

Adding Contract Details in SIMS

A member of staff's details can be saved without attaching a contract. However, if you use FMS to record financial data, correctly completed staff contracts are crucial for bringing through salary commitments into FMS.

For more information on adding members of staff and their employment details, please refer to the *Adding a Staff Member to SIMS* Quick Reference Sheet, available from SupportNet (<http://support.capitaes.co.uk>).

Adding Contract Information

1. Select **Focus** | **Person** | **Staff** and select the required member of staff to display the **Employee Details** page.
2. In the **Employment Details** panel, click the **New** button adjacent to the **Contract** section.

3. Select a **Service Term** from the drop-down list.
4. Select an **Employment Type**, e.g. **Permanent**, from the drop-down list.
5. Select a **Post Reference** from the drop-down list. This populates the **Post Category** field. In addition, the **SWC Post** field is populated with the value associated with the selected **Post Reference** (English state schools only).
6. Select the **Post Reason** from the drop-down list.
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 selecting an alternative date from the Calendar.
8. Select the **Financial Subgroup**, if required.
9. Select the appropriate **Superannuation** scheme from the drop-down list.
10. Enter the **Contract/Payroll Number**.
*NOTE: The **Contract/Payroll Number** is required for the automatic reconciliation of salaries in FMS.*
11. In the case of service terms that have spinal progression, an increment is awarded at a particular time of the year. Enter the **Increment Date**, in dd/mm format.
12. Indicate if they are **NI Contracted** by selecting either the **In** or **Out** check box.
13. If the contract is fixed term, select the **Contract End Date** by clicking the **Calendar** button and selecting the required date.
14. Enter the number of days per annum **Leave Entitlement**, if applicable.
15. Select the date the post was offered to the successful candidate by clicking the **Calendar** button adjacent to the **Post Offered Date** field and selecting the date.
16. If the contract has ended, select a **Contract Termination Reason** from the drop-down list.
*NOTE: This field becomes available once a **Contract End Date** has been entered.*
17. Select the **Contract Issued Date** by clicking the **Calendar** button and selecting the required date.
18. Select the date that the successful candidate accepted the post by clicking the **Calendar** button adjacent to the **Post Accepted Date** field.

If the employee does not work full-time, you can enter the times worked for each week.
19. In the **Hours/Week** field, enter the number of hours per week that the member of staff works.

The actual amounts paid are calculated using the number of hours worked and the pay rates applicable for the employee.
20. In the **Weeks/Year** field, enter the number of weeks per year that the staff member works.

For someone who works less than a full year, their monthly payments are averaged out across all months. The pro-rata figure is represented as a decimal fraction of the year that is actually worked. To calculate a pro-rata figure, it is necessary to supply the number of weeks worked per year by someone employed for the duration of a full year.
21. The system calculates the **FTE** and **Pro Rata** figures.

Alternatively, you can enter the **FTE** and **Pro Rata** values and the system will calculate the **Hours/Week** and **Weeks/Year** worked.
NOTE: Due to mathematical rounding, there may be variations depending on which way the figures are entered.

The **Pay Factor** field is read-only.
22. If the employee has protected rights in their salary, select the **Safeguarded Salary** check box.
23. For English state schools only, if a contract end date has been entered, select the destination of the leaver from the **Destination** drop-down list.
24. For English state schools only, select the employee's employment prior to joining the school from the **Origin** drop-down list, e.g. **Teaching post within the LEA sector**.

Adding Pay Scales to an Employee

1. Click the **New** button adjacent to the **Pay Scale** section to display the **Add Contract Scale** dialog.
2. Select the appropriate **Scale** from the drop-down list.
3. Select the **Start Date** for the pay scale by clicking the **Calendar** button and selecting the required date.
*NOTE: The first time that a pay scale is added to a member of staff'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 scale will be terminated automatically when you apply a new scale, when you enter a contract end date or when you enter a date of leaving.

The **Minimum Scale Point** and **Maximum Scale Point** are populated automatically according to the service term selected.
4. Enter the staff member's scale point in the **Point** field.
5. If the superannuation scheme is to be applied to this contract, select the **Superannuation** check box.
NOTE: If this 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.
6. If the pay is subject to National Insurance contributions, select the **NI Status** check box.
*NOTE: When salary commitment is calculated in FMS, these check boxes will not be taken into account. National Insurance and superannuation will **always** be calculated for a pay scale.*

The **Pay Scale** associated with the selected **Scale** is displayed and is read-only.

