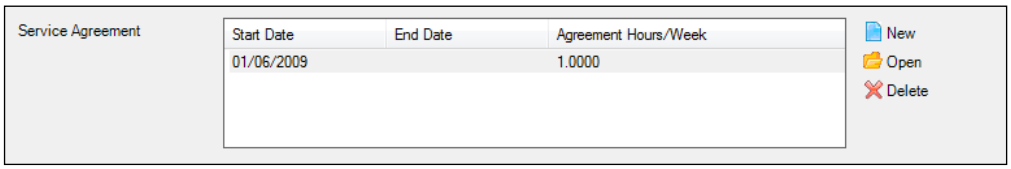
Editing Service Agreement Information

Not applicable to third party support staff

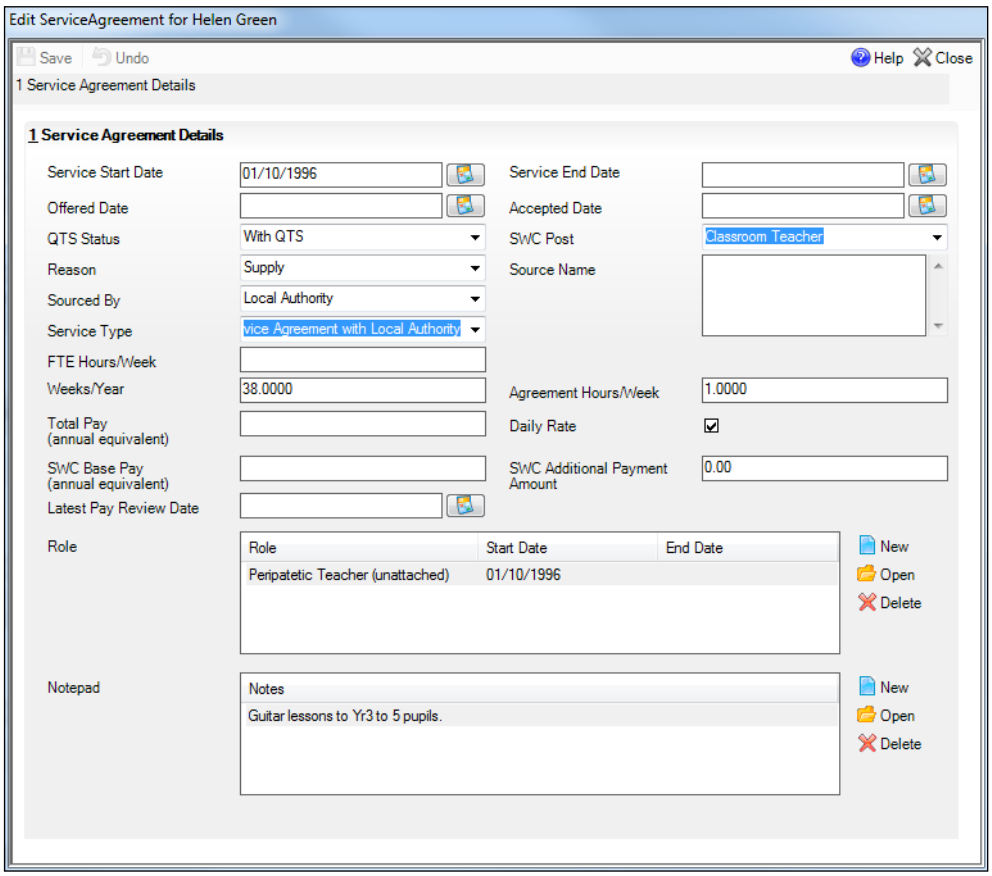
A person can have more than one role in the school, e.g. Teaching Assistant and Midday Supervisor, or can have more than one simultaneous contract with the same school. Multiple contracts/service agreements or roles (as well as old and current contracts) will be included in the return.

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.



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.



4. Ensure that the **Service Start Date** in entered in the correct format (dd/mm/yyyy). (Not required for centrally employed staff.)
5. Ensure that the **Service End Date** in 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.*

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.

