

School's e-forms – New Contract (Teaching)



Handbook

This guide will show you how to complete a new contract e-form for teaching members of staff. It covers all possible options, with easy to follow instructions and diagrams.

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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**':



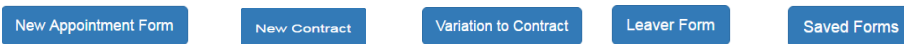
4. Once you are logged in you can access the eForms. To do this, click on the following link, or type it in to your address bar:

<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”.

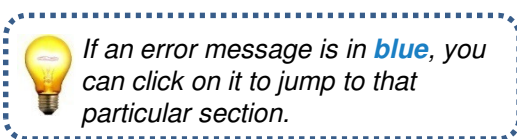


You will find these options at the bottom of each page throughout the form. Pressing **save and continue** will check to make sure you have filled in all the required fields, in the right format. The system then saves your progress, and moves on to the next page.

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.



The new appointment form 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.

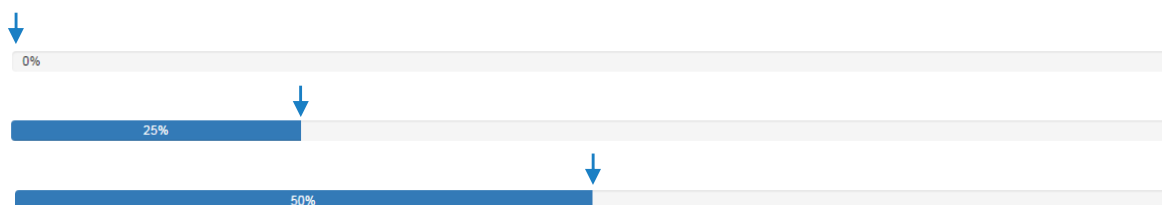
How to start the new appointment form:

—————> **Job Title ***

1. Click on the 'new appointment 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. 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 your response for this type of question, simply **click on the circle** to the left of the response you wish to select. If done correctly, the circle will change to a darker centre, as shown 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 text 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 *

Last Name *

5. Input the employee number for the person the form relates to: **Employee Number ***

6. 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

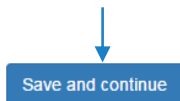
Town *

County *

Postcode *



7. 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".

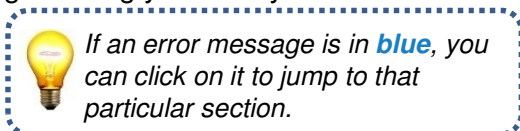


You will find these options at the bottom of each page throughout the form. Pressing **save and continue** will check to make sure you have filled in all the required fields, in the right format. The system then saves your progress, and moves on to the next page.

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 until your form entries have all been validated, this is useful if you do not have all the information you need to hand and want to save the form to come back to at a later time. Using save without validating is also 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.



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.

8. On the second page, continue to fill in the rest of the fields, as before. 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 can't see it for these workers!

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

Is this a job share post? *

No Yes

10. 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

11. 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

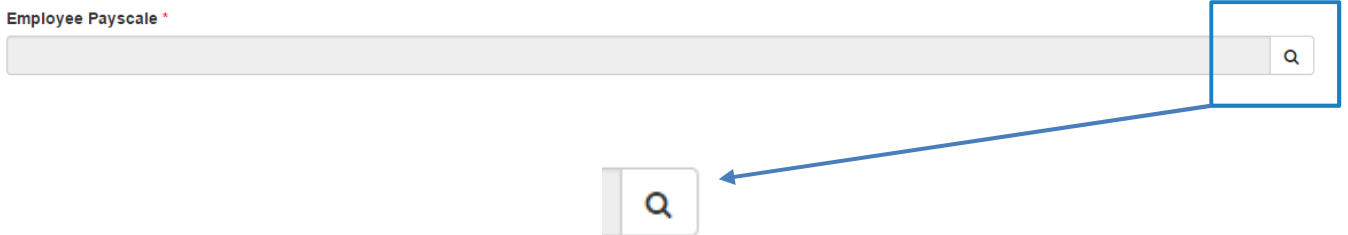
12. Select **yes** or **no** to declare if this post has been regraded.

Has this post been regraded? *

No Yes

13. 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

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

Use this search box to search for a grade

Remove Value

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

Select Cancel

Click cancel to close the pop-up

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

The payscale you have selected will now be displayed.

