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SIMS to SAP Guidance Manual

Issue 14 – January 2024

Working In partnership with

	Amendment	DATE
Issue 9		02/12/2020
Sect 2 **Sect 3** **Sect 5**	AnyComms Error reports • Additional validations • Changes to error messages	
Sect 4	Allowances: - End date mandatory and AnyComms failures - Amount cannot be £0.00 and AnyComms failures	
App 2	Addition of Illness category lookups	
App 5	Service Term updates for Teachers' Pay 2020-21	
App 6	*NEW* Summarised guidance when creating / closing fixed term contracts	
Issue 10		06/01/2021
Section 3	Rewrite of section to remove reference to data cleansing	
Section 5	Updates to AnyComms Error report guidance Update to HR Changes Report Guidance Reference SIMS Contract and Personal Data and Data Collection reports	
Issue 11		03/02/2021
Section 4	Absences - End date and Additional Information Allowances - End date and Additional information HR Service Desk - Notification Summary Change of practice when amending the end date in SIMS to either reduce or extend the absence or allowance	
Issue 12		03/03/2022
Section 4	Additional Notes: Changing contract from Permanent to Fixed Term – further guidance	
App 2	New lookup for fixed term contracts – Kickstart Scheme New Lookup for Absence Type – Flexi-time Paid	
Issue 14		
	Revision of current guidance & update notes where required. New lookup for STR – Strike Action (unpaid, unauthorised). Transfer of Secondary Guidance for schools using Cover.	04/01/2024

Contents

Introduction

What is SIMS to SAP?

In the educational sector a school, college or academy is required to maintain an information database that covers staff and pupil data, as well as staff and pupil attendance and curriculum details. This database is the primary data source for the school and as a result is meticulously maintained. The database is also the primary data source used for an OFSTED inspection and is used to generate the schools workforce census return which is required each November.

The data recorded on this database for personnel, with a small number of exceptions, is the same as the data required for payroll processing. For many schools, including those in Buckinghamshire Council, the school undertakes a dual data entry process to maintain the schools database and also to notify payroll.

The SIMS to SAP solution provides a direct transfer of data from the school's SIMS system to the payroll software SAP, using an extractor tool and AnyComms Plus to transfer the data.

The current data held on SIMS will need only a minor modification so that an additional field required for payroll processing can be recorded; the employees SAP number and amendments to Lookups. Some development was required in SAP to build an import mechanism that will take the SIMS data, apply some mapping standards and then post the data directly to the employees existing SAP record.

The development of a SIMS to SAP mechanism will form part of an enhanced service offering to our current payroll service customers. This will reduce data entry duplication in the school.

Added to this, a new e-form; the Schools Employee Data Report, allows data to be shared with the customer directly in real time from SAP has been developed, which will allow schools to have 100% ownership of the data entry process by providing them with the ability to check and verify the data entered.

Benefits of the SIMS to SAP process include:

- **Improved quality** – Reduction of multiple data entry points, reducing multiple human interventions, better quality and a transparent sign off procedure for the data, thereby reducing the need to contact the HR Service Desk.
- **Process improvement** – Reduction of multiple entries reducing human intervention, better quality and creating a signed off process for the data. Reduction in the need to contact the HR Service Desk, as the school can access the new Schools Employee Data Report to check SAP information held and answer their "have you received…….?" Queries independently.
- **Enhanced controls (eg. security)** Schools would verify their own data and would retain a full audit trail.
- **Ease of operation.** For the school there is minimal change as the process is simplified, because the data is going into SIMS only and the dual data entry onto e-forms is removed. There will be a potential time drag between data entry and data export when the payroll is being processed and SAP will be closed. This will need to be managed so that the school is aware of export and import timescales at certain times of each month.

Pre-Requisites

In order for a school to participate in the SIMS to SAP process the following must be in place:

- The school must buy in to both **MIS Support** and **HR payroll** from Buckinghamshire Council.

- Schools must have converted their Teachers Service Terms to pay **ranges** (not scales).
- Bucks Pay staff will remain on pay scales until such time that there are any changes to Terms and Conditions for Support staff.
- Schools not buying into ICT Schools Technical support must ensure that their external IT providers are fully informed of the process to install extractor tool, have up to date virus checking & security processes in place and requirements to ensure secure transfer of data from SIMS server to AnyComms Plus server.

Communications

- Prior to commencement of the project a SIMS to SAP agreement will be sent to the school for the Headteacher to sign, and the school must ensure sufficient resource with the required expertise is allocated to the project to enable a smooth transition.
- Schools planning on converting to an academy must give three months' notice to HR and SIMS.
- Schools using external IT support must ensure any plans to replace servers are communicated to Schools Technical Support Team schooltst@buckinghamshire.gov.uk at the initial stage of planning.
- Please notify ICT Schools Team when you change Internet provider/IP address as this might cause SIMS to SAP to error.
- On successful completion of the data cleanse process, a 'go live' date will be agreed and instructions for commencement of the live data transfers will be provided by the LA.

Inclusion in the SIMS to SAP Process

The following areas are included in the process and will eliminate the need to complete an LVTC or Absence Eforms (after data cleanse and parallel running, where applicable).

Changes/corrections to:

- Address
- Date of Birth
- Gender
- National Insurance Number
- Contract information eg. Service term, Employment Type, Hours/Wk, Weeks/Yr, Salary information, Allowance information, Leaver information
- Absence information

Exclusions from the Process

New starters

Whether a brand-new starter to the school or an existing member of staff starting a new post. School should continue to complete and send the online New Starter form (found on the Schoolsweb HR zone), as staff will not be paid until all the necessary paperwork has been received by HR and processed.

Creating the record in SIMS will not replace the above process, and no successful extraction of any data from SIMS will occur until the SIMS record is fully updated with all of the necessary validation data – **see Section 2 Validations and Errors**.

It is recommended therefore, that wherever possible, the SIMS records are not created until the school have received the Contract of Employment, containing the SAP number for the employee. This may be unavoidable for Secondary schools however, as records need to be created for timetabling purposes.

The Contract should be fully checked to ensure all Terms and Conditions are as expected before creating the record on SIMS. Any errors should be taken up with HR immediately.

- **Staff commencing or returning from maternity or adoption leave** are outside of the SIMS to SAP scope due to statutory paperwork that needs to be submitted to ensure correct payments. Current process should continue to be followed. (Refer to SchoolsWeb for paperwork required)

- **Protected Pay** – outside the scope of the project. HR to be notified via email to the Service Desk

- **Shift Allowances** - outside the scope of the project. HR to be notified via email to the Service Desk

- **Senior Midday Supervisors** – ie. teachers who are paid an hourly rate are outside the scope of the project. HR to be notified by email for any changes. However, contracts for these staff should be set up in SIMS.

- **Claims for Supply Teachers employed by the school and Casual Bucks Pay staff –** the current Eform processes still need to be followed. However, contracts for these staff should be set up in SIMS.

- Supply staff employed via an Agency should have a service agreement in SIMS, not a contract.

Chapter 1 Technical Overview

Process

Changes to staff records relating to personal details, contracts and absences, having been updated in SIMS, will be extracted overnight using **Groupcall Xporter** which is a third-party software already installed and used in a number of schools to generate email accounts for both pupils and staff.

Where Xporter is not installed already, the School's Technical Support Team will make contact with the school at the appropriate time to arrange installation.

Where the schools has 3rd party IT support, instructions for installation will be provided.

The extraction file is then passed through to AVCO AnyComms Plus – again software already in use in schools to transfer data securely between the school and the LA. This software will also be used to send information to the school if the transfer of data is unsuccessful.

Existing AnyComms user accounts will be utilised wherever possible. However, if responsibility for this process is to be actioned by a non AnyComms user, a new account can be created.

Note: if you are a nominated recipient of the AnyComms Reports and leave the school, the error reports do not automatically redirect to another member of staff.

The Schools Management Support Team must be advised the new contact details.

When you leave, your email address is deleted which has the action of freezing the delivery of all reports that would have gone to that email address.

Validations and Errors

In order to process changes a set of validations are performed by AnyComms. At this point the extract file may be split, sending records back to the school where errors are encountered, or passing 'good' data to HR for processing in SAP.

If any of the following occur, the record is rejected and the school informed, by email, that AnyComms reports are awaiting download:

- If the payroll/contract number field coming from SIMS is blank or incomplete.
- If the National Insurance number field coming from SIMS is blank
- If the date of birth field coming from SIMS is blank
- If one or all of the forename/surname fields are blank
- If there is a sickness absence **but no** illness category coming from SIMS
- For any absence where the days lost **and** hours lost are both zero
- Allowances – no end date input
- Allowances – no annual amount entered (amount = £0.00)

All rejections such as above and/or any others will automatically be communicated overnight to the corresponding schools via an email notification that files awaiting download in AnyComms.

The school must access the files and details of the error, locate the SIMS record/s and correct the information.

If the error relates to **absences or allowances**, the data will be re-extracted once the record has been amended.

If the error relates to a **missing SAP Number, National Insurance Number, Date of Birth or Title, Forename or Surname**, the school must **email** details of the change to the HR Service desk.

NB. If more than one change is being made to a personnel record on the same day eg. an absence entry and a change of contract, and an error occurs, all of the data transfer will fail, not just data relating to the validation error.

It is important therefore, that the school checks the error report thoroughly to identify all changes being made and inform HR accordingly.

Successful Validations

All records passing the initial validation rules are passed securely for processing in SAP. Depending on the amendments being made, the data will either automatically upload to SAP or will be passed to HR Payroll for manual processing.

Irrespective of the processing, upon successful update of SAP, the **HR Changes Report** will be generated to the school to confirm the changes made in SAP. This will be sent mid-month after the payroll cut-off, via AnyComms.

Note: The HR Changes Report show changes in the month they are happening (ie. effective date of change), not the month the SIMS input was made.

It is imperative the HR Changes report is checked in a timely manner to ensure the changes made are correct. Any errors identified or missing information, eg. an expected leaver does not appear on the report **must be raised** with the HR Service Desk immediately.

- If the error is in SIMS, the error must be corrected immediately.
- If the error is in SAP only, contact the HR Service Desk.

Changes to Third Party Programmes – Creation of Error Reports

If it becomes necessary to change the logic within the extract programmes, schools will be notified of the pending change and a freeze will be put on changes in SIMS for a short period of time, usually at the end of the day.

Prior to the freeze, the extracts will be run to capture any changes made that day, which will be pushed through to the validation process.

The changes to the programmes will then be pushed through. As part of this a full extract of all the relevant personnel data is made, which is disregarded for the purposes of the data exchange between SIMS and SAP.

However, as a consequence of the full extract, schools may receive an extended error report covering all staff within their personnel system, including errors for eg. a volunteer where there is no SAP no. or National Insurance number. This extended report can be ignored.

Technical Issues

- A Dashboard to highlight any technical issues with the extraction process will run and be monitored by the Schools Technical Support team to ensure there is no breakdown in the process.
- The file extract and any associated rejection emails will run daily. There is also the ability for HR to cancel or override an extract and push or pull data to SAP from individual SIMS environments should the need arise.
- In the event of SIMS database failure or back up restore, Technical Support Team are to rectify and notify HR Operations if it will impact payroll deadline

- If your SIMS Server is supported by an alternative provider, it is the School's responsibility to inform HR Operations immediately as no files will be received until the issue is resolved or duplicate files may be generated

The school server must remain switched on to allow the data extract to run, including holiday periods.

Process Overview

Groupcall extract runs approx. 1am to look for any changes made in SIMS since the last extract was run. Data collated and a CSV file is sent to AnyComms server

AnyComms runs the validation process against each record in the file **(1) (2)**

No changes made in SIMS – file empty. No further action

Data is found in the file; it can go one of two ways (per member of staff)

Pass validation

Data is forwarded to HR for processing in SAP

Fail validation

An Email is sent to the nominated account, and 3 error reports containing all failures are sent back to the school (via AnyComms) for corrective action **(3)**

(1) Validations and Errors

In order to process changes a set of validations are performed by AnyComms and if any of the following occur, the record is rejected and the school informed:

- If the payroll/contract number field coming from SIMS is blank or incomplete.
- If the NI number field coming from SIMS is blank
- If the date of birth field coming from SIMS is blank
- If one or all of the forename/surname fields are blank
- If there is a sickness absence but no illness category coming from SIMS
- For any absence where the days lost and hours lost are both zero
- Allowances: if the end date or the annual amount has not been input

(2) Extract File

At the validation stage, the file will be split where, for example, one record fails the validation rules but the rest of the file passes.

(3) Error Reports

a. a summary of the error/s, (e.g.8253035xxxxxxxx FailureSummary)
b. a report breakdown showing which personnel record/s is affected (e.g.8253035xxxxxxxx FailedValidationBad)
c. a copy of the complete extract taken the day before. (e.g. 8253035xxxxxxxx Original)

Chapter 2 Implementation Overview

Data Preparation Guidelines

Prior to a school going 'live' in the SIMS to SAP process, Contract and Personal data comparisons between SIMS and SAP are completed to identify any discrepancies in data between the two systems. Any discrepancies found are referred to the school to investigate and to either correct SIMS or SAP (or both).

In addition, Lookups and Service Terms are checked and amended where necessary, see below. This work is completed by a member of the ICT Schools Team, by remote access wherever possible.

Look Ups and Service Term Information

Look ups for Absence Categories, Illness reasons, Fixed Term Contract reasons have been standardised and no changes should be made to these without first liaising with the ICT Schools Team.

Service Term / Allowances descriptions have been standardised. No changes should be made to these without first liaising with the ICT Schools Team.

Appendix B provided a list of the Lookups / Service Term information in use.

Secondary Schools Using Cover

If Lookups other than the ones supplied by ESS or added in the exercise above are created and used, or the lookup description has a formatting error, this may result in an error when trying to upload your data to SAP and could mean payroll deadlines are missed. In these instances, a member of ICT Schools Team will contact you to discuss this in more detail and you may be asked to amend the information in SIMS to resolve the query.

Cover supervisors should be made aware of the implications of amending lookups. Failure to do so may result SIMS to SAP files failing and you could miss payroll deadline. A separate document will be made available to secondary schools using Cover.

If you have any queries with the SIMS data, please contact a member of the ICT Schools Team on 01296 383500 option 1 or email ictschools@buckinghamshire.gov.uk

Live Implementation

Prior to live implementation a copy of the SIMS to SAP Guidance manual and SIMS to SAP Agreement will be provided. The Agreement is to be signed by the Headteacher and emailed to simstosap@buckinghamshire.gov.uk The school will not be put live until this has been received.

Once final sign off of data has been achieved, contact will be made with the school to confirm the 'Go Live' date and arrange for the Groupcall Xporter to be installed; this software enables the SIMS data extraction to be performed on a daily basis.

1. If the school purchases IT support from the ICT Schools Team, the installation will be completed by the School's Technical team.
2. If the school purchases external IT support, an email giving instructions will be sent to the school to forward on to their supplier. It is important that this is actioned urgently to avoid the possibility of SIMS and SAP becoming out of sync.
3. An email is sent to the school giving an explanation of the AnyComms error reports and requesting details of all Eform users to be sent to the HR/SAP team, as their permissions have to be amended.

Following installation of the Groupcall software, an overnight extraction will take place immediately, taking a copy of the whole school data. This file is required to allow future extracts to take place. A 'picture' of the school's data is required so that changes made in future can be recognised. This file is transferred to HR and is archived without any action being taken.

Once data is being successfully received Eform access to the LVTC form and absence reporting function will be switched off. Schools will still have access for inputting Supply / Overtime claims and to access the Employee Data Report.

AnyComms Error Reports – Initial Extract

As a result of the full extract mentioned above, the school will receive an email and three AnyComms error reports, which could be quite extensive if the school has a large staff quota. The report may also contain historic information. **This file does not have to be worked on and can be ignored.**

Data Validations (Once Live)

Once the school has been put live, data extractions run on a nightly basis an extract is produced for any recognised changes to records.

Having produced the extract, the data is put through a series of validation rules and depending on the outcome, is either passed through to HR for processing or is rejected, and error reports produced.

In order to pass the initial validation tests the following must be present for the extraction to work:

- An 8 digit SAP number must be present in the contract (it will not pick up from the Employment panel).
- An National Insurance Number
- A legal Surname and, Forename
- A valid date of birth
- Where a sickness absence exists, an illness category is present.
- For any absence, a value other than zero must be present in either days lost **or** hours lost
- Allowances: where the end date or the annual amount has not been entered

Error Report

If any of the above is missing or invalid, the data will not be pushed through to HR; an AVCO Failure email will be sent to the school to advise them that reports detailing the error/s are awaiting download in AnyComms and no changes will reach SAP. Refer to Section 5 for instructions on dealing with errors.

Cover Guidance Note (Secondary Schools Only)

Refer to **Appendix G – Secondary Schools using Cover Guidance.**

Absence entries made via the Cover module will create AnyComms errors because the module will write to the SIMS Absence recorded but does not allow the Illness reason or days/hours lost to be recorded.

The error produced as a result of the Cover entry can be ignored but the absence created must be fully completed with the missing information once the member of staff returns to work.

Use the 'extend absence' feature in the Cover module is utilised to prevent errors being encountered in HR when the data is uploaded.

The extraction will take place overnight via a scheduled task. Following the successful validation of data (see above) and upload to SAP, the HR Changes Report, detailing all changes made to the SAP via the SIMS personnel records, will be produced and sent to the school, via AnyComms. This report is produced on approx. 15th of the month, following the payroll closure date.

The report should be checked thoroughly to ensure all changes made previously in SIMS are reflected in the report. It is recommended that an 'Admin' file is maintained which is checked in conjunction with the HR Changes report to ensure all expected changes have been processed in SAP. This is particularly important when changes have been made in SIMS some time in advance of the effective date of change, because the change will not be reflected in the HR Changes report until the effective date is reached.

Any errors or missing data should be raised with the HR Service Desk immediately to avoid possible payroll errors at the end of the month.

Once HR have processed any changes, the **School Employee Data Report** will reflect the SAP position. **Appendix D** refers.

Note: HR have until 14th month to continue to process changes after the payroll cut-off, therefore, do not expect to see any changes reflected before this time.

