

Work Instructions Schools Portal
Schools Payroll Forms (SPF)

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Accessing the Schools Payroll Forms

Login into the Schools Portal as normal

Login

Email address	<input type="text" value="uattester"/>
Password	<input type="password" value="*****"/>
<input type="button" value="Login"/>	


In the bottom right hand corner, select **Open Payroll Forms**

Schools Portal - Payroll Steppages Cty Primary School (2033) Logged in as uattester


Welcome to the Schools Portal - Payroll

This online service enables users to access the Schools Absence Return and Schools Variation Return (SAR & SVR) along with the Absence Report. The new service allows us to send and receive the information electronically, and securely. Before you begin, please review the Quick Start user guide on the Schools Payroll Portal home page.


Download Your Monthly SAR Template

 [2033_SAR_Apr_2013.xls](#)

Download Your Monthly SVR Template

 [2033_SVR_Apr_2013.xls](#)

Download Your Monthly Absence Report



Attach Your Completed Monthly SAR File

Example: 2033_SAR_Apr_2013.xls

Attach your Completed Monthly SVR File

Example: 2033_SVR_Apr_2013.xls

Latest Status

If you need to make adjustments to your files before the deadline for the month, simply open this page again and submit your updated files. Your old files on our system will be replaced with the new ones you upload.

History:
No files uploaded so far this month.


The SPF template should be downloaded and saved to a location. All submission files generated will also be saved to the same location.

Payroll Forms North West Surrey Short Stay School (4250) Logged in as marcelle

Welcome to the Payroll Forms

This online service enables users to access the Schools Payroll Forms. The new service allows us to send and receive the information electronically, and securely. If you have any questions, or need help please contact Surrey County Council Helpdesk on 0208 541 9000 or email them at myhelpdeskhr@surreycc.gov.uk

Download Your Monthly HR Template

 [4250_SPF_JUNE_2014.xls](#)

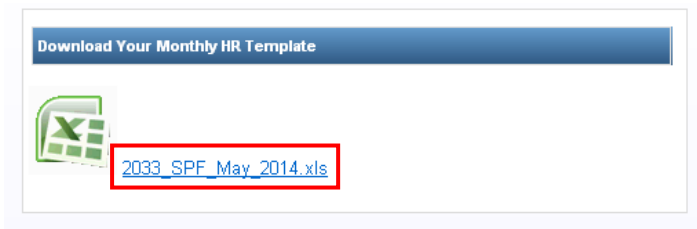
Attach Your Completed HR File

Example: 4250_SPF_JUNE_2014.xls

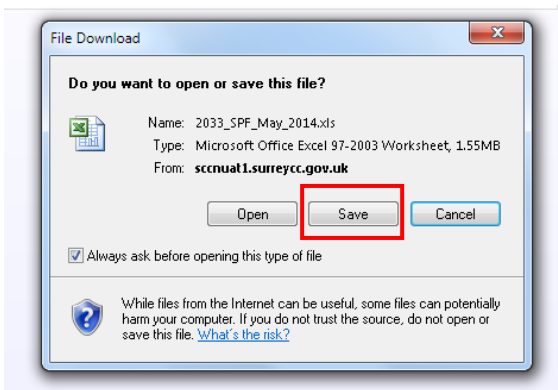
Latest Status

History:
04/06/2014 11:11:54 Sandra Carr uploaded HR file:
4250_SPF_JUNE_2014_Submission_1.xls

Select the file name to download the file



Select **Save** and save the file to an appropriate location on your computer



Please note: The file name must be saved in the following format – locn_SPF_month_year.xls (4045_SPF_May_2014.xls). This is the way it will be named so this MUST NOT be changed.

General Overview

- For New Starter's select the 'Add New Starter' button at the top of the spreadsheet.



- To add an additional job to an existing employee, select the employee from the list, double click and select 'Add a contract for same person'.



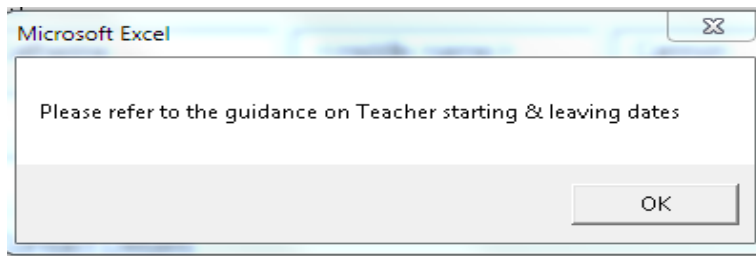
- To make a change on a particular contract, select the contract from the list, double click and select 'Change details'.