Employee Payscale *



If you want to remove the grade you have selected, simply click on the cross next to the magnifying glass.

14. 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 employee 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?

Finally you need to input the FTE annual salary that is to be paid to this employee:

FTE Annual Salary *

 If you select **non-standard annual salary**, you will need to specify the salary to be paid once you have closed the pop-up box.



Annual Salary to be Paid *



Annual Salary to be Paid *

15. Select whether a 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

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 as a figure in the input box that follows.

Once done, select if the TLR is to be paid as a pro-rata basis, and the end date for the TLR. Please note the end date is mandatory for a TLR 3.

Will this be on a pro-rata basis (to the FTE)?

No Yes

TLR Allowance End Date

16. Now select if an SEN payment is to be made to the 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 allowance.

Pay SEN Allowance

No Yes

SEN Allowance Amount *

£

Will this be on a pro-rata basis (to the FTE)?

No Yes

SEN Allowance End Date

17. Now select if a recruitment and retention allowance is needed. 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

18. 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.

Additional Allowance Amount *

£

Additional Allowance End Date

16/05/2016

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

Additional Allowance Amount *

£ 2500.00


Additional Allowance End Date


03/11/2016

19. 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 ✕

Search

<input checked="" type="checkbox"/> Name	Created On
Civica	06/04/2016 10:13 PM

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



Lookup Records ✕

Search

<input checked="" type="checkbox"/> Name	Created On
<input checked="" type="checkbox"/> Civica	06/04/2016 10:13 PM

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



Your selection will now appear. →

Expenditure Code Set
Civica

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

20. Now, 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

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

New contract form (teaching) - continued

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

Select

Your selection will now appear. →

Expenditure Code *

51

21. 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

22. 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 (LGA) 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 had previous service with:

Local Government Authority name

|

Local Government Authority name

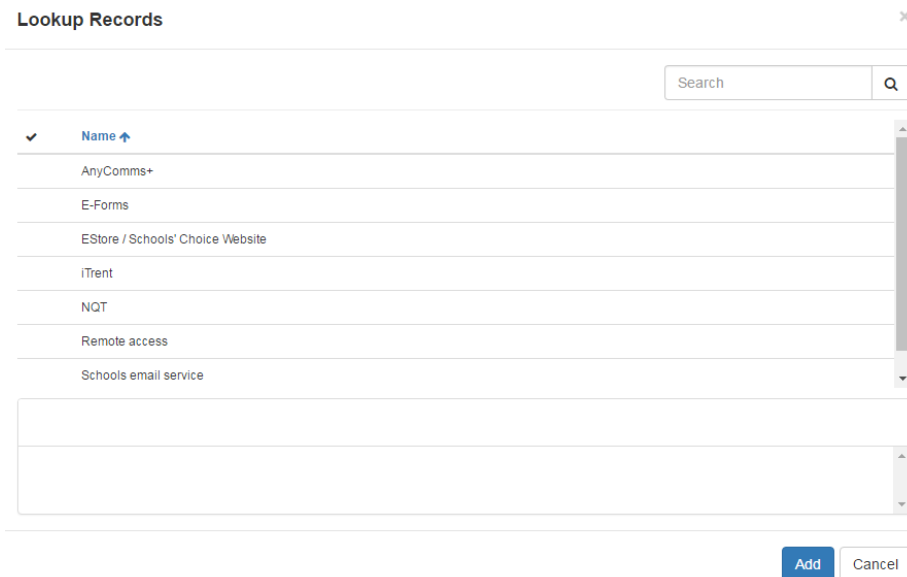
Suffolk County Council

23. The final section shows the Online Services that are available with Schools' Choice. If your new appointee needs access to these Online Services please select those which are relevant:

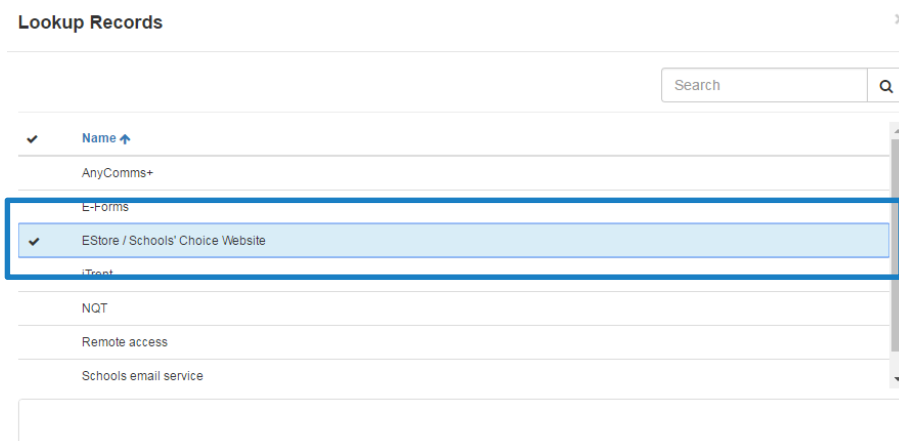
- AnyComms+
- E-Forms
- Estore / Schools Choice Website
- iTrent
- NQT
- Remote access
- Schools email service

By selecting the services you require, Schools' Choice will create the appropriate access for you.

Click on the **Add Service** button to open the services pop-up



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+	<input type="checkbox"/>
EStore / Schools' Choice Website	<input type="checkbox"/>
Remote access	<input type="checkbox"/>



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

25. The next page of questions are mainly tickboxes, to which you need to answer yes or no, simply by clicking a box.

Additional Contract Section

DBS Check

Additional Contract

No Yes

Respond with **Yes** to this question if the employee is staying in the same school, or transferring from one Local Authority School to another.

Respond with **No** to this question if the employee is moving between academies, or between academy and a local authority school.

When you respond with No you will be asked some questions about the DBS check.

26. The first question is: **Does the employee have a current DBS check? ***
 No Yes

Select Yes and you will be required to provide the DBS reference number 

27. 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 

28. 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 taken. They look like this:

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

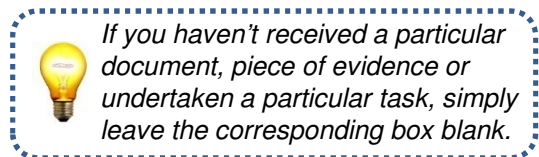
- Original Signed Application Form
- Acceptable references covering the last 5 years of employment
- Evidence of entitlement to work in the UK
- Equal Opportunities Monitoring Form
- Copies of Relevant Qualifications

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



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

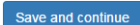
I can confirm that the following has been sent to the Occupational Health Service:

- Occupational Health Questionnaire

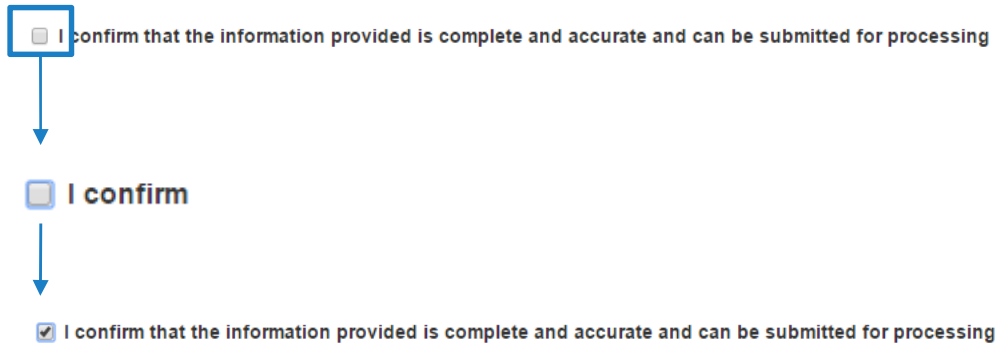
31. The final question on this box is a **other comments** box. If you don't have anything relevant to add, leave this blank. To enter comments, click in the box and type in your comments.


Other Comments

32. Click save and continue to check your entries, and move on to the last page.



29. The final page only has five questions, but all of these need to be filled in to submit the form. Firstly, you will need to tick the box confirming the information contained in the form is complete and accurate, and is ready for processing. The box looks like this:



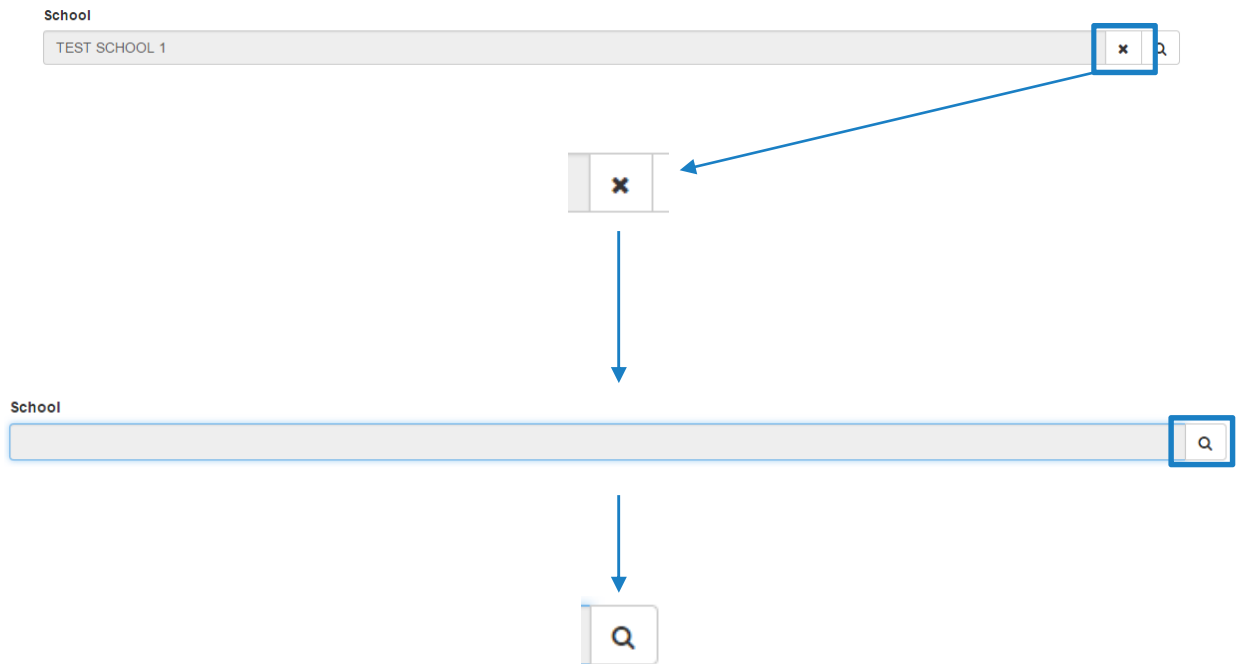
 *Don't forget to tick this box – without it, you can't submit the form. If you're not sure you can agree to the statement, you can save the form and come back to it later. The form automatically saves every time you click **save and continue** or **save without validating**.*

30. 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 * <input type="text"/>	→	<input type="text" value="Joe Bloggs"/>
Job Title of Authorising Person * <input type="text"/>	→	<input type="text" value="Office Manager"/>
Contact Email * <input type="text"/>	→	<input type="text" value="Jbloggs@testschool.co.uk"/>

31. 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.

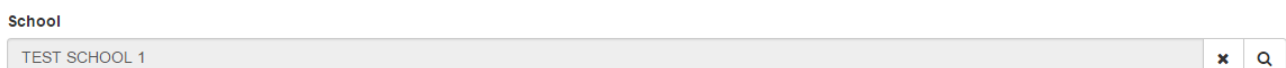
If the school displayed is incorrect, click on the **cross** on the right hand side of the bar to remove it, then click on the **magnifying glass** to open up the list of schools which may be available to you:



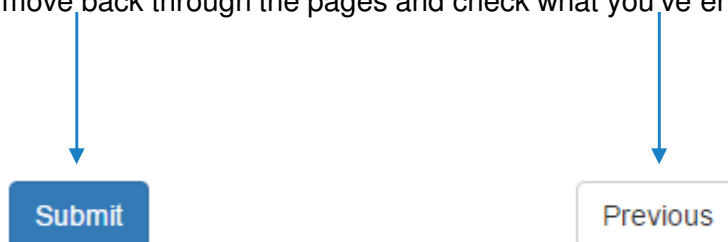
A popup will now appear with a list of schools available to you. To select your school, scroll through the list until you find yours, and click on it – a tick will appear on the left hand side. Now click on the **select button** on the right hand side, to close the popup.

Select

The school you have selected will now appear.



32. 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.



33. Once submitted, the details you have provided will be presented to you, in case you want to save or print them for reference. Your form has now successfully been passed to Schools' Choice for processing.

You will also receive a reference number, which can be found under the heading "**submission reference**". Please keep a record of this in case of any queries you may have.

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](#)