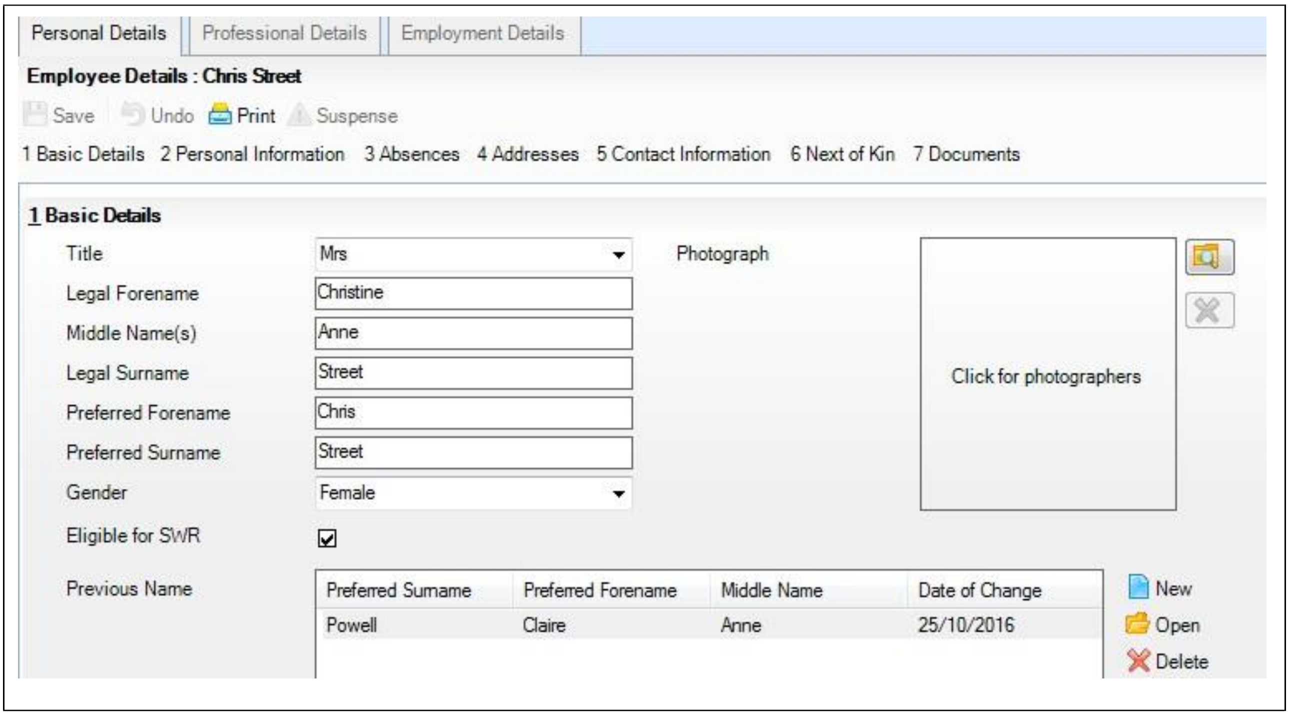
Chapter 3 Maintaining SIMS Personnel Records

The following sections detail the fields that will be extracted and passed to SAP. Where there are now conditions of use in SIMS, information will be provided against the relevant field. It is important the information below is checked prior to updating SIMS to ensure correct application.

Miscellaneous

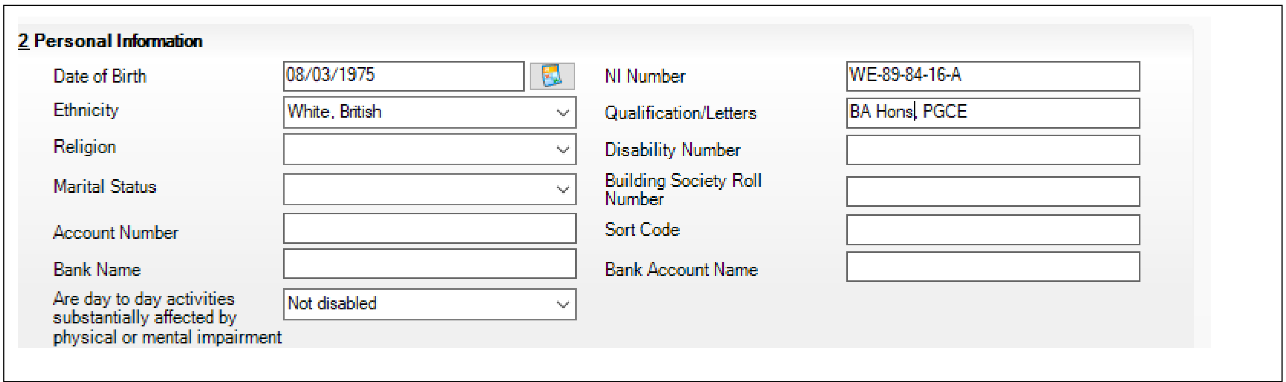
Upper / Lower Case	Standardise the use of Upper / Lower case throughout SIMS via Tools | Housekeeping | General. Refer to ICT Schools Team for assistance.
Non-standard characters	eg. commas should not be used when entering data in fields. No spaces should be entered between hyphens on double barrelled names.
School / HR Administrator amending own SIMS Personnel record or **Head Teacher's record is amended**	HR Administrators are authorised to amend their own SIMS records. Where this occurs and the change appears on the HR Changes report, the entry must be countersigned by the Headteacher. Changes to a Head Teacher record must be countersigned by the Chair of Governors. This process has been agreed by Internal Audit

Personal Details Tab



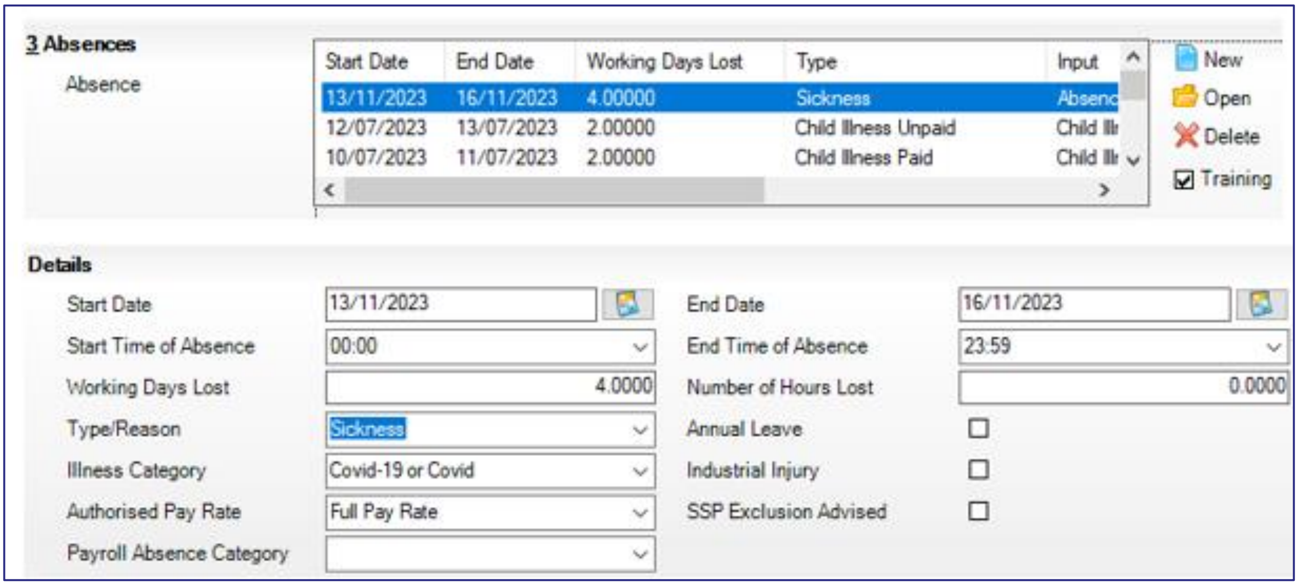
Data Item	Notes:
Title	Required. Ensure the correct use of Miss / Ms. For new employees, check the Contract issued by HR to ensure the Title matches SIMS. Contact HR if any discrepancies
Legal Forename	Ensure this is the legal forename as stated on their ID check and not what they are known as eg. Susan Jean but known as Jean. Must be present for extraction to take place
Legal Surname	Ensure this is the legal surname as documented in their ID check. Must be present for extraction to take place. **Note: No spaces** when entering hyphenated names eg. Smith-Jones **not** Smith – Jones.
Preferred Forename	Not collected
Preferred Surname	Not collected
Sex/Gender	Required
Additional Notes:	
Previous Names / Change of Name	As per HR guidance, if a member of staff changes their name eg. marriage, complete the **Change of Name** form located on SchoolsWeb and sent with the necessary evidence to HR Operations. **No changes will be made to the SAP records until the form and evidence is provided.**
Previous Names Date of change	This can be amended to the actual date of change ie. marriage date once the initial change has been saved

Personal Information



Data Item	Notes:
Date of Birth	With the requirement to check a member of staff's Date of Birth as part of an ID check and DBS check, the practice of using 01/01/1900 for a Date of Birth should no longer be necessary. If it is used, ensure the correct Date of Birth is input as a matter of urgency. Must be present for the data transfer to take place
National Insurance No.	Must be present for the data transfer to take place. (It is expected to be blank for Governors and Volunteers).
Additional Notes:	
Ethnicity **Religion** **Disabilities (are day to day activities…..)** **Impairment**	These fields are not required for the SIMS to SAP process but some are required for the School Workforce Census Return, therefore, where appropriate, must be completed.

Absence Records



Data Item	Notes
Start Date	Must be entered.
End Date	End date **always** required. • If the end date is to be brought forward because the member of staff is returning to work earlier than expected, amend the date and the working days lost figure at the same time. • If the absence is to be extended, amend the end date and working days lost in the existing record. Refer to Additional Notes for further guidance.

Working Days Lost	School Workforce Return: Multiples of 0.5 of a day. Where the morning and afternoon sessions differ, each session should be recorded as half a day (Absences of 2hrs or less to be recorded in Hours Lost field). HR are only interested in absences of 1 hour or more unless the absence is to be unpaid when it can be less than 1 hr. When entering working days lost, do not enter value of more than two decimal places eg.1.25 (1.2525 would be rejected).
No. of Hours Lost	Format eg. if 75 mins lost enter as 1.25, not 1.15. When entering hours lost, do not enter value of more than two decimal places eg.1.25 (1.2525 would be rejected). Refer to the **hours/decimal conversion chart.**
Type/Reason	**Illness categories** – are standardised and were set up at the outset of this process. **Lookups** <u>should not</u> be altered. This is particularly relevant to Secondary schools who use Cover. Ensure the Cover Supervisor is aware of the Look Ups in operation. See Additional Notes below.
Illness Category	**Illness category must ONLY be completed where the Type/Reason is Sickness**. - If left blank for a sickness absence, this will cause the extract to fail until such time as the reason is completed. - If completed for an absence other than sickness this will fail when uploading to SAP, please do not enter anything. Illness categories are standardised and were set up at the outset of this process. **Lookups** <u>should not</u> be altered. This is particularly relevant to Secondary schools who use Cover. Ensure the Cover Supervisor is aware of the Look Ups in operation. See Additional Notes below.
Authorised Pay Rate	Enter the relevant authorised pay rate. If absence is **unpaid**, the '**nil pay rate'** must be selected.
Industrial Injury	

Additional Notes:	
Absence Type/Reason: • Time in lieu (paid) • Medical/Dental (paid) • Training (paid)	Entries made for these absence types/reason in SIMS will not be recorded on a member of staff's SAP record, as HR do not record paid absence details.
Absence Type/Reason: • Medical/dental unpaid	Entries made in SIMS for Absence Reason Medical/dental **unpaid** must have the Authorised Pay Rate of '**Nil Pay Rate'** selected to ensure the absence is treated as unpaid.
Absence Reason Unknown	eg. Voicemail from an individual just states 'not in today'. SIMS can be updated later with the reason.

Unpaid absences spanning a weekend	If a member of staff is taking **unpaid leave** which spans a weekend, if the start date is entered as the Friday and the end date as Monday, SAP will deduct 4 day's pay irrespective of whether you put in 2 or 4 days in the working days lost. If you only wish to deduct 2 day's pay you must make 2 entries ie. one for the Friday and one for the Monday. This is because SAP works on 365 pay days. Liaise with HR if you have any queries with this.
Staff sickness absence over weekends, where the certificate ends on a Friday and staff not in on the Monday	Extend the current absence by amending the End Date to the date of the new certificate.
Staff absences during a holiday period.	In SAP absences during holiday periods are counted as working days because staff are paid for 365 days of the year.
End Dates – Extending absences	1. In the majority of cases, when a member of staff is absent, the SIMS record is updated once the person returns to work and the start and end dates are known. If a member of staff is on long term sick, this may necessitate the absence record being continually updated as certificates are received to record the correct end date and working days lost. 2. To ensure the absence is treated as one continuous period, the same absence reason and type must be used.
Entering an absence via Cover (Secondary Schools only)	**Secondary Schools**: Refer to **Appendix G Cover guidance** for staff absences.
Half Pay / Nil Pay	The HR Payroll team will email schools where staff on long-term absence are going to move to half or nil pay. **Note:** these aren't always timely. It is a systemic change that will be automated from the date of first day of absence. There is no responsibility of the school to initiate the pay change. Regardless of the 'Authorised Pay Rate' selected in SIMS, Payroll control the process at their end.

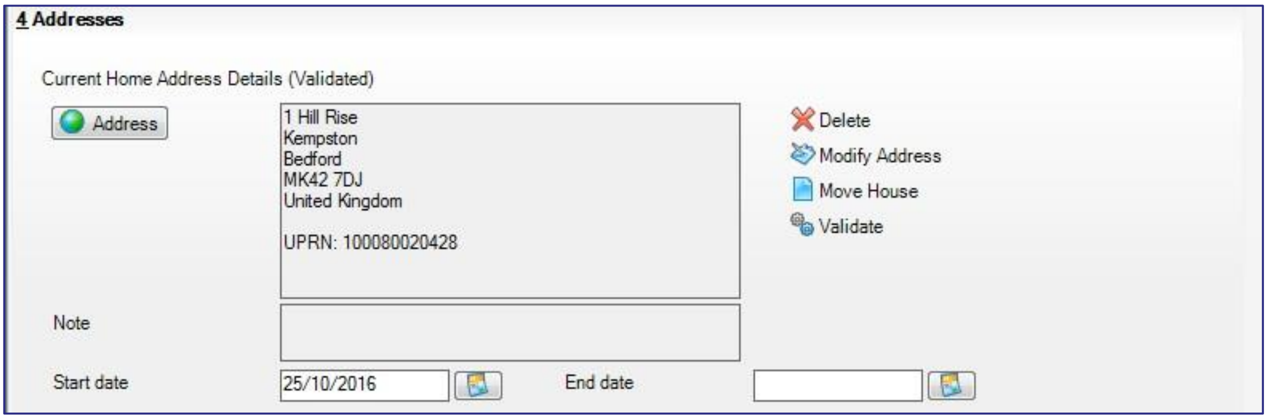
Maternity / Adoption Leave	Dealing with maternity absences is a manual process due to the paperwork required. All admin relating to maternity/adoption leave, should be emailed to HR as well as updating SIMS. Refer to **SchoolsWeb| HR Zone** for correct documents to be submitted. Once the MAT B1 has been submitted to HR, you will receive a copy letter confirming the start and end dates of an individual's maternity leave. Use this information to enter the absence in SIMS as follows: • **Start / End dates**: as per letter. • **Working Days lost**: required - this has to be calculated manually • **Absence type**: Maternity /Paternity leave • **Pay Rate**: SIMS does not hold the various options for maternity pay so just select the Maternity rate (9/10) option. HR will adjust pay at the appropriate time. • As and when the member of staff confirms their return date, advise HR, via the HR Service Desk portal • If this differs to the date held in SIMS, adjust the data held in SIMS (end date and days lost). If you use FMS links and wish to suspend commitments, you can suspend the contract. This has no impact in SIMS to SAP as suspended information is not passed through to HR. However, please remember to end the suspension once the member of staff returns to work.
Phased return	Staff returning from long term sick on a phased return should have their sickness absence ended. Staff on phased return, are paid full pay for a period of 4 weeks. If, after this time they are not able to resume full hours, their working hours should be reduced. Clone the contract and reduce the hours per week to the agreed hours. Enter a contract end date on the former contract, after cloning. If you have any queries regarding phased returns, contact the HR Service Desk. If a member of staff has a true sickness day whilst on a phased return, the absence should be entered as normal.
Unpaid Leave	Any staff **unpaid** absence entry in SIMS, must have '**Nil Pay rate'** selected in the Authorised Pay Rate field on the absence record. **Note:** if 'unpaid' appears in the Absence Type reason this will not automatically deduct pay from a member of staff

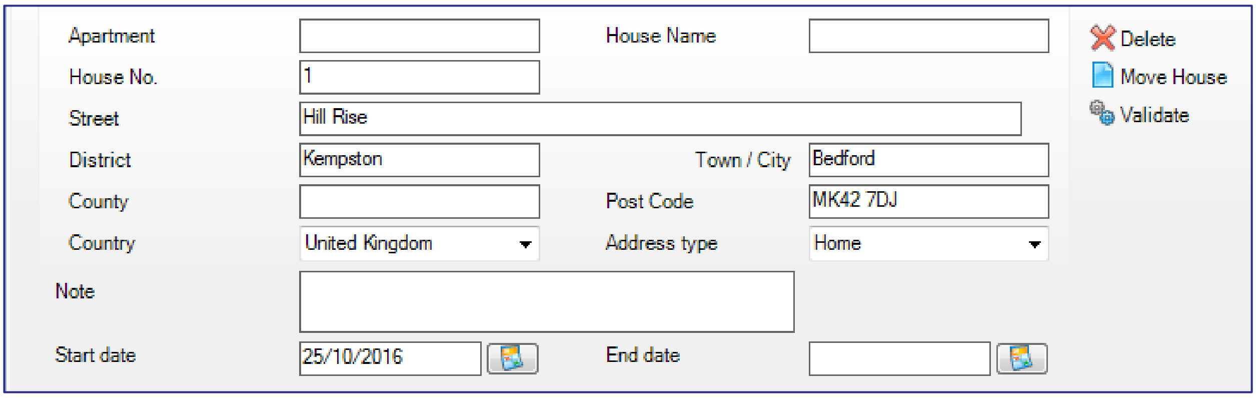
Unpaid leave for staff with multiple contracts	Absences in SIMS are recorded against a member of staff, not against a specific contract or SAP No. If a member of staff holds multiple posts, when an absence is sent through to SAP, it is recorded against all posts held in SAP. Therefore, if a member of staff is granted unpaid leave, because a deduction will be made against all contract, this could result in an over-deduction. Example: staff, with 2 contracts is absent on Thursday 22/6: TA in the morning for 3 hrs, MDS at lunchtime for 1 hr, both on permanent contracts. Staff member requests unpaid absence for MDS role but will return for TA role. In SIMS, enter for 22/6 unpaid absence for 1 hour. SAP will deduct 1 hour for both TA and MDS roles as it doesn't know which contract the unpaid leave relates to. **Email HR** to confirm which contract(s) the deduction is to be made from.

