Personnel

Maintaining Service Term Information

A service term is associated with a staff contract. It contains generic information including the number of hours worked per week, weeks worked per year, etc. Some service terms have scales defined in them, which determine the annual salary or hourly rate payable and allows spinal progression, where an employee's salary increments annually. This area enables you to define or input generic service term information that can then be used when entering a staff member's contract details.

Adding/Editing a Service Term

A service term is a collection of data that is associated with a pay scheme (normally a national pay scheme) that members of staff are paid, together with local variations. Once data has been entered, the data is used when contracts are entered for members of staff.

1. Select **Tools | Staff | Pay Related** to display the **Find Service Term** browser and click the New button to create a new Service Term.

2. In the **Service Term** panel, enter a unique **Code** for the service term. This becomes read-only once the service term has been saved.

3. If the service term you are defining is salaried, select the **Salaried** check box.

   NOTE: If you select the **Salaried** check box, the **Pay Pattern** button is disabled.

4. If the service term you are defining is not salaried, click the **Pay Pattern** button without selecting the **Salaried** check box. Please see Adding/Editing a Pay Pattern.

5. Enter a **Description** for the service term.

6. Enter the default full-time contractual hours in the **Hours Worked/Week** field then enter the number of full weeks in the **Weeks Worked/Year** field.

7. If the service term allows spinal progression, select the **Spinal Progression** check box. The **Increment Month** field becomes available. Select the month the increment is due from the **Increment Month** drop-down list.

8. If the service term being defined relates to teachers, select the **Teacher** check box.

9. If the service term is no longer in use, select the **Hidden** check box to stop the service term displaying in other Personnel browsers.

Adding/Editing a Pay Pattern

A pay pattern can be defined for weekly paid employees only. The pay pattern enables the commitment generated in FMS to be spread across the working year, corresponding to the weeks worked by the employee.

NOTE: If you do not define a pay pattern for a service term classed as weekly paid, the commitment generated in the appropriate SIMS Finance module for such an employee will be inaccurate.

1. In the **Service Term** panel, click the **Pay Pattern** button to display the **Edit Pay Pattern for** dialog.

2. If employees on this service term will have their actual salary payments reconciled to the commitments in FMS via a monthly reconciliation file, select the **Monthly Reconciliation** check box.

   NOTE: A monthly reconciliation file containing the total salary payments made to employees during the month, irrespective of the employee's actual pay period, is returned from the LA to the school.

3. Click the first month and enter the number of weeks worked during the month.

   In the fields adjacent to each subsequent month, enter the number of weeks worked per month.

   The number of weeks worked throughout the year is automatically calculated and displayed in the **Number of Weeks** field.

4. Click the **OK** button to save the pay pattern and return to the **Service Term** panel.

Adding/Editing Pay Award Information

The **Pay Award** panel operates in two ways, depending on whether the **Single Pay Spine** check box has been selected. If the check box has been selected, award dates and values are made at service term level.

If the **Single Pay Spine** check box has not been selected, each scale that is defined, carries its own set of award dates and values.

NOTE: Ensure that the latest version of the *CCSBaseLookups* file has been imported.

1. Click the **Pay Awards** hyperlink to display the **Pay Awards** panel.

2. If this service term has a single pay spine, select the **Single Pay Spine** check box.

3. Enter the lowest point for this service term in the **Minimum Point** field and the highest point in the **Maximum Point** field.

   NOTE: The **Interval** between points is set to 1.0 and cannot be edited.

4. Click the **New** button adjacent to the **Scales** field or highlight an existing scale and click the **Open** button to display the **Add New/Edit Scale for** dialog.

5. Enter a unique **Code**.

   NOTE: This field becomes read-only once the record has been saved for the first time.

6. Enter a **Description** for the scale.

7. If the scale is to remain inactive for the present, select the **Hidden** check box. This will restrict viewing of this scale to this page only.

8. Enter the **Minimum Point** and **Maximum Point** for the scale. This information can be obtained from your LA, if required.

   NOTE: The minimum and maximum points must lie within the range defined for the service term.

   When editing a pay scale, the point range cannot be reduced if the pay scale has been attached to a contract and any of the points being discarded have been used on any of the contracts that the pay scale has been attached to.

9. Select the appropriate **Pay Scale** from the drop-down list, such as **Teachers Main**.

Adding/Editing Pay Award Information (cont.)

10. English state schools should indicate which regional variation the pay scale is for by selecting from the **Regional Pay Spine** drop-down list, e.g. **Outer London**.

