

Producing the School Workforce Return

If you have any complex queries on using your MIS (SIMS) system to complete your Census return, please contact the **Capita.ict** helpdesk on 01604 824999.

Access Rights for Creating a School Workforce Census return

Adding a member of staff to the **Returns Manager** permissions Group in System Manager. In order to create a School Census return you need to be

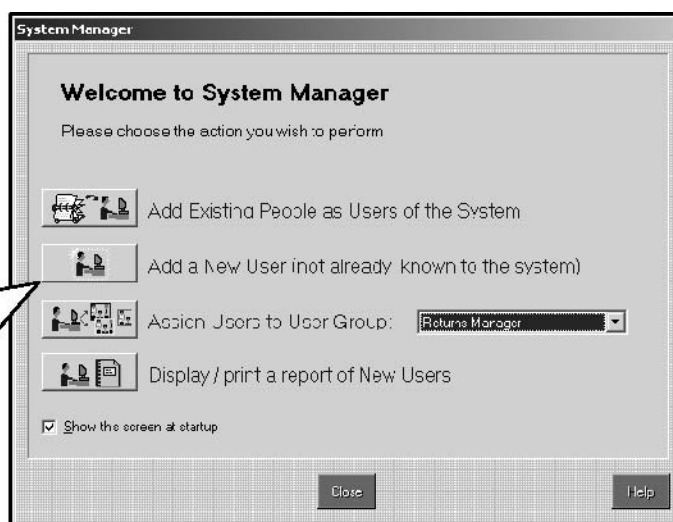
Log into SIMS .net with a user who has access rights to System Manager and from the shortcuts at the left hand side of the screen select **System**.



logged into SIMS .net as a user who is a member of the **Returns Manager** Group as defined in System Manager. In order to resolve School Workforce Census errors you will also require access to Personnel 7 and be a member of the **Personnel Officer** Group as defined in System Manager

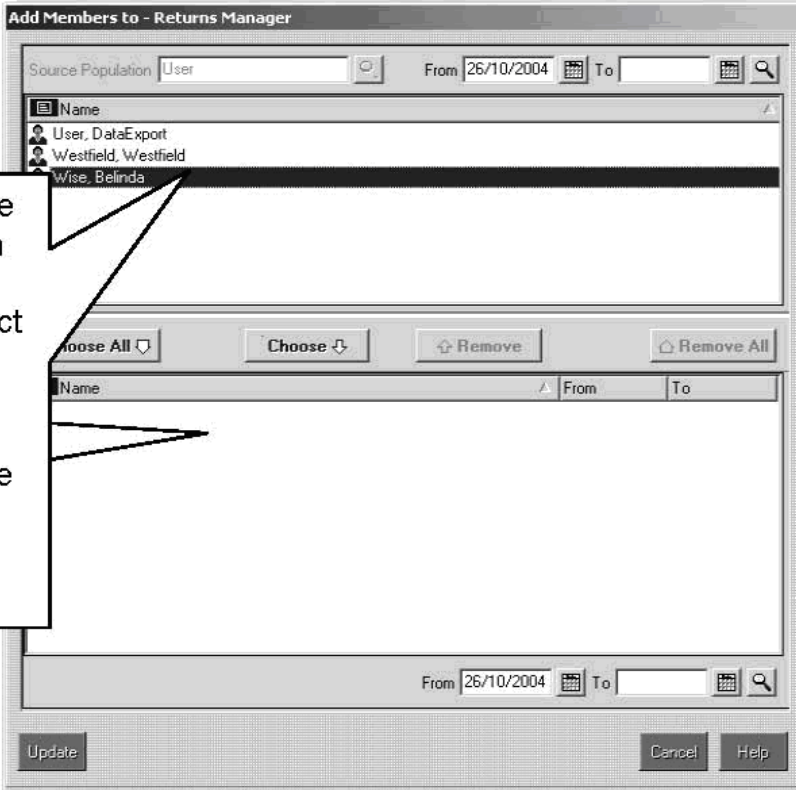
NB. The user must have already been activated as an SQL module user through the top option

From the Welcome Screen select the appropriate group from the drop down list on the right hand side of the **Assign Users to User Group**. Then select the active button to the left hand side of the row.



'Add existing people as users of the system'.