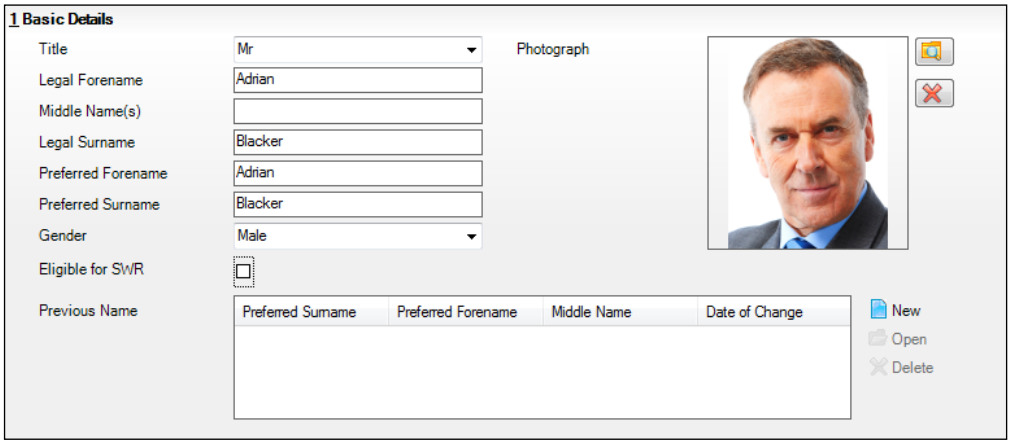
    a. Ensure that the applicable **Role** is selected from the drop-down list.
    b. Ensure that **Start Date** is entered in the correct format (dd/mm/yyyy).
    c. Click the **OK** button to return to the **Edit Service Agreement** dialog.
16. Click the **Save** button.

☐ **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 and 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.



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 Unit (please see *Importing Service Term Definitions* on page *11*), or it can be entered manually.

Additional Resources:

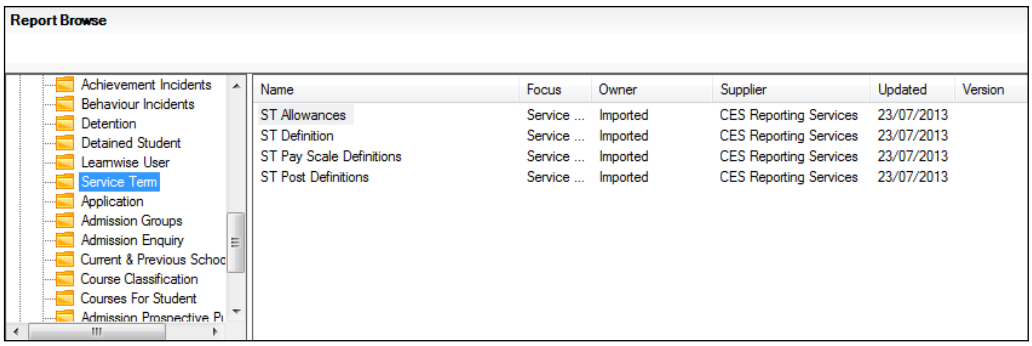
Defining Superannuation, Service Terms and Training Event Details chapter in the *Managing Staff* handbook

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

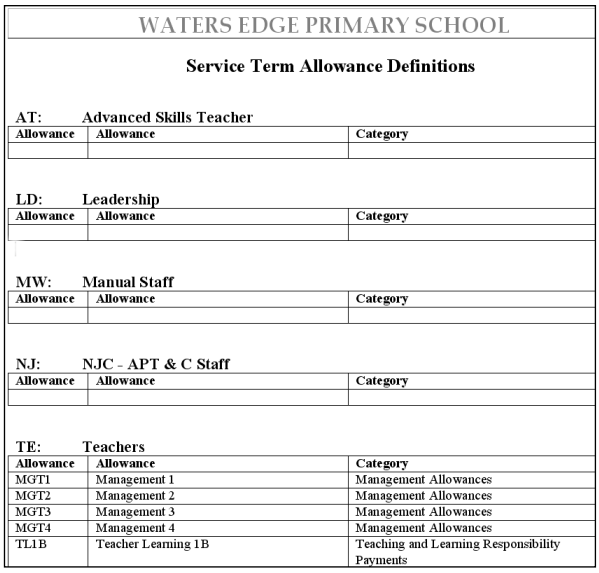
Ensure that the up-to-date pre-defined reports have been imported (please see *Importing Pre-Defined Reports* on page *38*).

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.



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.