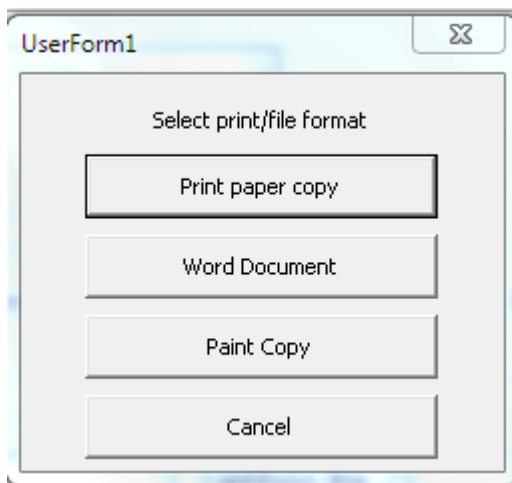
- To process a leaver, select the contract you wish to resign, double click and select 'Terminate contract(s)'.



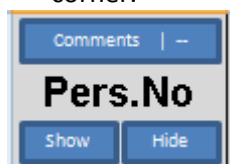
- A warning message will appear when entering any effective date for a teacher. This can be ignored but is a reminder to ensure you apply the correct rules regarding teachers contract start dates and end dates.



- If you choose the Print button you will have a few options – this must be done before you save.
 - Print paper copy.
 - Word Document – will transfer all the data to a word document with a signature box. This can then be saved and/or printed.
 - Paint Copy – will transfer all the data to a paint document with a signature box. This can then be saved and/or printed.
 - Cancel**Please check which option is best for you.**



- Once you have saved a change or a leaver the Employee ID will change colour and you will see a red triangle in the same field. You can hover over this and see the data you have changed. The comments can be shown or hidden using the options in the top left hand corner.



- Once you have saved a New Starter the data will appear at the bottom of the template with <new> as the Employee ID.

New Starters

- Mandatory fields on the new starter form are highlighted in red, these include:
 - Job Title
 - Start Date (selected using the date picker)
 - Title, Forename, Last name, Marital status, Date of Birth (selected using the date picker)
 - House number & Street name, Town/City, Postcode (format must be LLN NLL or LLNN NLL where L = a letter and N = a number).
1. Select a Job Title from the list, then select a Contract Type, definitions found below:
 1. Permanent Schools – salaries for these staff are based on 52 weeks - eg teacher, caretaker.
 2. Term Time Schools – salaries for these staff are calculated on a “spread-over” basis and require “weeks per year” and a “denominator”.
 3. Bank Staff Schools – these staff are set up as “Zero hours” and paid per hour/session. See below for setting the Holiday %.
 2. Once these two options have been selected the relevant dependant fields will become active.
 3. Select a Start Date and Local Government Start Date using the date pickers.
 4. Complete the Personal Details and Address and Contact Details sections.
 5. Complete the Contract Details section remembering the following:
 1. Hours/100ths – for Permanent and Term Time staff cannot exceed 36 – an additional post would need to be set up if the weekly hours are more than 36. For Teachers the 100ths need to be entered here.
 2. Weeks – Term Time only, must be between 35 and 45 inclusive
 3. Denominator – Term Time only, choice of 1618 or 1647
 4. ‘Contract over 3 months’ field is mandatory for all non-teaching staff (this will determine if the employee is enrolled into the LGPS. You should only select No for true casual workers and not current employees with extra hours on another post.)
 6. On completion of the Contract Details, The Pro Rata Salary and Gross Pay will be populated for you to check. You must click into the Ethnic Origin field for the pro Rata salary to show.
 7. Complete the Equality Monitoring and Census Data.
 8. When you are happy with the form, select Save, you will then be asked if you want to update the data.
 9. When complete, the new employee will appear at the bottom of the spreadsheet with NEW appearing as their personnel number.

Allowances

These can be changed or entered on the Starter, Change and Additional post forms. The figure you enter into the 'allowance amount' field must be the full time equivalent amount. The form will then pro rate the amount dependant on the employee's contractual hour's details.

