School's e-forms – New Appointment (Teaching Staff)

Handbook

School's e-forms user guides
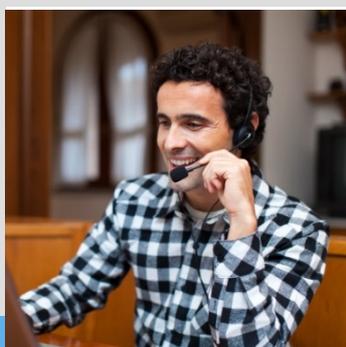
This guide will show you how to complete a new appointment e-form for teaching members of staff. It covers all possible options, with easy to follow instructions and diagrams.

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':

Sign in with an external account

ADFS

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':**

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:

| New Appointment Form | New Contract | Variation to Contract | Leaver Form | Saved Forms |

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".

| Save and continue | Save without Validating |

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.
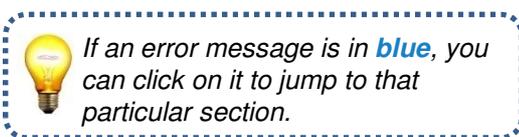
> ℹ The form could not be submitted for the following reasons:
>
> First Name is a required field.
> Last Name is a required field.
> First Name is a required field.
> Last Name is a required field.
> Date of Birth is a required field.
> National Insurance Number is a required field.
> Address Line 1 is a required field.
> Town is a required field.
> County is a required field.
> Postcode is a required field.

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

# New appointment form – personal details (teaching)

This area of the site allows you to access the new appointment 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 fields – such as SEN allowance – 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 '**new appointment form**' on the home page to load the form. **New Appointment 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:
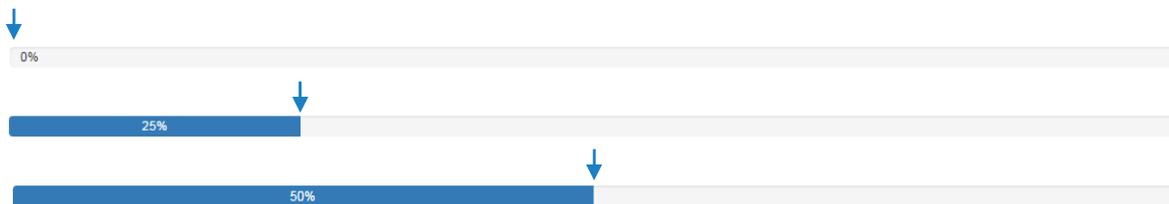
3. The first set of questions can be answered by **clicking** on a radio button, which looks like this:

Position Type *
◉ Support ◯ Teaching

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 – e.g. pay scales, additional payments etc.

When selecting a title, the option 'other' will create a free text field which **must** be filled in.

4. The next set of questions (first name, last name etc.) are free test fields, and look like this:

First Name *

Last Name *

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:

First Name *

Fred

Last Name *

Smith|

5. Date of birth can be entered 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:
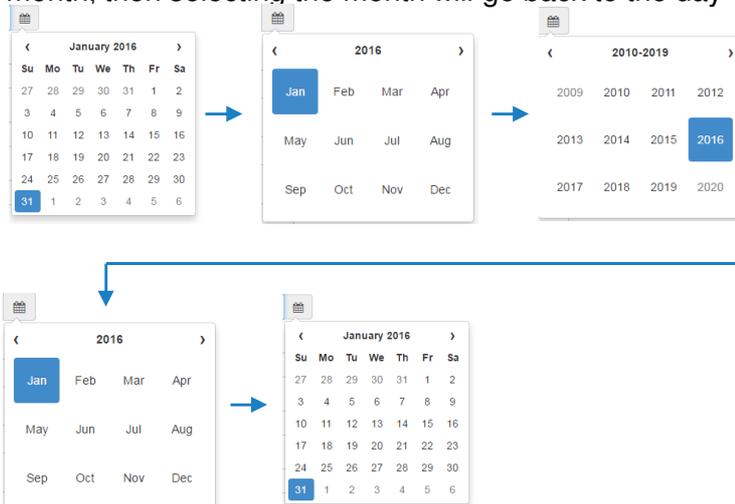
Date of Birth *

31/01/2016

OR

💡 You can cycle through the months in the calendar by clicking on the month at the top of the pop-up box, to present a year view. Clicking on the year will then change the view to decades. Selecting the year will then take you back to the month, then selecting the month will go back to the day view.