For English state schools only, the appropriate **Regional Pay Spine** is displayed depending on the **Scale** selected, e.g. **Outer London**.
7. Click the **OK** button to close the dialog then click the **Save** button to save the changes.

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Adding an Allowance

NOTE: You cannot add an allowance if an identical allowance is already displayed in the list and has an open end date. If it already exists in the system, the start date for the new record cannot lie within the date range of an identical allowance.

1. Click the **New** button adjacent to the **Allowances** section to display the **Add Contract Allowance** dialog.

2. Select the required **Allowance** from the drop-down list.

NOTE: The available allowances are those added on the **Service Term** page.

3. Select a **Start Date** and **End Date** for the allowance by clicking the **Calendar** button and selecting the required dates.

NOTES: The first time that an allowance is added to a 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**.

The **End Date** of an allowance is filled in automatically when you apply a new allowance, when you enter a contract end date or when you enter a date of leaving.

4. Enter the **Pay Factor**.
5. Select a **Type** from the drop-down list, e.g. **Permanent**.
6. Enter the **Amount** of the allowance.

NOTES: This field is editable only if a zero amount has been entered at the service term level.

Allowances must be entered as an annual figure.

7. Enter a **Reason** for the allowance.
8. Select the following check boxes as appropriate:

- **Superannuation**
- **NI Status**
- **Benefit in Kind**

NOTE: These check boxes are not taken into account by FMS.

The **Category Of Additional Payment** is defined by the Allowance selected and is read-only, e.g. **Outer London Weighting (Support Staff)**.

9. Click the **OK** button to save the details.

Adding/Editing a Role

A role reflects the functions that a member of staff undertakes as part of their post within the establishment. A member of staff can have several roles within any one post.

NOTE: There must be at least one role per contract.

1. Click the **New** button adjacent to the **Role** section to display the **Add/Edit Contract Role** dialog.

2. Select the appropriate **Role**, e.g. **Classroom Teacher**.
3. Enter the **Start Date** for this role by clicking the **Calendar** button and selecting the required date.

NOTE: The first time a role is added to a 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**.

4. When the **End Date** is known, enter this in the field provided.
5. Click the **OK** button then click the **Save** button.

Cloning an Existing Contract

Where a new contract is similar to an existing contract, the contract can be cloned and used as the basis for the new contract. The contract retains the current pay scale, allowances and roles, i.e. those without an end date. Initially, a cloned contract contains the start dates of the original contract, but the start dates will be updated automatically with the new contract start date once this has been entered in the **Contract Start Date** field, and once you have tabbed out of this field.

1. Highlight the **Contract** you wish to clone in the **Employment Details** panel on the **Staff Details** page.
2. Click the **Clone** button adjacent to the list of contracts.

The contract is created and displayed for editing. The contract details can then be completed, as described in this Quick Reference Sheet.

Adding/Editing a Pay Pattern

A pay pattern can be defined for weekly paid employees only. The purpose of a pay pattern is to allow the commitment generated in FMS to be spread throughout the working year, corresponding to the weeks actually worked by the employee.

A maximum of 10 weeks can be entered against a month.

NOTE: If you do not define a working pattern for a service term classed as weekly paid, the system assigns four weekly payments each month, beginning in January, and the commitment generated in the appropriate FMS module for such an employee will be inaccurate.

1. Click the **Pay Pattern** hyperlink on the **Add New Contract** for page to display the **Pay Pattern** panel.

Month	Weeks	Month	Weeks
April	4	May	4
June	4	July	2
August	0	September	4
October	4	November	4
December	3	January	3
February	4	March	4
Total Weeks		40	

2. If the staff member is paid within a monthly reconciliation file, select the **Monthly Reconciliation** check box.
3. Click in the box of the first month, i.e. **April**, and enter the number of weeks worked during that month.
4. Click the box adjacent to each subsequent month and enter the number of weeks worked per month.
5. The system calculates the **Total Weeks** worked automatically.
6. Click the **Save** button.

This guide is based on the version of the software (7.124) in use at the time of publication.

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