Hours/Decimal Conversion Chart

Min	Dec	Min	Dec	Min	Dec	Min	Dec	Min	Dec	Min	Dec
1	0.02	11	0.18	21	0.35	31	0.52	41	0.68	51	0.85
2	0.03	12	0.20	22	0.37	32	0.53	42	0.70	52	0.87
3	0.05	13	0.22	23	0.38	33	0.55	43	0.72	53	0.88
4	0.07	14	0.23	24	0.40	34	0.57	44	0.73	54	0.90
5	0.08	15	0.25	25	0.42	35	0.58	45	0.75	55	0.92
6	0.10	16	0.27	26	0.43	36	0.60	46	0.77	56	0.93
7	0.12	17	0.28	27	0.45	37	0.62	47	0.78	57	0.95
8	0.13	18	0.30	28	0.47	38	0.63	48	0.80	58	0.97
9	0.15	19	0.32	29	0.48	39	0.65	49	0.82	59	0.98
10	0.17	20	0.33	30	0.50	40	0.67	50	0.83		

Address Records





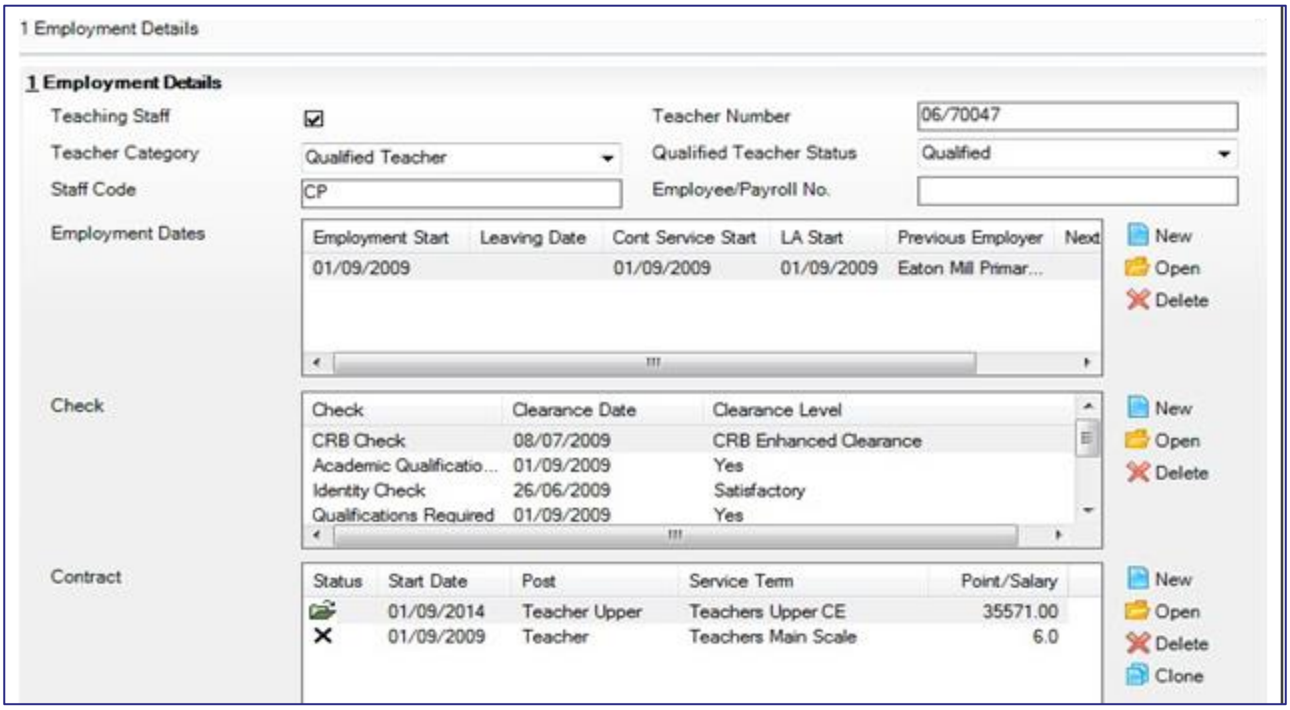
Data Items	Notes:
Address	District is not supplied to SAP All address changes will be picked up as part of the extract routine.
Address Type	
Address Start Date	

Additional Notes	
Validating addresses	To improve the format of addresses, use the Address Validation Service function where possible. Refer to the ICT Schools Team for assistance if necessary

Professional Details Panel

No data collected.

Employment Details Panel



Data Item	Notes:
Teacher Number	Applicable for Teaching Staff only.
Employment Start Date	Required for the member of staff to be recognised as a current member of staff and the data to be extracted.
Employee/ Payroll No.	If entered in this field the SIMS to SAP process **will not** pick up the number. The eight-digit SAP number must be entered in the Contract Record.
Employment Leaving date	• Ensure this is completed and the record terminated as soon as a member of staff leaves employment. • Staff leaving at the end of a term or school year should have their leaving date set to the end of the period eg. if leaving at the end of the Summer term they are paid until 31/8/xx (unless on a fixed term post covering a maternity absence or long term sickness). • Schools must check employment contracts / HR reports to ensure the correct date is reflected in SIMS
Fixed Term Contracts	• **Do not enter** the employment leaving date until the end of the Fixed Term period is reached and a decision is made regarding re-employment. • If the member of staff is being retained, clone and create a new contract; If the member of staff is leaving, enter the date of leaving.

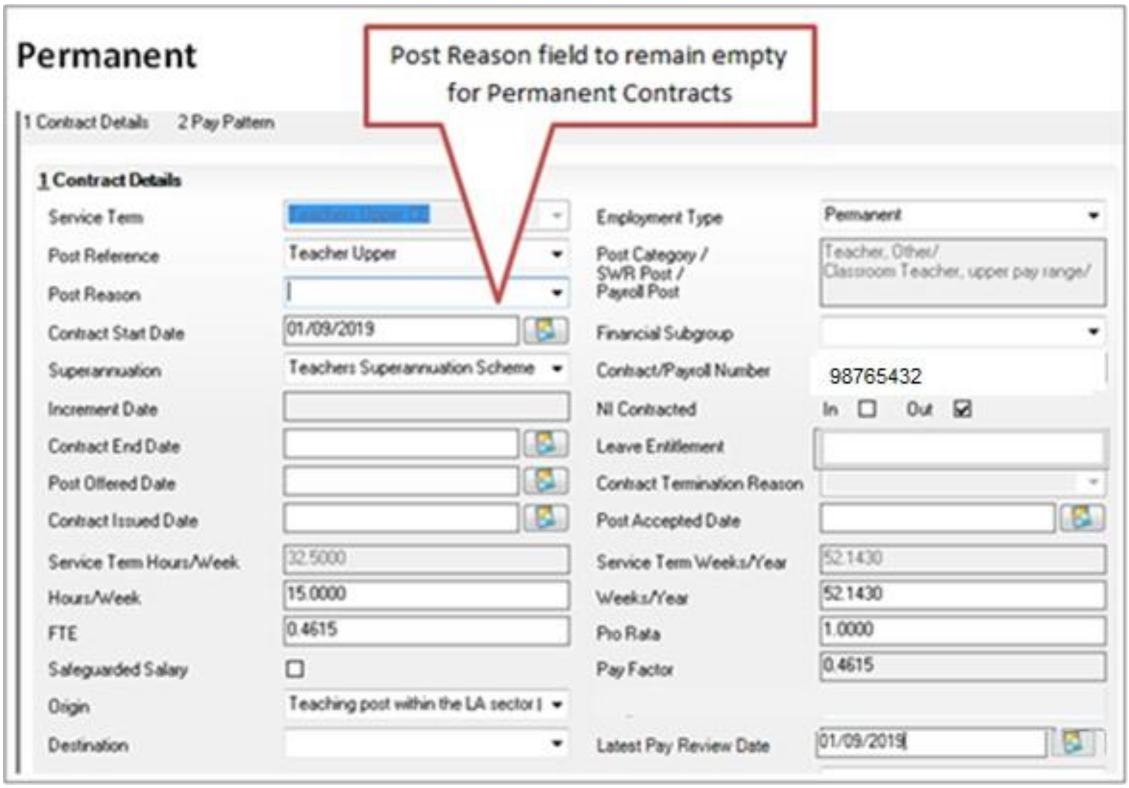
ADDITIONAL NOTES	
Leavers – notice withdrawn	If a member of staff has been made a leaver but subsequently withdraws their notice, SIMS must be corrected and **HR informed by email.** • Delete the Date of Leaving in the employment panel. • Remove the Contract end date, Salary End Date, Allowance End date (if

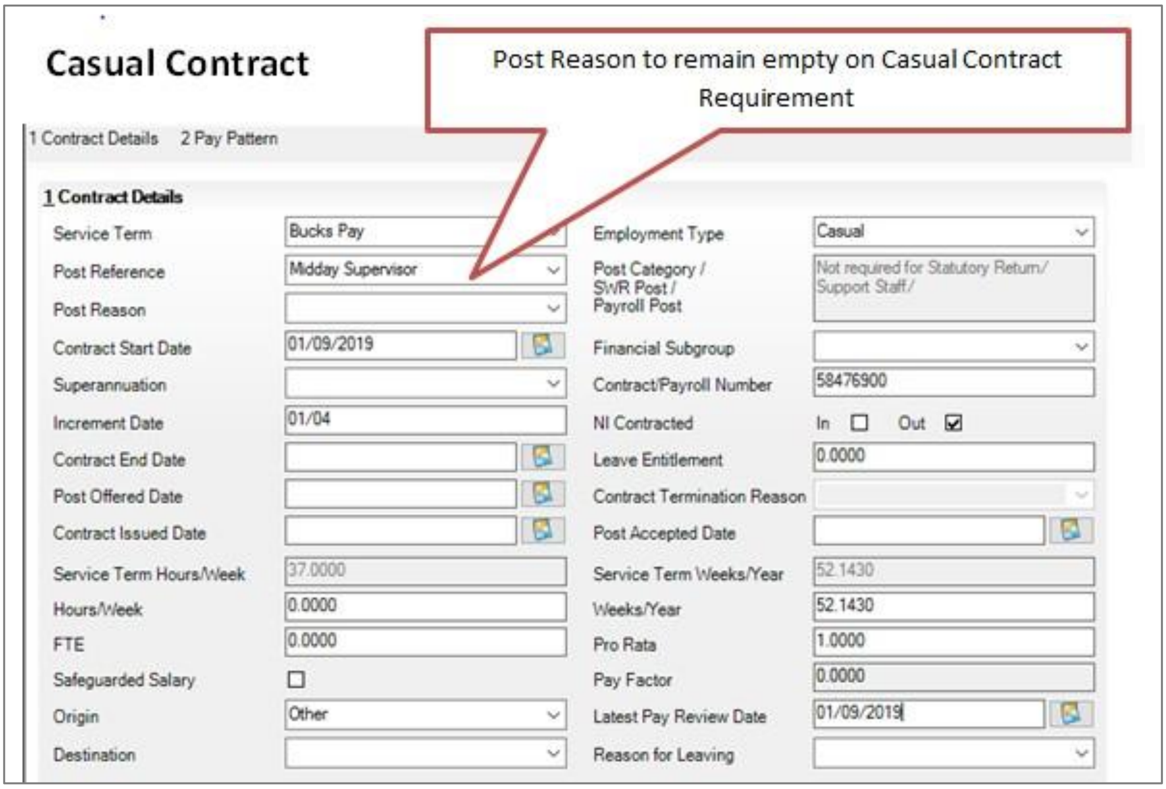
	applicable) and Role End date ** • Delete the information in the destination field ** • Delete the Reason for Leaving in the appropriate field ** **Unless the contract is Fixed Term.

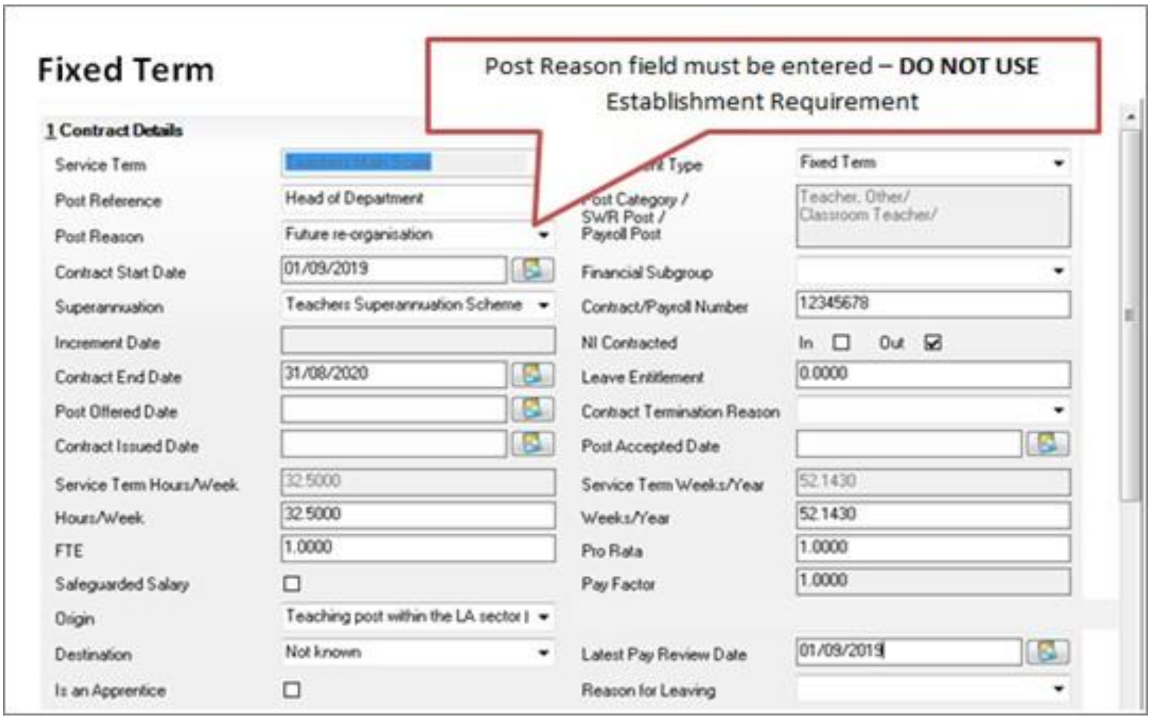
Contract Records

The following Screen shots depict the correct format for Permanent, Fixed Term and Casual Contracts.

Read all the notes for guidance on entering the correct data for each relevant field.







Note – unless you are just correcting an error in a field, changes to any data in the fields above requires a new contract to be created from the effective date of change (clone).

Do not over-type the information as you will lose your audit trail of changes.

Data Items	Notes
Service Term	No additional Service Terms must be created without first discussing with the SIMS to SAP team.
Employment Type	Enter the relevant employment type ie. Permanent, Casual, Fixed Term**.
Post Reference	SAP needs to differentiate between regular and Supply teachers. A post reference of Supply Teacher has been added to all Teacher Service terms and should be used to identify supply staff.
Post Reason	**Permanent Contracts –** No Post Reason **Casual Contracts** – No Post Reason **** Fixed Term Contracts** – A Post Reason must be supplied. Select from designated Lookups. <u>Do not</u> use **'establishment requirement'**.
Contract Start Date	Contract start date within last 365 days.
Contract End Date	Contract end date within last 365 days. See notes in Leaving Date above and Fixed Term Contract Notes below NB. In order to avoid possible overpayments, it is imperative that a contract end date is input for **Fixed Term contracts** and the Destination is amended in accordance with the instructions below. Currently SIMS does not error if the end date is omitted which could cause an overpayment if HR are unaware that the contract has ended. A possible overpayment would only be picked up at reconciliation with the PN41.
Contract/Payroll no. (SAP no.)	Each individual contract must hold its own **8 digit SAP Number**. If held in the Employment record, it will not be picked up for SAP purposes. It is important that the contract number is entered at the earliest possible opportunity to prevent changes in data being lost if there is no SAP number in the record. Ensure staff with multiple contracts have the correct SAP number in the relevant contract.
Leave Entitlement	**Bucks Pay** only – refer to **Appendix A** for current holiday entitlement. To ensure the correct pay, this must be present for all staff on a Term Time only contracts. **Full Time Staff (52.143),** leave as 0.00 for staff on full time contracts.
Contract Termination Reason	To be updated when a contract is being terminated. This can be updated once the Contract End date has been entered and the record saved. <u>For **Fixed Term Contracts**</u>: • Fixed Term contract is being renewed – do not complete this field. • Fixed Term contract/s which are ending and the member of staff is leaving, use the most appropriate reason (and remember to enter an Employment leaving date). • Multiple contracts, some of which are continuing but the Fixed Term contract/s are ending – use 'End of Fixed Period Agreement'.

<table>
<tr><td>Hours/Week</td><td>
1. The new Employee Data report does not hold a working pattern. If required for a member of staff, a letter will have to manually be created by the school and issued to the member of staff.
2. Hr/wk should be input as a decimal. eg. 13 hr 30 minutes should be input as 13.50. Refer to the Decimal Conversion Chart.
3. HR increment hr/wk in 5 minute intervals. When entering values in SIMS please do the same.
4. Casual staff - Zero if employed on an ad-hoc basis. Insert hours if on a regular contract and to be included in the School Workforce return.
</td></tr>
<tr><td>Weeks/Year</td><td>
1. Bucks Pay staff this is the total of weeks worked <u>plus</u> holiday entitlement.
2. Teaching staff / Full time Support Staff = 52.143 usually. (Some schools may use 52 or 52.14)
3. Casual staff - Zero if employed on an ad-hoc basis. If on a regular contract and to be included in the Workforce return.
</td></tr>
<tr><td>Destination

Permanent & Casual Contracts

Fixed Term Contracts</td><td>
1. Required when a contract has an end date.
2. If the member of staff is leaving the school, choose the most appropriate reason.
3. If you clone and create a new contract because their contract terms are changing, choose ‘Not applicable, change of contract’
4. The destination <u>is not</u> picked up on the SIMS to SAP extract, however, it is required for the School Workforce Census.

All Fixed Term contracts must have a contract end date entered at outset and a Destination entered.

As it will not be known if the contract will be renewed at the end of the fixed term period, enter the Destination as ‘Not Known’ (do not use ‘Not Applicable - Change of Contract’).

If a Fixed Term contract is being renewed:

1. Clone to create a new contract and set the Destination to ‘Not Known’ in the new contract
2. In the contract that is ending, amend the Destination reason from ‘Not known’ to ‘Not applicable – change of contract’

• For Fixed Term contracts that are definitely finishing at the end of the contract and the member of staff is leaving the school employment, amend the Destination to the appropriate reason. If you do not know where they are going, select Other.

Remember to input an Employment Leaving date too.

• If a member of staff with multiple contracts, some of which are continuing has a Fixed Term contract(s) which are ending - change the Destination in the ending contract(s) to ‘Remaining in the same LA – Primary or Secondary, as appropriate. This advises HR that the fixed term contract is to end.
</td></tr>
<tr><td>Reason for Leaving</td><td>
A new field for Reason for Leaving was added to the Contract record in 2018.

This field should be updated independently from the Destination field and is collected in the School Workforce census.