6. The email address field is free text, however must contain a **full email address** – for example, fred.smith@test.com, otherwise an error will be flagged, and you will not be able to proceed.

Email Address *

fred.smith@test.com

7. A national insurance number must be entered in to the national insurance number field, in the correct format. Usually, this takes the form of two letters, then six numbers, followed by a final letter (which is usually A, B, C or D). This must be entered with no spaces, and will default to upper case text regardless of what is entered.

8. Now input the **teachers reference number**. This field is mandatory and must be completed.

Teachers Reference Number *

9. You will now need to fill in the address details for the member of staff. These fields are free text fields, and apart from "Address line 2", are all mandatory and need to be filled in.
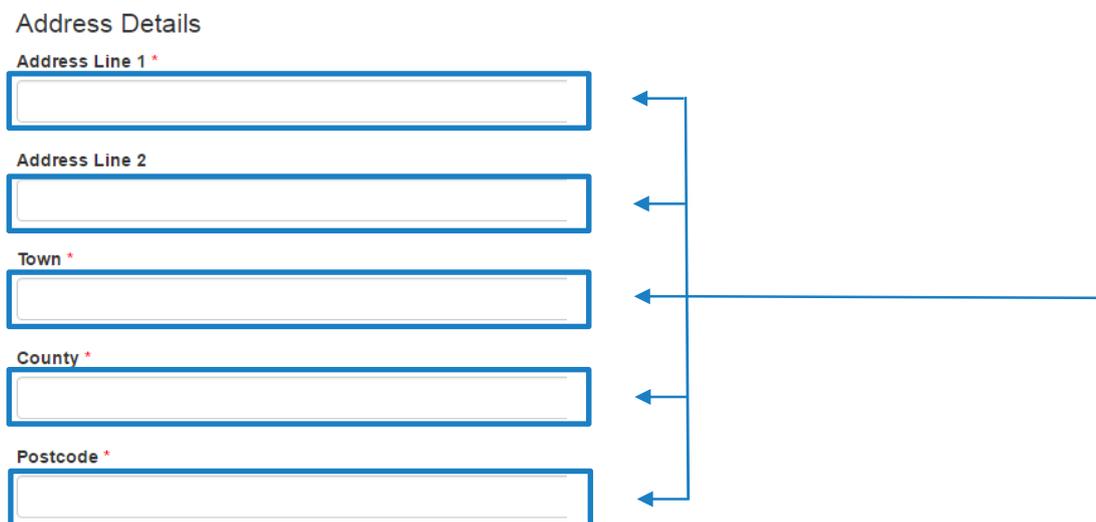
Address Details

Address Line 1 *

Address Line 2

Town *

County *

Postcode *

10. 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".

Save and continue   Save without Validating

New appointment form – employment details (teaching)

1. Next up, fill in details of the employment. The first question is **job title** – ensure you fill this in.

Next, If you select "part time" in the contract type section, an extra box will appear. You will need to enter the **FTE** of this post, as a decimal; for example, if the employee will be undertaking half the hours of a full time employee, enter **0.5** here.

