Quick Reference Sheet

Adding a Staff Member to SIMS

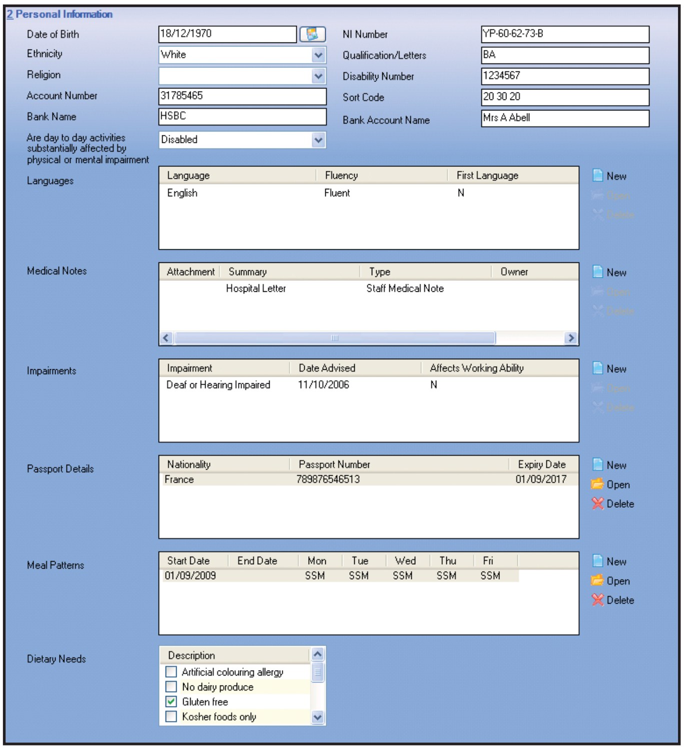
When a new member of staff joins the school, you need to add them to your SIMS system. You must ensure that the service terms, posts, etc. have been defined correctly before you add staff details, as you will need to select these details when entering staff contract information.

NOTE: This Quick Reference Sheet does not explain every field. Some details, e.g. basic details, address details, next of kin, etc. are similar to other areas of SIMS, which you are likely to be familiar with. These areas are described in detail in other documentation.

1. Select **Focus** | **Person** | **Staff** to display the **Employee Details** browser.
2. Click the **New** button to display the **Basic Details** page. The process of adding basic details is similar to other areas of SIMS. Complete the fields as appropriate.

Adding Personal Information

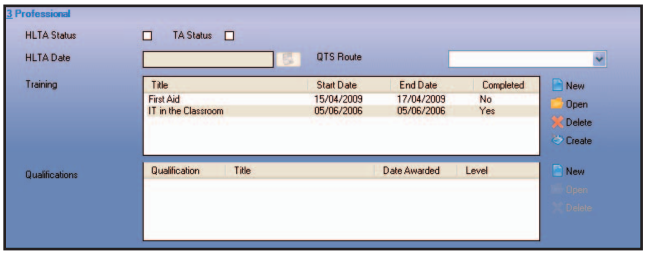
1. The **NI Number** field is not mandatory but can be completed for internal records.
2. Select the person's **Ethnicity** from the drop-down list.



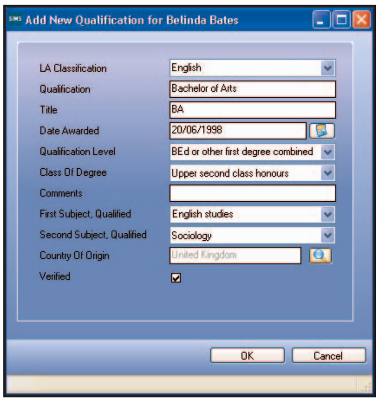
3. If the staff member has attained a nationally recognised degree or diploma, enter the details in the **Qualification/Letters** field.
4. Select their **Religion** from the drop-down list, if required.
5. If the employee is registered disabled, enter their **Disability Number**.
6. The staff member's **Account Number**, **Bank Name** of their account holding bank, **Sort Code** and **Bank Account Name** can be completed for internal records.
7. If the staff member suffers from any impairment that affects their work, select the appropriate option from the **Are day to day activities substantially affected by physical or mental impairment** drop-down list.
8. You can also add the following information by clicking the **New** button adjacent to each section and entering or selecting the required details:
   - **Languages** - enables you to record the languages and fluency of the member of staff. One language must be set as the **First Language**.
   - **Medical Notes** - enables you to record any medical information required for the staff member. This could be for administrative purposes, or information provided by the staff member for their own welfare, e.g. information about a medical condition.
   - **Impairments** - enables you to record anything that affects the member of staff's ability to work. This could be a registered disability or something short term, e.g. a painful back.
   - **Passport Details** - this section is primarily intended to record passport details that are captured when completing CRB checks.
   - **Meal Patterns** - when Dinner Money is in use, this section enables you to record the member of staff's meal pattern through the week.
9. Select the appropriate **Dietary Needs** check box(es) to indicate any special dietary needs that the member of staff has.