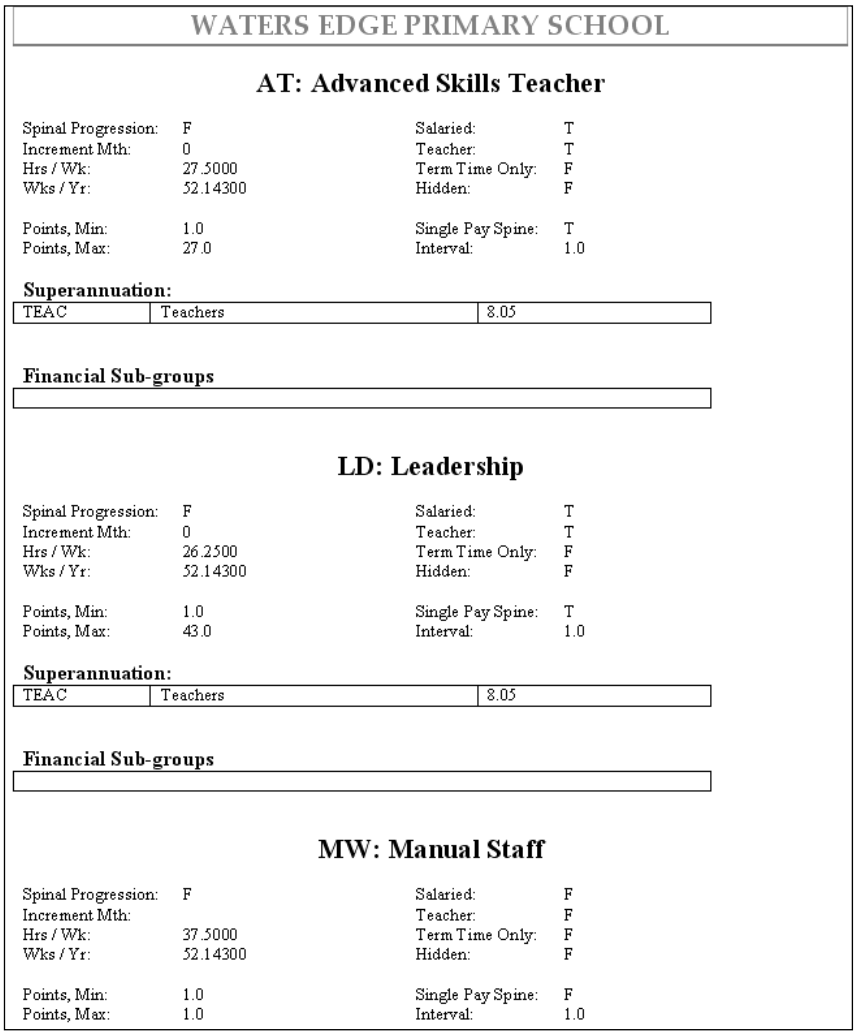
To allocate **Categories** to **Allowances**:

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

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_v7182.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:

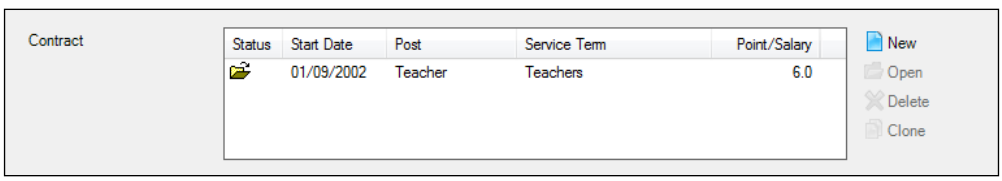
Designing and Running Reports handbook

Checking/Editing the SWC Post

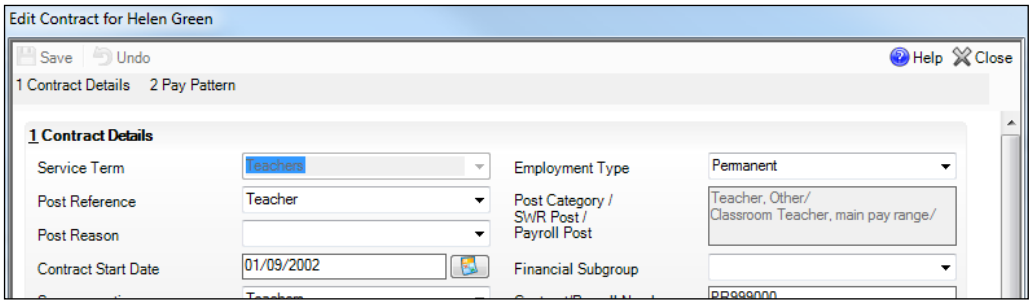
To avoid the validation error 4410 (post is missing or invalid) being triggered during the Create and Validate process, ensure that the **SWC Post** (SWR Post) is specified.

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.