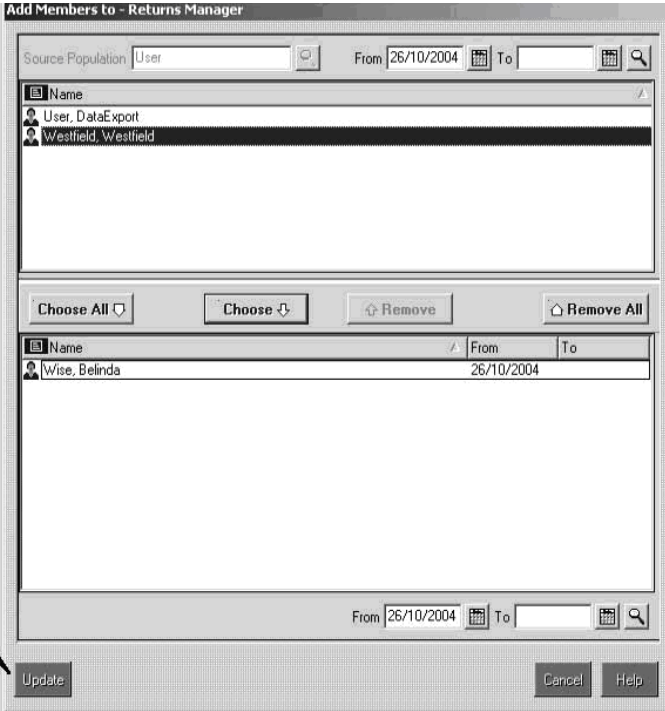
NB. The user must have already been activated as an SQL module user through the top option 'Add existing people as users of the system'.



In the top half of the screen, left click on the name of the person(s) and select **Choose**.

This will move the users name into the bottom window.

The screenshot shows a window titled "Add Members to - Returns Manager". At the top, there is a "Source Population" dropdown set to "User" and a date range "From 26/10/2004" to "To". Below this is a list of names: "User, DataExport", "Westfield, Westfield", and "Wise, Belinda". The "Wise, Belinda" entry is highlighted. Below the list are buttons: "Choose All", "Choose", "Remove", and "Remove All". Below these buttons is another list with columns "Name", "From", and "To". The "Wise, Belinda" entry is now present in this list with "26/10/2004" in the "To" column. At the bottom of the window are "Update", "Cancel", and "Help" buttons.



Once the details are correct select **Update** to refresh the membership of Group

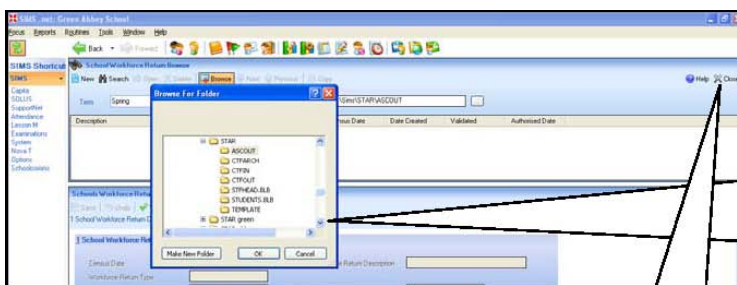
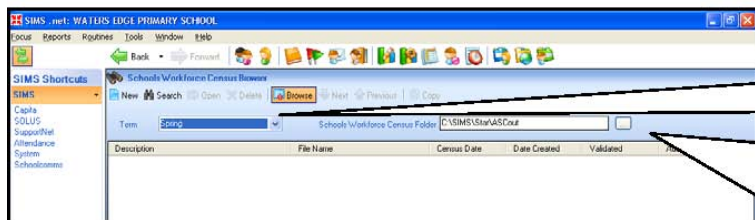
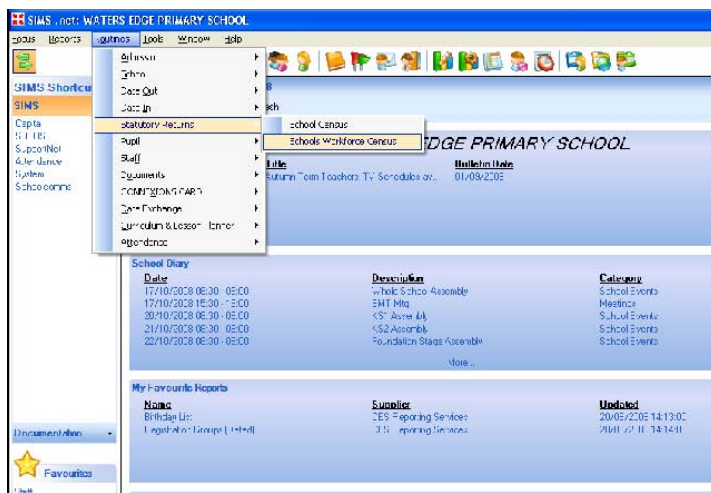
The screenshot shows the same window as above, but now the "Wise, Belinda" entry is no longer highlighted in the top list. The "Update" button at the bottom left is highlighted. The bottom list still shows "Wise, Belinda" with "26/10/2004" in the "To" column.

