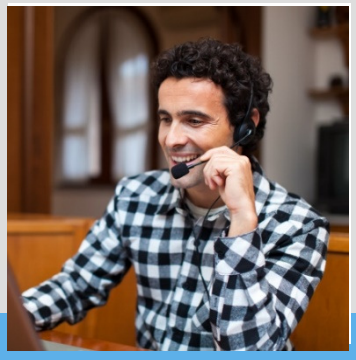
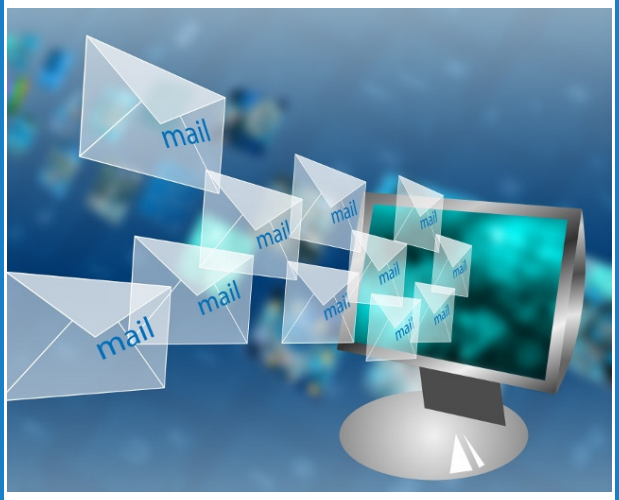
School's e-forms – Leavers





Handbook

Version 2.0 January 2017

School's e-forms user guides

This guide will show you how to complete a leavers form for a member of staff. It covers all possible options, with easy to follow instructions and diagrams.

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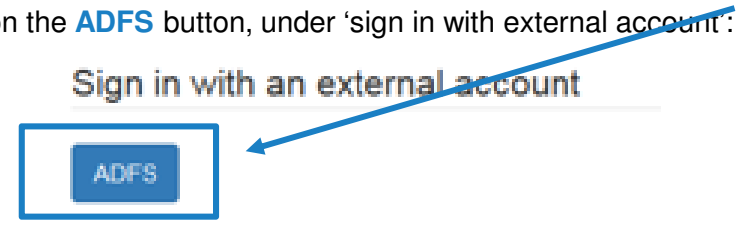
Leavers – accessing the forms

You can access the site using your schools e-learning account, just by using your normal username and password.

If you are not sure if you have one of these accounts, then please contact Schools' Choice.
The site can be accessed under the following link:
https://portal.suffolk.gov.uk/restricted/schoolschoice/hrforms/

1. To login, click on the **ADFS** button, under 'sign in with external account':



2. In the next screen, enter your eLearning email address and password, and click **sign in**

3. If this is the first time you have logged in, you will be asked to complete your personal information. Fill in the fields (any with red asterisks are mandatory), and press **'update':**

4. Once you are logged in you can access the eForms. To do this, click on the following link, or type it in to your address bar:

https://portal.suffolk.gov.uk/restricted/schoolschoice/hrforms/

5. Not sure of your login details? Contact **Schools' choice** who will be able to help**.**

6. Once logged in, you will be directed to the e-forms home page, where you can access all the forms, and view any forms you have saved.

Once logged in, You will be presented with the following options:

Click on one of the buttons to access that particular form. The following sections will explain how to use each of the three types of form, and how to re-open forms you have already created.

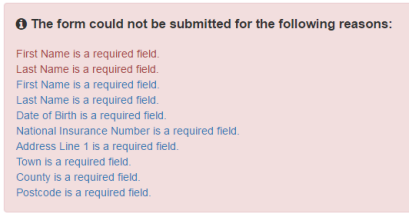
How to move between pages

Once you have completed all the relevant fields, you have two options at the bottom of the page to move on – "Save and continue" or "Save without validation".

You will find these options at the bottom of each page throughout the form. Pressing **save and continue** will check to make sure you have filled in all the required fields, in the right format. The system then saves your progress, and moves on to the next page.

