



SIMS Summer 2013 Release 2

Personnel Performance & Appraisal Enhancements

Overview

Because of the recent changes in legislation, 2012 saw schools get freedom for schools to manage their own appraisal processes and now in 2013, pay rises are directly linked to performance.

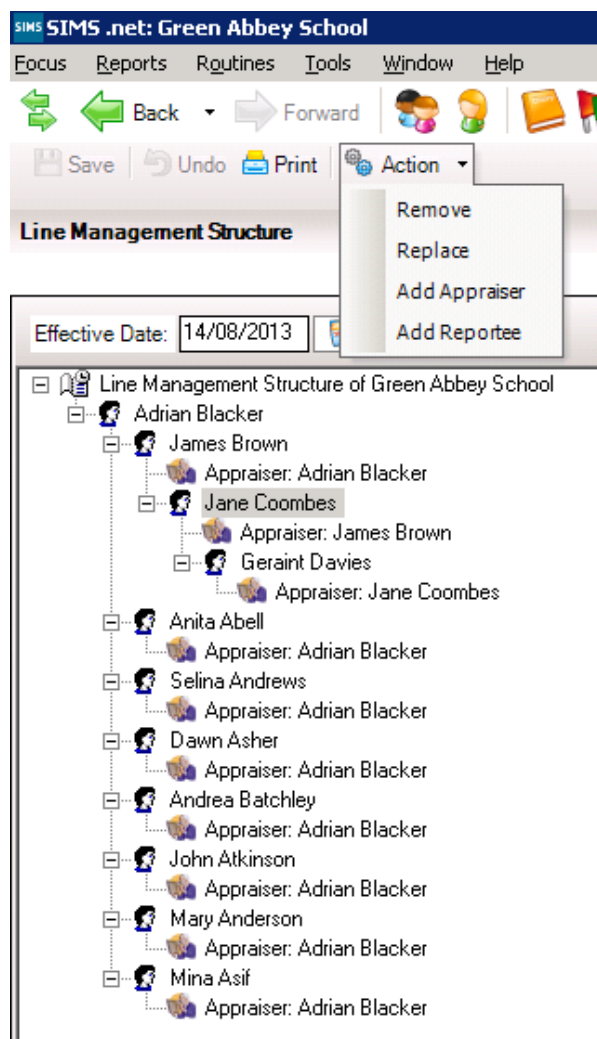
Capita have sought to automate this new requirement and allows all staff members to centrally hold details of their appraisal targets, objectives and evidence. This creates an environment where staff members feel in control of their career development and involved in the process of evaluation.

This is achieved through use of the following areas:

- Line Management Structure
- Permissions
- Staff Performance Setup
- Staff Search
- Appraisals Tab
- CPD Panel

Costs and training options are also detailed within this document for your information.

Line Management Structure



This works on the same basis as the pastoral structure, in that you can select the effective date and see the staff in the school as at that date, be it past or future.

Staff members listed here will automatically be given Staff Performance rights within the database, which will enable them to see the Appraisal tab and CPD panel, if only for their own record.

You can set multiple Appraisers or Reportees as required against each person.

As it is a tree structure, each staff member can see their records and those of the staff below them. The Head teacher is automatically placed at the top of the list.

Permissions

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Focus Reports Routines Tools Window Help

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Find Group

New Search Open Delete Print Browse Next Previous Clone

Description Code Group Type Active

Description	Code	Type	Active
SP Appraiser	SPAppraise	Template	Yes
SP Line Manager	SPLineMan	Template	Yes
SP Manager	SPManager	Template	Yes
SP Staff	SPStaff	Template	Yes

Four new groups have been created and people are added to them as a result of being added to the Line Management Structure or manually under the Manage Groups option.

All staff must be in SP Staff in order to see their own record, whereas the other groups allow levels of access to set up objectives and background settings.

Staff Performance Setup

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Staff Performance Setup

Save Undo Print

1 Appraisal Periods 2 Whole School Objectives 3 Professional Standards

1 Appraisal Periods

Appraisal Period	From	To	Active
Period for Academic Year 2012/2013	03/09/2012	31/08/2013	Yes
Period for Academic Year 2013/2014	03/09/2013	31/08/2014	Yes

New Open Delete

2 Whole School Objectives

Summary	Appraisal Period	Active
Promoting Healthy Diet and Hygiene	Period for Academic Year 2012/2013	Yes
Pupil-led Fundraising for Local Projects	Period for Academic Year 2012/2013	Yes

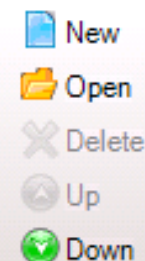
New Open Delete

Set the Periods (can be termly up to 2 years maximum) and Whole School Objectives. These are allocated to be used within the Period(s) as required.

