Business World HR Form Guide
TRANSFER WITHIN TEAM FORM

Shropshire Council

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1. Introduction

The following guide provides information to the Headteacher, Office Manager/Administrator or delegated person to ensure they are familiar with the process of how to transfer an existing Resource into another position within the school's establishment. When the form has been completed at school level it workflows to Payroll.

Please check your establishment list to check that there is a position ID number set up for the position that the Resource is transferring to. If not, please follow the process using the New Position Form.

2. Navigating Business World

Please refer to the 'Business World HR How To – Navigate' for additional tips for manoeuvring Business World.

2.1 The Tab key

Please ensure that you are familiar with the tab key.

Use the TAB button on your keypad, to move from one field to the next to work through the form.

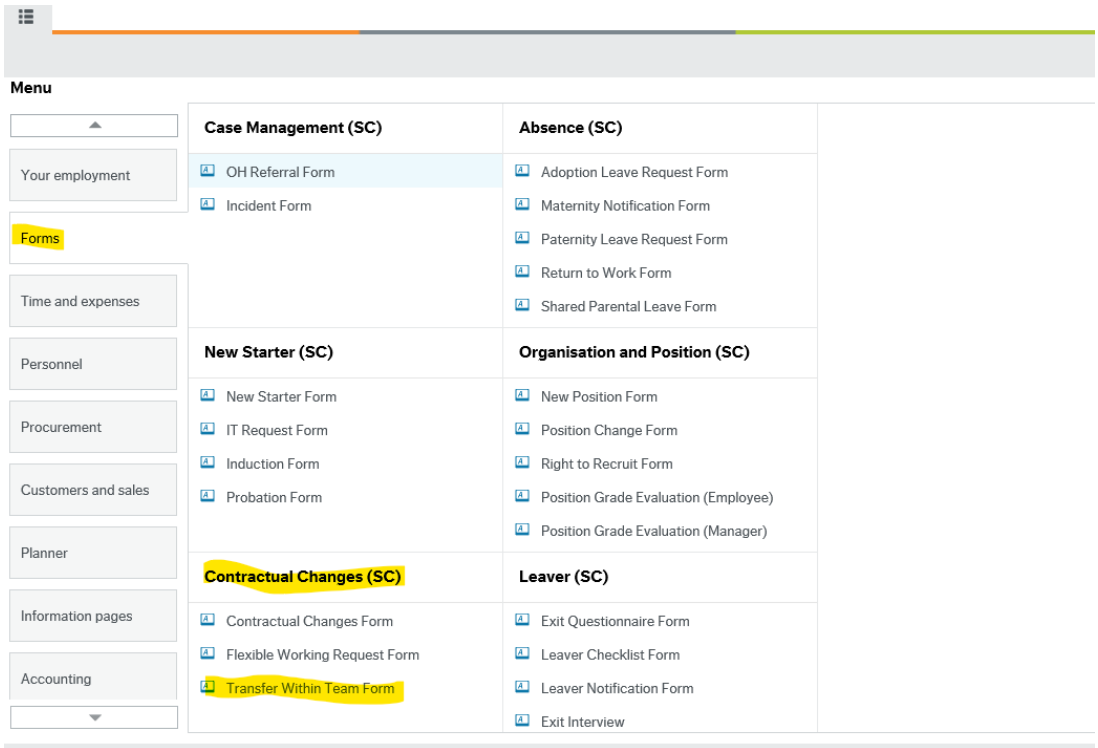
Also become familiar with the scroll bars to move the screen up and down or left to right.

3. To set up A TRANSFER WITHIN TEAM into an EXISTING POSITION

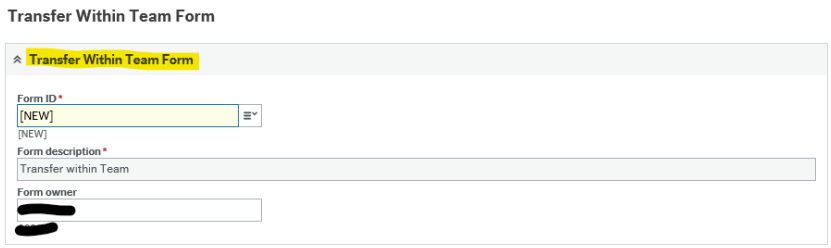
Log in to Business World**.**

Step 1

Click on Forms and then select Transfer Within Team Form:

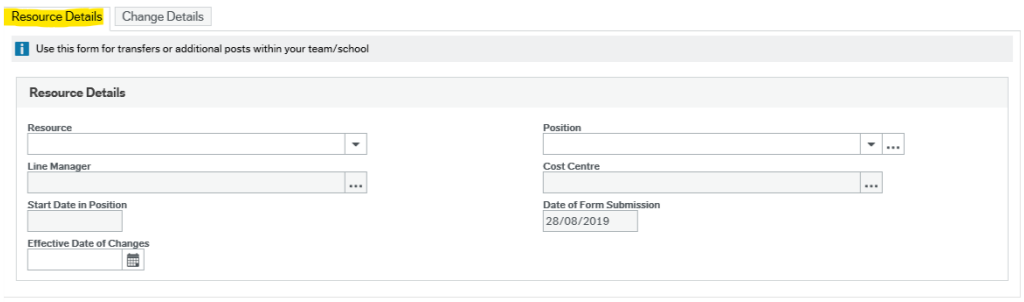


This section will auto complete with the Form owners name and Resource ID, use the TAB key to move down the 'Resource Details':

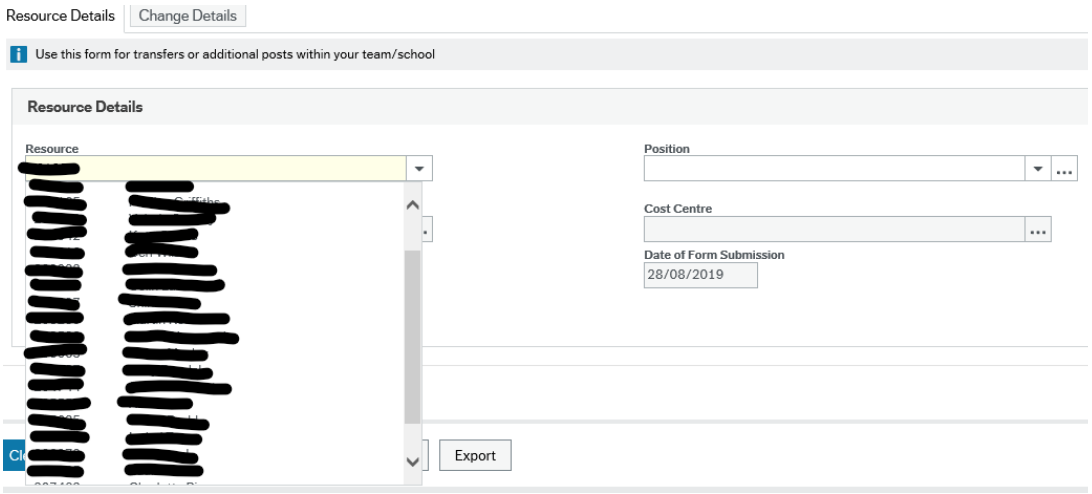


STEP 2

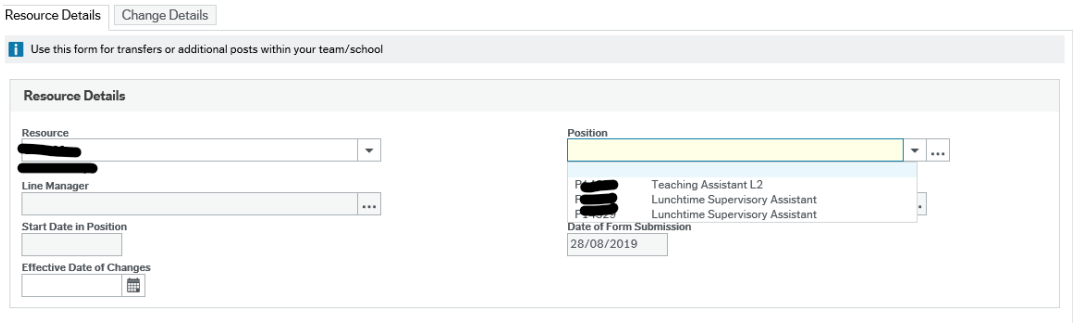
The Resource Details section will allow you to input the Resource name and confirm the position that they are transferring from and the effective date of change:



Click in the 'Resource' box, press SPACEBAR and select the Resource from drop down box or if you know the Resource ID type it in the box:

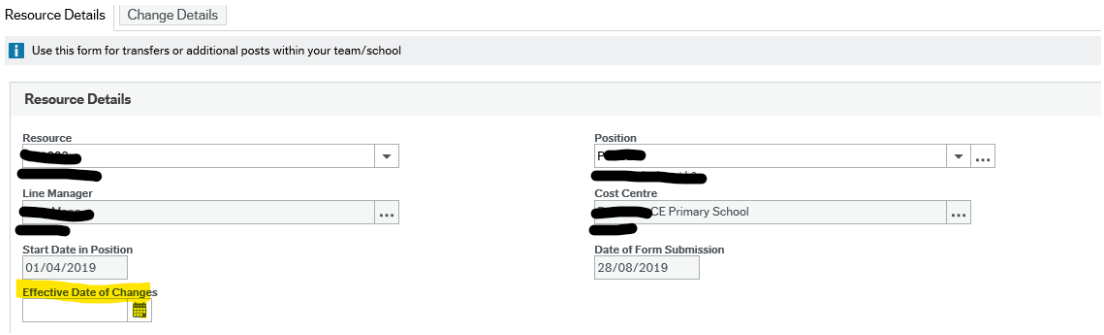


TAB to the next box, press SPACEBAR and select the position the Resource is transferring from and TAB.