If you need an allowance to be paid at a different rate (full time amount for a part time employee) do not enter an amount as this is "out of scope" – please email the Helpdesk with the details.

If the allowance does not show on the form then it is out of scope and you will need to email helpdesk.

Casual Holiday

All zero hours employees must have a Leave allowance added when they start. The standard % in Surrey is 14% and 16% after 5 years. The figure needs to be entered as shown below.



The image shows a screenshot of a web form. At the top, there is a dropdown menu with the text "Leave Allowance SCC" and a downward-pointing arrow. Below the dropdown is a text input field containing the number "14.00".

Transfer from another SCC school

This should be done as a New Starter process

- Mandatory fields on the new starter form are highlighted in red, these include:
 - Job Title
 - Start Date (selected using the date picker)
 - Title, Forename, Last name, Marital status, Date of Birth (selected using the date picker)
 - House number & Street name, Town/City, Postcode (format must be LLN NLL or LLNN NLL where L = a letter and N = a number).
1. Select a Job Title from the list, then select a Contract Type, definitions found below:
 - a. Permanent Schools – salaries for these staff are based on 52 weeks - eg teacher, caretaker.
 - b. Term Time Schools – salaries for these staff are calculated on a “spread-over” basis and require “weeks per year” and a “denominator”.
 - c. Bank Staff Schools – these staff are set up as “Zero hours” and paid per hour/session.
 2. Once these two options have been selected the relevant dependant fields will become active.
 3. Select a Start Date and Local Government Start Date using the date pickers.
 4. Select Yes within the ‘Within SCC transfer’
 5. Select the old school from the drop down list.
 6. **If the school does not exist or is not within SCC do not choose this option - set them up as a new starter and contact helpdesk to inform them that the employee has transferred but not from a Surrey School.**
 7. Enter the Employee ID from the old school (if known)
 8. Complete the Personal Details and Address and Contact Details sections.
 9. Complete the Contract Details section remembering the following:
 - a. Hours/100ths – for Permanent and Term Time staff cannot exceed 36.
 - b. Weeks – Term Time only, must be between 35 and 45 inclusive.
 - c. Denominator – Term Time only, choice of 1618 or 1647
 - d. ‘Contract over 3 months’ field is mandatory for all non-teaching staff
 10. On completion of the Contract Details, The Pro Rata Salary and Gross Pay will be populated for you to check.
 11. Once all data is entered you can print the form for authorisation and signature if necessary.
 12. When you are happy with the form, select Save and the post will be created.

Changes

The change form will display the Job Title and the Contract Type when opened. The only field that is mandatory upon opening the form is the Effective Date. Changing the Job Title or Contract Type could result in other fields becoming mandatory.

1. Select an Effective Date for the change using the date picker (this is mandatory).
2. You will see the form is split into 4 sections, Personal Details, Address and Contact Details, Contract Details and Census Data. Each of these sections can be expanded to display the fields that can be changed.
3. When expanding the Personal Details form you will see a message detailing that changes made to personal details will be applied to all contracts for that employee.
4. Current Address and Contact Details will not be displayed due to data protection reasons.
5. Current Contract Details will be displayed and can be changed. As stated above, changing Contract Type may cause some fields to be unchangeable or mandatory depending on the selection, e.g. changing from Permanent Schools to Term Time Schools will require you to enter Weeks and a Denominator.
6. Once you are happy with the changes you have made, select Save, you will then be asked if you want to update the data.
7. All personnel numbers that have changes made on them will be displayed in **Red**; you will be able to move your cursor over this field to see the changes you have made before submission.

Tips

When changing hours please make sure you have clicked or tab across to the week field. This will change the pro rata & gross salary.

Leavers

1. If selecting Terminate Contract(s) for an employee with multiple contracts, you will see a message which will ask you to select the contacts the termination applies to.
2. The name of the employee will be displayed at the top of the form.
3. You will be required to state if the person is transferring to another Surrey School or not. (If so, please follow Transfer work instructions).
4. Use the date picker to select the Date of Termination which is mandatory, you will also need to select a Reason for Leaving.
5. If the employee has other contracts, they will be displayed under the contract you have selected. You will be able to select any other contracts that will be terminating at the same date as the selected contract. **Please note if other contracts are to be terminated but from a different date, you must complete a separate leaver form where you will be able to select the termination date for that contract.**
6. Please see the note below when required to pay holiday hours to staff upon leaving.
7. The Address is mandatory as we will need to have the correct forwarding address for employees to be able to send their P45.
8. Once you are happy with the form, select Save, you will then be asked if you want to update the data.
9. The personnel numbers for all of the contracts you have terminated will be displayed in Red.