IMPORTANT INFORMATION

There may be a 24 hour delay before the new permissions take effect.

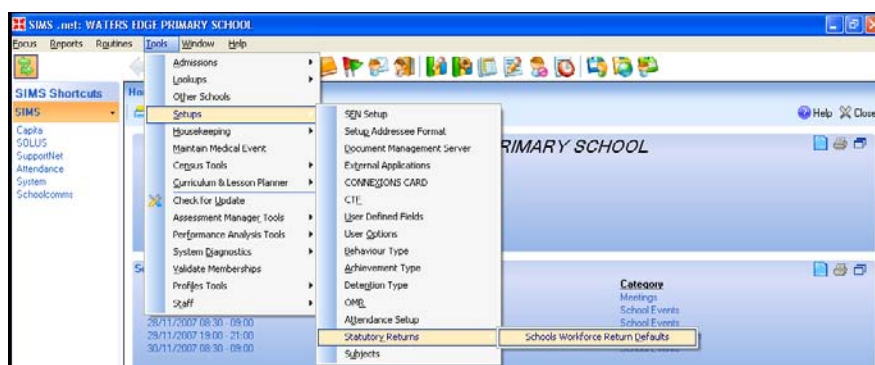
Creating a folder to save the School Workforce Return

Go to Routines | Statutory Returns | School Workforce Return

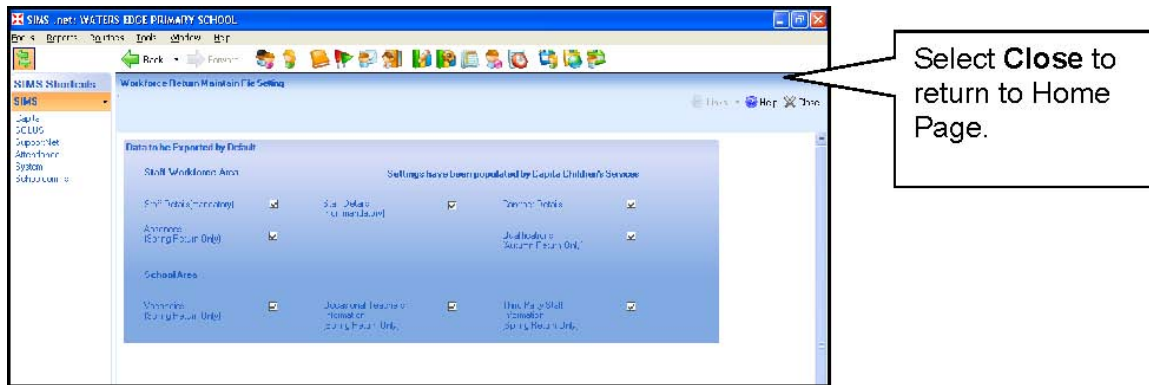


Select OK.

Settings for Information to be included in Return Go to Tools | Setups | Statutory Returns | School Workforce Return Defaults



For the Spring 2009 School Workforce Return all fields should be ticked. This is a default set by CCS

