

Spring 2014 Upgrade - Personnel Changes

To change from a Pay Award service term structure to a Salary Range service term structure, you will need to apply Patch 18881. Please log a call with the Scomis Service Desk to request this patch if you are a hosted school. This will create a checkbox in Panel 1: Service Term within the Pay Related area of SIMS.

The screenshot shows the SIMS .net: Green Abbey School interface. The top menu bar includes Focus, Reports, Routines, Tools, Window, and Help. Below the menu is a toolbar with various icons. The main window is titled 'Find Service Term' and contains a 'Service Term Details for Teachers' form. The form has a tabbed interface with tabs for 1 Service Term, 2 Pay Awards, 3 Pay Awards by Salary Range, 4 Allowances, 5 Posts, 6 Superannuation, and 7 Financial Sub-groups. The '1 Service Term' tab is active. The form contains the following fields and controls:

Field	Value	Field	Value
Code	TE	Salaried	<input checked="" type="checkbox"/>
Description	Teachers	Hours Worked/Week	32.5000
Award by Salary Range	<input type="checkbox"/>	Term Time Only Possible	<input type="checkbox"/>
Spinal Progression	<input checked="" type="checkbox"/>	Weeks Worked/Year	52.14300
Increment Month	September	Teacher	<input checked="" type="checkbox"/>
		Hidden	<input type="checkbox"/>

The 'Award by Salary Range' checkbox is highlighted with a red circle.

When you tick this box, you will see the following message box. Please read this carefully – please call our Helpdesk on 01392 385300 if you have any areas that require further explanation on any areas.

The screenshot shows the SIMS Conversion Process dialog box. The dialog box contains the following text:

Conversion Process

This process will need to be completed from start to finish and it is recommended that you read the documentation before proceeding. If you continue the following processes need to take place:

- You must define at least one new Range Type, Salary Range and Pay Award for this Service Term.
- Upon Saving the Salary Range definitions, you will be prompted to map the new Range Type(s) to existing active Scale definitions. This will enable the system to convert your current and any future contracts to the corresponding Range Type. If there is a one to one relationship between active Scale definition and Range Type, this will happen automatically.
- When the mapping process is complete and confirmed, you will be returned to the Service Term Details screen and you must select Save again.
- At this point the system will convert all of your current and future contracts to the mapped Range(s) inserting the appropriate salary value.

You can Cancel the mapping process but this will have the effect of preventing you from saving the new Salary Range definitions.

Recommended Actions

It is recommended that the following actions are taken prior to switching from existing Scale based Pay Awards to Range based Pay Awards

- Ensure that your Active scales and values against points have been maintained accurately using the latest published pay awards. NB Active Scales - this refers to Scales which are currently in use against current and future contracts.
- Print and retain the following Personnel report which can be used for comparison after conversion Reports | Personnel | Salary Information, together with any other reports you feel are necessary.
- If you have a third party supplier who accesses your Personnel Data, such as a payroll provider, you must consult with them prior to taking this action to ensure they have made amendments to their systems, and are able to handle the changes that will occur as a result of the conversion process.

If your payroll provider, for example, is unable to accept the salary range awards, your staff may be paid inaccurately or may not be paid at all. NB Payroll provider is an example of third party suppliers. Other systems may be affected.

☐ I have read and understood the above.

The 'I have read and understood the above.' checkbox and the 'Accept' button are highlighted with red circles.

This action is irreversible so once you have migrated a Service Term to Salary Range, then you cannot revert back to Point Scales. You would need to either rollback to the latest back up or create a whole new Service Term and move all your affected staff across. This is the reason for the warning message.

When and if you are happy to do so, tick the box to confirm that **you have read and understood the terms**, and click on Accept to make the change.

You will then see the screen change to the following. The Pay Awards box will collapse and a new Pay Awards by Salary Range will become available.

The screenshot shows the SIMS .net: WATERS EDGE PRIMARY SCHOOL interface. The 'Find Service Term' window is open, displaying 'Service Term Details for Teachers'. The 'Award by Salary Range' checkbox is checked, and the 'Effective 1st' date is set to 01/02/2014, which is circled in red. The 'Pay Awards by Salary Range' section is expanded, showing a table for Types and a table for Salary Range.

You must set the 1st of either the current month or the next month to be the changeover date. This will be used to end the point's amount against each person and the 1st date will be used for the start of the specified amount.

You must click on New next to Types to set up a new Salary Range Type, and then click on New next to the Salary Range box to enter the start date, the minimum and the maximum amounts for each Type.