11. Click the **OK** button to save the details and return to the **Service Term Details** page.

12. If you are not defining a service term with a single pay spine, highlight the scale for which you wish to define the award date in the **Scales** table (in the case of single pay spines, the award dates selected apply to all the scales in the service term).

13. Click the **New** button to display the **Add New Single Spine Award Date for** dialog (or the **Add New Award Date for** in the case of service terms not operating on a single pay spine).

    The **From Point** and **To Point** fields are populated with the range of points allocated to the scale/service term and are read-only.

14. Select the **Award Date** by clicking the **Calendar** button and selecting the required date. Alternatively, enter the date in dd/mm/yyyy format.

    Add New Award Date for Teachers

    Detail

From Point	1
To Point	6
Award Date	01/09/2010

    OK   Cancel

15. Click the **OK** button to save the details and return to the **Pay Awards** panel.

16. In the table adjacent to the **Scale Award** list, enter the annual salary to be awarded for each Point in the Amount field.

17. For service terms not on a single pay spine, repeat steps 10 to 14 for each scale within the service term.

Adding Superannuation Schemes

Pension schemes to which members of teaching staff belong are described collectively as superannuation schemes.

1. Click the **Superannuation** hyperlink to display the **Superannuation** panel.

2. Click the **New** button adjacent to the **Superannuation Schemes** field to display the **Search Superannuation** dialog.

3. Search for the required superannuation scheme by entering all or part of the **Superannuation Code** and/or **Description**, then clicking the **Search** button.

4. Highlight the required scheme and click the **Open** button.

    The **Superannuation Values** table is populated with the details from the selected scheme.

Adding Post Information

Posts describe the work to be undertaken by each member of staff within a particular service term. Posts need to be defined to allow the use of service terms and are required for the DfE statutory returns.

1. Click the **Posts** hyperlink to display the **Posts** panel.

2. Click the **New** button adjacent to the **Posts** field or highlight an existing post and click the **Open** button to display the **Add New/Edit Post for** dialog.

3. Enter a unique **Post Reference**.

4. Enter a **Post Description**.

5. Select the required **Post Category** from the drop-down list, for example **Teacher**, **Other**. The **Post Category** is used for statutory pupil census where summary staff information is required.

6. English state schools only, identify the School Workforce Return Post by selecting from the **SWR Post** drop-down list.

7. Click the **OK** button to save the details.

Adding/Editing Allowances

Allowances describe additional payments made over and above the basic salary.

1. Click the **Allowances** hyperlink to display the **Allowances** panel.

2. Click the **New** button or highlight an existing allowance and click the **Open** button to display the **Add New/Edit Allowance for** dialog.

3. Enter a unique **Code**.

4. Enter a **Description** for the allowance.

5. Identify the type of payment by selecting the **Category of Additional Payment** from the drop-down list, e.g. **Management Allowances**.

6. Click the **OK** button to save the details and return to the **Allowances** panel.

7. In the **Allowance Awards** table, click the **New** button or highlight an existing allowance and click the **Open** button to display the **Add New/Edit Allowance Award for** dialog.

8. Select the **Award Date** of the allowance by clicking the **Calendar** button and selecting the required date. Alternatively, enter the date in dd/mm/yyyy format.

9. Enter the **Amount** of the allowance.

    NOTE: The value of the allowance must be entered as an annual value. Where the entered value is greater than zero, the allowance value will be editable on the contract.

10. Click the **OK** button to save the details.

Adding/Editing Financial Sub-Groups

Financial sub-groups allow staff to be grouped together at a lower level than by service term. Financial sub-groups allow salary projections to be generated in FMS for a group of staff who are paid on the same service term.

1. Click the **Financial Sub-groups** hyperlink to display the **Financial Sub-groups** panel.

2. Click the **New** button adjacent to the **Financial Sub-groups** field or highlight an existing group and click the **Open** button to display the **Add New/Edit Financial Sub-group for** dialog.

3. Enter a **Group** identifier and a **Description**.

    NOTE: The group identifier becomes read-only once the record has been saved for the first time.

4. Click the **OK** button to save the record and return to the Service Term Details page.

5. Click the **Save** button.

Deleting Financial Sub-Groups

To delete a financial sub-group, highlight the group and click the **Delete** button adjacent to the **Financial Sub-groups** field. A financial sub-group can be deleted only if it is not attached to a contract.

Deleting a Pay Scale

A pay scale can be deleted by highlighting it and clicking the **Delete** button adjacent to the **Scales** field.

NOTE: A pay scale can be deleted only if it is not attached to any contract. A message is displayed if an attempt is made to delete a pay scale attached to a contract.

CAPITA

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