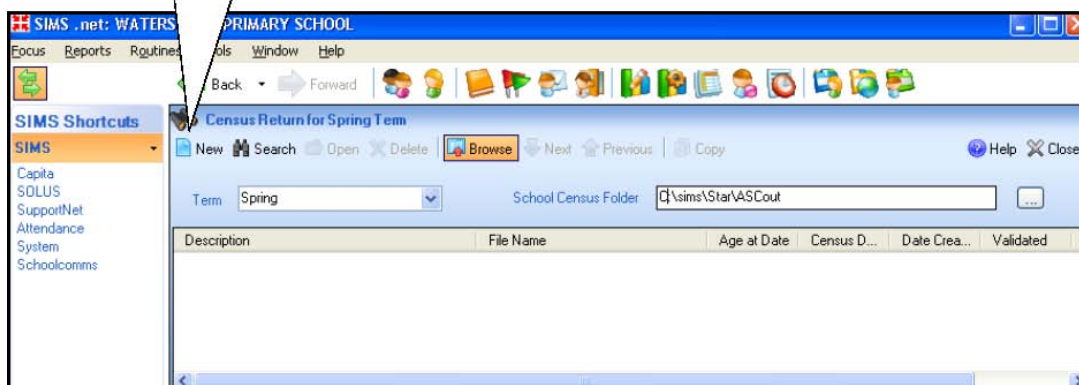


Producing the Return

Go to **Routines | Statutory Returns | School Workforce Census**



Select **New**



When you create the Spring return there will be six panels to complete. In order to see each of the panels you can either use the hyperlinks at the top of the page or the scroll bar on the right hand side of the return.

Schools Workforce Census Browser

Schools Workforce Census Details - New Return

1 Schools Workforce Census Details 2 School Information 3 Absent on Census Day 4 Vacancies 5 Occasional Teachers Information 6 Third Party Staff Count

1 Schools Workforce Census Details

Census Date: 15/01/2009 Schools Workforce Census Description: Spring Workforce Return 09

Workforce Return Type: Spring 2009

Absence Start Date: 01/01/2008 Absence End Date: 31/12/2008

Continuous Contracts Start Date: 01/09/2008 Continuous Contracts End Date: 31/12/2008

2 School Information

LA Number: 820 Establishment Number: 2001

School Type: Infant and Junior School 5-11

School Phase: Primary

School Name: WATERS EDGE PRIMARY SCHOOL

School Detail Calculate All Details

Census Date must be set to **15/01/2009**

Check School Information is correct, if not select **School Detail** and amend as required.

Select **Calculate all Details**

3 Absent on Census Day

Staff Surname	Staff Forename	Staff Code	Absent On Census Day
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4 Vacancies

Post Number	Post	Post Name	Subject Code	General Subject	Tenure	Temporarily Filled	Advertised
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5 Occasional Teachers Information

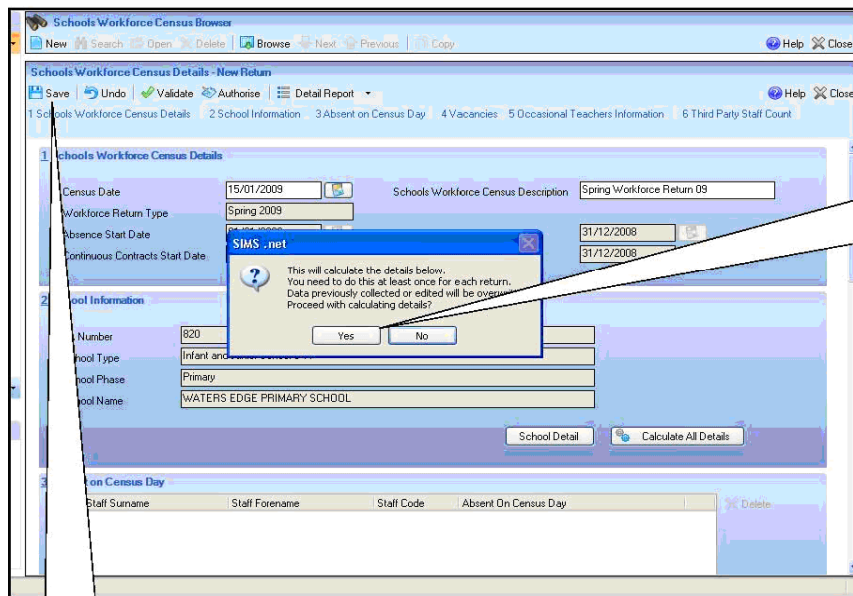
Category Description	Count
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Number of Occasional Teachers(Total)

6 Third Party Staff Count

Role	Count
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Number of Third Party Staffs(Total)