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



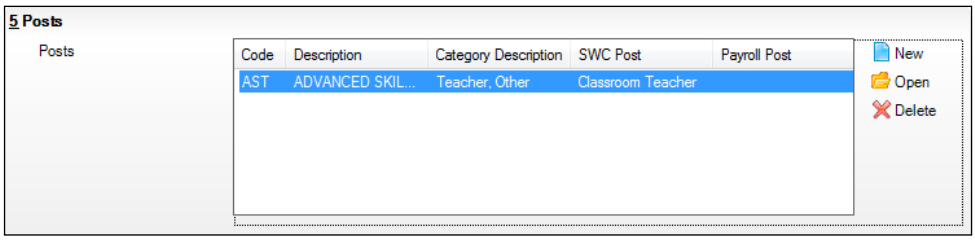
5. Check that a **Post Reference** has been selected from the drop-down list. It might be necessary to add an applicable **Service Term** if it does not already exist.
6. Click the **Save** button to return to the **Employee Details** page.
7. Re-open the contract then check the read-only entry in the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

☐ **Completed**

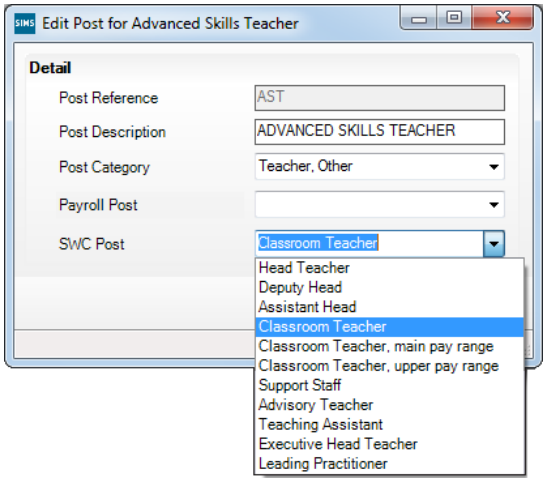
Changing the School Workforce Census Post

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**, **Classroom Teacher, upper pay range**, etc.
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

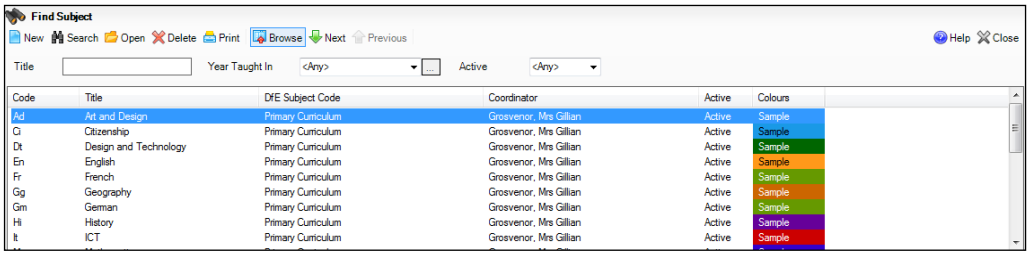
Applicable to Secondary phase schools only

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.

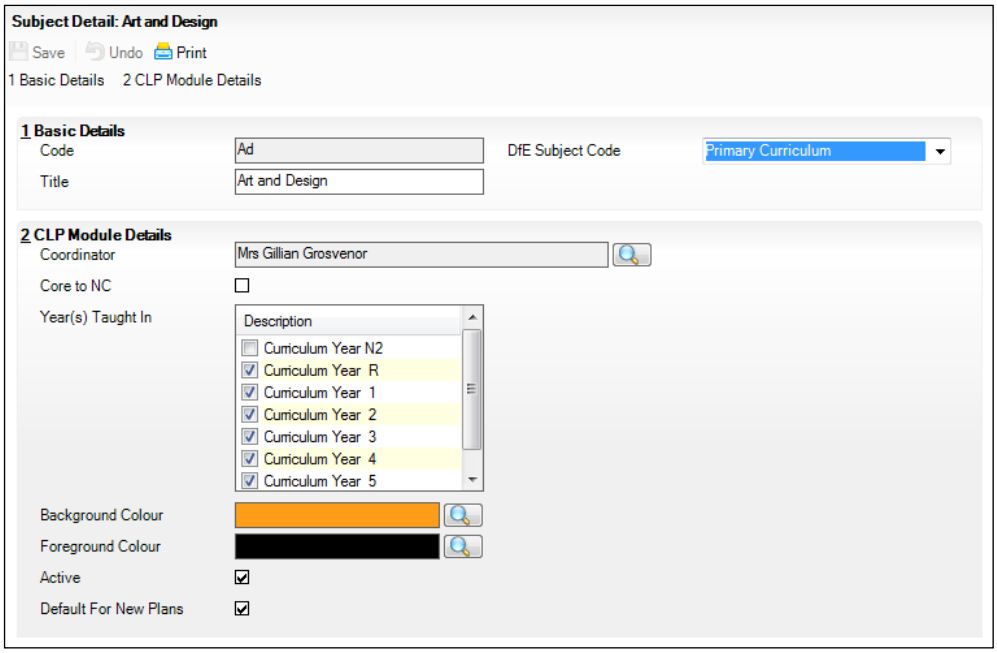
> *NOTE: One curriculum record will be generated when more than one Nova subject is mapped to the same DfE subject.*