It does not extract for SIMS to SAP purposes.
</td></tr>
</table>

Additional Notes:	
Casual Staff moving to a Fixed Term or Permanent Contract	Staff moving to a new Fixed Term or Permanent contract must have a **Notification of Appointment** form submitted. It is not sufficient to just create a new contract in SIMS.
Changes to Contracts - Cloning	Where a contract is being changed, a new contract should be created **(cloned)** and the old contract closed. Examples: increase/ decrease of hours, over 5 years' service increasing weeks paid per year etc. This ensures an audit trail of changes to contracts is maintained. <u>Do not</u> overtype existing information unless you are just making a correction to an error. If in doubt, please refer to the ICT Schools Team. By using the 'clone' facility to create a new contract it reduces the amount of data entry required because data from the current contract is copied across, which can then be amended if required. The current contract **must** be closed manually Ensure any changes to contracts are completed on the same day. Do not close a contract on Day 1, then, create a new contract on Day 2. Otherwise, HR will process the Day 1 change as a leaver, as no new contract has been generated.
Existing Staff starting a new role or a new contract type.	Staff moving to a new role eg. TA to HLTA or staff moving from a Fixed Term Contract to a Permanent one, must have a **Notification of Appointment** form submitted. It is not sufficient to just create a new contract in SIMS.
Extraneous Duties	HR to be informed by email of any changes to contracts.
Fixed Term Contracts **Contract of Employment** **Renewal of Fixed Term contracts**	HR will email schools when Fixed Term contracts are reaching their end date. SIMS should be updated to reflect the appropriate position as detailed below. In addition, if schools wish, they may respond to the email from HR to confirm which contracts will continue and which are to close. **Note**, if contracts are to continue, **no changes** to the information provided by HR should be made in the email response. This must all be managed in SIMS. A member of staff <u>does not</u> require a new Contract of Employment when renewing a Fixed Term contract. Schools may wish to issue the Employee Data Report or the new SIMS Employee Confirmation letter to confirm contract changes. See Section 5 for details. **Renewal** of **Fixed Term contracts** <u>should not</u> have the end date extended**.** A new contract should be **cloned** and started from the start date of the extension and the old contract date left as is.

Fixed Term End Dates **Fixed Term Contracts <u>not</u> being renewed** **Fixed Term contracts being renewed** **Staff member leaves before end of Fixed Term end date** **Fixed Term contract ending during the school holidays.**	It is mandatory all Fixed Term contracts have a **contract end date** completed. 1. When entering a Fixed Term contract with an end date, on saving you may get the message, '*Terminating this contract closes all contracts for this person. Do you also wish to use this as the 'Date of Leaving'?* Select **No**. This avoids the employment record being updated with a leaving date, and leaves the record open to add more contracts if required, at a later date. It will also avoid the need to submit new starter paperwork to HR if you made them a leaver but subsequently decide to retain the member of staff as staff will close their record if you enter an employment leaving date. 2. When you reach the end of the Fixed Term contract date one of two actions is required: - If it is decided **not** retain the member of staff, ensure the **date of leaving** is entered in the Employment tab as soon as their definite leaving date is known. Update the Destination and Contract Termination Reason. - If all contracts are finishing, by entering a leaving date in the employment record, this will feed through to SAP and terminate all contracts. 3. If you decide to retain the member of staff for a further period, create a new contract from the extension date (by cloning). Follow the guidelines above regarding amending the Destination field 4. If the member of staff leaves before their contract date is reached, amend the contract end date in SIMS. Also **enter an Employment Date of Leaving, a Contract Termination reason** and **amend the Destination reason.** 5. To avoid possible overpayments, if a fixed term contract is coming to an end during a school holiday, please ensure all necessary SIMS administration is completed prior to the school closing.
Contract Destination: **Staff with Multiple Contracts where one or more is Fixed Term and ending, but other contracts are continuing.**	If the member of staff has a Fixed Term Contract which is ending but also has contacts which are continuing, the Destination field must be updated to '**Remaining in the same LA – Primary / Secondary'** (as appropriate). This will notify HR that the contract is to close. Failure to do so could result in an overpayment because HR will not know the contract has ended.

Fixed Term to Permanent contract	If a member of staff, originally on a Fixed Term contract, is moving to a new Permanent contract. 1. **Clone** the Fixed Term contract and enter a start date on the new contract as of DD/MM/YYYY. 2. Update the contract type to Permanent, the hours per week, weeks per year and holiday entitlement (if applicable), as normal 3. Save the contract. 4. The Fixed Term contract should already have an end date, make sure this is present 5. Amend the destination of 'Not Known' to 'Not applicable – change of contract' 6. Save the changes. *On saving you may get the message, 'Terminating this contract closes all contracts for this person. Do you also wish to use this as the 'Date of Leaving'? At this point say* ***No****.* 7. The member of staff does not require a new contract of employment when changing from Fixed Term to Permanent.
Permanent to Fixed Term	If a change is being made from a Permanent to Fixed Term contract, HR require an **Notification of Appointment** form to be submitted because the terms of the employee's contact are changing significantly. If the change to hours is just a temporary requirement, the contract should be cloned and the hours changes for the duration of the change, but the contract type left as Permanent.
SAP Numbers	If a member of staff transfers to another post eg. Teaching Assistant to a Teacher, they retain their SAP number.
Secondments	If a member of staff is seconded to another post, but is still being paid by their existing school, SAP is not notified. If they are to be paid by the new school, via payroll, the new starter process would apply at the new school. The old school should close their contract. Once the employee returns, their contract should be restarted.
Suspensions **Maternity/FMS**	If a member of staff is suspended with pay, SAP is not notified. If without pay, HR is to be notified **by email**. The contract in SIMS can be suspended. NB. Contracts suspended in SIMS do not feed through to SAP via the extract. If you are suspending a contract because it is temporarily being replaced by another, you must notify HR by email. If a member of staff goes on Maternity leave and you wish to suspend commitments to FMS, you can suspend the contract; this will have no impact on HR. Remember to close the suspension on their return to work

Supply Staff	Supply staff employed by the school, that hold a SAP number, should be set up in SIMS with a **contract**, with a **Post Reference** of **Supply Teacher**. Supply staff recruited through an agency where the school is invoiced for payment (and they do not have a SAP number) should be set up with a **Service Agreement**. These staff will not be picked up in the SIMS to SAP process
Casual Staff on Zero Hour Contracts moving to a new Fixed Term or Permanent Contract.	Casual staff on zero hours contracts subsequently employed in a more permanent role eg. two terms on regular hours should: • have new starter paperwork completed. • retain the same SAP number • have their contract changed from Casual to Fixed Term. Where zero hours contracts have been set up, but the contract is not to be picked up in Workforce census, ensure an additional role of 'do not include in statutory return' is entered, alongside their contracted role.

Salary Records

Leadership and Teaching Staff

Salary Records

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Teachers Main Salary ...	01/09/2023		38000.00	38000.00
Teachers Main Salary ...	01/09/2022	31/08/2023	37000.00	37000.00
Teachers Main Salary ...	01/09/2021	31/08/2022	36961.00	36961.00

New
Open
Delete

Support Staff (Bucks Pay)

Salary Records

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Range 6	01/04/2023		35.0	
Range 6	01/04/2022	31/03/2023	34.0	
Range 6	01/04/2021	31/03/2022	33.0	

New
Open
Delete

Data Items	Notes
Scale / Range	**Scales** - Bucks Pay staff **Ranges** - Teaching staff; Support staff on CPB, Apprentices
Start Date	
End Date	
Point	For Bucks Pay staff.
Salary	The FTE must be entered for staff on Ranges. SIMS and SAP will apply the relevant pay factor if the member of staff is part time.

Additional Notes:	
Bucks Pay Scales	Do not use 'BP New Range 1a and 1b'. This salary scale has not been updated for some time and should not be used. For staff on this salary scale, amend the salary scale to Range 1 or Range 1a / Range 1b as applicable. Recommendation: Open the Bucks Pay service term and locate the above description in Panel 2 Pay Awards. Open the invalid scale, tick the 'hidden' box to prevent the scale appearing in the list of selections in the future.
1st April Increments for Support Staff	April increments to Bucks Pay Staff will be led by HR and the HR Changes Report will detail changes made. SIMS should then be updated to reflect the change. Following a pay review, if a % increase is applied across all points, staff at the top of their scale should also have an appropriate award date to reflect an increase in their salary **Probationary staff**: Staff joining after 01.10.20xx will not receive an increment until they have completed 6 months service.

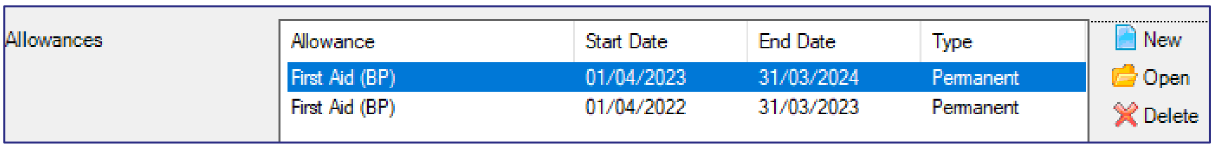
1st September pay awards for Teaching Staff	Changes to Teachers Pay & Conditions should be reflected in Salary records. Where an increase is made to the bottom of a salary range, any staff sitting on that range must have their salary increased to the minimum. All other salary increases are at the discretion of the school. To ensure an audit trail of changes is maintained, a new salary line should be created from the effective date of change. The salary amount should not just be overwritten. The FTE salary must be entered, irrespective of the hours worked per week. SAP will pro-rata the salary.
5 Year Service	Staff completing 5 year service, the holiday entitlement increases. HR will automatically update SAP for staff completing 5 years' service and the change will appear on the HR Changes report. Action to be taken by School: • amend holiday entitlement and weeks worked/year by creating a new (cloned) contract from the effective date of the increased holiday entitlement • close the current contract from the day before the new contract started and change the Destination in the closed contract to 'Not applicable – change of contract' • **do not overwrite current information**
10 & 15 Years' Long Service Awards	An automatic email is generated by HR to advise schools when a member of staff completes 10 or 15 years' service. An automatic payment is generated by HR for maintained schools. Nothing is entered in SIMS.

Head Teacher Salary changes	An email from the Chair of Governors personal email account must be sent to the HR Service desk to confirm any change to a Head Teacher's salary. Without this, **HR will not process any salary change in SAP**, even if the entry has been made in SIMS and extracted.
Protected Pay	Outside scope of the project. HR to be advised by email.
Salary Calculations **(Bucks Pay)**	When calculating a salary for a member of staff SIMS and SAP use two different calculation methods: SIMS uses 52.143 wk/yr SAP uses 52.140 wk/yr eg. a contract based on 37 hrs/wk; 39 wks/yr; 6.1 weeks annual leave entitlement SAP: 45.1 x 37 / 2 (then rounds up to 835) / 962 = pay factor of .8679 SIMS: 37 / 37 / 52.143 x 45.1 = pay factor of .8649 SAP rounds up part way through the calculation to avoid an underpayment. We are unable to amend the calculations used by the individual systems; therefore the SAP calculation will be used to determine an individual's salary.
Staff 'Acting Up' but not in receipt of an allowance	Where a member of staff is 'acting up' temporarily (not in receipt of an allowance), their contract should be cloned and set up on the new service term. The current contract should be ended at the point they take on the new role. When they revert back to their old role, end the acting up contract and restart the new one. A **Notification of Appointment** form must also be submitted. *NB. In SIMS this cannot be done by suspending the contract and creating a new one for a temporary period as the extract does not recognise suspensions. The above process must be followed to avoid an overpayment in SAP as two contracts may run simultaneously*

Acceptable Allowances

Bucks Pay Support Staff

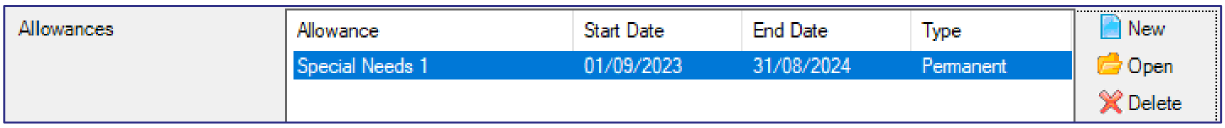
Code	Description	Category in SIMS	Applicable to (see overleaf)
FAB1	First Aid (BP)	Other	6
HON1	Honorarium allowances	Other	6

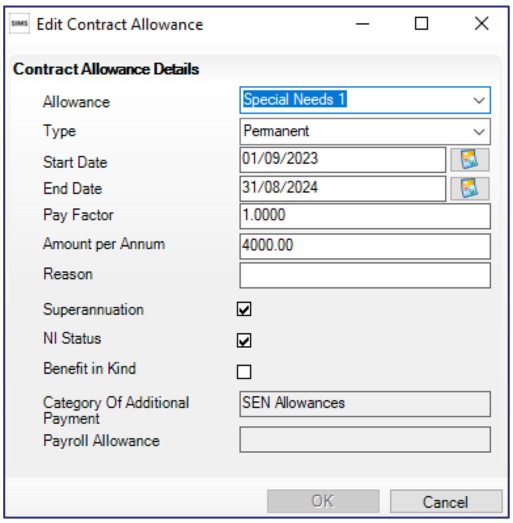


Teaching, Leadership and Unqualified Teaching Staff

Code	Description	Category in SIMS	Applicable to (see below)
TLR1	Teaching and Learning Responsibility 1	First & second Teaching and Learning Responsibility Payments, aka TLR1 and TLR2	1 – 3 incl.
TLR2	Teaching and Learning Responsibility 2	First & second Teaching and Learning Responsibility Payments, aka TLR1 and TLR2	1 – 3 incl.
TLR3	Teaching and Learning Responsibility 3	Teaching & Learning Responsibility 3 Payments	1 – 3 incl.
REC1	Recruitment	Recruitment & Retention	1 – 3 incl.
RET1	Retention	Recruitment & Retention	1 – 3 incl.
SAF1	Safeguarding	Other	1 – 3 incl.
SPN1	Special Needs 1	SEN Allowances	1 – 3 incl.
FAA1	First Aid (Teachers)	Other	1 – 3 incl.
HDA	Heads' Discretionary Allowance	Management Allowance	3
UQA	Unqualified Teacher Allowance	Unqualified Teachers	4

1 = Teachers	**2 = Teachers Upper**	**3 = Leading Practitioner**	**4 = Unqualified**
6 = Bucks Pay (Support staff)			
5 = Leadership ** a one off spot allowance may be granted if <u>prior agreement</u> obtained by Chair of Governors and HR. This will not be recorded in SIMS.			





Allowances for Part-time Teaching and Support Staff

- Allowances paid to staff who work part time may be pro-rata'd.
- The tables below confirms which allowances are pro-rata'd and which are paid in full.
- The amount entered in SIMS must be the Full Time Equivalent (FTE).
- SAP holds its own pay factor per contract for a member of staff and it is this figure that is used to determine how much is paid on an allowance if it is to be pro-rata'd.
- Note: no reference is made to the Pay Factor field in the Allowance record in SIMS.

Bucks Pay - Part time staff	**Pro rata'd or paid in full as per SIMS amount**
First Aid (BP)	Actual
Honorarium allowances	Actual

Teachers - Part time staff	**Pro rata'd or paid in full as per SIMS amount**
Teaching and Learning Responsibility 1	Pro rata'd
Teaching and Learning Responsibility 2	Pro rata'd
Teaching and Learning Responsibility 3	Actual
First Aid (Teachers)	Actual
Recruitment	Actual
Retention	Actual
Safeguarding	Pro rata'd
Special Needs 1	Pro rata'd
Unqualified Teacher Allowance	Pro rata'd

Data Item	**Notes**
Allowance Description	The types of allowances allowed has been standardised and schools are prohibited from created new types without first discussing this with the ICT Schools Team. TLE (Combination of TLR1 &TLR2) although visible in SIMS, can no longer be used; because SAP holds a monetary range for each type and is unable to distinguish between the two, to check the amount being paid falls between the appropriate range.

Allowance Start Date	**Teaching staff:** • At the end of the academic year, any allowances should be reviewed as part of Teachers' Pay and Conditions. If it is to continue, a new allowance should be created from the new effective date. **Support Staff:** • Salaries are reviewed on 1st April and allowances should be reviewed at the same time. Therefore, the majority of allowances run from the period 1st April to 31st March. Refer to the published SIMS Guidance Notes for updating Service Terms for Teaching and Bucks Pay staff at the relevant period.
Allowance End Date **Allowance End date missing**	**Teaching staff:** • if an allowance is being awarded at the beginning of an academic year to run for the whole year; enter the start date as 1st September and the end date as 31 August. • If the allowance has been set up for part-year but it agreed to continue payment to the end of the academic year, amend the end date to 31/8. **Bucks Pay Staff** • Salaries are reviewed on 1st April and allowances should be reviewed at the same time. Therefore, the majority of allowances run from the period 1st April to 31st March. If the end date is missing, the extract will fail the validation and the school will receive an AnyComms error failure report. No allowance will be paid until the end date has been input and the data re-extracted **An end date is mandatory for all allowances** To avoid overpayments, ensure the correct end date is entered eg. start date 01.09.2023; 12 x monthly payments due; end date would be 31.08.2024.
Amount (FTE)	• Any change to the amount payable must be recorded with a new allowance line from the effective date of change, as per the instructions issued by SIMS when updating Service term information. • Do not over type the amount payable (unless the change is to correct an amount present from the original start date) as this could cause an overpayment. The change to the amount would generate a back payment if the amount was increased; or, a recall if the amount was reduced. • If the amount is not updated and left as £0.00, the extract will fail the validation and the school will receive an AnyComms failure error report. • No allowance will be paid until the amount is corrected and the data re-extracted • FTE to be input. SAP will apply pay factor for part time staff – refer to Allowances notes and can only be paid as per the staff's FTE. • Refer to the Salary Table:- ➢ select the correct allowance type according to the amount being paid

	➢ Ensure the allowance amount is between the current minimum and maximum, where applicable** ➢ If the allowance amount is entered as 0.00, HR will no longer contact regarding this and the allowance will not be paid until such time as the school identify the error and correct SIMS ** Does the amount you input divide exactly into 12 monthly payments with no recurring figures? eg. £2000 / 12 = 166.6666666666666667 £2000.04 / 12 = 166.67 exactly **Allowances are automatically uploaded to SAP. HR do not see the extracts so are unable to intercept and correct any errors made in SIMS.
Additional Notes	
Creating Allowances	Allowances have been standardised as SAP cannot hold individual allowances per school. The agreed descriptions are as per tables.
Leadership staff	Staff on the Leadership range **do not** qualify for any allowances. Before entering any allowance in SIMS for Leadership staff, contact HR.
Deputy Head's Allowance	Teachers Pay and Pensions have advised Teachers on the Leadership range should not receive any allowances. The Deputy Head's Allowance Type has been removed from the SIMS lookup tables from September 2017. If used on or after 01.09.2017 it will fail in SAP.
End date brought forward	If the end date of an allowance is to be brought forward, update SIMS with the new date.
Allowance ended early and replaced by another amount /type	Enter an end date for the allowance. Restart it the next day with a different amount or a different type. TLR3 – 01.09.2023 to 30.11.2023 - £571. TLR2 – 01.12.2023 to 31.08.2024 - £3,000
Multiple TLR's allowances - acceptable combinations	A member of staff can have the following combinations: ➢ TLR1 and TLR3 ➢ TLR2 and TLR 3 They can't have a TLR1 and TLR2 or multiples of the same allowance type. One of the other allowance types should be selected, as an alternative.
Shift Allowances	Out of scope for this project. All shift allowances must be advised by email to HR

Spot allowances	Spot allowances do not feed to SAP correctly as the FTE is required. To make a one-off payment, enter the FTE amount and a start and end date for one month. eg. £300 one-off payment to be made in September. • Enter allowance type as **Permanent** • Start date of 01/09/2023 • End date 30/09/2023 • FTE of £3,600
Staff 'Acting Up' where a TLR is currently paid	Staff currently receiving a TLR who are temporarily 'acting up' to a higher post should not be moved up to higher pay range. To retain a TLR if 'acting up' they should be left on their current range but given an 'acting up' allowance by creating an allowance lookup in the appropriate Service Term for acting up. This is particularly relevant where someone is on Teachers Upper pay, acting up to Leadership as TLRs are not payable to staff on the Leadership range. **Refer to Appendix F.**
Unqualified Staff	Should not have TLRs applied. The Unqualified Teacher allowance category should be used.