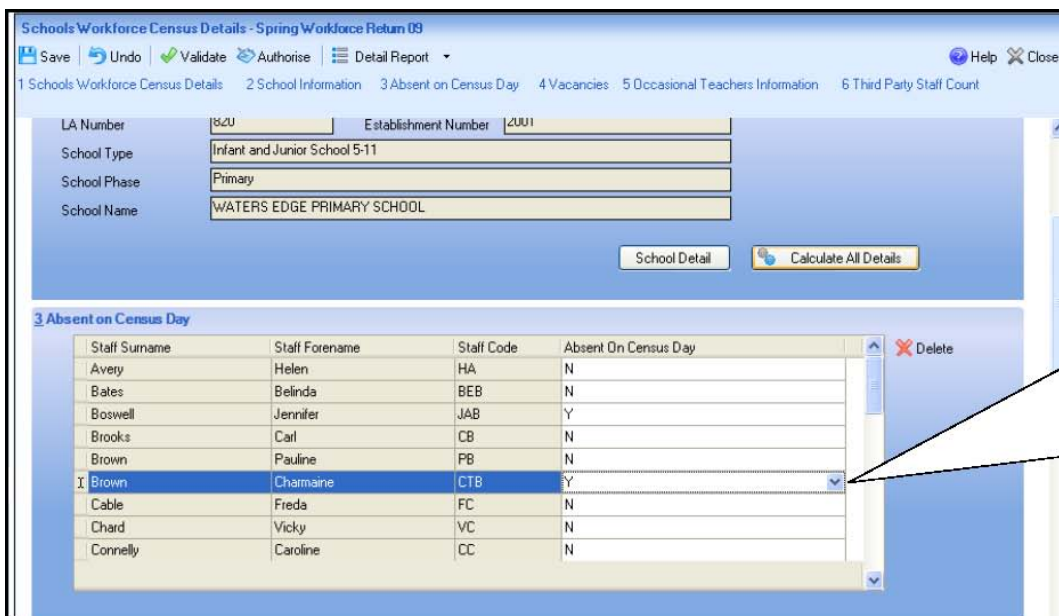


The first time you create a SWC return you must select Yes to populate the return.

Select Save

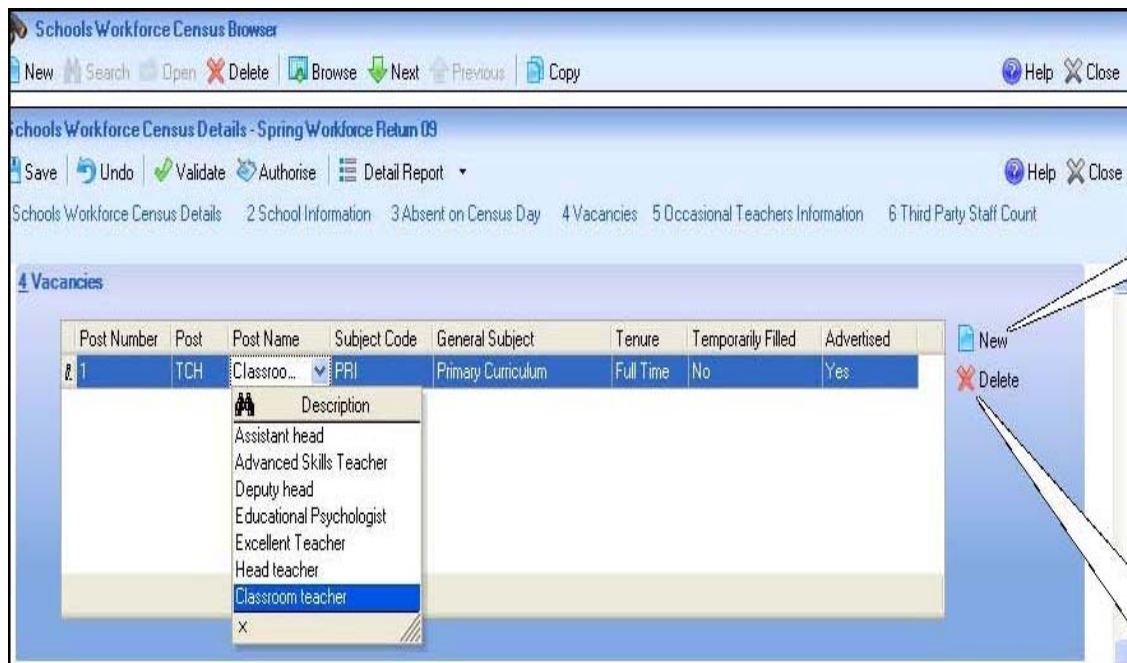
The return will be populated with any data that is already recorded in Sims .net

Panel 3 absent on Census Day



If any staff are absent on SWC day (15.01.2009) and this has not yet been recorded in P7. Click on the N and from the drop down option change it to a Y.