Adding Professional Information

This panel enables you to record professional details concerning the member of staff, including training course attendance and qualifications.



1. If the staff member is a Higher Level Teaching Assistant, select the **HLTA Status** check box.
2. If the **HLTA Status** check box is selected, select the **HLTA Date** (the date that the HLTA status was achieved) by clicking the **Calendar** button and selecting the required date.
3. If the member of staff has Teaching Assistant status, select the **TA Status** check box.
4. If the staff member has Qualified Teacher Status, select the appropriate option from the **QTS Route** drop-down list.
5. Click the **New** button adjacent to the **Qualifications** section to display the **Add New Qualification for** dialog.
6. If B2B:Personnel is licensed, select the appropriate **LA Classification** from the drop-down list.
7. Enter the name of the **Qualification** and the **Title**.
8. Select the **Date Awarded** for the qualification by clicking the **Calendar** button and selecting the date.



9. Select the **Qualification Level** from the drop-down list.
10. Select the **Class Of Degree** from the drop-down list.
11. Enter any additional notes in the **Comments** field.
12. Select the **First Subject, Qualified**, for which the qualification was awarded from the drop-down list and repeat for the **Second Subject**, **Qualified** if appropriate.
13. Indicate the **Country Of Origin** of the qualification by clicking the **Browser** button and selecting from the **Nation** dialog.
14. If the qualification has been verified, i.e. the paper certificate has been checked, select the **Verified** check box.
15. Click the **OK** button.

Please refer to the *Periodical Activities in Personnel 7* Quick Reference Sheet for details on adding training courses.

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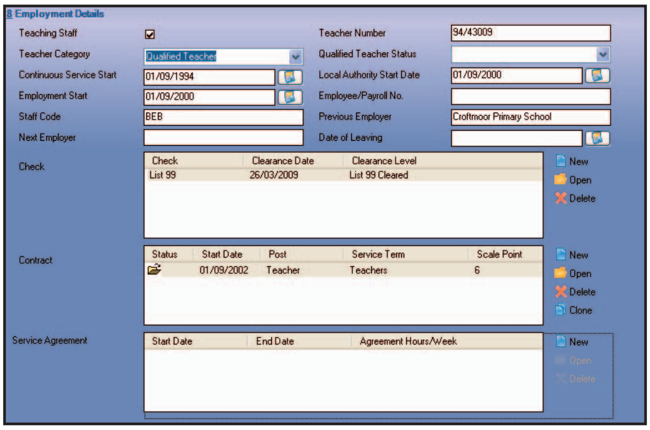
Adding Staff Employment Details

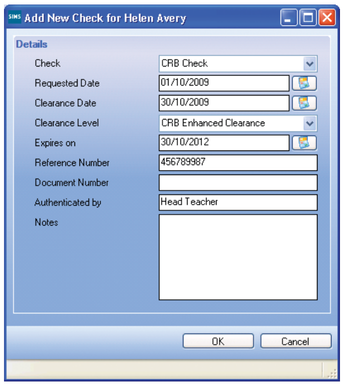
1. In the **Employment Details** panel, select the **Teaching Staff** check box if the staff member is employed in a teaching capacity. Enter a **Teacher Number**, if available.