HR Desk Notifications – Summary

Email the HR Service Desk or contact via SchoolsWeb, if applicable. You do not need to send an email to confirm every change made in SIMS, only those listed below:

Absence recording	Unpaid leave where multiple contracts exist. If a member of staff has more than one contract and 'Nil pay' is to be applied to one or more contracts but not all
AnyComms Errors	Changes to data where the SAP No or National Insurance number was missing, resulting in an AVCO failure. Full details of the change being made must be email to HR.
Change of Legal surname / forename	Documentation is required – refer to SchoolsWeb | HR Zone
Extraneous Duties	Any changes to contracts for extraneous duties. Out of scope for SIMS to SAP Project
Fixed Term Contracts where the Fixed Term contract is ending but the employee has other open contracts	These changes must be managed in SIMS by amending the Destination field to 'Remaining in the same LA'. However, if schools wish, they may respond to the email notification from HR regarding Fixed Term contracts coming to their end date, to confirm which are to continue and which are to end. Note - if any contracts are to continue, no changes to the existing contract should be requested in your response. All changes to contracts must be processed through SIMS.
Head Teacher salary changes	Chair of Governors to confirm change from their personal email account, not the school office account. The school will not be chased for a response and SAP will not be updated until this is received, even if it has been entered in SIMS.
HR Changes Report	• Any errors which will affect pay. • Any changes made in SIMS but not reflected in the HR Changes report
Leaver withdraws their notice	If a leaver has already been processed and subsequently withdraws their notice.
Maternity	Documentation is required - refer to SchoolsWeb | HR Zone. An absence should be entered in SIMS but this will not generate any paperwork from HR.
Protected Pay	Any changes to contracts for Protected Pay. Out of scope for SIMS to SAP.
Senior Midday Supervisors	Any changes to contracts for SMDS (ie. teachers who are paid an hourly rate) - changes to hours, salary etc. Changes should still be reflected in SIMS
Shift Allowance	Any changes to contracts for Shift Allowances. Out of scope for SIMS to SAP.
Suspensions without pay	Any changes to contracts for suspensions without pay. SIMS should be updated – refer to Section 4 Contract Records / Additional Notes / Suspensions.

Chapter 4 Reports and E-Forms

As detailed in earlier sections, various reports will be produced or are available from the system.

- AVCO Failure Email and Reports
- HR Changes Report
- School Employee Data Report (available in EForms)
- SIMS reports: Contract and Personal Data, Data Collection
- SIMS report to confirm a change of contract

AnyComms Failure Email and Reports

1. As part of the S2S process, validations are performed each time data is extracted from your systems to check for the following:
    - A SAP number is present in the contract and has 8 digits
    - An National Insurance number is present in the personal details
    - A Date of Birth is present in the personal details
    - Legal Surname and Legal Forename are present in the personal details
    - An illness category is present for a sickness absence.
    - ‘Days lost’ or ‘hours lost’ are present for any absence
    - Allowances: An End date exists
    - Allowances: An Annual amount has been entered (greater than £0.00)
2. If any of the above is missing when extracting your data, the validation will fail and you will receive the following:
    - An email notification that AnyComms files exists.
    - Three reports for downloading in AnyComms:
        - ❖ a summary of the error/s, (eg.8253035xxxxxxxx **FailureSummary**)
        - ❖ a report breakdown showing which personnel record is affected (eg.8253035xxxxxxxx **FailedValidationBad**).
        - ❖ a copy of the complete extract taken the day before. (eg. 8253035xxxxxxxx **Original**) (for use by ICT Schools Team to resolve issues, if necessary).

FailureSummary Report

- gives details of the error/s encountered. NB. there could be more than one error so the columns must be expanded to view all errors
- references the line number to be viewed on the FailedValidationBad report.

FailedValidationBad Report

Gives details of the member of staff and details of the change/s being made. It is important that the whole line is checked to identify all changes being made, particularly where schools have devolved responsibilities and more than one person may be making changes to a record on the same day.

Original Report

A complete copy of the data extracted the previous day. This report will predominantly be used by the ICT Schools Team to aide investigations if issues are encountered.

Additional Information

Accessing reports and working errors	On receipt of an AnyComms Error email advising you that reports are awaiting download, access the reports and work any errors as soon as possible to ensure important payroll deadlines are not missed. If the record failed due to missing information, ensure SIMS is updated with the missing information as soon as possible Ensure you look across the whole line on the 'Failed ValidationBAD' report to identify all changes being made to an employee record. Notify HR by Email of any changes to be made in SAP.
Reports received after payroll deadlines	eg. If deadline day falls on a Friday and we pick up any error notifications on Monday, what can HR do? HR will endeavour to try and take action of any request post the deadline in exceptional circumstances ie. priority is given if the result is significant under payment. Schools should now be more aware of the issues that will cause an error, so every effort should be made to eliminate these.
Changes made to several staff records on the same day but only one record fails the validation checks	The only task that won't process is the one that has failed, all other items will run as normal and will be passed to HR for processing
Agency Staff, Governors and Volunteers	If you use SIMS to record DBS information, you will receive an error because they will not have a SAP record or a payroll number. These errors can be ignored.

Report 1 - Failure Summary.csv

The report will detail what is wrong / missing and one of two messages will be displayed across 2 columns for each failure. It is important that you expand every column (by highlighting the whole spreadsheet and clicking on the triangle in the top left), to display all error messages relating to the extracted data as there may be more than one.

eg. Missing SAP number and National Insurance Number for a contract change. The data would not reach HR in these circumstances and would have to be emailed to HR

	A	B	C	D	E	F
1	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ANY ADDITIONAL data changes appear				
2	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ALL data changes appearing are Emaile				
3	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ANY ADDITIONAL data changes appear				
4	File 825701216092O:	correct SIMS. Please	Allowance End date	correct SIMS. Please	Allowance amount c:	correct SIMS. Please
5	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ANY ADDITIONAL data changes appear				
6	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ANY ADDITIONAL data changes appear				
7	File 825701216092O:	correct SIMS. Please also scroll across the whole line and ensure ANY ADDITIONAL data changes appear				
8	File 825701216092O:	correct SIMS. Please	Illness category sup	correct SIMS. Please	Working Days OR Hc	correct SIMS. Please
9	File 825701216092O:	correct SIMS. Please	Working Days OR Hc	correct SIMS. Please also scroll across the whole line and ensu		

Example 1:

COL A reads: File 825701216092020113640.csv failed on line 3 with error(s). Payroll contract number cannot be empty

COL B reads: correct SIMS. Scroll across the whole line and ensure ALL data changes appearing are Emailed to HR Service Desk

Example 2:

Col A reads: File 825701216092020113640.csv failed on line 2 with error(s): Illness category supplied cannot be empty

Col B reads: correct SIMS. Scroll across the whole line and ensure ANY ADDITIONAL data changes appearing are Emailed to HR Service Desk

- On the Summary report the line reference determines which line the error relates to on the FailedvalidationBAD report.
- The SAP number and National Insurance number are vital for any extract to work and either of these is missing, the whole row of data will fail. Once the error/s have been corrected the data will not be re-extracted (unless the errors relate to an Absence or Allowance entry, see below). All other changes made must be emailed to HR
- For Absence and Allowance errors only (where the SAP no. and National Insurance no. are present), the data will be re-extracted once SIMS has been corrected.

	A	
1	File 825701216092020113640.csv failed on line 2 with error(s): Illness category supplied cannot be empty	correct SIMS. Please also scroll across the whole line an
2	File 825701216092020113640.csv failed on line 3 with error(s): Payroll contract number cannot be empty	correct SIMS. Please also scroll across the whole line an
3	File 825701216092020113640.csv failed on line 4 with error(s): Allowance End date required	correct SIMS. Please also scroll across the whole line an
4	File 825701216092020113640.csv failed on line 5 with error(s): Payroll contract number cannot be empty	correct SIMS. Please also scroll across the whole line an
5	File 825701216092020113640.csv failed on line 6 with error(s): Working Days OR Hours Lost cannot be zero	correct SIMS. Please also scroll across the whole line an

Report 2 - Failed Validation BAD.csv

This report expands over 55 columns. The example below is a snapshot of some of the data in the report.

Contract/P	NI Number	Date of Bi	Title	Legal Fore	Legal Surn	Preferred	Preferred	PN Preferr	PN Preferr	PN Date o
	JX489606	22.09.199	Mr	Peter	Rooke	Peter	Rooke			
20050537	JH060939	01.03.197	Mrs	Tanya	Orton	Tanya	Orton			
20035565	JT877255	23.09.198	Mr	Kevin	Myles	Kevin	Myles			
		16.12.2000		Anne	Watkins	Anne	Watkins			

Report 3 - Original

The **Original** report is a complete copy of the data extracted the previous day. This report will predominantly be used by the ICT Schools Team to aide investigations if issues are encountered.

AnyComms Error Reports – Initial Extract

As a result of the full extract, the school will receive an email and three AnyComms error reports, which could be quite extensive if the school has a large staff quota. The report may also contain historic information.

This file does not have to be worked and can be ignored.

Error Reports Once Live

Once you are live, whenever you make changes in SIMS, the daily extraction will go through the validations mentioned above, and if any errors are found, you will receive an email the next day to advise you reports are available for download from AnyComms.

Note:

- Errors **will not repeat** each night until corrected. It is important therefore that you action these queries immediately to correct the records, to ensure staff are paid correctly and on time.
- If more than one change has been made to a record, (ie. an absence and a contract change entered on the same day), part of which failed one or more of the initial validation tests above, the 'clean' information will not be passed to HR.

Example:	Staff 1	Staff 2
On 9th July	Absence entered but did not input the working days lost. Failed AnyComms validation	Entered a change to contract hours correctly. As the absence entry failed, the contract data, although successfully extracted, did not reach HR. There was no error on the AnyComms report for the contract data change (as this does not form part of the initial validation tests).
On 10th July	Absence entry corrected.	Not aware of the previous day's error so made no change to the contract. Nothing to extract on day 2
Outcome	The data was extracted successfully and passed to HR	The change contract data never passed to HR. Member of staff incorrectly paid.

Investigating / Correcting Errors

For any error/s on the 'Summary' report:

- Expand all the columns on the Summary report to identify all the errors and then locate the data on the appropriate line on the FailedvalidationBad report.
- Review the data across the spreadsheet to identify what changes were made. Scroll across **all of the columns**, (the spreadsheet is 55 columns wide), to identify all of the changes. This is particularly important where roles are devolved and more than one person may have made a change to a record on the same day.

  You will often have two (or more) lines of data per change; one closing off the current data and the second showing the new data.
- If the error was for a missing Personnel no and/or National Insurance number, by entering the missing information in SIMS, this will not prompt the data to be re-extracted again. If the changed being made was to change a contract, the changed information would have to be emailed to HR.

- If the error was for a missing Personnel no. and/or National Insurance Number, where you are setting set up a record for a new member of staff, HR will have received a Notification of Appointment form to set up SAP, so you just need to check the details come through correctly on the HR Changes Report. Enter the missing information as soon as possible.

  N.B. If you are adding additional information for a record already created and have forgotten to input the Personnel no. and/or National Insurance No. HR will not receive any new information until these have been entered in SIMS. You will need to email the HR service desk with the details.

- If the data being extracted was just for an absence or an allowance entry (where the Personnel/National Insurance no's were all present), by correcting the missing data in SIMS, the information will be re-extracted.

If you have any problems interrogating the report, contact the ICT Schools Team for assistance.

Missing SAP Number Error – Closed Contracts

If you receive an error stating the SAP number is missing but on checking the live contract records, the numbers are all present, the error is likely to relate to a contract which closed in the last 365 days where the SAP no. is missing, as the extract looks back at data over the last year to ensure back dated changes are picked up. To avoid this error occurring in the future, update the closed contract with the appropriate SAP no.

Changes To Third Party Programmes – Creation Of Error Reports

If it becomes necessary to change the logic within the extract programmes, schools will be notified of the pending change and a freeze will be put on changes in SIMS for a short period of time, usually at the end of the day.

Prior to the freeze, the extracts will be run to capture any changes made that day, which will be pushed through to the validation process

The changes to the programmes will then be pushed through. As part of this a full extract of all the relevant personnel data is made which is disregarded for the purposes of the data exchange between SIMS and SAP.

However, as a consequence of the full extract, schools may receive an extended error report covering all staff within their personnel system, including errors for eg. a volunteer where there is no SAP no. or National Insurance number. Much of this report can be ignored. However, where for example, a record has failed for a missing SAP no. on a current member of staff, to avoid future errors occurring, the error must be investigated and corrected in SIMS.

Secondary Schools Using Cover

Note: secondary schools using cover will encounter errors where the sickness absence has been entered by this route as no illness category can be input at this stage and both the day/hours lost will be zero.

<u>Scenario 1 example</u>.

Day 1: Sickness absence entered in cover for 20.02.2023 and an absence record created in SIMS. Overnight extract performed, extract fails as no illness category and no days/hours equal zero.

Day 2: No further changes made, no extract performed

Day 3: Personnel officer adds reason for illness and working days/hours lost to absence record

Overnight extraction recognises a change and extracts data which passes validation tests and uploads information to SAP.

<u>Scenario 2 example.</u>

Day 1: Sickness absence entered in cover for 20.02.2023 and an absence record created in SIMS. Overnight extract performed, extract fails as no illness category / days/hours lost.

Day 2: Absence extended for another day

Overnight extract performed, extract fails as no illness category / days/hours lost. SIMS record end date updated to 21.02.2023

Day 3: Personnel officer adds reason for illness and working days/hours lost to absence record

Overnight extraction recognises a change and extracts data which passes validation tests and uploads information to SAP

HR Changes Report

The HR Changes Report details changes made in SAP – refer to **Appendix C** for example reports. The report will be sent to schools immediately following the payroll cut off (approximately 15th of the month).

Note: changes are shown in the month they are happening (ie. effective date of change), not the month the SIMS record was updated.

Unpaid leave <u>does not</u> show on HR Changes Report, refer to PN41.

School are asked to check the information contained in the report immediately to ensure the changes made in SAP reflect the school requirements.

It is best practice that you date and hold all 'change' paperwork in an Admin file and check it against the HR Changes report to ensure all changes are accounted for. This includes changes to contracts, leavers etc.

If you have paperwork and are expecting to see an entry on the HR Changes report which doesn't appear, to avoid under/overpayments being made, any errors must be notified to the HR Service desk immediately, **by email**; if the error has been made in the SIMS record, it must be corrected to ensure consistency of data across the two systems.

If the error has been made in SAP only, an email confirming the correct information must be sent to HR to rectify the issue.

Each month the HR Changes report must be signed by the Head Teacher to confirm the changes made to all personnel records. This is particularly relevant for any changes to contracts for staff maintaining SIMS records.

For any changes to the Headteacher's salary, an **email** from the Chair of Governors personal email account must be sent to the HR Service Desk to confirm the change. Without this, the school will not be chased and no changes to salary will be made in SAP, even if the change has been made in SIMS and extracted.

It is recommended as best practice that the HR Changes report is countersigned by either the Ch. of Governors or Ch. of Finance Committee for any change to a Head teacher's salary.

Under/Overpayments

Changes processed in schools where an error/omission has been made in SIMS resulting in an underpayment to staff, the current practice of charging for an additional salary payment will be enforced.

Schools Employee Data Report – EForms

This report is available in EForms and provides information on data held in SAP for your staff. Accessing this information will save unnecessary phone calls to HR to establish what information they have for a given individual.

Note, HR have until the 14th month to make changes in SAP so if you access the Employee Data report on eg. 13th, you may not see your change reflected in SAP. Do not chase HR immediately but allow them time to complete the changes.

This report can be used to **confirm a change of contract terms and conditions for a member of staff.** Alternatively, a SIMS mail merge report has been created which can be used instead. See below. **The effective date can be changed to a future date to view / confirm the changes.**

Once printed, both the Headteacher and staff member should sign the form. A copy passed to the individual and the original retained on the employee's file.

Refer to **Appendix D** for a copy of the Guidance Note. The report can be used to:

- Produce a form for the employee / Head Teacher to sign to acknowledge contract changes (like the old LVTC).
  - By changing the effective date of the report, you can produce a 'future change' form for signing.
  - You can tailor the report to meet your requirements by selecting tick boxes for the data you wish to see.
- Produce a report for all absences for all employees within your school for the last eight weeks

Payroll Closure

If a change is made in SIMS whilst payroll is closed to schools and HR, the change will not be reflected in SAP until it reopens for HR staff and the information is processed. This could result in several days delay before the SAP records show as being updated.

SIMS Reports

Three reports are available in SIMS as follows:

- SIMS to SAP Data Cleanse Personal xx/xx
- SIMS to SAP Data Cleanse Contract xx/xx**
- SIMS to SAP Staff Data Collection Sheet xx/xx (where xx/xx is the version date currently in use)

The two **Data Cleansing** reports can be used by the school at any time to produce a snapshot of current contract or personal data held in SIMS. The Contract report is particularly useful when checking data against the PN41.

** When running the Contract report, always use 'today's date' in the parameter field to avoid picking up old contracts (do not tick 'accept all').

If you see two or more lines of data <u>for the same SAP number</u>, this usually means:

- You have a current and future contract in the system, or
- The person has more than one allowance

However, if you have two contract lines for the same SAP number where the Contract start date on both contracts is in the past, this would indicate that you have either forgotten to close a contract or you have an incorrect SAP no. on one of them.

The **Data Collection** report can be used to gather up-to-date personal information from members of staff (similar to the one issued to parents of pupils). The report runs a word document and produces a data collection sheet per member of staff. Space is available for staff to amend any data, as required.