Panel 4 Vacancies



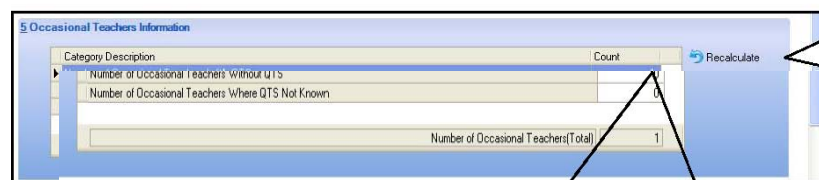
To record a teaching vacancy Select **New**.

Click into each column and select the appropriate option for the vacancy being recorded.

If a vacancy is recorded in error it can be removed by highlighting it and selecting **Delete**

Panel 5 Occasional Teacher Count

If a Service Agreement has already been set up in P7 for any Occasional Teachers in school on SWC day (15.01.2009) this panel will already be



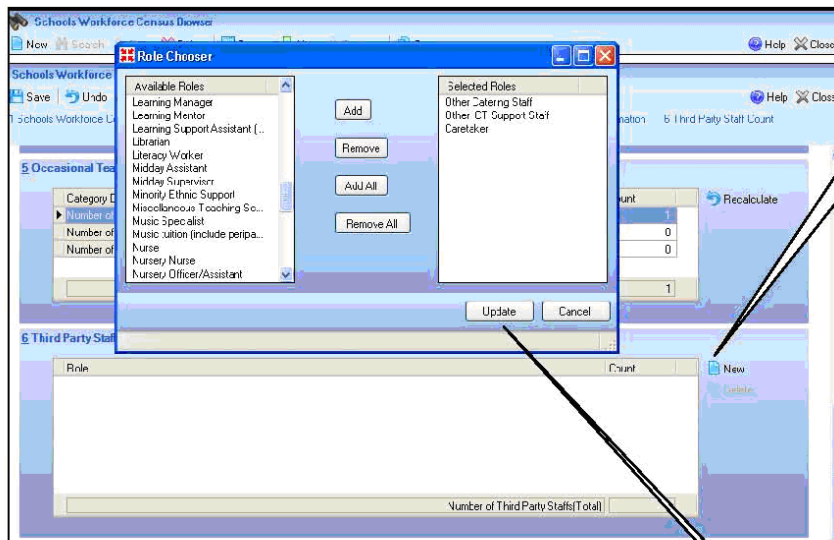
Should a Service Agreement be added after the SWC return has been created. Selecting **Recalculate** will update the return.

The number of Occasional Teachers can also be recorded manually by clicking into the field and typing in the applicable number.

populated.

Panel 6 Head Count

Schools are required to take a head count of all persons deemed to be 'Third Party Staff' who are working in school on census day.



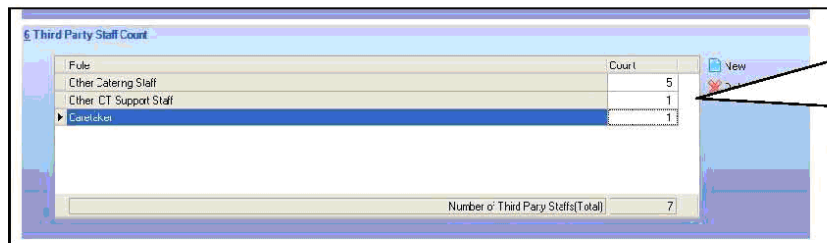
To record Third Party Staff.

Select **New** this will bring up the **Role Chooser** panel.

From the **Available Roles** panel highlight the applicable roles for all Third Party Staff in school and select **Add**. These roles will now appear in the **Selected Roles** panel.