When you terminate a contract for an employee that has a 'Permanent Schools' contract you will be able to enter any holiday hours they are due.

Transfers to another SCC school

This should be done as a leaver (termination of contract)

- Mandatory fields on the termination form are highlighted in red, these include:
 - Within SSC transfer
 - Date of Termination (selected using the date picker)
 - Reason for leaving (selected using drop down list)
 - House number & Street name, Town/City, Postcode (format must be LLN NLL or LLNN NLL where L = a letter and N = a number)
1. Select Yes within the 'Within SCC transfer'
 2. Select the new school from the drop down list. (If the school does not exist or is not within Surrey do not choose this option).
 3. Select the termination using the date pickers.
 4. Select the reason for Leaving (Trans. in other SCC Svce).
 5. Complete the relevant address and contact details.
 6. When you are happy with the form, select Save, you will then be asked if you want to update the data.

Transmission of Data

This can be done at any time after you have made changes or created. Once you are happy with the changes click the 'Generate Submission'.

This will create a file with the following named format

9999_SPF_May_2014_Submission_1

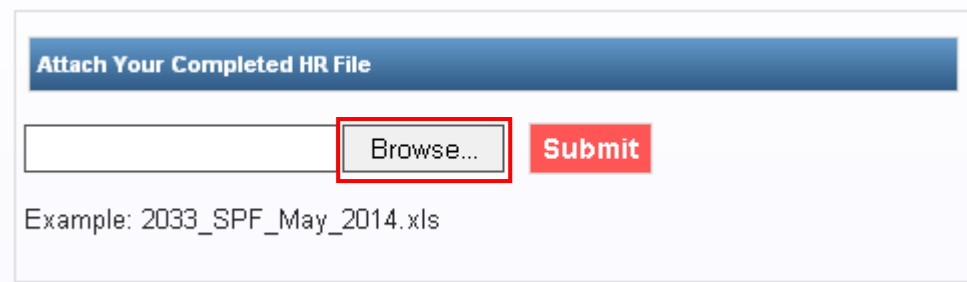
You can create as many submission files as you like and the number will just increase. These are the files that you will need to load into the portal when you wish to send them to us.

Please see the work instructions for 'returning a submission'.

PLEASE DO NOT RETURN THE ACTUAL SPF TEMPLATE

Returning a Submission through the Portal

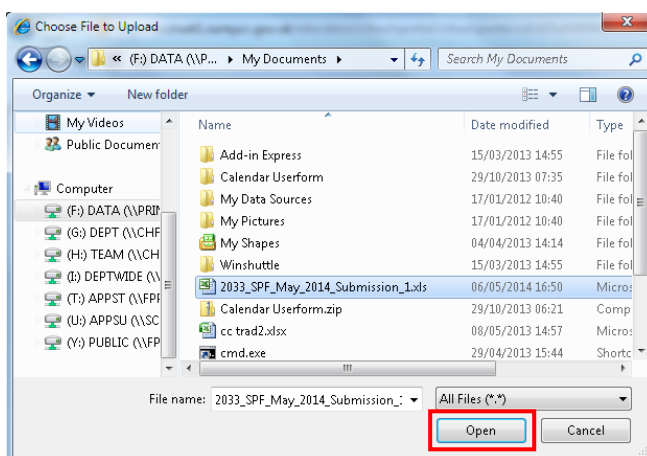
From the Schools Payroll Forms Portal, select **Browse**