If this report is utilised, to maintain confidentiality, please ensure the data sheets are passed to staff in a secure manner.

Employee Contract Confirmation Letter

ICT Schools Team has created a new mail merge report as an alternative to the Employee Data Report which is available to download from the SchoolsWeb / ICT Zone, if required.

The report will extract the following and produce a mail merge letter as follows:

- Extracts last contract and salary information
- Extracts Allowance information, if applicable
- Staff and Head Teacher to sign.
- Print or Scan
- Store electronically onto Staff record in SIMS or as paper copy in Personal File, or both
- Hold a copy in an 'Admin file' to marry against the HR Changes report.

School logo

Date: 03 March 2020

Employee Contract Change Confirmation Letter

Name: Mrs J Boswell
Employment Start Date: 01 Sep 2000
Contract Payroll No: 45678920
Role: Classroom Teacher

Please see below for latest Contract Information

Employment Type	Service Term	Contract Start Date	Contract End Date (if fixed Term)
Permanent	Teachers Main Scale	01 Sep 2000	

Contractual Hours and Weeks
Leave Entitlement relevant to staff on Bucks Pay

Contract Hours per week	Full Time Equivalent	Leave Entitlement
32.5000	1.0000	0.0000

Salary Information

Start Date	Pay Range	Pay Scale	Salary
01 Sep 2019	Teachers Main Salary Range	0.0	£35971

Allowance Information

Allowance Start Date	Allowance End Date	Allowance Type	Allowance Amount
01 Sep 2019	31 Aug 2020	**Type:** Permanent **Description:** Teaching and Learning Responsibility 1	£5500.00

If you agree with the above information, please sign below and return to the Office Manager.
(a signed copy will be kept electronically on your SIMS Personnel record and as a paper copy on your file)

Signed:
Name: Mrs J Boswell
HeadTeacher Signature: Gillian Grosvenor
HeadTeacher Name: Gillian Grosvenor

Appendix A Bucks Pay Term Time Only Annual Leave Entitlement

Ranges 1 – 3	UP TO 5 YEARS SERVICE			OVER 5 YEARS SERVICE	
Weeks	**Holiday Entitlement**	**Weeks Paid Per Year**		**Holiday Entitlements**	**Weeks Paid Per Year**
38	5.0	43.0		5.8	43.8
39	5.1	44.1		6.0	45.0
40	5.2	45.2		6.1	46.1
41	5.4	46.4		6.3	47.3
42	5.5	47.5		6.4	48.4
43	5.6	48.6		6.6	49.6
44	5.8	49.8		6.7	50.7

Ranges 4 – 5	UP TO 5 YEARS SERVICE			OVER 5 YEARS SERVICE	
Weeks	**Holiday Entitlement**	**Weeks Paid Per Year**		**Holiday Entitlements**	**Weeks Paid Per Year**
38	5.1	43.1		6.0	44.0
39	5.3	44.3		6.1	45.1
40	5.4	45.4		6.3	46.3
41	5.5	46.5		6.4	47.4
42	5.7	47.7		6.6	48.6
43	5.8	48.8		6.8	49.8
44	5.9	49.9		6.9	50.9

Ranges 6 – 12	UP TO 5 YEARS SERVICE			OVER 5 YEARS SERVICE	
Weeks	**Holiday Entitlement**	**Weeks Paid Per Year**		**Holiday Entitlements**	**Weeks Paid Per Year**
38	5.5	43.5		6.4	44.4
39	5.7	44.7		6.5	45.5
40	5.8	45.8		6.7	46.7
41	6.0	47.0		6.9	47.9
42	6.1	48.1		7.0	49.0
43	6.2	49.2		7.2	50.2
44	6.4	50.4		7.4	51.4

Appendix B Look Ups and Service Terms

Introduction

Below is a list of the current lookups in use. Check you are using the correct types and have added new items, where applicable. Any lookups appearing on your system which are not on the list should be made inactive by opening the relevant item and removing the tick to make them inactive.

The format of the lookup is vital, eg. spacing before and after dashes and commas etc. Check your lookups are formatted as per the list.

Absence Types

Absence type must be mapped to one of the existing categories. **These are the only ones to be used when entering an absence.**

If you have other lookups not in the list below, make them **inactive** by highlighting the relevant lookup, click **Open** and remove the tick from the active box.

	SIMS (Type/reason)	Cat			SIMS (Type/reason)	Cat
ADO	Adoption Leave	OTH		**PRG**	Pregnancy related	PRG
ALE	Annual Leave	OTH		**SEC**	Secondment	SEC
CIP	Child illness Paid	OTH		**SIC**	Sickness	SIC
CIU	Child illness Unpaid	UNP		**STR**	Strike	UNA
MAT	Maternity/Paternity Leave	MAT		**TIL**	Time in lieu paid	OTH
FT	Flexi-time Paid	OTH		**TRN**	Training	TRN
MED	Medical/Dental	OTH		**UCA**	Unpaid, Authorised absence - Carer leave	UNP
MEDU	Medical/Dental Unpaid	UNP		**UCL**	Unpaid, Authorised absence - Compassionate leave	UNP
OCL	Other paid authorised absence, Carer leave	OTH		**UPL**	Unpaid, Authorised absence - Parental leave	UNP
ODL	Other paid authorised absence, Discretionary leave	OTH		**URH**	Unpaid, Authorised absence - Religious holidays	UNP
OSL	Other paid authorised absence, Special leave	OTH		**USL**	Unpaid, Authorised absence - Special leave	UNP
OTH	Other paid authorised absence, eg. compassionate leave	OTH		**UST**	Unpaid, Authorised absence - Study leave	UNP
PJS	Paid absence for public duties - Jury Service	PUB		**UTU**	Unpaid, Authorised absence - Trade Union duties	UNP
PTU	Paid absence for public duties - Trade Union duties	PUB		**UNP**	Unpaid, authorised absence	UNP
PUB	Paid absence for public duties	PUB		**UNA**	Unauthorised absence	UNA
PHR	Phased Return	OTH				

Illness Category

The illness category types below are the only ones to be used when entering a sickness absence

If you have other lookups not in the list below, make them **inactive** by highlighting the relevant lookup, click **Open** and remove the tick from the active box.

Code	SIMS (Illness category)		Code	SIMS (Illness category)
ACNO	Accident out of Work		**INJB**	Injury - Back or Neck
ACWK	Accident at Work		**INJO**	Injury - Other
ALRG	Allergy		**KDNY**	Kidney Condition
BACK	Back problems		**LVER**	Liver Condition
BLDD	Blood Condition		**MENO**	Menopausal
BONE	Bone Condition		**META**	Metabolic Condition
CHST	Chest Respiratory		**MIGR**	Migraine/headache
CIRC	Circulation Condition		**NEUR**	Neurological Condition
COLD	Cold/flu		**NKWN**	Not Known
COVD	COVID-19 or Covid		**NSPC**	Not Specified
CRIT	Critical Illness		**OMHR**	Other Mental Health Reason
DEPR	Depressive or Anxiety Condition		**OTHR**	Other reason for absence
DGTV	Digestive or Nutrition Condition		**RESP**	Respiratory Condition
AURL	Ear Conditions		**SKIN**	Skin Disorder
EYES	Eye Conditions		**STOM**	Stomach, Liver Kidney
HEAD	Eye, Ear, Nose & Mouth		**SUBM**	Substance Misuse
FOOD	Food borne Illness		**SURG**	Surgery related abs.
GAST	Gastrointestinal Condition		**THYR**	Thyroid Condition
HART	Heart Condition		**TUMR**	Tumour
GYNA	Gynaecological		**VIRA**	Viral infection
HEAT	Heat- or Sun- related		**WORK**	Work related Stress
INFN	Infection			

Reason for Fixed Term Contracts

The reason for the contract being fixed term must be recorded in the **Contract Post Reason** field in the contract record.

The current ESS lookup allows for Establishment Requirement only which **is not** a valid reason for setting the contract as Fixed Term in SAP.

We recommend you make 'establishment requirement' inactive to avoid selecting this incorrectly.

Fixed term contracts that are reviewed and extended should have a new contract created (cloned) with the new start date. **Do not** overwrite the end date of the current contract because this does not reflect the change in contract and no audit trail is apparent.

SIMS (Contract Post Reason field)				
SC	Sickness Cover		**SEC**	Secondment Cover
MLC	Maternity Leave Cover		**TIP**	Temporary increase in pupils
ALC	Absence Leave Cover		**VC**	Vacancy Cover
FR	Future re-organisation		**YTS**	Youth Training Scheme
EFO	External funds only		**UT**	Unqualified Teacher
TP	Temporary Project		**EXR**	Expert Resources
KS	Kickstart Scheme			

Title Option – Gender Neutral

HR have received requests for Gender Neutral to be a Title option.

- To create: go to **Tools | Lookups |Maintain**. Search for **Title**.
- Select **New** and create with a **Code** and **Description** of **Mx**. **Save**.

  Note, this will have no impact on Gender. The options remain as they are.

Allowances

To enable the allowances used in SIMS to be mapped correctly to those used in SAP, the types of allowances available in SIMS are being restricted to the following. Any allowances currently in use must be converted to one of the ones listed below.

With the introduction of pay ranges for teaching staff, and the practice of creating zero amount allowances it is no longer necessary to have allowances created for individual members of staff.

With newly created item highlighted, go to the Allowance Awards panel and select **New.** Enter an appropriate award date and set the annual amount as 0.00. (This will allow any amount to be entered on a staff record).

If you have allowances in SIMS that do not appear below, they cannot be deleted if they have been used at some time in the past. To ensure they are not inadvertently used we suggest you either add DO NOT USE to the description or open the individual allowance and tick the 'hidden; box.

Bucks Pay Support Staff

Code	Description	Category in SIMS	Applicable to (see below)
FAB1	First Aid (BP)	Other	6
HON1	Honorarium allowances	Other	6

Teaching, Leadership and Unqualified Teaching Staff

Code	Description	Category in SIMS	Applicable to (see below)
TLR1	Teaching and Learning Responsibility 1	First & second Teaching and Learning Responsibility Payments, aka TLR1 and TLR2	1 – 3 incl.
TLR2	Teaching and Learning Responsibility 2	First & second Teaching and Learning Responsibility Payments, aka TLR1 and TLR2	1 – 3 incl.
TLR3	Teaching and Learning Responsibility 3	Teaching & Learning Responsibility 3 Payments	1 – 3 incl.
REC1	Recruitment	Recruitment & Retention	1 – 3 incl.
RET1	Retention	Recruitment & Retention	1 – 3 incl.
SAF1	Safeguarding	Other	1 – 3 incl.
SPN1	Special Needs 1	SEN Allowances	1 – 3 incl.
FAA1	First Aid (Teachers)	Other	1 – 3 incl.
HDA	Heads' Discretionary Allowance	Management Allowance	3
UQA	Unqualified Teacher Allowance	Unqualified Teachers	4

***Service Terms To Be Updated**

1 = Teachers	**2 = Teachers Upper**	**3 = Leading Practitioner**	**4 = Unqualified**
6 = Bucks Pay (Support staff)			
5 = Leadership ** a one off spot allowance may be granted if prior agreement obtained by Chair of Governors and HR. This will not be recorded in SIMS.			

Schools are asked **not** to use TLE or Teaching and Learning Responsibility 1&2 as SAP is unable to decide which allowance is being awarded between and TLR1 or TLR2.

Post Reference - Supply Teacher

In order to ensure mapping to the correct pay scales takes place in SAP a post reference of *Supply Teacher* has been created. **In the contract record** ensure that Supply Teacher is recorded in the **Post Reference** field for all supply staff.

Contract vs. Service Agreement

When creating records for supply teachers, those staff employed by the school (and have a SAP number) should be set up in SIMS with a contract; those staff employed by an agency (where the school are billed for hours worked) should be set up with a service agreement.

Appendix C HR Changes Report

Introduction

- HR Changes Report are available from the 15th of each month (approximately).
- Unpaid staff absences **will not** appear on the report, please always check the PN41.

Buckinghamshire County Council

HR Changes Report

Childrens Services

April 2018

Buckinghamshire County Council

New Starters

Personnel No.	Employee Name	Contract Type	Start Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)
20063813	Tracey Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R9 / 00	42,999.96
20063814	Bernard Part Time	Fixed Term Contract	01.04.2018	81.08	30.00	0	0	R9 / 00	36,486.00
20063815	Boris Pt Tto	Permanent Contract	10.04.2018	54.05	21.00	5.50	38.00	R2 / 00	10,809.96
20063818	Sally Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R9 / 00	42,999.96
20063819	2 Yr Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04
20063820	3 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R2 / 00	20,000.04
20063821	4 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R3 / 00	21,999.96
20063822	5 Years Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R10 / 00	50,000.04
20063823	Mat Leave	Permanent Contract	01.04.2018	100.00	37.00	0	0	R8 / 00	41,000.04
20063824	Pat Ernity	Permanent Contract	01.04.2018	100.00	37.00	0	0	R7 / 00	32,000.04
20063825	Adop Tion	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04

Leavers

Personnel No.	Employee Name	Contract Type	Leaving Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)
20063825	Adop Tion	Permanent Contract	30.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04

1 of 3

HR Changes Report
Run On: 12.04.2018 at 14:42:46

Commence Maternity / Adoption Leave

Personnel No.	Employee Name	Contract Type	Start Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)

Return from Maternity / Adoption Leave

Personnel No.	Employee Name	Contract Type	Return Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)

Change to Hours

Personnel No.	Employee Name	Contract Type	Start Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)
20063813	Tracey Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R9 / 00	42,999.96
20063814	Bernard Part Time	Fixed Term Contract	01.04.2018	81.08	30.00	0	0	R9 / 00	36,486.00
20063815	Boris Pt Tto	Permanent Contract	10.04.2018	54.05	21.00	5.50	38.00	R2 / 00	10,809.96
20063818	Sally Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R9 / 00	42,999.96
20063819	2 Yr Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04
20063820	3 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R2 / 00	20,000.04
20063821	4 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R3 / 00	21,999.96
20063822	5 Years Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R10 / 00	50,000.04
20063823	Mat Leave	Permanent Contract	01.04.2018	100.00	37.00	0	0	R8 / 00	41,000.04
20063824	Pat Ernity	Permanent Contract	01.04.2018	100.00	37.00	0	0	R7 / 00	32,000.04
20063825	Adop Tion	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04

#

Change to Pay

Personnel No.	Employee Name	Contract Type	Start Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)
20063813	Tracey Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R9 / 00	42,999.96
20063814	Bernard Part Time	Fixed Term Contract	01.04.2018	81.08	30.00	0	0	R9 / 00	36,486.00
20063815	Boris Pt Tto	Permanent Contract	10.04.2018	54.05	21.00	5.50	38.00	R2 / 00	10,809.96

2 of 3

HR Changes Report
Run On: 12.04.2018 at: 14:42:46

Change to Pay

Personnel No.	Employee Name	Contract Type	Start Date	FTE (%)	Weekly Hours	Hol. Weeks	Term Time Weeks	Range / Point	Annual Salary (£)
20063819	2 Yr Test	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04
20063820	3 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R2 / 00	20,000.04
20063821	4 Yr Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R3 / 00	21,999.96
20063822	5 Years Sickness	Permanent Contract	01.04.2018	100.00	37.00	0	0	R10 / 00	50,000.04
20063823	Mat Leave	Permanent Contract	01.04.2018	100.00	37.00	0	0	R8 / 00	41,000.04
20063824	Pat Ernity	Permanent Contract	01.04.2018	100.00	37.00	0	0	R7 / 00	32,000.04
20063825	Adop Tion	Permanent Contract	01.04.2018	100.00	37.00	0	0	R5 / 00	26,000.04

Recurring Allowances & Deductions

Personnel No.	Employee Name	Start Date	End date	Allowance Name	Amount (£)	FTE
20063815	Boris Pt Tto	10.04.2018	31.12.9999	HONORARIUM PEN	100.00	54.05

One-off Allowances & Deductions

Personnel No.	Employee Name	Start Date	Allowance Name	Amount (£)	FTE
20063825	Adop Tion	01.04.2018	ADDITIONAL PAY (PENS)	500.00	100.00

3 of 3

HR Changes Report
Run On: 12.04.2018 at: 14:42:46

Appendix D School Employee Data Report

Introduction

This report has been created as a result of feedback relating to not being able to see the information that SAP holds for employees. **Note**: this is a report, you cannot amend any data or submit any changes.

Allow up to 5 working days for any changes to be reflected in the School Employee Data Report.

The Employee Data Report does not hold Fixed Term Contract end dates. If you wish to confirm this with staff, please add the information manually before passing a copy of the report to the member of staff.

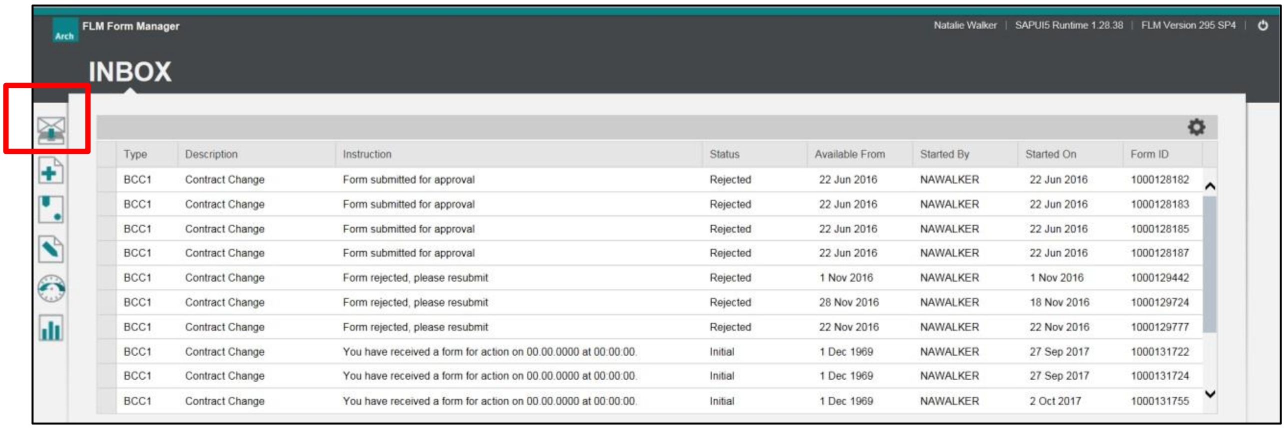
This report provides you with two sub reports:

1. View the employee information held in SAP for an individual employee, on any specific date. With the option to print off the information, if you require paper records.
2. Absences across the school within the last 8 weeks.