Contract type *
○ Full-time   ● Part-time   ○ Supply

What is the FTE? *

0.5

*If you select **full-time or supply** this field will not appear – so don't worry if you cant see it for these workers!*

2. Decide if this job is a job share post, then click **yes** or **no**. ⟶

Is this a job share post? *
○ No   ● Yes

3. Select the type of appointment, either **fixed term** or **permanent**, then select the effective date by typing it in, or clicking on the calendar icon to select the date. ⟶

Type of appointment *
○ Permanent   ● Fixed Term

Effective date of this appointment *

09/05/2016

Clicking on **fixed term** will present a second set of options relating to the fixed term appointment. You will need to select a **reason** for the fixed term appointment. Clicking on the bar below the heading will give you a drop down list to select from.

Once you know the reason for the fixed term appointment, click on it to select it.

▼

↓

Why is this post fixed term? *

Amalgamation
Establishment review
External funding
Maternity cover
Paternity cover
Pending permanent appointment
Secondment
Sickness cover

↓

Why is this post fixed term? *

Maternity cover

4. Select the end date for the fixed term appointment by typing in the date / selecting the date by clicking on the calendar icon.

Fixed Term Contract End Date *

09/06/2017

← **OR** →

	June 2017	
‹		›

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

5. Select **yes** or **no** to declare if this post has been regraded.

Has this post been regraded? *
◉ No ○ Yes

6. You will now need to select the **payscale** for employee. Click on the magnifying glass icon to open the pop-up box containing the payscale information:

Employee Payscale *

🔍

🔍

Continues on next page

Lookup Records   ✕

Search 🔍

✓	**Employee Payscale**	**Created On**
	Leadership Posts	23/05/2016 12:17 PM
✓	Mainscale	23/05/2016 12:18 PM
	Non-Standard Annual Salary	23/05/2016 12:18 PM
	Unqualified (Instructors)	23/05/2016 12:18 PM
	Upper Payscale	23/05/2016 12:19 PM

Remove Value   Select   Cancel

Use this search box to search for a grade

This tick indicates **mainscale** has been selected

To select a grade, click anywhere along the line of the grade that you want – the whole line will turn blue

Once you have selected the payscale and it has turned blue, click **select**

Click cancel to close the pop-up

The payscale you have selected will now be displayed.

Employee Payscale *

Mainscale

💡 *If you want to get rid of the grade you have selected, simply click on the cross next to the magnifying class.*

✕   🔍

7. Once you have selected the payscale, you will need to input the point on the payscale:

Point on the payscale *

When you select "Leadership Posts" from the payscale you will need to provide the range of points the employee is being appointed to:

What range of points is the person being appointed to?

The final step is to provide the FTE annual salary that needs to be paid

FTE Annual Salary *

£

8. Select if **TLR allowance** is needed, by clicking yes or no in the box. If you select "yes", an additional set of options appear:

Level of TLR *
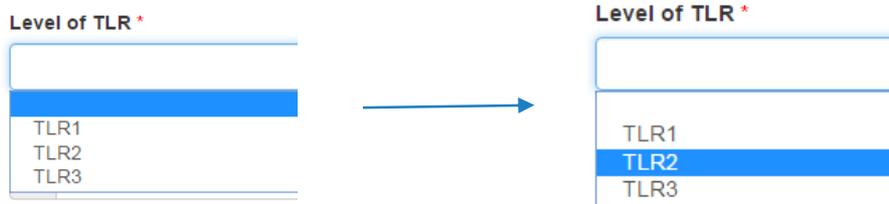
Please enter a TLR amount within the allowed range **

£

Will this be on a pro-rata basis (to the FTE)?
◉ No ○ Yes

TLR Allowance End Date

07/06/2016

Select the **level** of TLR required (either one, two or three), by clicking on the dropdown list, then the required level of TLR:

Level of TLR *

TLR1
TLR2
TLR3

Level of TLR *

TLR1
TLR2
TLR3

Once selected, enter the TLR to be paid in the next box.

Once done, select if the TLR is to be paid as a pro-rata basis, and the end date for the TLR.

