Quick Reference Sheet

SIMS Cover

Setting up Staff, Named Intervals and Working Patterns

For a member of staff to be recorded as absent in Cover, or for a staff member to be assigned to cover as an additional resource for a lesson, they must be recorded in Personnel so that their information is available through **Focus** | **Person** | **Manage Classroom Staff**.

Each person must be given one or more appropriate **Staff Roles** and made a member of the relevant organisation, i.e. the school and/or a supply or self organisation. Members of staff to be used in Cover must belong to at least one organisation.

Organisations can include the school, supply agencies and individuals working independently as supply teachers.

Staff Code - Each member of staff is assigned a unique identifier. This is used to represent individual staff members in the Cover Diary.	1 Basic Details Surname Alkinson Forename John Midhame Henry No Mr Gernde Male	The information in the Basic Details panel is drawn from the Focus Person Staff area and cannot be changed here.
Subject(s) - Identify any subject specialisms taught by the member of staff.	2 Classroom Inic vion Existing code assignments Role(s) as at 05/03/2012 Staff Code (11/12) J/A UA: Alkinson, Mr John Image: Code of the state	Role(s) - The roles assigned to a staff member are used as a filter when browsing the list of Available Staff in the Cover Diary.
Cover Option - It is essential that members of staff who will be used for cover are designated as Provides cover or Cover Supervisor. If Does not provide	Image: Cover Option Provides cover	Organisations panel - A staff member's association with an organisation, and the working pattern defined for each
member will <u>not</u> be available for selection in the Cover Diary.	3 Organisations Organisation Working Pattern Active Green Abbey School Mo. Tu We. Th Fr All Day Ture Edit Company Company Co	organisation, determine their general availability in the Cover Diary.

Adding/Editing Working Patterns

An organisation representing the school is created automatically by SIMS. Each staff member should be made a member of the school organisation and given a working pattern within it, if they are regularly available for classroom duties (either because they are on the timetable as full-time or part-time teachers or because they regularly attend lessons, e.g. as a Learning Assistant).

NOTE: A member of the school organisation cannot be assigned to cover outside the times of their working pattern (unless they are also supply staff and have a booking).

- 1. Select Focus | Person | Manage Classroom Staff to display the Find Classroom Staff browser.
- Search for and select the required member of staff to display the Classroom Staff Details page.
- 3. Click the **Add** button in the **Organisations** panel to display the **Organisation Details** dialog.

In this example, Mr Atkinson works four days a week for the Green Abbey School organisation, which leaves him free to work on Fridays as a 'self' (supply) organisation if he wishes. If he is needed to provide cover on a Friday, he can do so <u>only</u> if he is recorded as a 'self' organisation. He takes registration on Monday and Wednesday mornings, so his **Start time** on these days has been changed in the **Working Pattern** to accommodate this. The times can also be changed in the default **Named Interval** of **ALLDAY** via **Tools** | **Cover** | **Organisations and Bookings** | **Define Named Intervals**.

NOTE: A booking <u>must</u> be created before a person can be used as supply staff. This adds a service agreement for these times to their Personnel record.

Defining Named Intervals

A 'named interval' is a particular interval of time (from a start time to an end time) that you may wish to use regularly to define a frequent absence or closure. Once defined, you can use it to save time whenever you register an absence or closure.

You may wish to define named intervals such as Morning and Afternoon sessions (e.g. Morning: 8:50 - 12:30, Afternoon: 12:30 - 15:30).

- 1. Select Tools | Cover | Organisations and Bookings | Define Named Intervals to display the Edit Named Intervals page.
- Click the New button or select an existing interval then click the Open button to display the Add/Edit Named Interval dialog.
- 3. Enter or edit the unique **Code** and the **Description** for the interval, e.g. **Morning Session** or **Fire Alarm Testing**.
- 4. Specify the **Start Time** and **End Time** using the up and down arrows.
- 5. Click the **OK** button.
- 6. Click the **Save** button to add or update the named interval.

nesday All Day day All Day All Day All Day	08:45 08:45 08:45 08:45	15:30 15:30 15:30	Edit X

Manual Add/Edit Named Interv	val	
Named Interval		
Code	АМ]
Description	Morning Session	
Start Time	00:00	
End Time	00:00	
		OK Cancel

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Cover

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Assigning New Roles to Classroom Staff

Cover uses Staff Roles to help match appropriate staff to a cover assignment. The Cover Credit system also uses a person's Staff Role(s) to decide whether a person should be 'credited' when they are assigned.

NOTE: If a member of classroom staff (who is assignable in the current academic year) has one or more Staff Roles that extend into the next academic year, when the new academic year starts they will also be made assignable in the new academic year. Terminate the Staff Roles of classroom staff who you do not wish to be assignable for the next academic year.