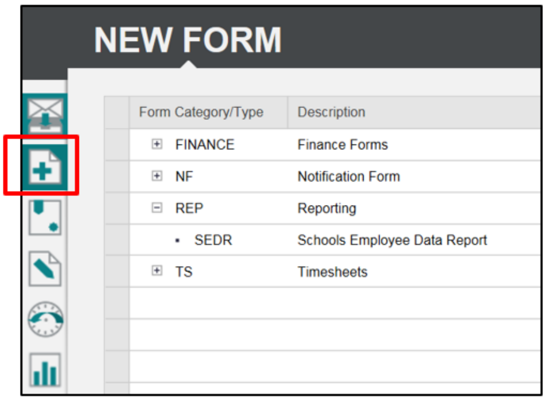
Access the School Employee Data Report

Log into the FLM portal. You will be presented with your ‘Inbox’ where all forms, awaiting approval, will be displayed.

1. **Inbox Button**



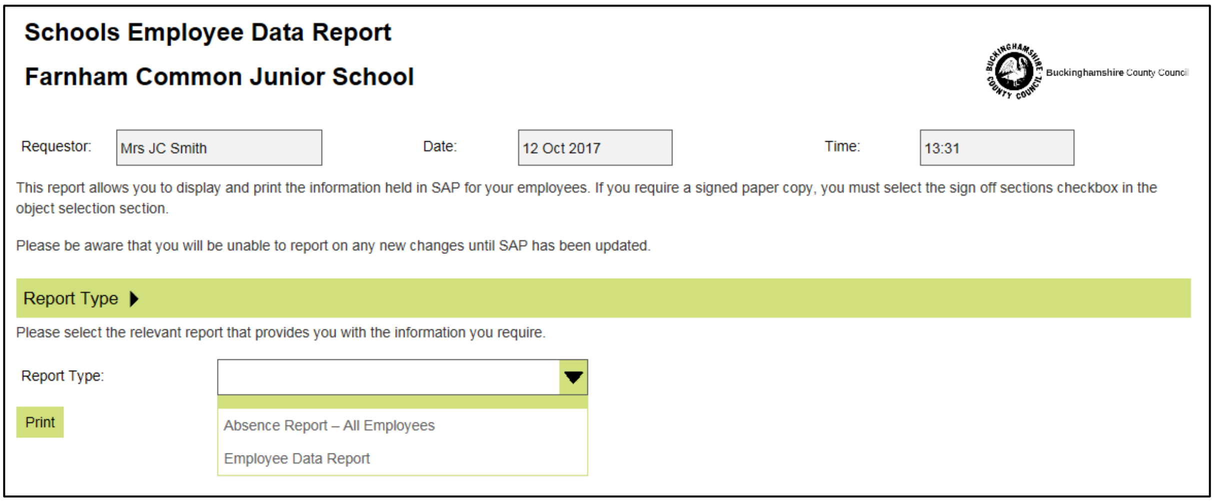
2. Select ‘**New Form’** from the options bar.



3. Under Form Category/Type, select ‘**Reporting**’.

4. Select **Schools Employee Data Report.**

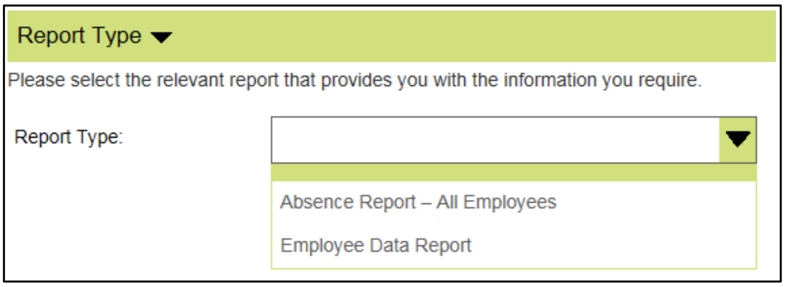
Form Category/Type	Description
⊞ FINANCE	Finance Forms
⊞ NF	Notification Form
⊟ REP	Reporting
▪ SEDR	Schools Employee Data Report
⊞ TS	Timesheets



- Your school name will be defaulted in the top left of the header and the BCC logo will be displayed on the top right.

- As the initiator, your name will be defaulted in the requestor field and the date and time fields will also be populated automatically.

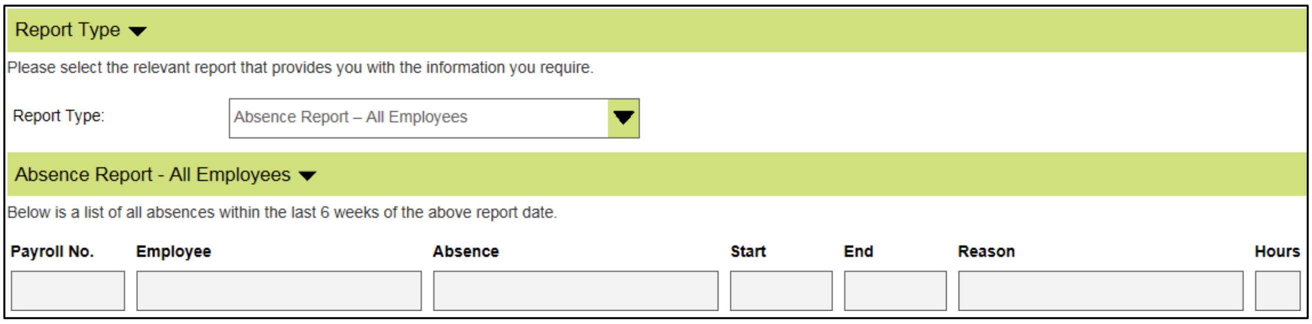
- The 1st section is “Report Type” this is a dropdown with two options:



Absence Report – All Employees

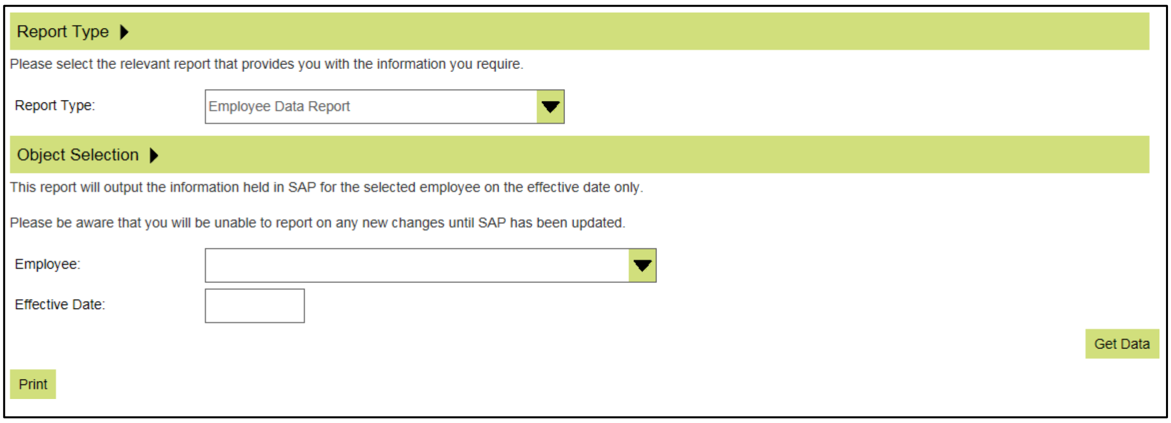
This report will automatically display a list of all absences for employees within your school for the last 8 weeks from the effective date.

This is the same information that you would have seen in the Schools Absence Report.

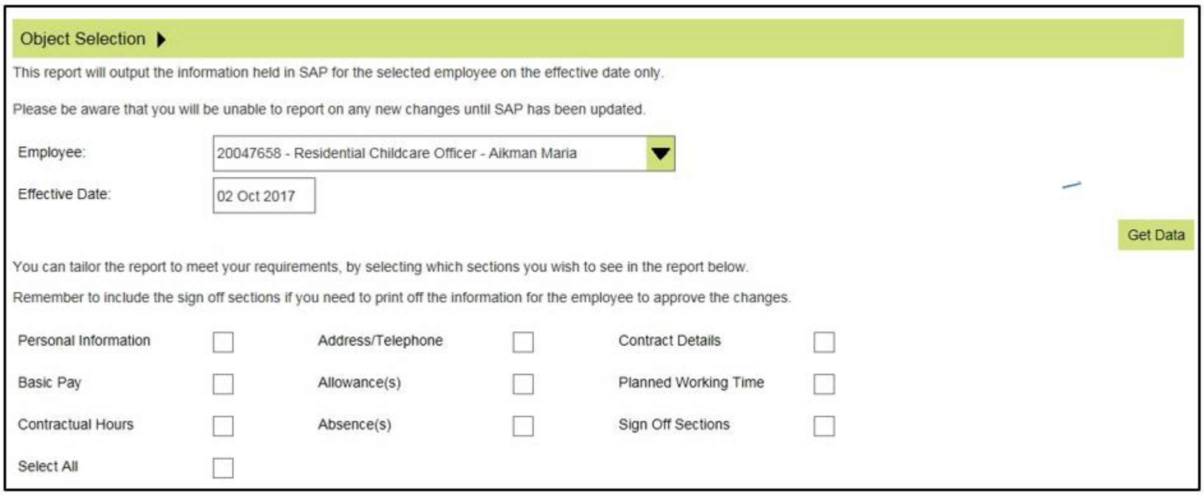


Employee Data Report

This report displays personal information held in SAP for any individual employee within your school.



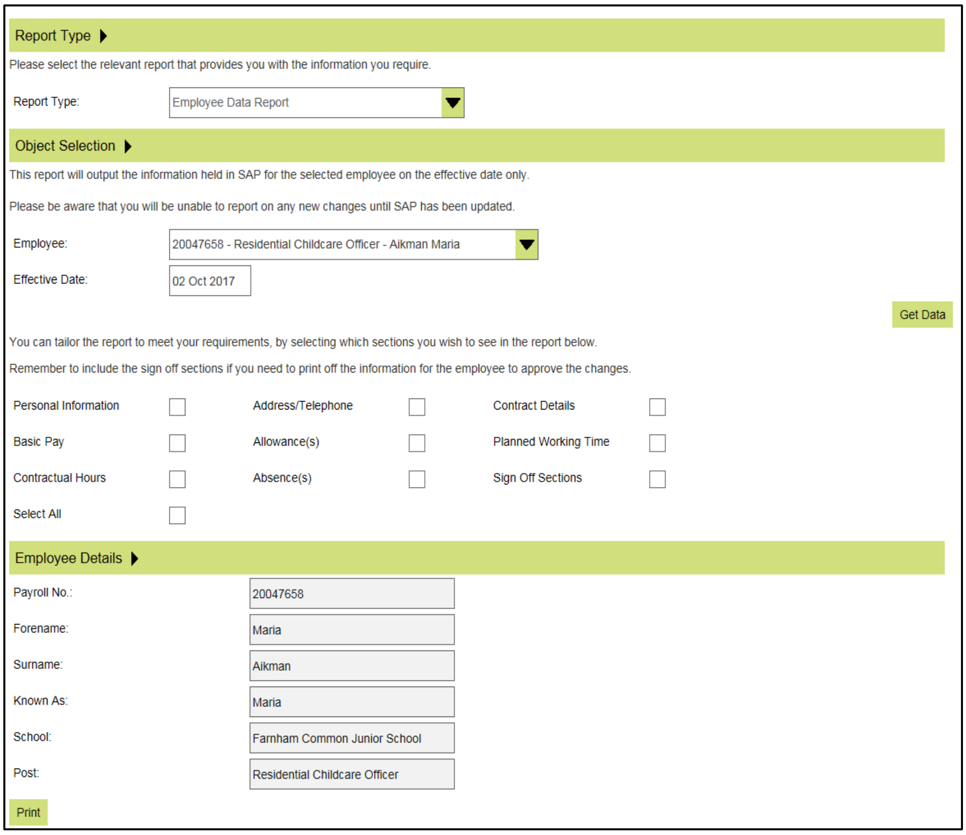
1. When you select this report type, the “Object Selection” section will be displayed.
2. Select the relevant employee from the dropdown list of all employees in your school.
3. Enter the effective date, this can be in the past or the future. The date entered will determine the information that will be output in the report.
   Note: This report extracts data directly from SAP therefore you will not be able to see any changes until SAP has been updated.
4. Click **Get Data**. This will populate all of the relevant information for the selected employee.



5. You now need to decide what information you want to see in the report. To do this you can select whichever sections you want, or all sections.

Remember to select the **"Sign off Sections" checkbox to print off the report for signing by the employee and school**

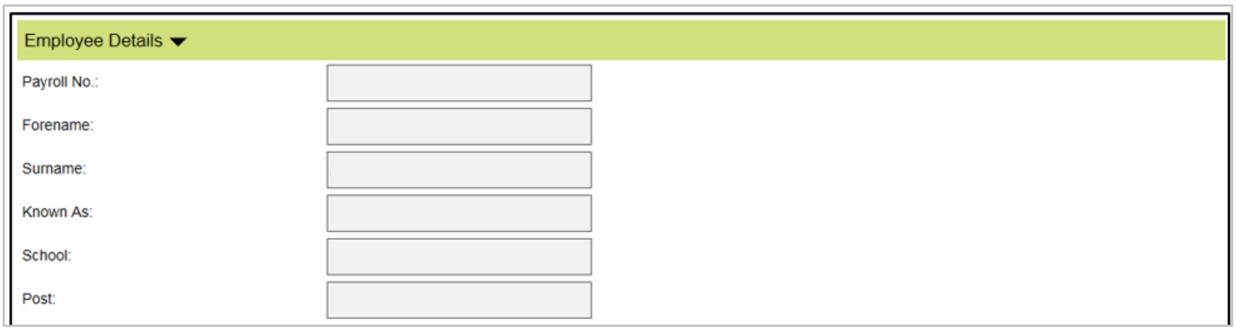
6. To print the report, click **Print** at the bottom of the form.



Report Type
Please select the relevant report that provides you with the information you require.
Report Type: Employee Data Report
Object Selection
This report will output the information held in SAP for the selected employee on the effective date only.
Please be aware that you will be unable to report on any new changes until SAP has been updated.
Employee: 20047658 - Residential Childcare Officer - Aikman Maria
Effective Date: 02 Oct 2017
Get Data
You can tailor the report to meet your requirements, by selecting which sections you wish to see in the report below.
Remember to include the sign off sections if you need to print off the information for the employee to approve the changes.
Personal Information | Address/Telephone | Contract Details
Basic Pay | Allowance(s) | Planned Working Time
Contractual Hours | Absence(s) | Sign Off Sections
Select All
Employee Details
Payroll No.: 20047658
Forename: Maria
Surname: Aikman
Known As: Maria
School: Farnham Common Junior School
Post: Residential Childcare Officer
Print

7. Below are screenshots of each section and the information included within in.

The employee details section will always be displayed.



Employee Details
Payroll No.:
Forename:
Surname:
Known As:
School:
Post:

Personal Information ▼

National Insurance No.:	
Date of Birth:	
Gender:	
Nationality:	
Religion:	
Ethnic Origin:	
Disability:	
Disability Date:	
DCSF No.:	

Address/Telephone ▼

1st Address Line:	
2nd Address Line:	
District:	
City:	
Post Code:	
County:	
Telephone No.:	

Contract Details ▼

Contract Type:	
Employer Notice Period:	
Employee Notice Period:	

Basic Pay ▼

Terms & Conditions:	
Grade:	
ISN/Scale Point:	
FTE Salary:	

Allowances ▼

Recurring	**Amount (£)**	**Start Date**	**End Date**

One-off	**Amount**	**Effective Date**

This section could, depending on the employees working pattern display up to 8 weeks.

Planned Working Time ▼

WK1	**Sunday**	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**
Start	00:00	00:00	00:00	00:00	00:00	00:00	00:00
End	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Total Daily Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Contractual Hours ▼

Work Schedule Rule:

Part Time Employee:

Employment %:

Daily Working Hours:

Weekly Working Hours:

Monthly Working Hours:

Weekly Workdays:

Term Time/Full Year:

Term Only Working Weeks:

Term Time Only Holiday Weeks:

This section will display absences for the selected employee within the last 12 months.

Absence Report - Individual Employee ▼

Below is a list of all absences for the selected employee where the start date falls within the last 12 months of the effective date.

Start	End	Type	Reason	Days	Hours

Comments – Internal Schools Use Only ▼

Additional Comments:

Add Comments

School Authorisation ▼

Name of Headteacher or Nominated Person

Post Title

Signed

Date

Employee Agreement ▼

I confirm that I understand and agree to this variation to my contract of employment.

I understand that all other terms and conditions remain unchanged.

Signed

Date

Employee Name

Please retain a copy for school records and pass the signed original to the employee.

Print

Appendix E Fixed Term Contracts

Introduction

The processes for dealing with fixed term contracts differs between SIMS and SAP.

In SIMS, when the end of a Fixed Term contract is reached, the contract automatically closes in SIMS; depending on whether an employment end date has been entered or not, the whole personnel record could also close if the employee only has one contract.

NB. It is recommended that the Employment end date in not input when creating a Fixed Term contract record, see below.

In HR they do not close Fixed Term contracts even when the end date is reached as it is a legal requirement to keep the contract open.

HR do try to email schools to advise of contracts coming to an end and it is recommended that a school responds to this email with confirmation of the action to be taken as well as updating SIMS.

Note, if contracts are to continue, NO CHANGES to the contract eg. hours etc should be made in the email response. This must all be managed in SIMS.

The following notes provide guidance when dealing with Fixed Term contracts. If you have different scenarios to the ones detailed, please contact the SIMS Support team for further guidance.

1. New Staff member with one Fixed Term contract only
2. Creating a Fixed Term contract where the employee already has another open contract
3. End of Fixed Term period reached

New Staff Member with One Fixed Term Contract Only

Creating their contract – areas to be aware of for SIMS to SAP purposes:

Employment Type	Fixed Term
Post Reason	Required - select from list. Do not use 'Establishment Requirement' if available in the list. Go to Tools |Lookups | Maintain |Contract Post Reason and untick the Active box.
Contract/Payroll No.	Mandatory field. This field must be present for extracts to reach HR. We recommend, where possible, that the contract is not created in SIMS until you have received the Contract paperwork from HR with the payroll no. As long as all the paperwork sent to HR is complete, they will get paid even if the record in SIMS is not immediately present. Secondary schools using Cover may have to create the record earlier to allow timetabling to occur.
Contract Start Date	Mandatory field If starting at the beginning of term HR usually use 1st of month eg. 1st September. Check the date appearing on the Contract from HR to ensure SIMS/SAP match.

Contract End Date Mandatory field.

If starting on 1st September for a year, they would usually be paid until 31 August following year (unless Maternity cover or Sick leave cover) as their salary is divided up into 12 equal payments.

Leave entitlement Mandatory field

Term Time only staff (TTO), refer to Bucks Pay TTO table in Appendix 1 for the relevant figure.

Check against Contract when received as they may have previous service at another school that you are not aware of.

Hours/Week Must be in decimals, not hours/minutes. eg. 15 hr 30 mins should be entered as 15.50.

HR work in increments of 5 minutes.

Refer to Decimal conversion chart in SIMS to SAP Guidance manual.