Clicking **save without validating** will move you on to the next page without checking your entries. You won't be able to submit the form without clicking save and continue on each page. Using save without validating is useful if you want to skip through the form and see what information you need about your new member of staff.

What happens if I've filled some of the fields in wrong?
If you've clicked on **save and continue** and haven't quite filled in all the fields correctly, you'll get error messages telling you what you need to do move on.



*If an error message is in **blue**, you can click on it to jump to that particular section.*

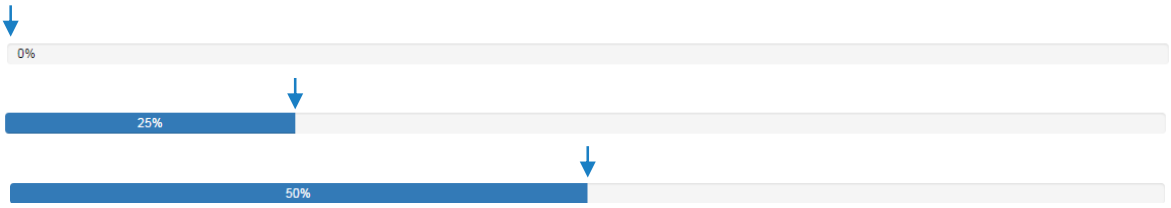
Leavers – accessing the forms

This area of the site allows you to access the leaver form, which can be used for both teaching and support staff.

It is made up of mandatory and non-mandatory fields, depending on the nature of the information; details such as name and date of birth **must** be filled in, however some are not mandatory as they are not always applicable. A red asterisk next to a heading indicated that particular part of the form is mandatory. → Job Title *

1. Click on the **leaver form** on the home page to load the form.

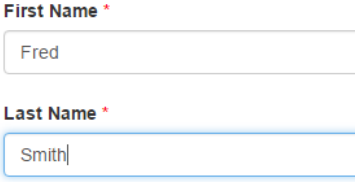
2. The first page of the form will now be displayed. Your progress throughout the form is tracked by a progress bar near the top of each screen:



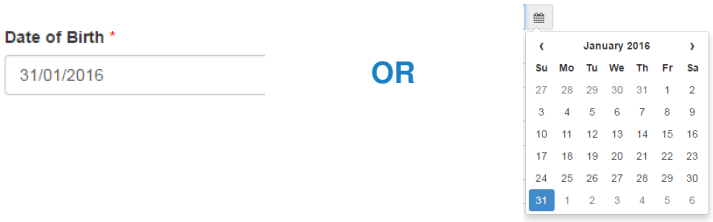
3. Select **support or teaching** under position type, To fill in the correct answer for these types of questions, simply **click on the circle** to the left of the statement you which to select. If done correctly, the circle will change from light grey, to light grey with a darker centre, as above. Remember that selecting either 'support' or 'teaching' will customise the form to show questions that are only relevant to the category selected.

The next set of questions (first name, last name, job title, position reference and employee number) are free test fields, and look like this:

To fill these fields in, simply **click inside the rectangle** with your mouse – the border around it will turn from grey to **blue** to indicate you have selected it, and the cursor inside the box will begin to flash. You can now type in the details as required:

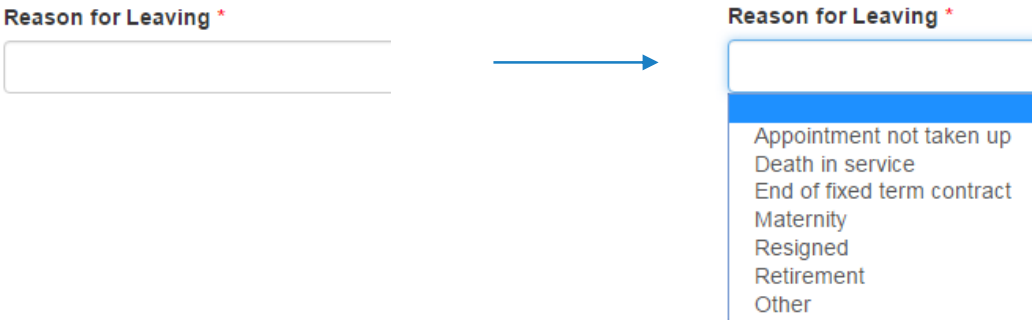


5. Now select the contract end date, and the last day in school for that member of staff. Both of these questions are date fields, and can be completed either by filling in the free text field (in the format dd/mm/yyyy), or by clicking on the calendar icon and selecting the date. Both options look like this:



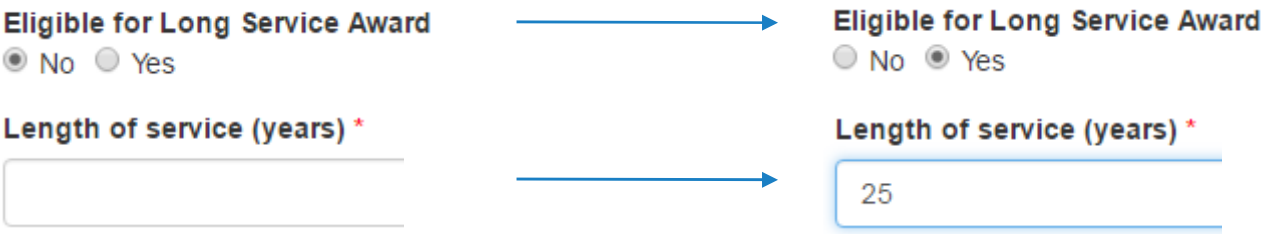
6. Now select the reason that member of staff is leaving. This is a dropdown list of seven options, which are:

- **Appointment not taken up**
- **Death in service**
- **End of fixed term contract**
- **Maternity**
- **Resigned**
- **Retirement**
- **Other**



Click on the dropdown list to reveal the options, then click on the most appropriate reason. If none of the reasons for leaving are appropriate, select **other;** An additional free text box will then appear, in to which you can type the reason in more detail.

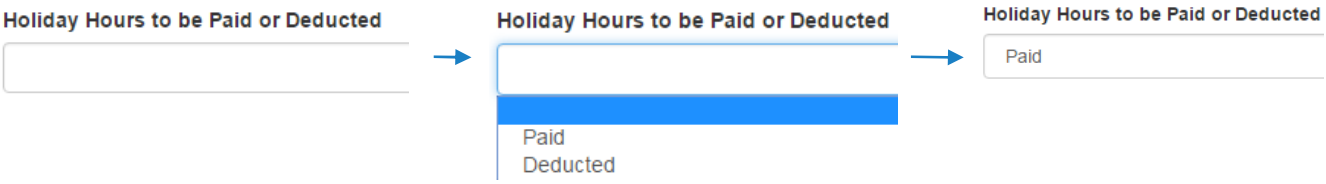
7. If the employee is eligible for a long service award, click **yes** in this section. If not, leave this defaulted as no. If you select yes, an additional box will appear, in which you need to type in the member of staff's length of service, in years.



8. If payroll deductions are required, select **yes** in this next section. If not, leave this defaulted to **no**.

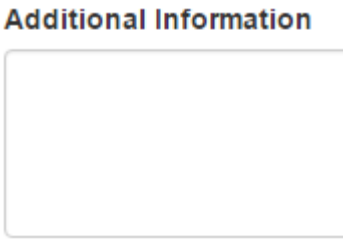
9. Next, If the employee is a member of the Key Workers scheme, select yes. If not, leave this defaulted to no.