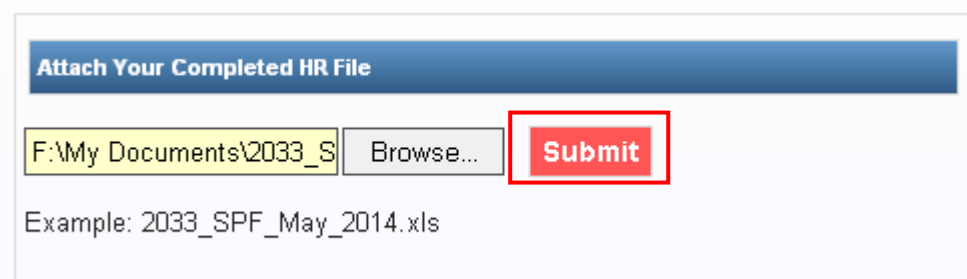
Attach Your Completed HR File

Example: 2033_SPF_May_2014.xls

Location the file submission file you wish to return and select **Open**



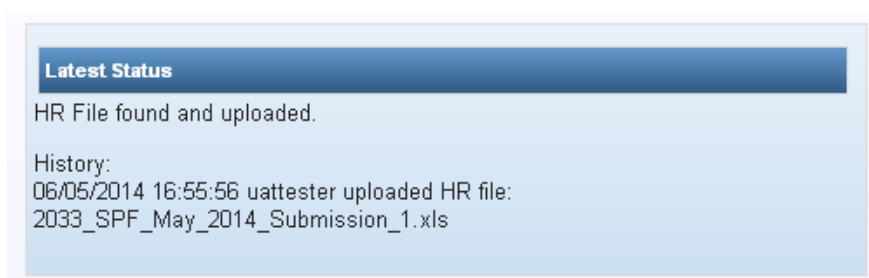
Select **Submit**



Attach Your Completed HR File

Example: 2033_SPF_May_2014.xls

The file has now been submitted and the status updated



PLEASE DO NOT RETURN THE ACTUAL SPF TEMPLATE

FAQs

Q- I have saved the form but then realised I have made a mistake; I cannot get back to the form I was changing?

A – Once a form has been saved you cannot retrieve that form. Depending on what the mistake is you will have to contact helpdesk to inform them of the correct information. Saving the form is like physically putting it into the post, once it has been saved we you will need to contact us with any amendments.

Q - There is no option for fixed term or temporary contract?

A – We do not hold this information; you will need to choose the relevant Contract Type. When the employee is leaving you will need to submit the termination through the SPF process.

Q – Hours – we normally enter 100ths for teachers do we do the same?

A- This field will accept 100ths for teachers and will take 2 decimal places as well.

Q – How do I calculate a FTE from an hourly rate for casual staff? And the hourly rate from the salary?

A – The calculations are:

Salary/365) x 7/36 = Hourly rate

Hourly rate x 36/7 x 365 = Salary

Q – I have submitted my New Starter but how do I add the bank details or change bank details for a current employee. I also have a P45/P46.

A – Bank details still need to be submitted via a BK1 and sent in via post or email. All tax forms should be sent via post or email.

Q- I have an employee returning from a long term absence e.g. Maternity leave, how do I submit this via an SPF form?

A – If there is a change in the terms and conditions you can submit a change form with the effective date as the return date. Please also email helpdesk informing them that the employee has returned. If there is no change in the terms and conditions please email helpdesk informing them that the employee has returned with no change.

Q –The SPF has closed and I have a leaver I have forgotten about. How do I inform payroll?

A – Please email helpdesk with the information

Q – I need to process or stop a recurring payment or deduction for an employee. Can I do this using the SPF?

A – No, any recurring payments or deductions are out of scope so you will need to email the Helpdesk for anything to do with this area. Please note these are not automatically stopped when making other changes.

Q – I have a part time person who is entitled to receive a full time allowance, does the SPF account for this?

A – The SPF will automatically pro-rata any allowances entered so in this scenario, leave out the allowances from the form and email the Helpdesk with details so we can process this manually.

Q – I used to use the comments box on the old forms, am I able to write a comment using the SPF?

A – Additional comments are out of scope for the SPF so if you wish to add any comments to anything on the SPF, you will need to email the Helpdesk with the details and this will be passed to the team.

Q – Can I access the SPF file via the portal at any time?

A – No, there are times when the SPF will be unavailable due to payroll running. You will be able to access the SPF the Friday before payday up until approximately the 10th of the next month.

Q – Can I process Redundancy/Severance payments using the SPF?

A – No these are considered out of scope. You will need to contact My Helpdesk if you wish to alert the team of any payments of this nature.

Q – I have set up a starter and now they have another job that is starting earlier?

A – You can still set them up as a New Starter but please inform Helpdesk of the details so we can make sure the correct one is set up first.