It may be necessary to change the role of classroom staff if their role alters during the academic year, e.g. if a teaching assistant is promoted to a higher level teaching assistant (HLTA).

1. Select Focus | Person | Manage Classroom Staff to display the Find Classroom Staff browser.

🐆 Find Classroom Staff 👘							
📄 New 🎽 Search 📼 Open 🖇	Remov	e 👻 🚔 I	Print 🛛 🐻 Browse 🔍 N	ext 👚 Previous 📔			
Academic Year 2011/2012	🖌 ha	s staff cod	a? (Any) 💌 Ro	ile <any></any>	~		Include Leavers?
Sumame		Staff	Code Subj	ect	Organisa	tion (Any) 🗸]
Name	Code	Gender	Role(s)		Subject(s)	Active	
Abell, Mrs Anita	AA	F	Teacher		Science, Biology, PSE	Yes	
Andrews, Mrs Selina	SA	F	Teacher		Science, PSE	Yes	
Asif, Mrs Mina	MIA	F	Higher Level Teaching A	ssistant		Yes	
Atkinson, Mr John	JA	м	Teacher		English	Yes	
Blacker, Mr Adrian	AB	м	Teacher		Religious Ed. Geography	Yes	

- Search for and then select the required member of staff to display the Classroom Staff Details page.
- In the Classroom Information panel, assign a new role to the member of staff by selecting the appropriate check box from the list of Role(s). A member of staff can have multiple roles.



- From the Cover Option drop-down list, select Cover Supervisor, Provides cover or Does not provide cover to indicate the staff member's cover status.
- The new role will commence from the current default date. To change the date, click the Edit button to display the Edit Roles dialog <u>before</u> selecting the new role.

NOTE: By default, the dialog displays information relating to the current academic year. To display previous or future academic years, click the **Back** or **Forward** button. To view and edit a role in the past, click the Relax button. Click the **Zoom** button to magnify the calendar and timeline areas of the dialog. Click the **Zoom** button again to revert to the original magnification setting.

 To change the date range for a staff member's role, double-click the role you wish to change or highlight the role and click the **New** button to display the **Add/Edit Date Range** dialog.

Atkinson, Mi Cursor Day Cursor Date	Friday 25/05/2012		Selected Role Selected Date Range	Teacher 02/07/2002 ·
Academic Yea	r 2011/2012	Seo Oct N	ov I <mark>Dec J</mark> an IFeb M	ar Apr May Jun Jul Aug
l eacher		-		
Higher Level 1	eaching Assistant			
eaching Assi	stant oot Assistant			
Jeanning Supp	iet wet	_		
Lechnician	in an			
Other Supervis	sor			
Other Assistan	t.			
Examination In	vigilator			
<			ши 	>

 Set the date range for the new role by entering a Start Date and End Date, or click each Calendar button and select the required dates.

: Higher Level Teachi	ng Assistant
Date Range Start Date End Date	05/03/2012
	OK Cancel

- 8. Click the ${\bf OK}$ button to add the updated date range for the role.
- To delete a role for the member of staff, highlight a role from the Edit Roles dialog and click the Delete button.
- 10. Click the **Save** button on the **Classroom Staff Details** page.

Assigning Cover Credit

When you fulfil an assignment requirement in the Cover Diary, the cover credit rule can be applied to assign credit to a covering member of staff.

When a member of staff is used to provide cover, two figures are recorded, the number of covers carried out and the total amount of time spent on cover.

The rows in the table relate to the possible roles of those providing cover. The columns represent three outcomes when arranging cover:

- **Cover Assignment Required:** A member of staff has been registered as absent and a class or Non-Class Code (NCC) requires cover.
- Change Assignment Required: A member of staff is not absent but, on this particular occasion, a class transfer to another member of staff is required.
- Additional Assignment Requirement: A member of staff is not absent but a placement of an additional member of staff with the class is required, e.g. an additional learning support assistant is required to help with practical experiments.
- Select Tools | Cover | Cover Credit Setting to display the Cover credit rule(s) page.
- To change the cover assignment requirements for a staff role, highlight the applicable role then select any of the cells containing the word Credit.

In each cell, a choice of three options is available: **Credit**, **No Credit** or **Prompt**.

The option of **Credit** is an appropriate default in most cells. Changing cells to **Prompt** is not a practical option because this causes a dialog to be displayed after every single cover arrangement is made in the Cover Diary.

It is possible to override the settings for particular covers, for example registration cover, when this is deemed necessary via the Cover Diary.

CAPITA

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