SIMS

Personnel

Periodical Activities

The information and definitions entered through **Tools | Staff | Pay Related** form the basis of your personnel records and therefore reflect the contracts and pay of all employees in your school.

Adding an Annual Increment

This facility enables you to add an increment to a contract rather than to each individual. Any staff members to whom the increment point should not be applied can be removed before applying the point. SIMS then updates the employees' contracts automatically to reflect the new incremental point.

NOTE: This routine increments a person's scale by one point only. For example, if the employee did not receive an increment point the previous year, it will not increment by two points this year.

1. Select **Tools | Staff | Annual Increment** to display the **Apply Increment to Staff** page.
2. Select the appropriate **Service Term** from the drop-down list.
    *NOTE: Only service terms where the **Spinal Progression** check box has been selected are available.*
3. The **Increment Year** defaults to the current year. This can be changed by selecting another year from the drop-down list.
4. The **Increment Month** defaults to the next calendar month. This can be changed, if required, by selecting another month from the drop-down list.
5. Click the **Search** button.

A list is displayed of all the contracts for members of staff who are eligible for an increment based on the selections made.

6. Select the member(s) of staff to whom the annual increment should be applied by selecting the check box beside their name.

    Alternatively, click the **Select All** or **Clear All** buttons to select all the names on the list or to clear your selections.
7. Click the **Apply** button to apply the increment point to all the selected members of staff.

    The system updates the contract details of the selected staff members.

Adding National Insurance Rates

National Insurance rates are not related to service terms. The calculation of each contribution depends solely on the earning capacity of the employee. A rate is determined by the band into which their salary falls; this in turn indicates the employer's contribution. Current National Insurance rates can be obtained from your LA.

NOTE: Only employer's contributions are considered because only their contributions affect salary commitment.

1. Select **Tools | Staff | National Insurance Rates** to display the **National Insurance Rates** browser.
2. Click the **New** button to display the **Add New National Insurance Rate** dialog.
3. Select the **Start Date** by clicking the **Calendar** button and selecting the required date.
4. Enter the **Number of Bands**.
5. Click the **OK** button to display the **National Insurance Rate Details** page.
6. In the **Band Collection** panel, highlight the first band and enter the maximum amount in the **Upper Monthly Earning** field.

This updates the **Lower** amount of the next band with the figure you have just entered, plus one penny extra.

7. Enter the appropriate rates in the **Rate 1 (contracted in)** and **Rate 2 (contracted out)** fields.
8. Highlight each band in turn and enter the appropriate figures.
9. Click the **Save** button to save the details.

Deleting a Staff Member

You might need to delete a staff member's details if, for example, duplicate records have been entered or the person's details have been entered in error. Deletion of a staff member's details should be carried out only in these circumstances.

NOTE: Due to the integrated nature of SIMS and the various elements that might make use of a staff member's details, it is not always possible to delete a staff member's record.

When a staff member's details are deleted, all of their records are completely removed from the system, including any associated documents that reside on the Document Management Server. It is not possible to view an audit trail of staff members who have been deleted, so deletion must be considered carefully before it is undertaken.

1. Select **Routines | Staff | Delete Staff** to display the **Locate Staff** browser.
2. Search for and highlight the staff member whose details you want to delete, then click the **Open** button to view their details.

    This stage prepares the record for deletion and provides you with the opportunity to review the details present in the system that relate to the selected staff member before taking further action.

    These details can be printed for future reference, by clicking the **Print**

button. This is the only opportunity you will have to keep a record of the staff member whose details you wish to delete.

If there is no information relating to the selected staff member for a particular category, the category is not displayed.

3. When you are confident that you have selected the correct staff member for deletion and have reviewed their details, click the **Delete** button.
4. A warning message prompts you to confirm that you wish to undertake this action and reminds you that it is irreversible. Click the **No** button if you want to cancel the deletion process.

    Alternatively, click the **Yes** button to proceed with the deletion.
5. Once the process has removed the selected staff member's record successfully, a message informs you that the selected staff member's details have been deleted.

    If a staff member's details cannot be deleted for any reason, a message advises you that the deletion was not permitted and explains why it was not possible. In Personnel, you cannot delete the details of a staff member who has a past, current or future contract or has any absences recorded against them.

