

School's e-forms – Variation to Contract (Teaching)



Handbook

This guide will show you how to complete a variation of 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.

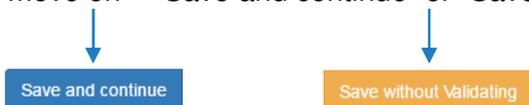
Once logged in, You will be presented with the following options:



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”.

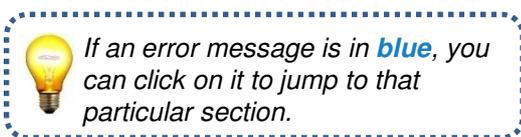


You will find these options at the bottom of each page throughout the form. Pressing **save and continue** will check to make sure you have filled in all the required fields, in the right format. The system then saves your progress, and moves on to the next page.

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 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.

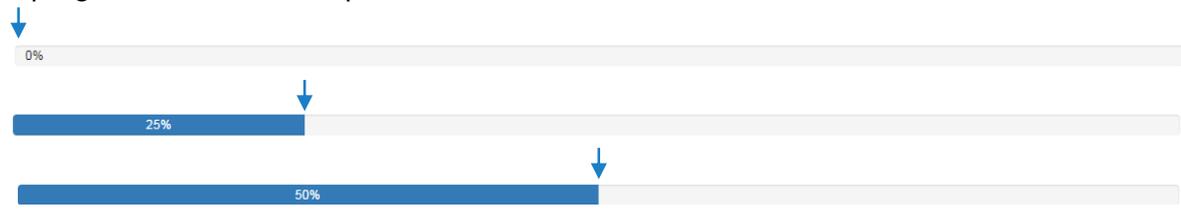
This area of the site allows you to access the variation to contract form, which can be used for both teaching and support staff.

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 ***

Variation to Contract

1. Click on the **variation to contract 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:

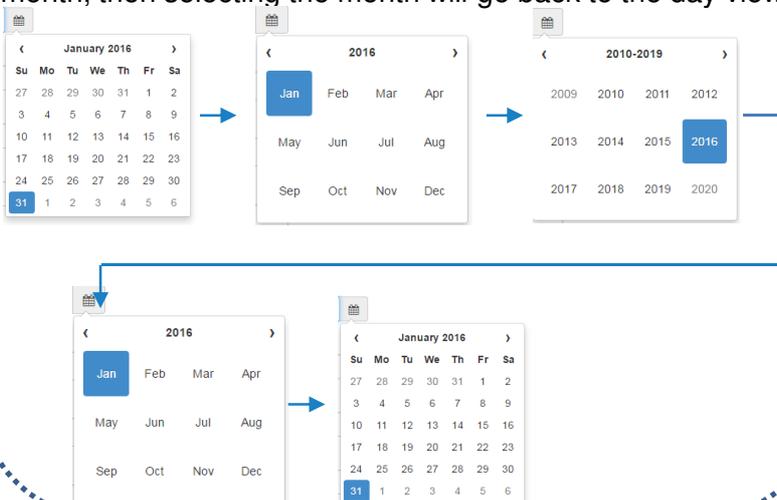


3. Select **Teaching** under **position type**. To fill in the correct answer for these types of questions, simply **click on the circle** to the left of the statement you which to select. If done correctly, the circle will change from light grey, to light grey with a darker centre, as above. Remember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

4. Select the date the changes will take place. You can have multiples changes all starting on the same date, but not multiple dates for multiple changes. If you have more than one change occurring on more than one date, submit a new form for each date.



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.



5. Fill in the date of birth for the member of staff the form relates to. You can select the date by 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



6. Now select the member of staff's title. When selecting a title, the option 'other' will create a free text field which **must** be filled in.

7. The next set of questions (first name, last name, employee number, job title and position reference) 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

8. 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

9. Now select the type of changes you wish to do. The categories are:

- Change of hours/weeks worked per year
- Extension of temporary change
- Allowance change
- Change of name
- Change of address
- Expenditure code change
- Extension of a fixed term contract
- Access to online services
- Salary increments
- Temporary to permanent contracts
- Return from maternity/adoption leave
- Other change

10. To select the changes you want, tick the box next to that particular type of change:

What would you like to change?

- Change of hours/weeks worked per year
- Extension of temporary change
- Allowance Change
- Change of Name
- Change of Address
- Expenditure Code Change
- Extension of a Fixed Term Contract
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What would you like to change?