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 display a list of all subjects.
2. Click the **Search** button to display a list of subjects that match the search criteria.



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



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

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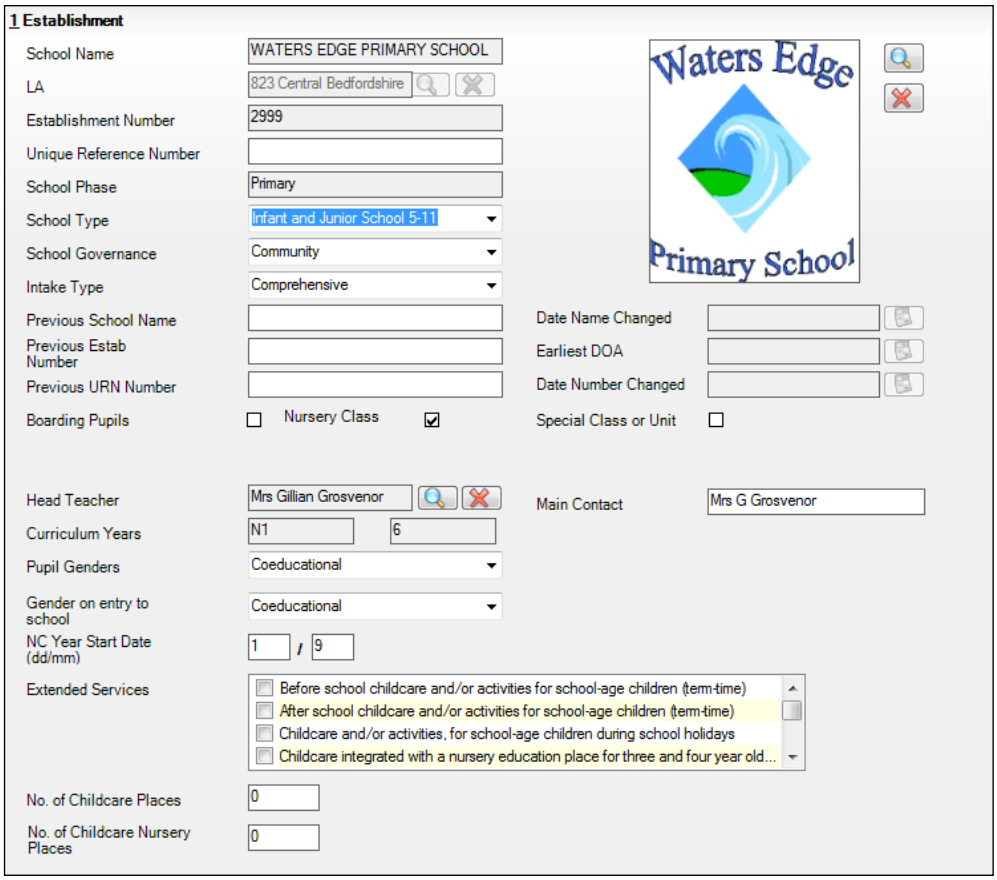
Checking Establishment Details

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.



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 **Previous School Name** and **Date Name Changed**.
- The **Previous Estab Number** and **Earliest DOA** (date of admission).

  If the DfE establishment number has changed for sponsor-led Academies, the Academy should record the previous establishment number and the earliest date of admission. This date is collected in the the School Census return.
- 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. 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?

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 2018 Summer Release (7.182) before completing the School Workforce Census 2018 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 2018 Return. For specific instructions, please refer to the *Producing the School Workforce Census 2018 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 2018 Return* handbook
  This handbook outlines how to produce the School Workforce Census in SIMS.
- *School Workforce Census 2018 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. Alternatively, use the **Search** facility to locate the required document.

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

   Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

   The search results are displayed automatically.

Problem Solving

- **Notifications** (the latest news to keep you up to date and informed)
- **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)
- The **Knowledge Base** (a library of helpful articles produced by our customer service desks).

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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