

Managing Classroom Staff in SIMS .net

Introduction

In schools, a variety of types of people take on classroom roles including people other than teachers, such as agency staff, consortium staff and volunteers.

When a timetable is imported into SQL, staff are identified by their Staff Code, by which they are represented on timetable displays, printouts, etc.

In order to allow schools to schedule non-teachers on the timetable, it is now possible to give a Staff Code to any person to be assigned to lessons on the timetable. This is achieved using a new category of person called *Classroom Staff*. Each Classroom Staff person is given a Staff Code.

IMPORTANT NOTE: Any member of staff can be assigned as Classroom Staff, not just employees (i.e. they do not need to have a contract).

Staff Roles are used to identify types of Classroom Staff. Currently there are two roles - *Teacher* and *Teaching Associate*. Any member of Classroom Staff can be assigned to either, or both of these roles (but only one at a time).

After SIMS .net 7.90 or later is installed, a one-off, automatic import of Classroom Staff into the Manage Classroom Staff area is carried out. Classroom Staff are considered to be people recorded in SIMS .net:

- with the **Teaching Staff** check box selected and a unique Staff Code and/or
- who appear on the timetable with a unique Staff Code.

NOTE: Because this is a one-off process, any new staff, or existing staff who you subsequently wish to add to the timetable, must be manually added to the **Manage Classroom Staff** area.

Classroom Staff can be added or selected via:

- Personnel 7 or SIMS .net by selecting **Focus | Person | Staff** and clicking the **Manage Classroom Staff** link in the **Links** panel.
- The **Manage Classroom Staff** area by selecting **Focus | Person | Manage Classroom Staff**.

Adding/Selecting Classroom Staff

Adding/Selecting Classroom Staff via Personnel 7/SIMS .net

1. Select **Focus | Person | Staff** to open the **Find Staff** browser.
2. Select an existing, or add a new member of staff in the usual way.
3. With the required record open and saved, click the **Manage Classroom Staff** link in the **Links** panel.
4. Complete the details as described in the next section, *Adding/Editing Classroom Staff Details*.

Adding/Selecting Staff via Manage Classroom Staff

1. Select **Focus | Person | Manage Classroom Staff** to open the **Find Classroom Staff** browser.
2. Changes are applied to the **Academic Year** displayed in the drop-down list, which defaults to the current year. Changes can be applied to a future year by selecting the year from the drop-down list.
3. If the required member of staff is listed, double-click their record to select them and go to step 5.
4. If the required member of staff is not listed, click the **New** button to add them/search for them.

- If the member of staff exists elsewhere in SIMS .net, e.g. as a contact, agent, etc., search for matching records by entering the **Surname** and **Forename** in the **Basic Details** panel and clicking the **Continue** button.
- Any people with a matching surname and/or forename will be displayed in the **Matched People** panel.
- If the required person is listed, highlight their name and click the **Open** button.
- If the person is not listed, a new record will be created populated with the **Surname** and **Forename** used to search.

IMPORTANT NOTE: ONLY create a new record if you are sure that the person has not already been added to SIMS .net (e.g. as a contact, agent, etc.) If they already exist, you **MUST** select them from the **Matched People** panel to avoid duplicate records.

5. The **Classroom Staff Details** page is displayed showing any existing Staff Code and/or Role(s).

Adding/Editing Classroom Staff Details

The **Classroom Information** panel displays, and enables you to edit, the Staff Code, subject specialisms and Staff Role(s) of a member of Classroom Staff.

assist in the classroom are displayed in the **Subject(s)** list. To edit this list, click the **Edit** button adjacent to the **Subject(s)** list to open the **Add/Remove Subject(s) for <Classroom Staff Name>** dialog.

Adding/Editing Staff Codes

The **Staff Code** field displays the Staff Code assigned to the selected member of staff and can be edited, if required. A new code will need to be added for a new member of Classroom Staff.

NOTE: If the **Staff Code** is not unique across the selected Academic Year, the background colour of the field will change to red and a message displayed in the Status Bar. It is not possible to save the record until a unique code (across the current Academic Year) has been entered.

Any member of Classroom Staff already assigned this code will be displayed in the **Existing code assignments** list.

NOTE: Once a member of staff has been made a member of Classroom Staff, their Staff Code can be maintained **ONLY** in Academic Management, i.e. it cannot be edited in Personnel 7 or SIMS .net.

Selecting Subjects

1. Any subjects for which the member of Classroom Staff can teach or

2. Amend the list of subjects by selecting or deselecting the appropriate check box(es). Click the **OK** button.
3. Any unwanted subjects can be deleted by highlighting the required name in the **Subjects** list and clicking the **Remove** button.
4. To change the subject order, highlight the required subject and click the **Up** or **Down** button.

NOTE: Subjects are automatically added to Classroom Staff when the timetable is imported.

Managing Classroom Staff in SIMS .net

Adding/Editing Classroom Staff Details (Continued)

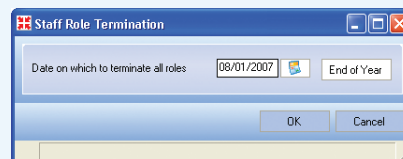
Assigning Roles

Staff Roles play a vital part in the timetable import process. In order to be imported on the timetable, a member of Classroom Staff must have a Staff Role for the entire duration of the import period.