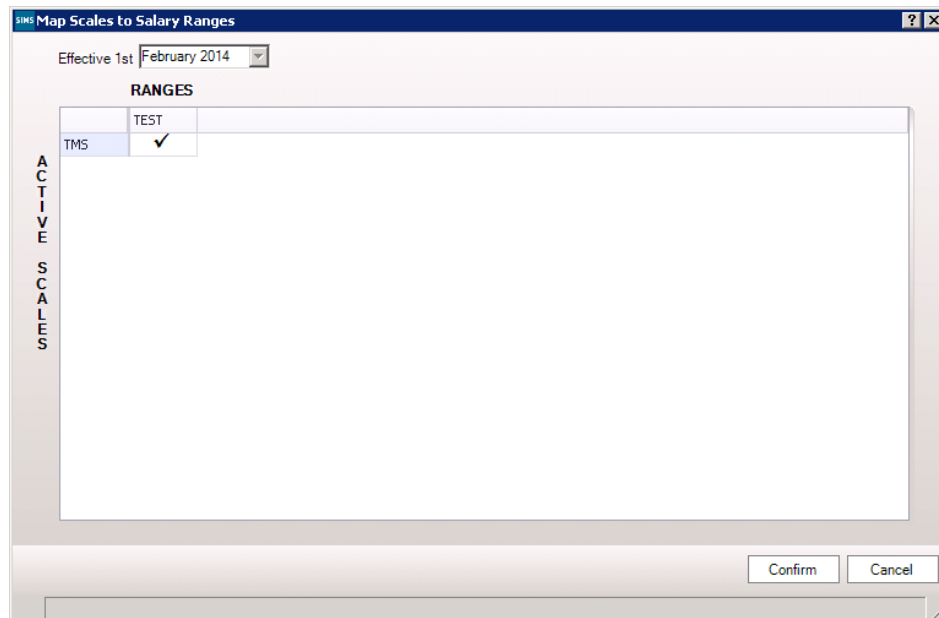
The screenshot shows the 'Add New Salary Range Type for Teachers' dialog box. The 'Detail' section contains the following fields:

- Code: TEST
- Description: Test
- Hidden: ☐
- PayScale: Teachers Main
- Regional Pay Spine: Rest of England

The screenshot shows the 'Add New Salary Range for Test' dialog box. The 'Detail' section contains the following fields:

- Minimum Amount: 21804
- Maximum Amount: 31868
- Award Date: 01/02/2014

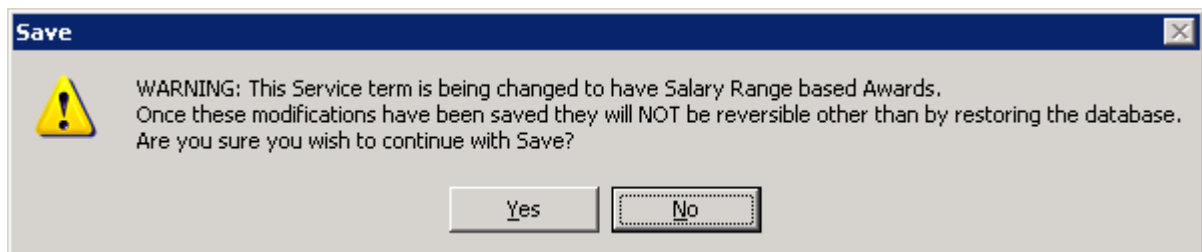
When you are happy with the information input, click on Save. This will then make SIMS check the active scales (i.e. staff members with active contracts within this Service Term) and ask you to confirm the mapping. If you have set up just one Type, then everything will be mapped for you. If you have more Types, then you will be asked to specify which ones are mapped.



The dialog box titled "SIMS Map Scales to Salary Ranges" has a dropdown menu for "Effective 1st" set to "February 2014". Below this is a section labeled "RANGES" containing a table with two columns: "ACTIVE SCALES" and "TEST". The first row shows "TMS" under "ACTIVE SCALES" and a checked box under "TEST". At the bottom right are "Confirm" and "Cancel" buttons.