- Change of hours/weeks worked per year
- Extension of temporary change
- Allowance Change
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- Other Change

Once you have decided on the changes you have made and ticked the relevant boxes, click **save and continue** to move to the next page.

Save and continue

If you're not sure about which options to select, and want to view the questions they ask, click **save without validating** to move through the pages to see what they contain.

Save without Validating

Change of hours/weeks worked per year

This section allows you to change the hours per week or weeks worked per year for a member of staff. There are three fields to be filled in, all of which are mandatory, which look like this:

Change of Hours/Weeks Worked

What are the new hours per week? *

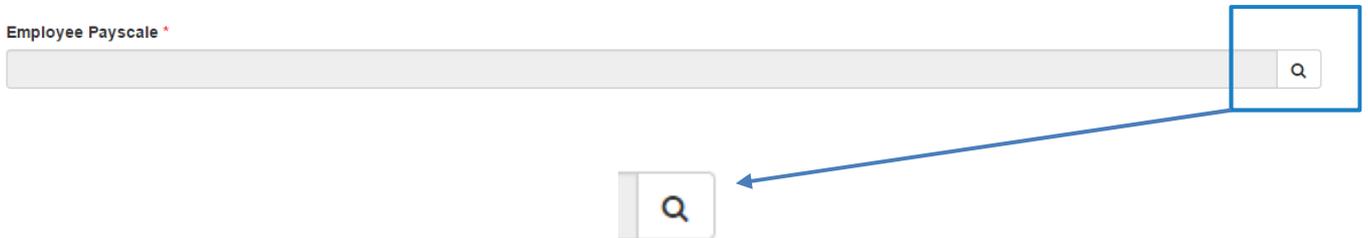
How many weeks per year will be worked? *

Is this change temporary or permanent? *

1. First, enter the new hours per week. Enter the number of weeks per year to be worked in the field below, and in the last field type in if this change is temporary or permanent in the last field.

Salary increments

1. Select the **payscale** for employee. Click on the magnifying glass icon to open the pop-up box containing the grade information:



Lookup Records ×

		Search	Q
✓	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

This tick indicates mainsclae has been selected

To select a payscale, 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

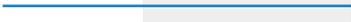
Click cancel to close the pop-up

Remove Value

Select Cancel

2. The payscale you have selected will now be displayed.  **Employee Payscale ***

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



3. Once you have selected the payscale, you will need to input the new point on the payscale for this employee:

Point on the payscale *

When you select “Leadership Posts” from the payscale you will need to provide the new range of points on the payscale for this employee:

What is the new range of points on the payscale for this employee? *

The final step is to input the new annual salary that is to be paid to this employee:

Annual Salary to be Paid *
£

Extension of temporary change

1. This section only has two questions to fill in. First, pick the reason for the extension, from a drop-down list. The reasons are:

- Amalgamation/opening of a new school
- Establishment review
- External funding
- Maternity cover
- Paternity cover
- Pending permanent appointment
- Secondment
- Sickness cover

Reason for Temporary Change Extension *



Extension of temporary change

Reason for Temporary Change Extension *

- Amalgamation/Opening of a new school
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Reason for Temporary Change Extension *

- Amalgamation/Opening of a new school
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- Sickness Cover



Reason for Temporary Change Extension *

2. Now select the revised end date of the temporary change, 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

Change to an allowance

1. Make sure you tick the **additional allowance** box first. This will bring up the additional options you need to fill in.

Change to an allowance

Additional Allowance

→

Change to an allowance

Additional Allowance

2. Now pick from the dropdown if the additional allowance is an honorarium, or first aid payment:

Support Additional Allowance Type *

First Aid
Honorarium

→

Support Additional Allowance Type *

First Aid
First Aid
Honorarium

3. Now enter the amount to be paid in the box below:

What is the amount of the allowance to be paid? *

£

→

What is the amount of the allowance to be paid? *

£ 1000

4. Finally, enter the allowance end date.

Date of Birth *

31/01/2016

OR

Temporary to permanent

1. To indicate you wish to make a temporary member of staff permanent, simply tick the box marked **yes**.

<p>Temporary to Permanent</p> <p>Are you making this post permanent? *</p> <p><input checked="" type="radio"/> No <input type="radio"/> Yes</p>		<p>Temporary to Permanent</p> <p>Are you making this post permanent? *</p> <p><input type="radio"/> No <input checked="" type="radio"/> Yes</p>
---	---	---

Extension of fixed term end date

For this section, you need to enter the end date for the extension of the fixed term contract, and the reason.