Staff Performance Setup

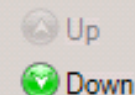
3 Professional Standards

Type	Summary	Active
Teachers Standards	Set high expectations which inspire, motivate and challenge	Yes
Teachers Standards	Promote good progress and outcomes by pupils	Yes
Teachers Standards	Demonstrate good subject and curriculum knowledge	Yes
Teachers Standards	Plan and teach well-structured lessons	Yes
Teachers Standards	Adapt teaching to respond to the strengths and needs of all	Yes
Teachers Standards	Make accurate and productive use of assessment	Yes
Teachers Standards	Manage behaviour effectively	Yes
Teachers Standards	Fulfil wider professional responsibilities	Yes



Aspects for selected Standard

Summary	Active
Establish a safe & stimulating environment for pupils	Yes
Set goals that stretch & challenge all pupils	Yes
Demonstrate positive attitudes, values & behaviour expected	Yes



The Teaching Standards are already input (using latest information from the DfE). New Standards (Teaching or Custom) can be added, and existing entries amended.

Staff Browse

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New Search Open Print Browse Next Previous View

Surname: Forename: Previous Name:

Staff Code: Gender: <Any> Title: <Any>

Status: Staff, all Current Tier: <Any> Staff: <Any>

Name	Previous Name	Title	Gender	Staff
Abell, Anita		Mrs	F	AA
Anderson, Mary Elizabeth		Mrs	F	MA
Andrews, Selina	Andrews, Selina	Mrs	F	SA
Asher, Dawn		Mrs	F	DA
Asif, Mina		Mrs	F	MA
Atkinson, John Henry		Mr	M	JA

Staff: <Any>

- All of My Staff
- Staff I Appraise
- Staff I Manage
- Staff I Manage Directly

A new filter has been added, which allows Appraisers and Line Managers to quickly filter the staff list into those records they need to see.

'Any' is the default 'All Staff' setting and would show you all staff within the school. However you would not be able to view any Staff Performance information for any staff record not allocated to you within the Line Management Structure.

Staff Personnel Record

Personnel Details Professional Details Employment Details **Appraisals**

Employee Details : Mary Anderson

Save | Undo | Print | Suspend

1 Professional Standards 2 Objectives 3 Observations 4 Reviews 5 Line Management Details

1 Professional Standards

Standard Type Teachers Standards ☐ All

2 Objectives

Current

Summary	Status	Planned Review	Appraisal Period

New
Open
Delete

Previous

Summary	Status	Actual Review	Appraisal Period

Open
Delete

3 Observations

Current

Date	Type	Observer	Overall Grade	Status

New
Open
Delete

Previous

Date	Type	Observer	Overall Grade	Status	Appraisal Period

Open
Delete

The Appraisals Tab is now available for all staff members within the Line Manager Structure. There are 5 panels available.

1. Teachers automatically default to the Teachers Standards but the All tick box allows other Standards to be available within the record if required.
2. Click on the New icon within Objectives to set Targets
3. Click on the New icon within Observations on progress against the targets

Staff Personnel Record

4 Reviews

Current

Date	Type	Reviewer	Overall Grade	Status
------	------	----------	---------------	--------

Previous

Date	Type	Reviewer	Overall Grade	Status	Appraisal Period
------	------	----------	---------------	--------	------------------

5 Line Management Details

Line Manager - Blacker, Mr Adrian

Staff who report to : Mary Anderson

Staff Name	Staff Code	Start Date
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Appraisers

Staff Name	Staff Code	Start Date
Blacker, Mr Adrian	AB	05/08/2013

Appraisees

Staff Name	Staff Code	Start Date
------------	------------	------------

4. Click on the New icon to record Reviews
5. Information is pulled through from the Line Management Structure, to indicate who is responsible both to and for this staff member.