2. Select the appropriate **Teacher Category** and **Qualified Teacher Status** from the drop-down lists.
3. Select the staff member's **Continuous Service Start** date by clicking the **Calendar** button and selecting the required date.
4. In the **Local Authority Start Date** field, select the date from which the staff member first commenced employment with the Local Authority.
5. Specify the staff member's **Employment Start** date (the date that they started working at your establishment).
6. Enter the staff member's **Employee/Payroll No.**, if available.
7. Enter a **Staff Code** of up to three digits. All staff codes must be unique within the school and are primarily used by the Nova suite.
8. **Previous Employer** details can be entered for historic purposes.

Adding Check Information

1. Click the **New** button adjacent to the **Check** section to display the **Add New Check for** dialog.



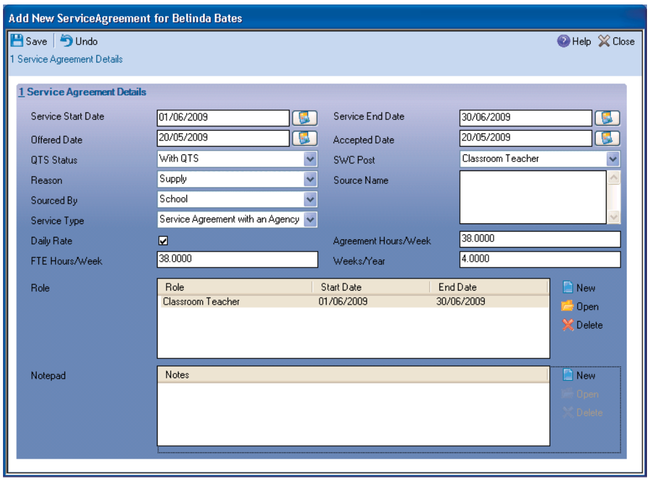
2. Select the type of **Check** from the drop-down list, e.g. **CRB Check**.
3. Select the **Requested Date** and **Clearance Date** by clicking the respective **Calendar** buttons and selecting the date.
4. Select the **Clearance Level** from the drop-down list.
5. If applicable, select the **Expires on** date of the check by clicking the **Calendar** button and selecting the required date.
6. Enter a **Reference Number** and a **Document Number** for the check.
7. Enter the name of the person who authenticated the check in the **Authenticated by** field.
8. Add any additional **Notes**.
9. Click the **OK** button to save the details.

Please refer to the *Adding Contracts in SIMS* Quick Reference Sheet for details on adding a contract.

Adding Service Agreements

This panel is provided to record service agreements relating to members of staff who do not have contracts, e.g. supply teachers.

1. In the **Employment Details** panel, click the **New** button adjacent to the **Service Agreement** section to display the **Add New Service Agreement for** dialog.



2. Select the **Service Start Date** and the **Service End Date** by clicking the **Calendar** buttons and selecting the required dates.
3. Enter the date that the post was offered in the **Offered Date** field and the date it was accepted in the **Accepted Date** field.
4. If appropriate, select the Qualified Teacher Status from the **QTS Status** drop-down list. This is not required if **Support Staff** is selected from the **SWC Post** drop-down list.
5. For English state schools only, indicate the School Workforce Census Post by selecting from the **SWC Post** drop-down list.
6. Select the **Reason** for the agreement from the drop-down list.
7. In the **Source Name** field, enter the name of the supplier.
8. Select the origin of the person supplying the service from the **Sourced By** drop-down list, e.g. **Agency**.
9. Select the type of service agreement from the **Service Type** drop-down list, e.g. **Service Agreement with an Agency**.
10. If the person is on a daily rate of pay, select the **Daily Rate** check box.

    *NOTE: For those providing a service for which there is no charge, e.g. governors, the **Daily Rate** check box should be deselected.*
11. Enter the **Agreement Hours/Week**.
12. If appropriate, enter the full-time equivalent in the **FTE Hours/Week** field.
13. Enter the **Weeks/Year** worked.
14. Click the **New** button adjacent to the **Role** section to display the **Add Service Agreement Role** dialog.
15. Select the appropriate **Role** that the person is carrying out, e.g. **Classroom Teacher**.
16. Enter the **Start Date** and **End Date** (if known) for the role.
17. Click the **OK** button.
18. Any additional notes can be entered in the **Notepad** section.
19. Click the **Save** button then click the **Close** button.

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

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SIMS