1. First, enter the end date 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:

<p>Date of Birth *</p> <input type="text" value="31/01/2016"/>	OR		 <p><i>Make sure you enter the end of the holiday period that the fixed term contract will end in, not the last day of term.</i></p>
--	----	---	--

2. Now pick a reason for the revised end date, from the dropdown list. The options are:

- **Amalgamation/opening of a new school**
- **Establishment review**
- **External funding**
- **Maternity cover**
- **Paternity cover**
- **Pending permanent appointment**
- **Secondment**
- **Sickness cover**

Reason for Revised End Date *



Reason for Revised End Date *

- Amalgamation/Opening of a new school
- Establishment Review
- External Funding
- Maternity Cover
- Paternity Cover
- Pending Permanent Appointment
- Secondment
- Sickness Cover



Reason for Revised End Date *

- Amalgamation/Opening of a new school
- Establishment Review
- External Funding
- Maternity Cover
- Paternity Cover
- Pending Permanent Appointment
- Secondment
- Sickness Cover



Reason for Revised End Date *

Expenditure code change

To change an expenditure code, 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.

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

Expenditure Code Set



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

Lookup Records ✕

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

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



Lookup Records ✕

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

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

5. Your selection will now appear. →

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

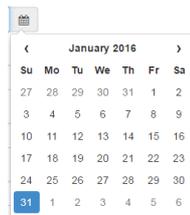
→

Return from maternity/adoption leave

This section requires you to select the end date for either of these leave periods. To do this, fill in either the free text field (in the format dd/mm/yyyy), or click on the calendar icon and select the date. Both options look like this:

Date of Birth *

OR



Change of name

The change of name section allows you to change the employees first and/or last name. Both of these fields need to be completed, even if one part of the employees name hasn't changed; so, for example, if someone has changed from a maiden name to a married surname, you would still need to input their first name. The fields look like this:

What is the new first name? * →

What is the new surname? * →

Change of address

The change of address fields are all free text, to enable you to enter a full address.

1. To fill these fields in, simply type the required information in each text box. At the end of the address, you will also need to select if the change is temporary, or permanent. The fields look like this:

Change of Address

Address Line 1 *

Address Line 2

Town *

County *

Postcode *



Change of Address

Address Line 1 *

Address Line 2

Town *

County *

Postcode *

Once the new address is complete, fill in if this change is temporary or permanent:

Temporary or Permanent Change *

→

Temporary or Permanent Change *

↓

Temporary or Permanent Change *

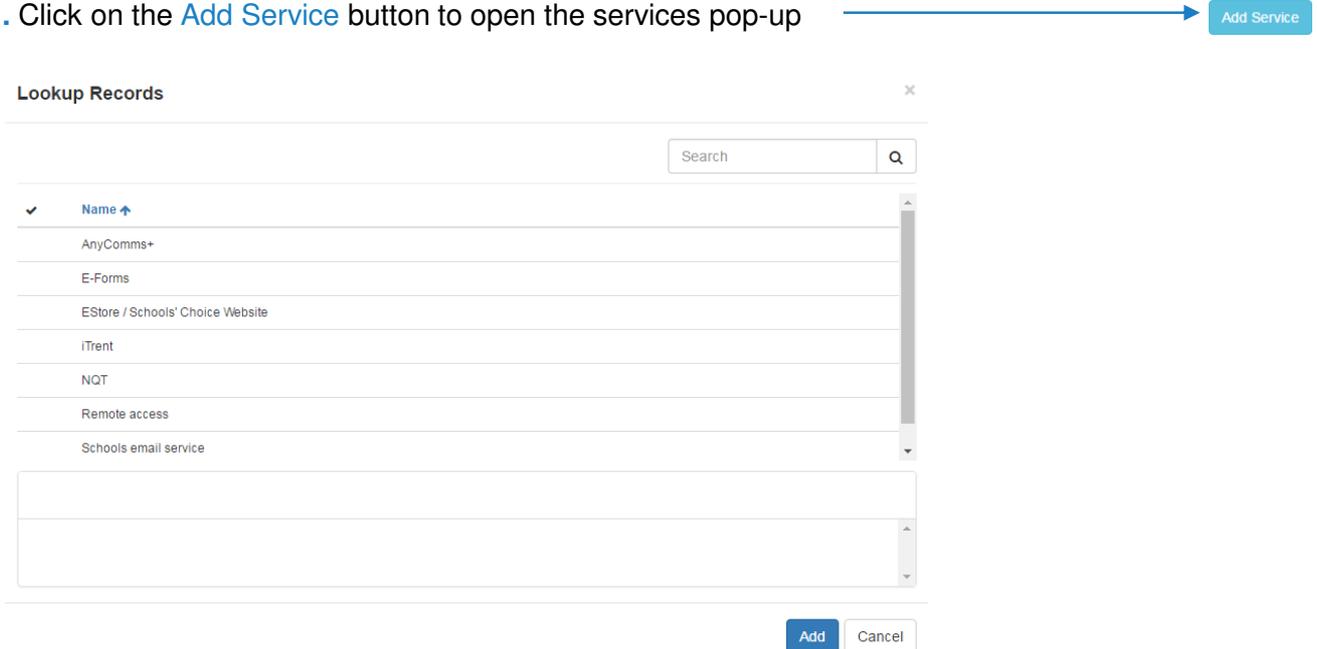
Online services

This section is used to select

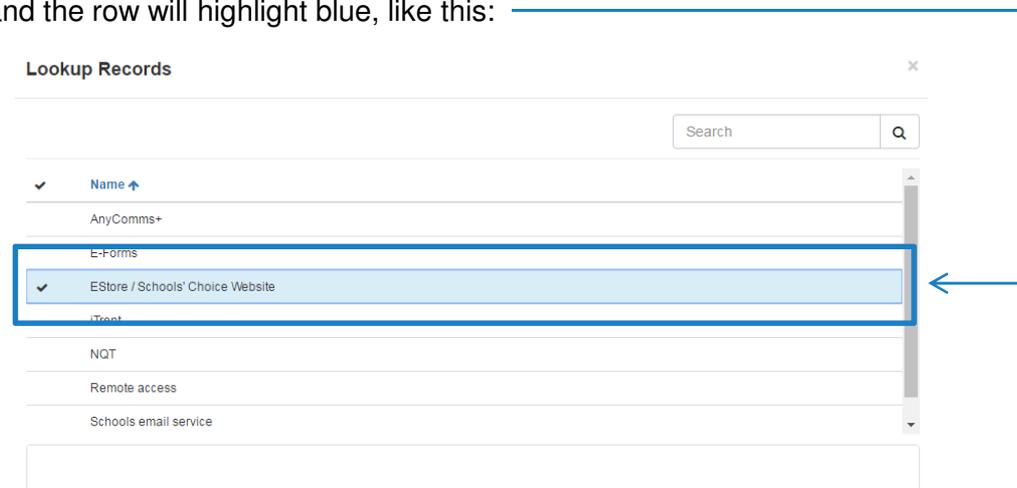
- AnyComms+
- E-Forms
- Estore / Schools Choice Website
- iTrent
- NQT
- Remote access
- Schools email service

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

1. Click on the [Add Service](#) button to open the services pop-up 



2. 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: 



3. 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"/>



4. If the member of staff has a school email address, enter this once you have selected the services you want:

Email Address

If the employee has a work email address, please enter it here.



Email Address

If the employee has a work email address, please enter it here.

Other changes

The final field is a free text box used to describe a change that is not listed in any of the other fields. To fill in an unspecified change, type the details in to the box, providing as much information as you possibly can.

Once you are happy with all the changes you have entered, press **save and continue**.

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**.