Will this be on a pro-rata basis (to the FTE)?
◉ No ○ Yes

TLR Allowance End Date

07/06/2016

9. Now select if a SEN payment is to be made to the new member of staff. If you select yes, enter the full amount in pounds, and then select if this SEN payment is to be pro-rata. Lastly, select the end date for the SEN payment.

Pay SEN Allowance
○ No ● Yes

SEN Allowance Amount *

£ | 2800

Will this be on a pro-rata basis (to the FTE)?
● No ○ Yes

SEN Allowance End Date

07/06/2016

10. If a recruitment and retention allowance is needed, enter it here. Much like the previous questions, if you select **yes**, you will need to enter the monetary amount of the allowance, and then the end date.

Pay Recruitment and Retention Allowance
○ No ● Yes

Recruitment and Retention Amount *

£ | 1500

Recruitment and Retention Allowance End Date

07/06/2016

11. Select if an additional allowance is needed, by clicking yes or no in the box. If you select "yes", an additional set of options appear:

Additional Allowance

Is an additional allowance required?
○ No ◉ Yes

Continuing Professional Development
Discretionary Payment to Headteacher
First Aid
Out of School Hours Learning Activity
Provision of Initial Teacher Training

Select one of the reasons for the additional allowances. Once you have selected a payment type, you will need to fill in how much that payment will be, and when that payment will end.

The amount needs to be entered as a monetary figure, and the end date in the format of dd/mm/yyyy.

Additional Allowance Amount *

£

Additional Allowance End Date

16/05/2016

12. Finance information comes next. You will need to select the expenditure code set, the appropriate expenditure code from the set you have selected, and any applicable PSF system codes.

First, select the expenditure code set by clicking on the magnifying glass, to open the pop-up:

Expenditure Code Set

🔍

🔍

Select the appropriate expenditure code set from the list, by clicking on the heading.

Lookup Records   ✕

	Name	Created On
✓	Civica	06/04/2016 10:13 PM

Remove Value   Select Cancel

Once you have selected your code set, it will turn blue and a tick will appear next to it:

⬇

Lookup Records   ✕

	Name	Created On
✓	Civica	06/04/2016 10:13 PM

Remove Value   Select Cancel

Now click on the **select** button to confirm your selection, and close the pop up.

Select

Your selection will now appear.

Expenditure Code Set

Civica

💡 *If you want to close the pop-up box, simply click on the "cancel" button.*

Cancel

13. Select the expenditure code by clicking on the magnifying glass, to open the pop-up:

Expenditure Code *

🔍

🔍

Select the right expenditure code from the list, by clicking on the heading.

Lookup Records   ✕

✔	Expenditure Code ▲	Expenditure Description
	50	Teaching Staff
	51	Educational Support
	52	Other Staff Salaries
	53	Administration Staff
	54	Premises Staff
	55	Cleaning Staff

Remove Value   Select   Cancel

Like last time, once you have selected your code, it will turn blue and a tick will appear next to it:

Lookup Records

✔	Expenditure Code ▲	Expenditure Description
	50	Teaching Staff
✔	51	Educational Support
	52	Other Staff Salaries
	53	Administration Staff
	54	Premises Staff
	55	Cleaning Staff

14

Now click on the **select** button to confirm your selection, and close the pop up. ⟶ Select

Your selection will now appear. ⟶ Expenditure Code *

51

14. Enter any PSF system codes. This is a free text box, you just need to type the code in to the box. PSF System Codes

15. Entering any continuous local government service is up next. If the new employee doesn't have continuous service you can leave the option selected as no – but if they do, click yes.

Other Employment Details

Does the employee have continuous Local Government service with another authority?
○ No ○ Yes

⟶ Other Employment Details

Does the employee have continuous
○ No ● Yes

Selecting yes will make two new boxes appear – **local government authority start date**, and **local government authority name.**

First enter the LGA start date. This needs to be in dd/mm/yyyy format – you can either type this in manually, or click on the **date** symbol to open a pop up box, and select the date.