10. Select if holiday hours are to be paid or deducted, from the dropdown:



Underneath this selection, type in the number of holiday hours to be paid/deducted:

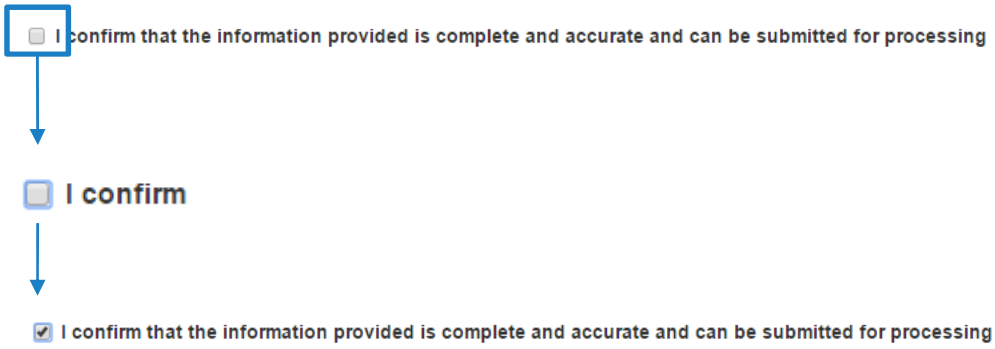
11. If there is any additional information to be entered, type it in to the free text information at the bottom of the page.



12. Once you are happy with the information you have entered, click **save and continue** to move on to the next page.

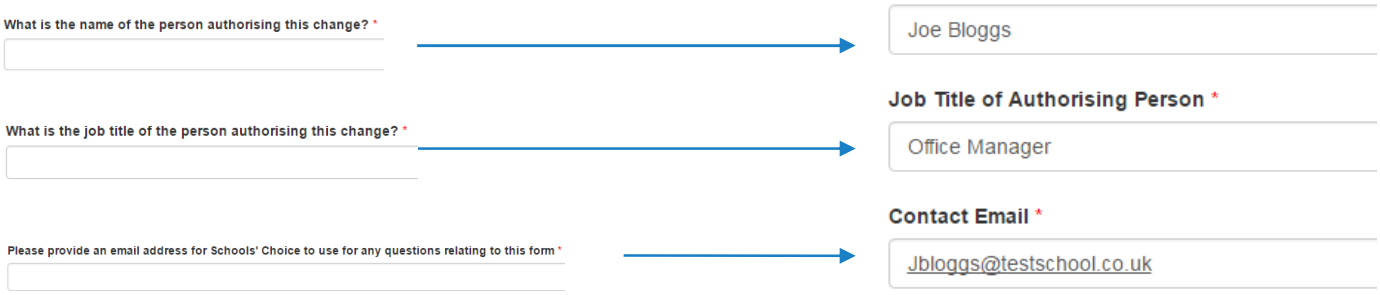
The final page only has five questions, but all of these need to be filled in to submit the form.

1. Tick the box confirming the information contained in the form is complete and accurate, and is ready for processing. The box looks like this:



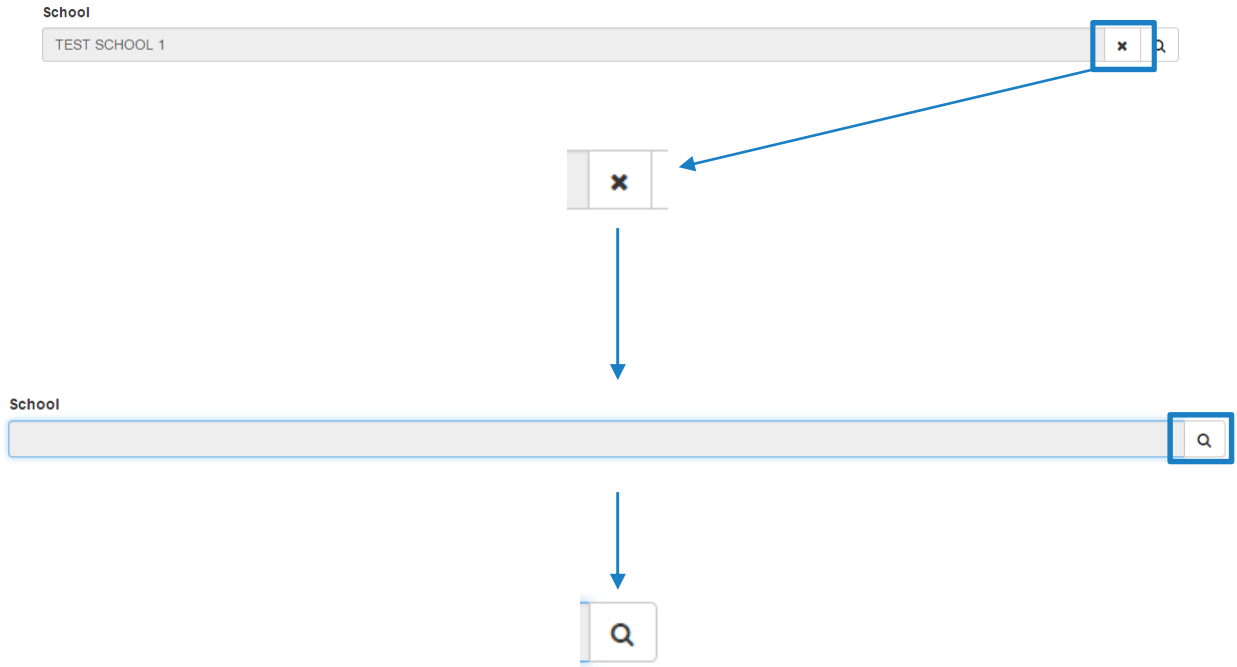
*Don't forget to tick this box – without it, you can't submit the form. If you're not sure you can agree to the statement, you can save the form and come back to it later. The form automatically saves every time you click **save and continue** or **save without validating**.*

2. The next three boxes are free text fields, which need to have information typed in to them. First, enter the name of the **authorising person** for the new starter. In the field below, enter the authorising person's **job title**, and in the field below that enter their **email address.**



3. Check that your school has been entered in the **school** box, at the bottom of the page. Normally this will be filled in automatically, as the system detects your school when you login.

If the school displayed is incorrect, click on the **cross** on the right hand side of the bar to remove it, then click on the **magnifying glass** to open up the list of schools:

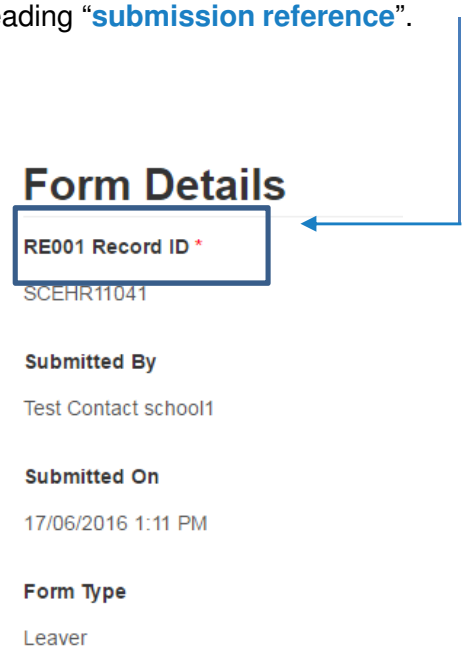


A popup will now appear will a full list of schools. To select your school, scroll through the list until you find yours, and click on it – a tick will appear on the left hand side. Now click on the **select button** on the right hand side, to close the popup.

The school you have selected will now appear.

4. You now have two options. If you press **submit**, the system will check your answers for any missing fields, and then submit the form to school's HR. If you're not sure about your answers, you can press **previous** to move back through the pages and check what you've entered.

Once submitted, the details you have submitted will be presented to you, in case you want to save them for reference. You will also receive a reference number, which can be found under the heading "**submission reference**".



Stuck? Don't worry, we're here to help. You can get in touch with us in the following ways:

T: 03456 066046
E: HRandPayroll@schoolschoice.org
W: www.schoolschoice.org

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