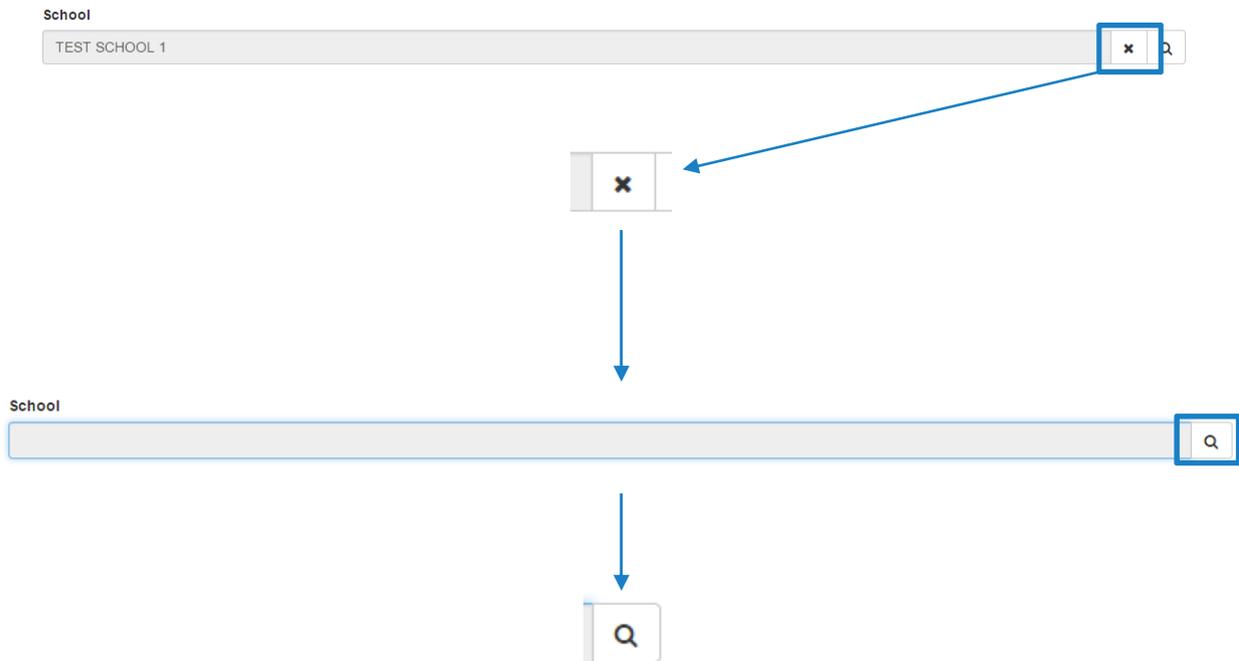
What is the name of the person authorising this change? *

What is the job title of the person authorising this change? *

Please provide an email address for Schools' Choice to use for any questions relating to this form *

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.

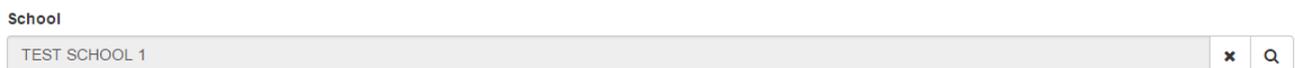
If the school displayed is incorrect, click on the **cross** on the right hand side of the bar to remove it, then click on the **magnifying glass** to open up the list of schools:



4. A popup will now appear with 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.

Select

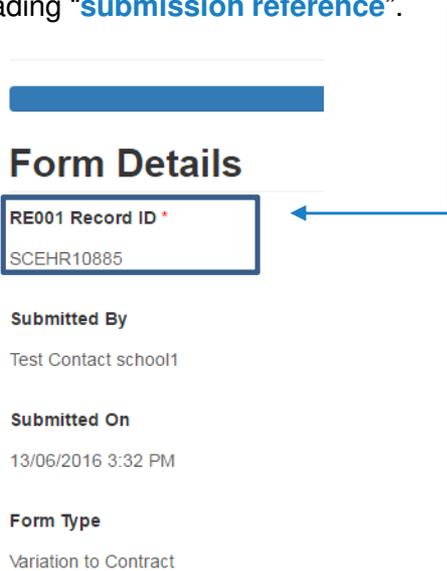
The school you have selected will now appear.



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**".



The screenshot shows a 'Form Details' section. At the top is a blue bar. Below it is the heading 'Form Details'. Underneath is a table with one row: 'RE001 Record ID *' with the value 'SCEHR10885'. Below this are three other rows: 'Submitted By' with 'Test Contact school1', 'Submitted On' with '13/06/2016 3:32 PM', and 'Form Type' with 'Variation to Contract'. A blue box highlights the 'RE001 Record ID *' field, and a blue arrow points from the text 'submission reference' in the paragraph above to this field.

RE001 Record ID *	SCEHR10885
Submitted By	Test Contact school1
Submitted On	13/06/2016 3:32 PM
Form Type	Variation to Contract

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:

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