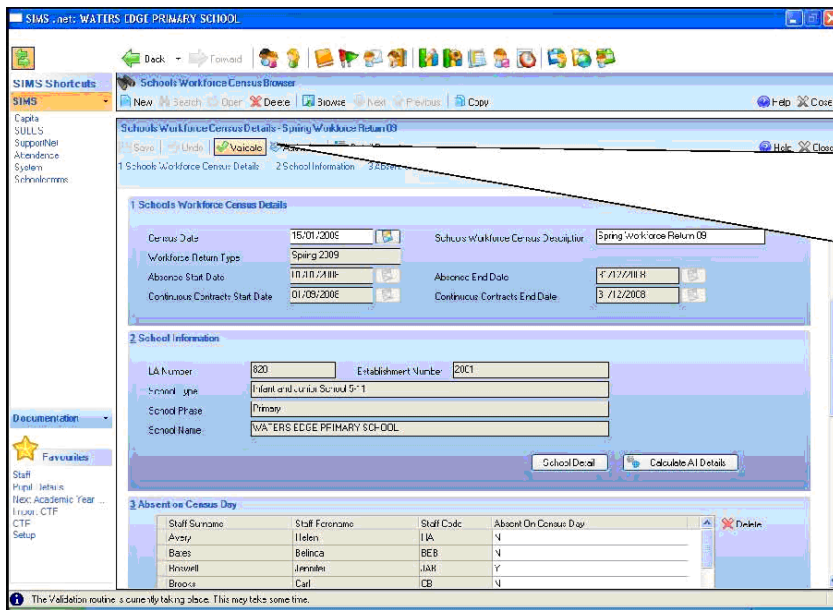
Roles selected in error can be removed by highlighting them and using the **Remove** option.

Select **Update**.



The roles will now appear in Panel 6 and the number of people carrying out each role can be added by clicking into the count field.

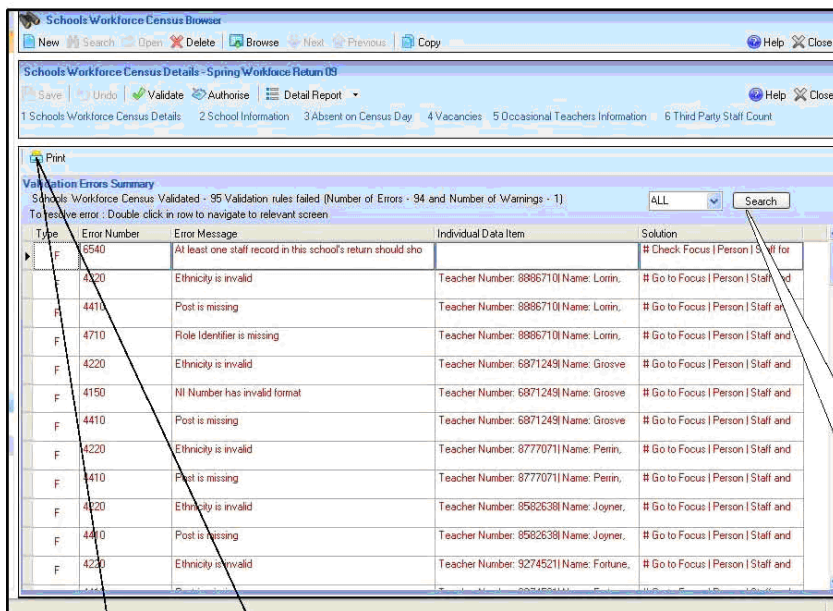
Once the return has been calculated it will need to be Validated to check for any errors or queries.



Select Validate

The following message will appear in the status bar at the bottom left hand side of screen

The validation routine is currently taking place. This may take some time.



You can print the list of errors for ease of checking.

The return will generate Validation Errors and Queries for any data that does not meet the SWC specification.

F = Failure these will show in Red and must be resolved before authorising and sending the return.

Q = Queries these will show in Black. The return can be authorised and sent with these queries provided the school can offer a suitable explanation for them.

You can order the way that you view the errors by clicking in the header of any column or by using the code filter option and selecting **Search**.

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To resolve an error – double click on it and the member of staff's personnel record will open at the panel where the error has occurred. In this example the NI Number is missing.

Employee Details: Paul Hall

1 Save | 2 Personal Information | 3 Personal | 4 Licence | 5 Previous | 6 Current Information | 7 School | 8 Employment Details | 9

2 Personal Information

Date of Birth: 20/07/1963 | NI Number: [Empty]

Priority: [Empty] | Justification Letters: [Empty]

Religion: [Empty] | Disability Number: [Empty]

Account Number: [Empty] | Bank Code: [Empty]

Bank Name: [Empty] | Bank Account Name: [Empty]

Any hybrid vehicles associated with this record: [Empty]

Employee Details: Paul Hall

1 Save | 2 Personal Information | 3 Personal | 4 Licence | 5 Previous | 6 Current Information | 7 School | 8 Employment Details | 9