Local Government Authority service start date

17/05/2016

‹	May 2016	›

Su	Mo	Tu	We	Th	Fr	Sa
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

The selected date should now appear: ⟶ Local Government Autho

10/05/2016

In the box below, now type in the name of the authority that the new member of staff is coming from

Local Government Authority name

⟶ Local Government Authority name

Suffolk County Council

16. The final section on this page is used to select the online services required for your new member of staff. These services are:
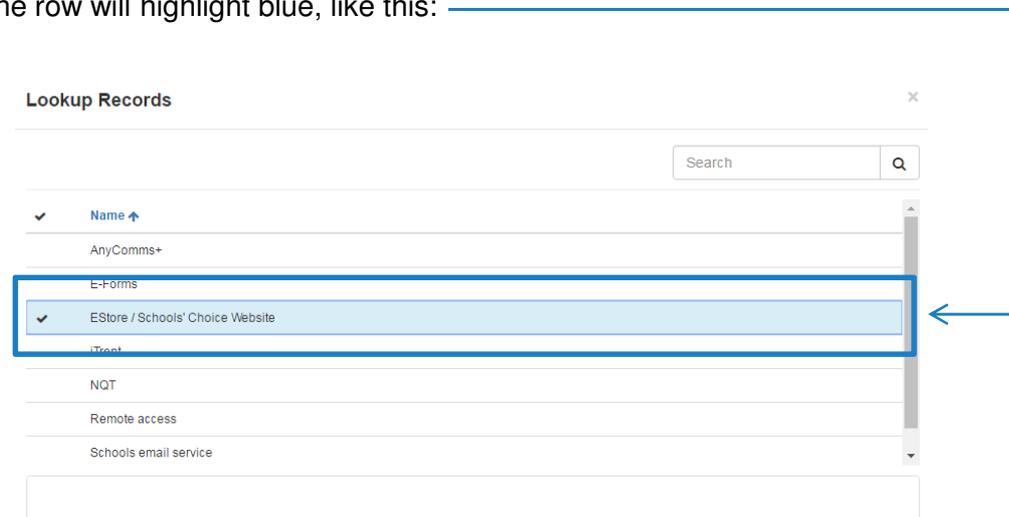
- **AnyComms+**
- **E-Forms**
- **Estore / Schools Choice Website**
- **iTrent**
- **NQT**
- **Remote access**
- **Schools email service**

By selecting the services you require, Schools' Choice will automatically add the accesses for you.

Click on the Add Service button to open the services pop-up ⟶ [Add Service]
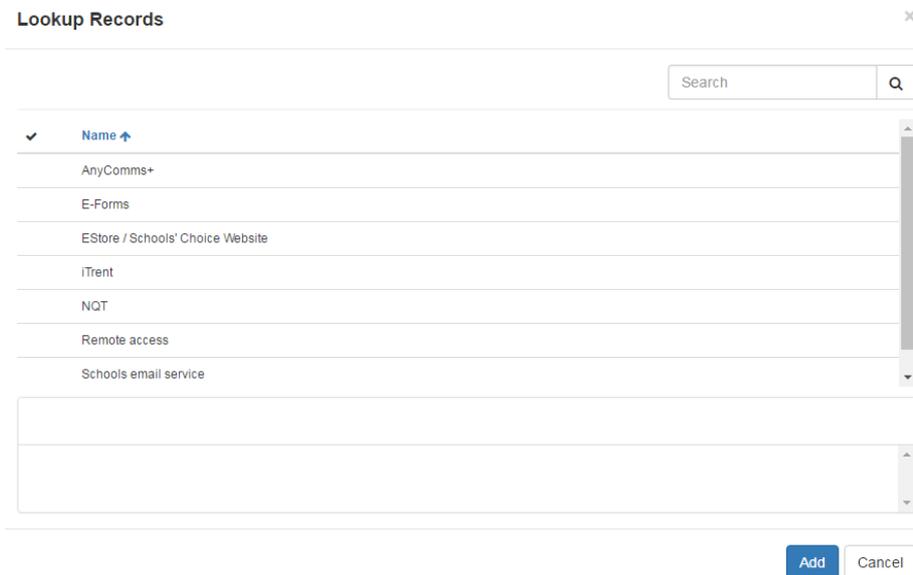
To select a service, click on the name of the service. A tick will appear in the left hand column, and the row will highlight blue, like this:

You can select more than one option at a time. Once you have selected all of the services you require, click the **add** button to close the pop up. Your results will now be displayed like this:

Name ↑	
AnyComms+	⊙
EStore / Schools' Choice Website	⊙
Remote access	⊙

*If you want to remove an entry without re-opening the popup, click on the ⊙ button, then click **remove service**.*

17. Click **Continue** to check the details you have entered, and move on to the next page.

Applicant document confirmation

1. The next page of questions are mainly tickboxes, to which you need to answer yes or no, simply by clicking a box. Selecting **yes** for the first question – **does the employee have a current DBS check?** – will open an additional box for you to fill in the DBS check number. Fill in the DBS number simply by typing the reference in to the box.

Does the employee have a current DBS check? *
○ No ● Yes

DBS Reference Number *

2. The second question – **DBS Check submitted** – will open an additional box if you tick **yes**, which is **DBS application ID**. To enter the application ID, click in the field and type it in.

DBS Check Submitted *
○ No ● Yes

DBS Application ID *

3. Confirm if the employee is a student or not, by clicking **yes** or **no:**

Is the Employee a Student?
○ No ○ Yes

4. The next section is split in to eight questions, which need to be ticked/left blank, depending on the documents and evidence you have received and actions you have undertaken. They look like this:

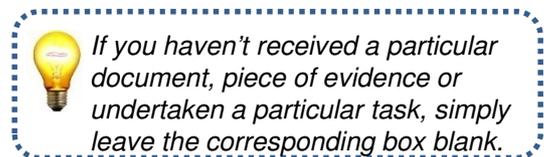I can confirm that I have received and retained the following:

☐ Original Signed Application Form
☐ Acceptable references covering the last 5 years of employment
☐ Evidence of entitlement to work in the UK
☐ Equal Opportunities Monitoring Form
☐ Copies of Relevant Qualifications

I can confirm that the following have been sent to Schools' Choice HR:

☐ Pay 5 Form
☐ P45 or P46 Form

I can confirm that the following has been sent to the Occupational Health Service:

☐ Occupational Health Questionnaire

💡 *If you haven't received a particular document, piece of evidence or undertaken a particular task, simply leave the corresponding box blank.*

I can confirm that I have received and retained the following:

☑ Original Signed Application Form
☑ Acceptable references covering the last 5 years of employment
☑ Evidence of entitlement to work in the UK
☑ Equal Opportunities Monitoring Form
☑ Copies of Relevant Qualifications

I can confirm that the following have been sent to Schools' Choice HR:

☑ Pay 5 Form
☑ P45 or P46 Form

I can confirm that the following has been sent to the Occupational Health Service:

☑ Occupational Health Questionnaire

5. The final question on this box is a **other comments** box. This isn't a mandatory box, so if you don't have anything relevant to add, leave this blank. To enter comments, click in the box and type in your comments.

Other Comments

6. Click save and continue to check your entries, and move on to the last page. ⟶ Save and continue

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:

☐ I confirm that the information provided is complete and accurate and can be submitted for processing

☐ **I confirm**

☑ I confirm that the information provided is complete and accurate and can be submitted for processing