Weeks/Year Teachers 52.143

Support Staff

- If full time eg. Caretaker/Business Manager 52.143
- If TTO refer to Bucks Pay TTO table for figure, Appendix A. In SIMS this figure is TTO figure + Holiday entitlement.

In SAP, they hold this as two separate figures.

eg. staff working 38 weeks (no INSET days) less than 5 years' service on Range 1a/6 this figure would be 43.00 (and Leave entitlement field mentioned above 5.0)

Origin Select from list. Do not use 'Not applicable-change of contract' for initial creation.

Destination Use Not Known

Remaining fields should be completed as required.

<u>Saving the record</u>

When entering a Fixed Term contract with an end date, on saving you will get the message, 'Terminating this contract closes all contracts for this person. Do you also wish to use this as the 'Date of Leaving'? Select **No**.

Selecting **No** avoids the employment record being updated with a leaving date, and leaves the record open to add more contracts if required, at a later date.

Creating a Fixed Term Contract where the Employee Already has Another Open Contract

Follow the guidelines above. On saving the record you will not receive the message about making the employee a leaver as they have another open contract.

1. End of Fixed Term Period Reached

Various scenarios can occur involving Fixed Term contract and the actions to take depend on individual circumstances.

a) One contract only – fixed term – contract not being renewed

b) One contract only – fixed term – contract being extended

c) Multiple contracts – one or more fixed term which is not being renewed but other contracts continuing

d) Multiple contracts – one or more fixed term – Fixed Term contract/s to be extended.

a. One Contract Only – Fixed Term – Contract Not Being Renewed

<u>In the Contract</u>:

Contract Termination Reason Complete the field with the appropriate reason.

Destination Amend the field (if known)

<u>Employee Details Panel</u>:

Employment Dates Open the record and enter a Leaving date (& any other relevant data).

b. One Contract Only – Fixed Term – Contract Being Extended

Do not just change the Contract End Date in the current contract.

Select 'clone' and create a new contract from the date of extension.

<u>Employee Details Panel</u>:

1. Locate and highlight the Fixed Term contract in the Contract section
2. Select Clone. A contract record will open with some fields already populated.
3. Check/complete necessary fields as per above, or overtype fields already present if T&C's are changing.

<u>In the current contract</u>

4. **Destination**: Amend the reason to 'Not applicable – change of contract'
5. **Contract Term Reason**: Select End of fixed period agreement.

If creating a new contract with a future date, in the Contract panel two contracts will show:

- One with a yellow folder (current contract) and one with a ? (future contract).
- When the date is reached for the new contract the current one will automatically close and the new contract will become the current contract (with a yellow folder).

c. Multiple Contracts – One (Or More) Fixed Term Which Is Not Being Renewed But Other Contracts Continuing.

In SIMS the Fixed Term contract will automatically close when the Contract End date is reached. This action will not generate an extract for HR because there has been no actual field change to the SIMS record.

To enable HR to be notified that the Fixed Term contract is not to continue, a change must be made to the record in SIMS.

Open the contract that is to end:

1. **Destination:** Change reason to ‘Remaining in the same LA – Primary or Secondary’, as appropriate.
2. **Contract Term Reason**: Select most appropriate reason

Amending the above fields will generate an extract to HR to advise them the Contract is to end.

d. Multiple Contracts – One Or More Fixed Term – Fixed Term Contract/S To Be Extended.

Follow process as per b. above for each Fixed Term contract being extended.

Appendix F Teachers Acting up to SLT via Allowances

Introduction

Any additional allowances for Teachers to have an Acting Up Allowance for Leadership, must be agreed with the Chair of Governors and HR. To set up in SIMS, go to:

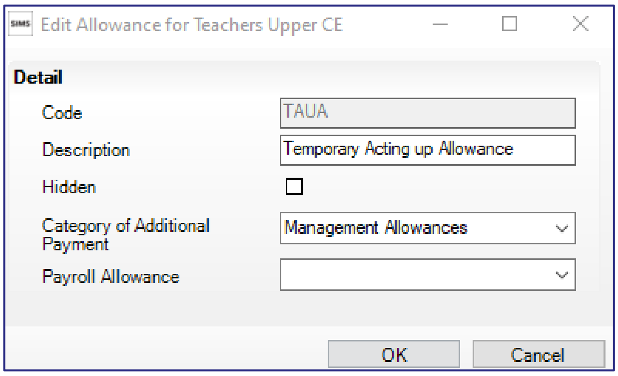
Tools | Staff | Pay Related and **Search** for the relevant Service Term eg. **Teachers Upper**.

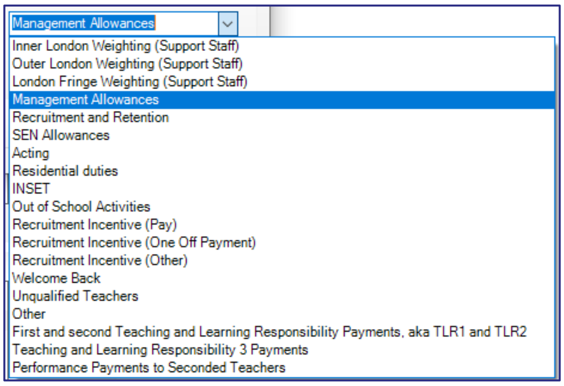
Go to **Panel 4: Allowances** and select **New**

Enter a **Code** and **Description.**

Category of Additional Payment – select from drop-down list (usually Management Allowances or Acting)

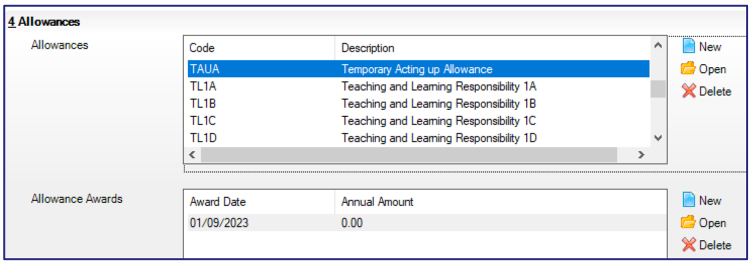
Select **OK** and **Save.**





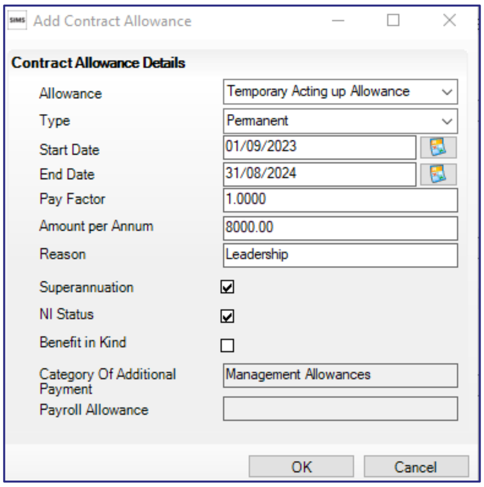
Go to **Allowance Awards** Panel, highlight the new Allowance and select **New**.

Enter the **Date** and **Annual Amount** of **£0.00.** Select **OK** and **Save.**



Open the Teachers contract and add the new allowance.

Note: Email HR as the extract will fail and also check the HR Changes Report when received.



Appendix G Guidance for Secondary Schools using Cover

Reasons for Absence

Staff absence reasons are mapped to an absence type. This writes back to the staff member's personnel record and is used for Workforce statutory returns, therefore, it is important to check the Cover Reasons for Absence to ensure they are correctly mapped back to an Absence Type.

As part of the SIMS to SAP project, the **Reasons for Absence** have been revisited and aligned with the SAP system to ensure data can be automatically uploaded to SAP without the need for manual intervention. The full list of absence types which affect SAP can be found in **Appendix B – Look Ups and Service Terms**. It is essential that this list is adhered to and that no additional types, which affect SAP, are created as this will cause failures when uploading information.

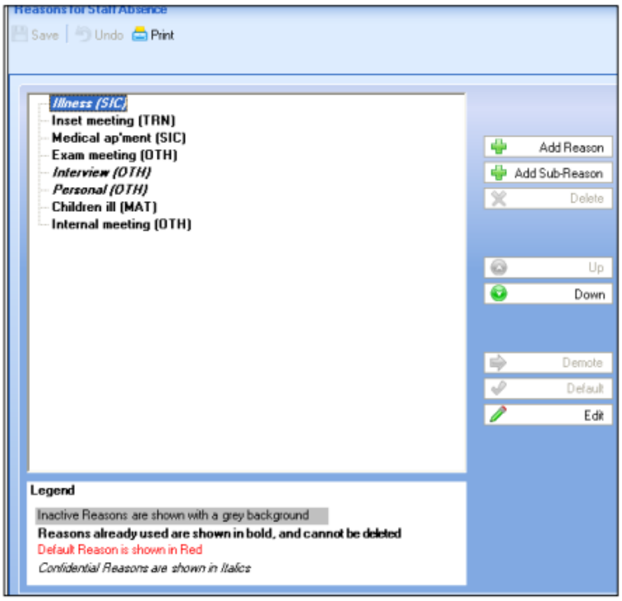
It is essential you use an "**Internal Unavailability**" type of absence when you want to cover lessons for staff that are in school but otherwise unavailable, eg. meeting with parents, phased return to work, to prevent incorrect absences being recorded in their personnel record.

Enter Reasons for Absence

1. Select **Tools | Cover | Reasons for Absence**.

Any existing reasons will have been previously entered manually.
The personnel absence type mapped to each reason is shown in brackets.

- Confidential reasons (those not showing up on daily printouts) are in italics.
- The default reason (initially selected when registering an absence) is in red text, although this colour is not visible when the reason is selected.
- Bold text indicates that the reason has already been used in the Cover Diary.
- Used reasons cannot be deleted, but may be edited and may be flagged as inactive.
- The order of the reasons can also be changed.



It is possible in Cover to have a two tier system of reasons. For example, the reason **Internal Meeting** could have sub reasons such as seeing parents, liaison with external agencies and exclusion meetings. These detailed reasons would all be mapped to the same absence type and, in this case, flagged as internal unavailability so as to prevent them from being recorded as an absence in the personnel record in route **Focus | Person | Staff**.

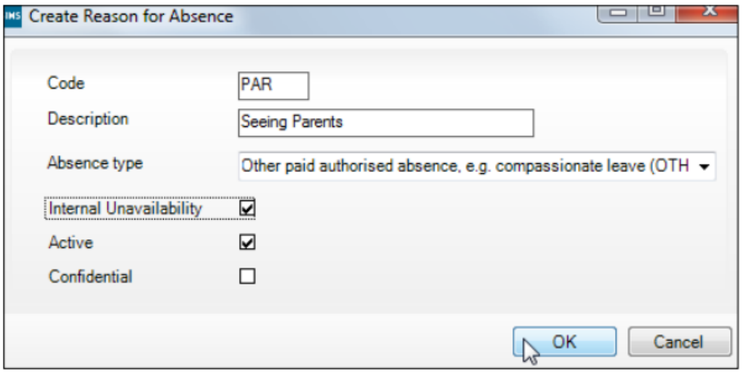
The benefit of using sub reasons is in the increased ability to carry out a more detailed statistical analysis. The benefit of having the higher level, but less specific reason, is that it can be used when detailed information is not forthcoming. Should more information become available the cover manager might then change the absence reason via the Cover Diary.

This two-tier approach with illness must be used with caution. The Absence panel via **Focus | Person | Staff** already provides a mechanism (illness category) for storing such details and it is important to realise that absence reasons in Cover have no link with the items used in the illness category. Only the absence type is conveyed by Cover to the staff record. The use of detailed illness reasons, such as stress, would be better left to those directly managing the personnel records of staff and that cover should be limited to more general reasons.

When using **sub reasons** the **Parent** reason is not treated simply as a heading, but serves as a reason in its own right. When an absence is first recorded, it may be necessary to use the **Parent** reason, with a view to possibly changing to a sub reason once further information becomes available. Assume that the school particularly wants to monitor the time spent seeing parents and being engaged in exclusion meetings. Rather than using a generic reason such as internal meeting for everything, it would be better to create specific reasons.

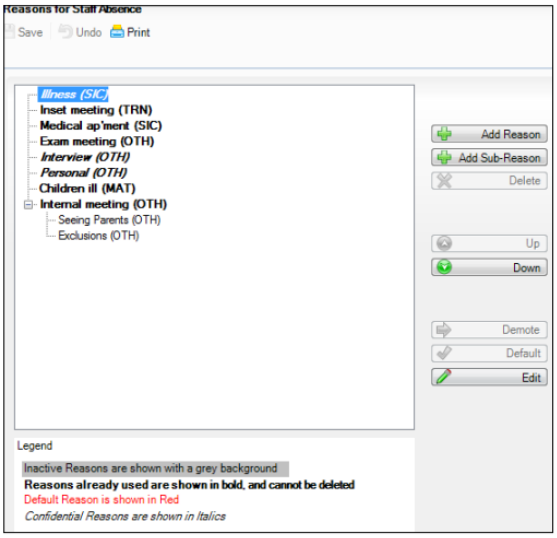
This method should also be used to manage phased returns to work, to avoid the member of staff having multiple absences recorded in their personnel record when they are actively in the process of returning to work.

2. Select the Internal Meeting reason, and then select **Add Sub-Reason**.



3. Enter the information as shown in the preceding graphic, and then create another detailed reason called **Phased Return** under the appropriate heading.

4. Click **Save** to save the changes.

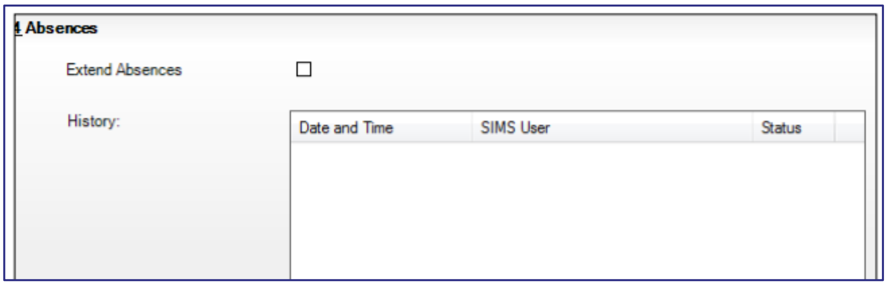


Note:

- The button above the default button changes from **Demote** to **Promote** depending on which item is selected in the **Reasons** list. It can be used to move items between the two tiers. For example, medical appointment could be made a sub-reason of illness.
- When first entering reasons, it is not possible to save the data until one of the reasons has been made the default. When entering absences on the Cover Diary the default reason is initially selected by the software. Most schools are likely to make illness the default.
- If **internal unavailability** is selected on an absence reason, it prevents it from being seen by the personnel sections of SIMS. In other words, staff may need cover, but they should not be regarded as absent from school.

Cover Settings in SIMS

Tools | Cover | Global Settings | Panel 4 provides a control for joining absences of the same type for the same person that take place on consecutive days.



An example scenario is a member of staff is placed in the Cover Diary with a one day absence. They subsequently confirm the absence will be for another day.

The correct way to deal with this (assuming that the reason for absence is the same, and that the days are contiguous to the person's working pattern) is to join the two days together to make one absence of two days, rather than create two separate one day absence records.

Not joining them together may not particularly affect the Cover Manager, but it does create an inaccurate absence record in the personnel area of SIMS, and to consequent census information, it will not be regarded as acceptable.

For SIMS to SAP the **Extend Absences** check box should be selected, to activate additional functionality in the Cover Diary. Once selected it now possible to join the new absence to an existing absence thereby extending it rather than creating a second absence of the same type.

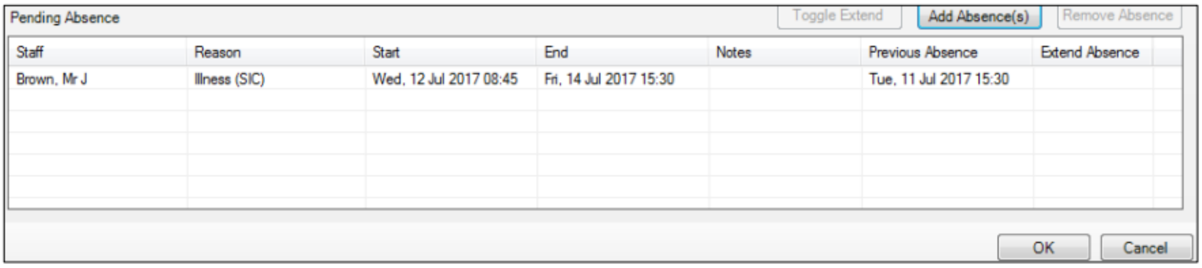
The **History** section immediately below the check box keeps a log of changes to this setting including who changed it and when.

Note: By default, the **Extend Absences** check box is deselected.

Unless staff members visit this section and make a change, there will be no indication in the Cover Diary of this additional functionality. The buttons will be hidden, rather than inactive.

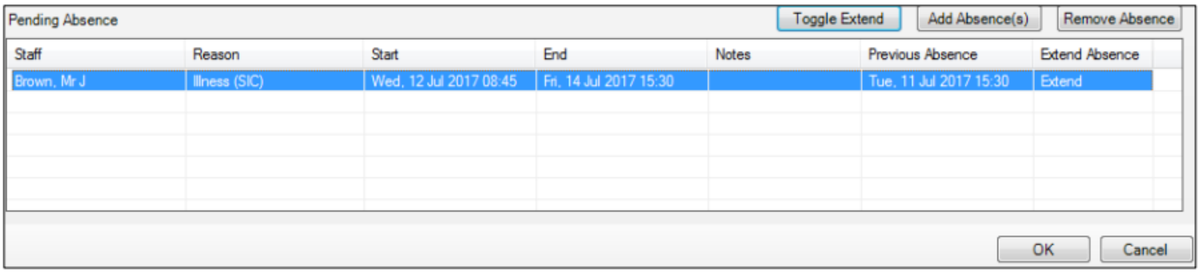
Using the New Settings in Cover

Observe the information in the **Pending Absences** section when recording an additional day of absence.



The software will detect the previous absence from the working day before provided the **SAME** reason for absence has been used.

Select the pending absence for your member of staff and then click **Toggle Extend**.



The absence is flagged as being extended. Clicking this button toggles the flag in the Extend Absence column on and off.

With the absence extended, confirm the arrangement by clicking **OK.**

Appendix H Useful Contacts

	Can provide help on / and any other related issues	Telephone / Email
HR Service Desk	Matters relating to SAP data HR Changes Report EForms	**01296 382233** hrservicedesk@buckinghamshire.gov. uk
ICT Schools Team for MIS Support	Matters relating to SIMS.	**01296 383500 option 1** ictschools@buckinghamshire.gov.uk
ICT Schools Team for Technical Support	Groupcall issues. Server Issues	**01296 383500 option 3** schooltst@buckinghamshire.gov.uk
SIMS to SAP team	Pre-requisites and Data Cleansing ONLY	simstosap@buckinghamshire.gov.uk