Set Objectives

The screenshot shows a web-based form titled "Add Objective for Mary Anderson". At the top, there are buttons for "Save" and "Undo", and links for "Help" and "Close". Below these are four tabs: "Details" (selected), "Evidence", "Objective Review", and "Author Details". The "Details" tab contains several fields: "Appraisal Period" (a dropdown menu showing "Period for Academic Year 2012/2013"), "Set By" (a dropdown menu showing "Blacker, Mr Adrian"), "Set On Date" (a text box with "14/08/2013" and a calendar icon), "Summary" (a single-line text box), "Detail" (a multi-line text box with a vertical scrollbar), "Success Criteria" (a multi-line text box with a vertical scrollbar), "School Objective" (a dropdown menu), "Professional Standard" (a dropdown menu), and "Planned Review Date" (a text box with a calendar icon).

Enter the details of the Target/Task, using the Summary, Detail and Success Criteria fields (which are free text). You can link this target to one School Object and Professional Standard at present – this may change in future versions. An optional Review date can be entered also.

Set Objectives

Add Objective for Mary Anderson

Save Undo Help Close

1 Details 2 Evidence 3 Objective Review 4 Author Details

2 Evidence

Evidence	Attachment	Summary	Type	Owner	Last


New
Open
Delete

Linked CPD Entries

Type	Summary	Date	Author

Open

3 Objective Review

Actual Review Date  Achievement Status

Comments

4 Author Details

Created By	<input type="text"/>	Created On	<input type="text"/>
Last Updated By	<input type="text"/>	Last Updated On	<input type="text"/>

Evidence can be entered direct here or linked from the CPD Panel against the Staff record.

Details of the Review can be entered with an overall status.

This Status pick list is fully customisable by the school.

Record Observations

Add Observation for Mary Anderson

Save Undo Help Close

1 Details 2 Staff 3 Observers 4 Observation Results 5 Author Details

1 Details

Type	Lesson Observation	Appraisal Period	Period for Academic Year 2012/2013
Date	Lesson Observation	Duration	
Class	Work Analysis	Subject	
Present/NOR	0 / 0	Male/Female	0 / 0
SEN/FSM/PPI	0 / 0 / 0	Ability	

2 Staff

Staff Member: Mary Anderson

Other Staff: Staff Name [New] [Delete]

3 Observers

Main Observer: [New] [Delete] External Observer: [New] [Delete]

Other Observers: Observer Name [New] [Delete]

Select the type, date, duration and period at the top of the screen.

If applicable, select the class (taken from registers assigned to this teacher) and the analysis boxes will be populated.

Enter details of other staff present as necessary.

Record Observations

4 Observation Results

Summary

Results

Standard/Aspect	OU	GO	RI	INAD
<input checked="" type="checkbox"/> Set high expectations which inspire, motivate and challenge <ul style="list-style-type: none"> Establish a safe & stimulating environment for pupils Set goals that stretch & challenge all pupils Demonstrate positive attitudes, values & behaviour expected 				
<input checked="" type="checkbox"/> Promote good progress and outcomes by pupils				
<input checked="" type="checkbox"/> Demonstrate good subject and curriculum knowledge				
<input checked="" type="checkbox"/> Plan and teach well-structured lessons				
<input checked="" type="checkbox"/> Adapt teaching to respond to the strengths and needs of all				
<input checked="" type="checkbox"/> Make accurate and productive use of assessment				
<input checked="" type="checkbox"/> Manage behaviour effectively				
<input checked="" type="checkbox"/> Fulfil wider professional responsibilities				

Overall Grade

Evidence

Attachment	Summary	Type	Owner	Last M

Status

5 Author Details

Created By

Created On

Last Updated By

Last Updated On

Enter supporting details in the Summary box.

Enter ticks to indicate grade achieved at Standard or Aspect level

Set the overall Grade at the bottom and attach Evidence if applicable.

Author details are automatically captured for audit purposes

Undertake Reviews

Add Review for Mary Anderson

Save Undo Help Close

1 Details 2 Objectives and Observations 3 Results 4 Author Details

1 Details

Appraisal Period: Period for Academic Year 2012/2013 Type: Annual

Reviewer: Blacker, Mr Adrian Appraiser: Blacker, Mr Adrian

Line Manager: Blacker, Mr Adrian Review Date: 14/08/2013

Staff Roles: Assistant Head

Current Point on Scale: 18.0

Recommended Pay Progression:

2 Objectives and Observations

Objectives

Summary	Status	Actual Review
Promoting Healthy Diet		

Open

Observations

Date	Type	Observer	Overall Grade	Status
14/08/2013	Lesson Observati...	Blacker, Mr Adrian		Draft

Open

Type is mandatory but schools can set up as many types as required.