2 Personal Information

Date of Birth: 20/07/1963 | NI Number: 48367855 F

Priority: [Empty] | Justification Letters: [Empty]

Religion: [Empty] | Disability Number: [Empty]

Account Number: [Empty] | Bank Code: [Empty]

Bank Name: [Empty] | Bank Account Name: [Empty]

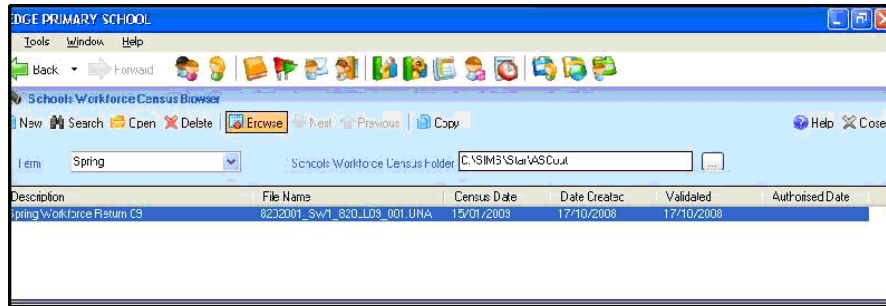
Any hybrid vehicles associated with this record: [Empty]

Enter the missing NI Number

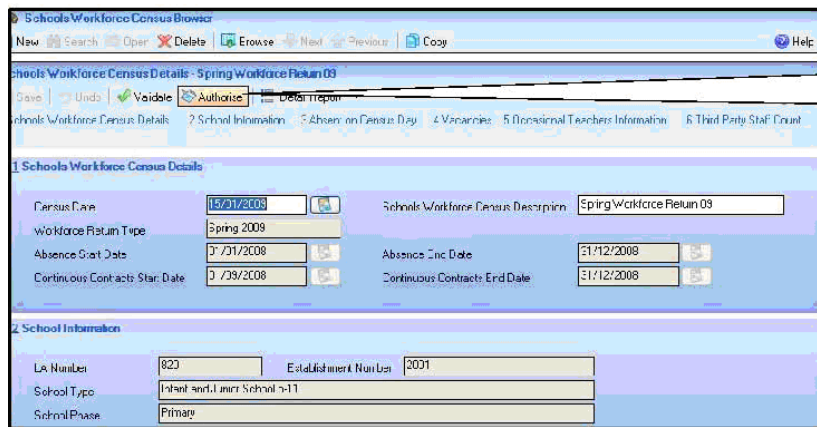
Select **Save** to update the record. Close the record to return to the SWC return.

Once all the errors have been resolved, the detailed reports have been checked and any anomalies cleared, it is necessary to authorise the return before it can be sent.

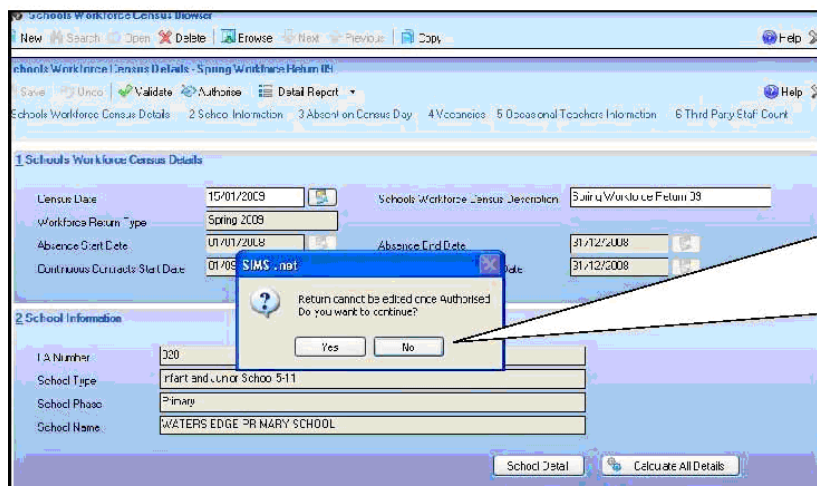
If you have exited from the return. Go to: **Routines | Statutory Returns | School Workforce Census**. Select **Search**



Double Click on the return you wish to authorise.



Select **Authorise** to authorise the return



When you select Yes the return will be authorised.

The following message will appear in the bottom left hand corner of the screen.

Schools Workforce Census authorised successfully

The XML file can now be uploaded to COLLECT.