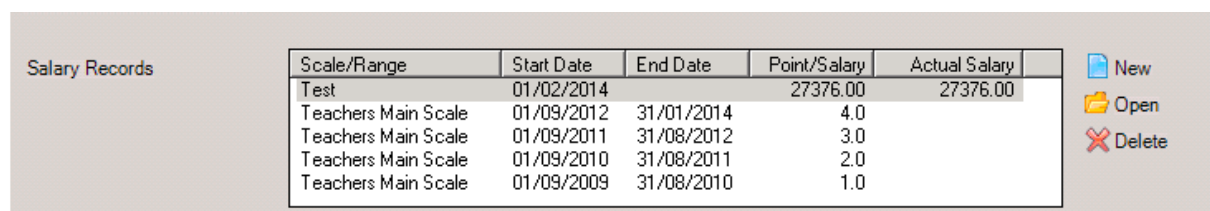
ACTIVE SCALES	TEST
TMS	<input checked="" type="checkbox"/>

Once you have confirmed you are happy with the mappings, click on Confirm. You will then be shown the following message box.



A "Save" dialog box with a yellow warning icon. The text reads: "WARNING: This Service term is being changed to have Salary Range based Awards. Once these modifications have been saved they will NOT be reversible other than by restoring the database. Are you sure you wish to continue with Save?". At the bottom are "Yes" and "No" buttons.

If you click on Yes, the change will be made and the staff records will be amended accordingly. SIMS will calculate their salary amount from the point they are currently on. Individual pay will be shown as the following (from Employment Details – Contract)

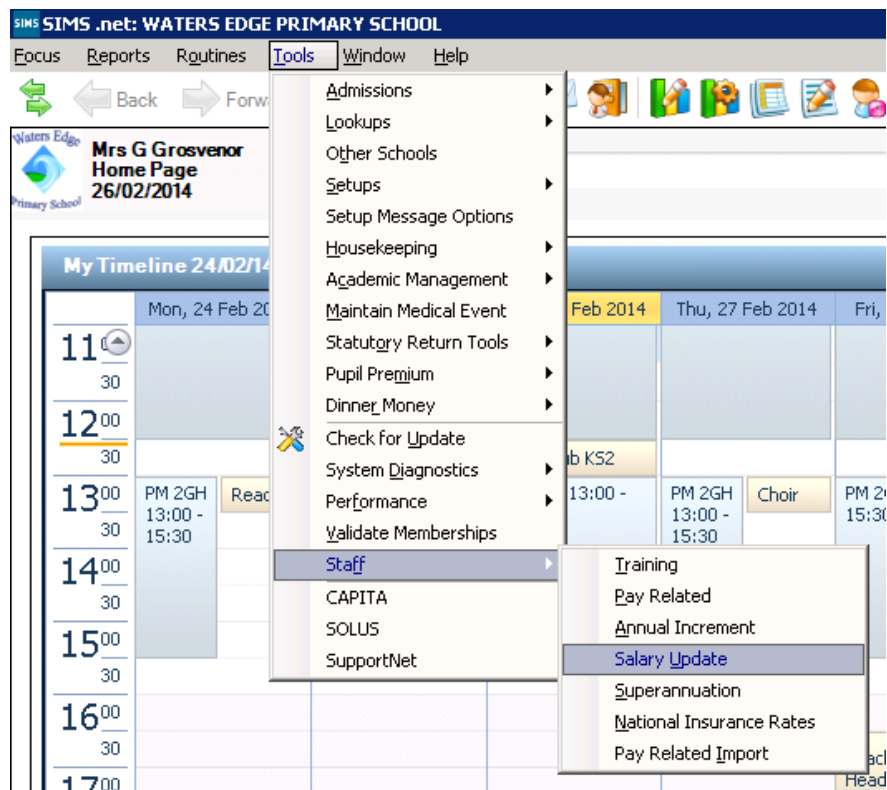


The "Salary Records" section displays a table with salary history. To the right of the table are three icons: "New" (blue document), "Open" (yellow folder), and "Delete" (red X).

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Test	01/02/2014		27376.00	27376.00
Teachers Main Scale	01/09/2012	31/01/2014	4.0	
Teachers Main Scale	01/09/2011	31/08/2012	3.0	
Teachers Main Scale	01/09/2010	31/08/2011	2.0	
Teachers Main Scale	01/09/2009	31/08/2010	1.0	

You will see that the previous point history is available and SIMS has ended the contract the day before our selected Start Date. The new Salary Range Type has been added with the actual salary amount against Point 4 being brought in as the pay amount. This could be amended via the Open option if necessary.

You can then update the Salaries each year through the new routine, Salary Update.



This will then bring you into this screen.

[illegible]

If you select your Service Term, Year and Award month, using the filters at the top of the screen and Search, you will get a list of staff members and their details.