Details default to current Appraisal Period, along with current spinal point.

Recommendations for Pay Increases are recorded here.

Objectives and Observations can be accessed here on a read-only basis.

Undertake Reviews

3 Results

Summary

Results

Standard/Aspect	OU	GO	RI	INAD
▢ Set high expectations which inspire, motivate and challenge				
▢ Establish a safe & stimulating environment for pupils				
▢ Set goals that stretch & challenge all pupils				
▢ Demonstrate positive attitudes, values & behaviour expected				
▢ Promote good progress and outcomes by pupils				
▢ Demonstrate good subject and curriculum knowledge				
▢ Plan and teach well-structured lessons				
▢ Adapt teaching to respond to the strengths and needs of all				
▢ Make accurate and productive use of assessment				
▢ Manage behaviour effectively				
▢ Fulfil wider professional responsibilities				

Overall Grade

Evidence

Attachment	Summary	Type	Owner	Last
<input type="text"/>				

New Open Delete

Status

4 Author Details

Created By Created On

Last Updated By Last Updated On

The overall results can be set at Standard or Aspect level, with a Summary allowing greater detail.

The Overall Grade and Evidence can be completed as necessary.

Once the Status has been set to Ready for Review, the record is set to Read-Only and cannot be amended further.

New CPD Panel

Personnel Details | Professional Details | Employment Details | Appraisals

Employee Details : Mary Anderson

Save | Undo | Print | Suspend

1 Professional 2 Continuing Professional Development

1 Professional

HLTA Status ☐ TA Status ☐

HLTA Date QTS Route Annual College Exit - Post graduate course

Training

Title	Start Date	End Date	Completed
Academy Status	05/11/2012	05/11/2012	Yes
Academy Status	04/01/2012	04/01/2012	Yes
Recording Student Assessments	31/10/2011	31/10/2011	Yes
School Leadership and Management	17/10/2011	17/10/2011	Yes
Child Protection Policy	01/09/2011	01/09/2011	Yes
Child Protection Course	01/09/2011	01/09/2011	Yes

Qualifications

Qualification	Title	Date Awarded	Level
BA Hons	BA	07/07/1988	Other First Degr...
PGCE	PGCE	31/08/1990	Post-graduate In...

2 Continuing Professional Development

Current

Type	Summary	Date	Author

Previous

Type	Summary	Date	Author	Appraisal Period

Staff can access and update their own Appraisal records and provide evidence via a CPD panel under Professional Details.

They can record text or attach documents as necessary.

Staff members will need to be in the Line Management Structure or manually added to a Staff Performance Permissions Group to see this panel.

Costs

In complying with fair competition regulations, Capita are charging a one-off fee for this release, with the annual cost being part of the annual maintenance charge for Personnel in the future.

Price	School Phase/Type
£200	Primary, Special, Middle deemed Primary
£500	Secondary, Middle deemed Secondary

The Summer Release 2 should be available from mid-September but this date may be subject to change.

To order your licence, please contact Capita direct.

How to Order

To purchase this software, the school will need to sign a contract for the one off purchase.

Capita will require the following information :

School Name	Address, Town, Postcode
Contact Person	Job Title
DfE Number	Number on Roll
Email address	

The school will need to return the contract in full with a Purchase Order number, signature, name, position and date on the front page. The contract can be faxed back to Capita or scanned and emailed to robert.tanner@capita.co.uk.

Installation will not be available before 27th September, unless advised otherwise by Scomis.

Software & Appraisal Skills Training



SIMS Staff Performance - £115 per person (SLA rate) 09.30 – 12.30

To tie in with the Department of Education's drive to link pay progression and the launch of the new Personnel Module in SIMS, Scomis have developed a new learning programme to support schools in getting up to speed quickly with the new SIMS module on Personnel.

What will it cover?

- Setting up a line management structure
- Setting up and configuring permissions
- Customising lookups and settings
- Recording and managing staff objectives
- Recording and managing observations
- Recording and managing reviews
- Reporting on Staff Performance

www.devon.gov.uk/scomis



Contact us on 01392 385300 or scomis@devon.gov.uk for further information