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.**

Authorising Person *

Joe Bloggs

Job Title of Authorising Person *

Job Title of Authorising Person *

Office Manager

Contact Email *

Contact Email *

Jbloggs@testschool.co.uk

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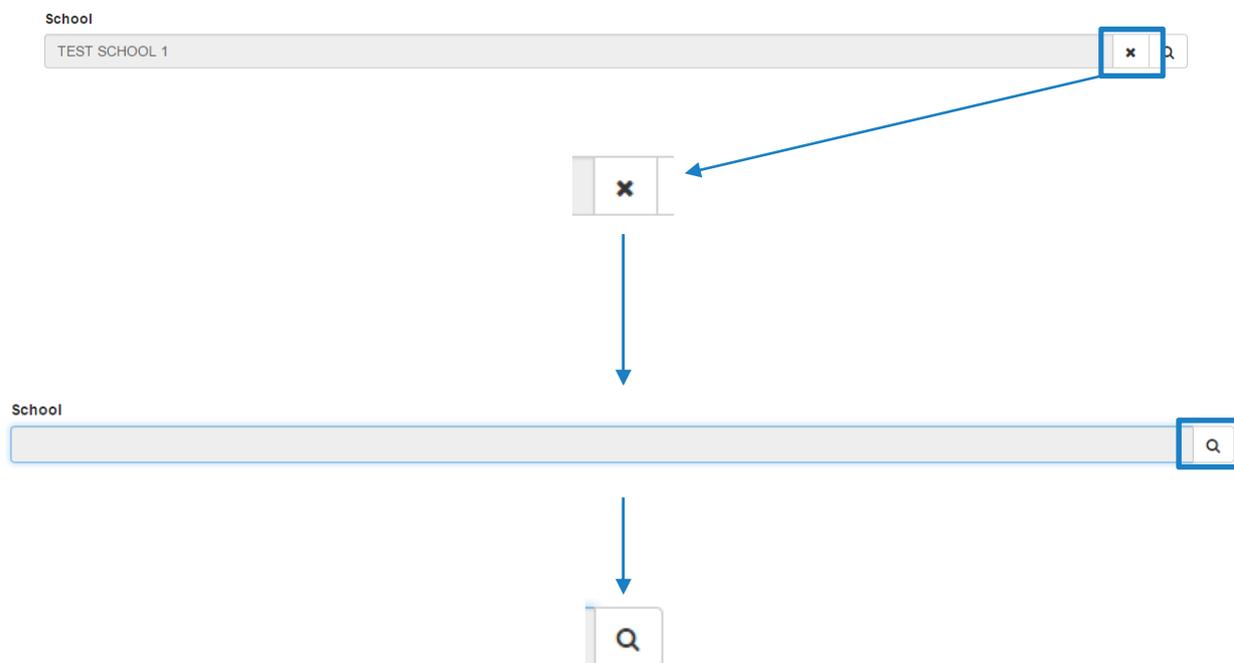
A popup will now appear will a full list of schools. To select your school, scroll through the list until you find yours, and click on it – a tick will appear on the left hand side. Now click on the **select button** on the right hand side, to close the popup.

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.

Submit   Previous

5. 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**".
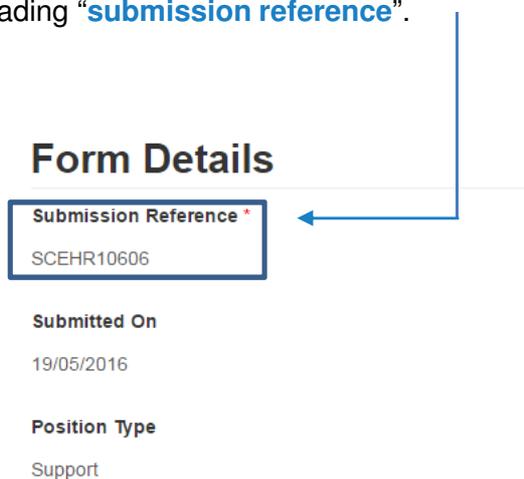
Form Details

Submission Reference *

SCEHR10606

Submitted On

19/05/2016

Position Type

Support

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

Useful links:

E-store -
Maintained Schools
Academies

Login

Schools' Choice apps