SIMS .net: WATERS EDGE PRIMARY SCHOOL

Focus Reports Routines Tools Window Help

Back Forward

Apply Salary Update to Staff

Apply Select All Clear All

1 Salary Update

1 Salary Update

Service Term: Teachers Award Year: 2014 Award Month: September Search

Staff Name	Range Type	Start Date	End Date	Annual Salary	Actual Salary	New Annual Salary	New Actual Salary	New Start Date	Notes
<input type="checkbox"/> Bates Belinda	TEST	01/02/2014		27376.00	27376.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Boswell Jennifer	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Brown Charmaine	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Chard Vicky	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Fortune Shirley	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Holyoake Gerald	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Kent Amelia	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Lawson Lisa	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Lester Sabina	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Myles Kevin	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Orton Tanya	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Perrin Richard	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Stevens Emma	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Turnbull Davina	TEST	01/02/2014		25420.00	25420.00	.00	0.00	01/09/2014	

Range Types

Range Type	Range Description	Minimum Amount	Maximum Amount
TEST	Test	21804.00	31868.00

Select the staff member you wish to edit by putting a tick in the box next to their name. This then enables you to input the new amount in the New Annual Salary column.




1 Salary Update

Service Term: Teachers Award Year: 2014 Award Month: September Search

Staff Name	Range Type	Start Date	End Date	Annual Salary	Actual Salary	New Annual Salary	New Actual Salary	New Start Date	Notes
<input type="checkbox"/> Bates Belinda	TEST	01/02/2014		27376.00	27376.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Boswell Jennifer	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Brown Charmaine	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Chard Vicky	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Fortune Shirley	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Holyoake Gerald	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Kent Amelia	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Lawson Lisa	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Lester Sabina	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Myles Kevin	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Orton Tanya	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Perrin Richard	TEST	01/02/2014		29533.00	29533.00	.00	0.00	01/09/2014	
<input type="checkbox"/> Stevens Emma	TEST	01/02/2014		31868.00	31868.00	.00	0.00	01/09/2014	
<input checked="" type="checkbox"/> Turnbull Davina	TEST	01/02/2014		25420.00	25420.00	26000.00	26000.00	01/09/2014	

Repeat as necessary and then Click on Apply to make the changes to the staff records.


Apply Salary Update to Staff


 Apply  Select All  Clear All


This will then end the current salary on the last day of the month before and add a new line with the new salary details, starting from the 1st of the Award Month.

Salary Records

Scale/Range	Start Date	End Date	Point/Salary	Actual Salary
Test	01/09/2014		26000.00	26000.00
Test	01/02/2014	31/08/2014	25420.00	25420.00
Teachers Main Scale	01/09/2012	31/01/2014	3.0	
Teachers Main Scale	01/09/2011	31/08/2012	2.0	
Teachers Main Scale	01/09/2010	31/08/2011	1.0	

 New

 Open

 Delete

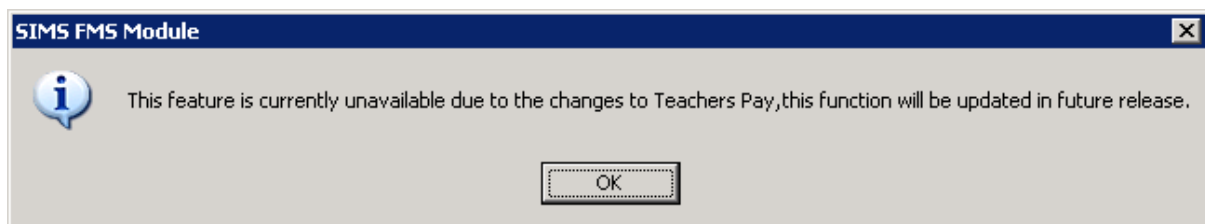
These changes will then feed through to FMS and show the correct commitment for the future.

FMS Spring 2014

- Salary Projections
- Individual Salary Payments
- Block Payments

To accommodate Salary Ranges within SIMS Personnel, the labels within these screens will change from Scale to Scale/Range - Resource Number 22051 illustrates these label changes.

NB: Teachers Salary Calculator is no longer available in FMS, once you enable and use a Salary Service Term. After the Spring Upgrade, clicking the shortcut will display the following message:



Following feedback from customers regarding the initial planned disabling of Salary Calculator and Budget Planner, Capita have developed a revised solution that enables these menu routes to remain available after the Spring 2014 upgrade.

However, once the licence has been applied to SIMS Personnel to use Salary Ranges and a Service Term has been converted and data has been passed to FMS, the menu routes Focus | Personnel Links | Salary Calculator and Focus | Budget Planning will not be available.

Capita are planning to support Salary Ranges in these two menu routes by re-enabling Salary Calculator in the Summer 2014 Upgrade and Budget Planning in the Autumn 2014 Upgrade.