Adding/Editing Training Events

Personnel provides the facility to fully record the details of your staff members' training events. Training course details can be entered and staff members can be added to the course via either **Tools | Staff | Training** or the **Professional** panel on the **Employee Details** page.

1. Select **Tools | Staff | Training** to display the **Find Training Courses** browser.

2. Search for the required training course, highlight it and click the **Open** button, or click the **New** button to add a new training event.

3. Enter the **Title** of the course. The name of the **Organiser** responsible for co-ordinating the event can also be entered.

4. Enter a **Description**.

5. Enter the details of the **Venue** where the event is being held.

6. Select the **Start Date** and **End Date** of the course by clicking the **Calendar** buttons and selecting the required dates.

7. Select the **Level** of the course from the drop-down list.

8. If the course requires renewal, e.g. a First Aid course, select the renewal date by clicking the **Calendar** button and selecting the required date.

9. If applicable, enter the fee for the course in the **Course Fees** field.

10. If the course is full time, i.e. not day release, select the **Full Time** check box.

11. Enter the **No. of Days** over which the course takes place.
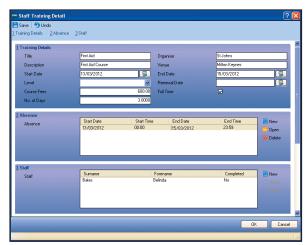
Recording Absences due to Training Courses

IMPORTANT NOTE: *If the absence details relating to the training event are edited after they have been saved and the course attached to a member of staff's record, these changes are not reflected in either the* **Professional** *or* **Absences** *panels of the affected staff member's record and must be amended manually.*

1. Click the **New** button adjacent to the **Absence** section to display the **Maintain Training Absences** dialog.

2. Select the **Start Date of Absence** by clicking the **Calendar** button and selecting the required date.

3. Enter the **Start Time of Absence**, in hh:mm format.

4. Enter the **End Date of Absence** by clicking the **Calendar** button and selecting the required date.

5. Enter the **End Time of Absence**, in hh:mm format.

6. Enter the number of **Working Days Lost**.

7. Click the **OK** button to return to the **Absence** panel then click the **Save** button.

Adding Members of Staff to a Training Event

The **Staff** panel enables you to assign one or more members of staff to a training event.

NOTES: Staff can also be assigned to the course individually via the **Professional** *panel on the* **Employee Details** *page.*

A member of staff cannot be added to a training course retrospectively on this page. Instead, they must be added through the **Professional** *panel on the* **Employee Details** *page.*

1. Click the **New** button adjacent to the **Staff** section to display the **Select Staff** browser.

2. Search for and select the required member(s) of staff and click the **OK** button. To select multiple members of staff, hold down the **CTRL** key whilst clicking the required names. To select blocks of people, hold down the **Shift** key whilst clicking the start and end point on the list.

3. Click the **OK** button.

Adding a Training Event via Employee Details

A training course can be added through an individual's **Employee Details** page. Other members of staff can then be assigned to the training course.

1. Select **Focus | Person | Staff**, open the appropriate person's **Employee Details** then click the **Professional** hyperlink.

2. In the **Professional** panel, click the **Create** button adjacent to the **Training** section to display the **Staff Training Detail** dialog.

The panels on this dialog should be completed in the same way as described in the previous sections.

3. Click the **Save** button to save the details then click the **OK** button to return to the **Employee Details** page.

Cloning a Training Course

Sometimes you will want to enter training course details that are very similar to a previously entered course. For example, you might send a staff member on a First Aid course that another staff member has already attended, but on a different date. To avoid entering the information again, you can clone the existing training record and amend the details as appropriate.

WARNING: *If you edit an existing training event that has already been attached to a staff member, the changes made will be reflected in their training record. If you wish to add a new training event with similar details to an existing event, use the Clone function.*

1. Select **Tools | Staff | Training** to display the **Find Training Courses** browser.

2. Search for and select the required training event.

3. Click the **Clone** button.

4. Amend the details as required.

5. Click the **Save** button.

CAPITA

This guide is based on the version of the software (7.148) in use at the time of publication.