1. Assign or unassign a Staff Role by selecting the appropriate check box adjacent to the required role. The selected role will be allocated as of today's date.
2. If you are working in the current Academic Year, the **Role(s) as at <Today's Date>** list displays the selected member of Classroom Staff's current teaching role(s) within the school and any roles that have been or will be active during the current Academic Year. If you are working in the next Academic Year, the roles displayed will be those that will be in place as of the first day of the next Academic Year.
3. The role associated with the selected member of Classroom Staff can be amended by selecting the appropriate check box adjacent to the required role. This will allocate the role as of today's date or, if you are working in the next Academic Year, the first day of the Academic Year.

NOTE: Only one role per member of Classroom Staff can be selected.

4. To remove a role as of today's date, deselect the required check box. Alternatively, a role membership can be terminated on a given date by clicking the **Terminate All** button to open the **Staff Role Termination** dialog.



Enter the **Date on which to terminate all roles** or click the **Calendar** button and select the required date.

To default the termination of the Staff Role to the last day of the current Academic Year, click the **End of Year** button. Click the **OK** button to confirm the selection.

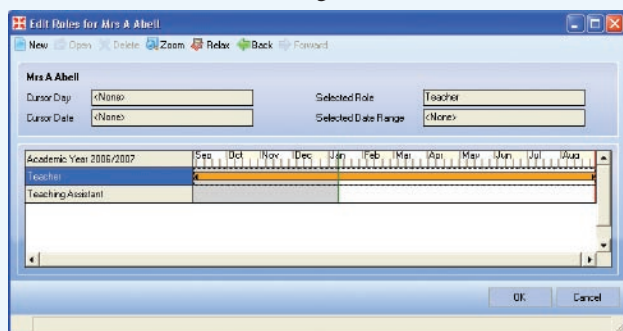
IMPORTANT NOTE: By terminating a Staff Role using one of these methods, the appropriate role will be removed regardless of any previous or planned classroom assignments.

5. As a member of Classroom Staff's role might change throughout the year, or across year boundaries. It is possible to view past role and view/edit present and future role assignments. To view the role assignments in more detail, click the **Edit** button to open the **Edit Roles for <Classroom Staff>** dialog. For more information, please refer to the *Editing the Role History of a Member of Classroom Staff* section below.
6. Click the **OK** button to return to the **Classroom Staff Details** page.
7. Click the **Save** button to save any changes made.

Editing the Role History of a Member of Classroom Staff

The **Edit Roles for Classroom Staff** dialog displays the full history of role assignment and allows you to make changes to a role history.

1. Click the **Edit** button adjacent to the **Role(s)** panel on the **Classroom Staff Details** page to open the **Edit Roles for <Member of Classroom Staff Name>** dialog.



This dialog displays a history of a member of Classroom Staff's role memberships. The calendar ruler at the top of the display and timeline indicates the period of membership for each of the staff roles. The initial view displays role memberships for the current Academic Year which can be edited if required.

A vertical green line indicates the **Effective Start Date** and a vertical red line indicates the **Effective End Date**.

Highlight a timeline to display further detailed information relating to the Staff Role membership. The **Selected Role** displays the name of the role and the date range of the selected staff role membership is displayed in the **Selected Date Range** field.

NOTE: For those Staff Role memberships whose end date has not been specified, the end date will be blank.

Hover over the calendar ruler or anywhere in the timeline area to display the day of the week on which the cursor is resting (Cursor Day) and the date (Cursor Date).

To edit the dates between which to apply any changes, right-click the required date on the calendar ruler and select either **Select Effective Start Date** or **Select Effective End Date** from the menu.

2. To view staff role memberships for another Academic Year, click either the **Back** or **Forward** button.

3. To view a particular area of a timeline in more detail, click the **Zoom** button. Click the **Zoom** button again to return to the normal view.
4. To view or edit the start or end date of a Staff Role membership, either double-click the timeline bar or highlight the timeline bar and click the **Open** button to open the **Add/Edit Date Range** dialog.
5. Enter or select a **Start Date** and an **End Date** for the selected staff role membership. Leaving the **End Date** field blank indicates an ongoing membership, but this can be edited if required.
6. Click the **OK** button to return to the **Edit Roles for <Member of Classroom Staff Name>** dialog.
7. To create a new Staff Role membership, click the **New** button to open the **Add/Edit Date Range** dialog and follow Steps 4-6. The **End Date** defaults to blank to indicate an ongoing membership, but this can be edited if required.
8. Click the **Relax** button in the **Edit Roles for <Member of Classroom Staff Name>** dialog to relax the eligibility rules to enable a role to be allocated retrospectively.

Once you have finished working in **Relaxed Mode**, click the **Relax** button again to restore the read-only status.

This guide is based on the software version (7.93) in use at the time of publication.

For details of the changes to the software, please refer to the associated handbook and online help file.

For further copies of this, or other Quick Reference Sheets, please email publications@capita.co.uk.

For information on available training courses, please contact Capita Professional Services on 01234 838080 or email profserv@capita.co.uk.

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