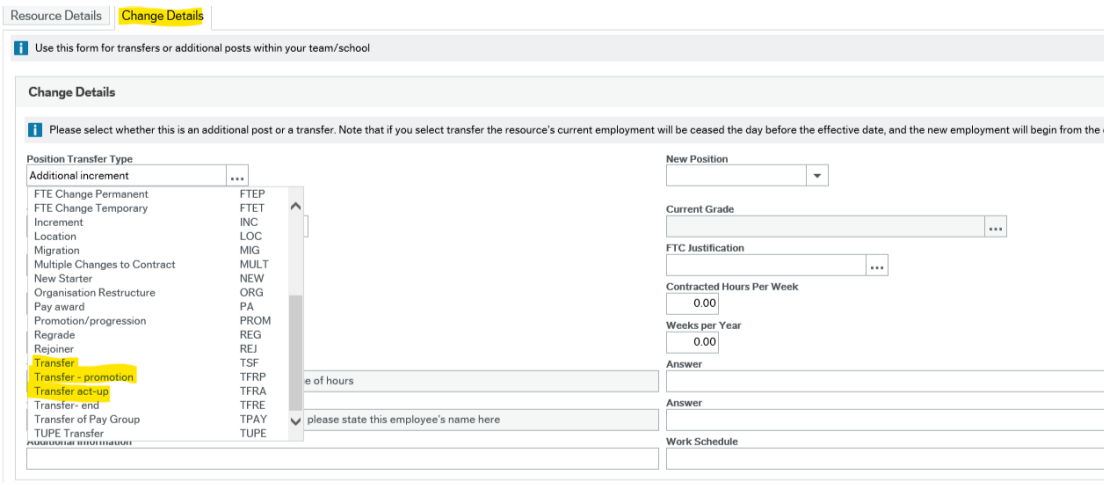
This will populate the following boxes with Line Manager details, Cost Centre, Start Date in Position and Date of Form Submission.

Use the calendar to select the effective date of change:



STEP 3

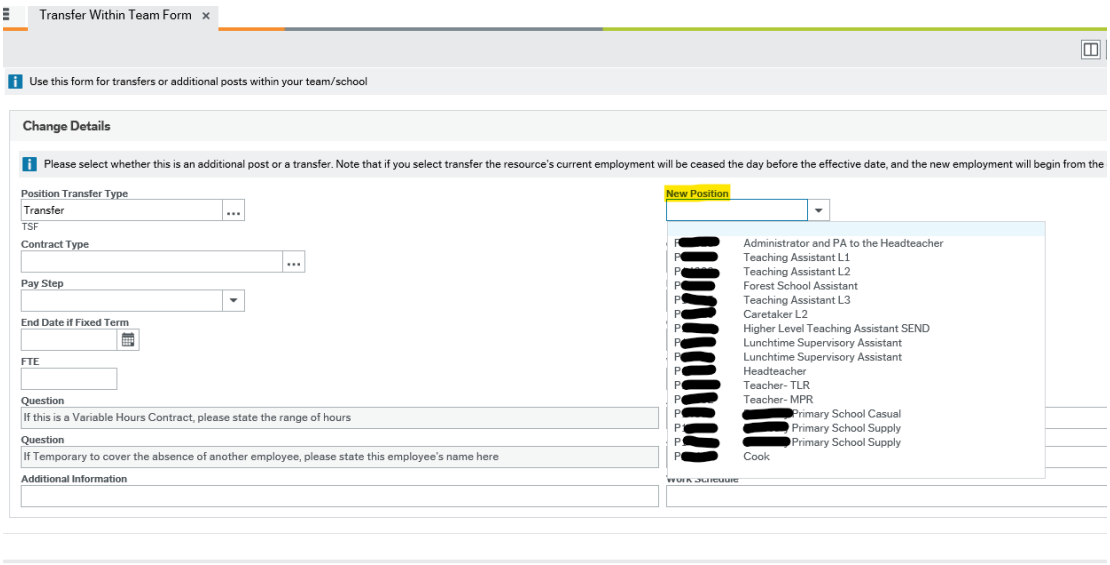
Select the next tab ‘Change Details’:



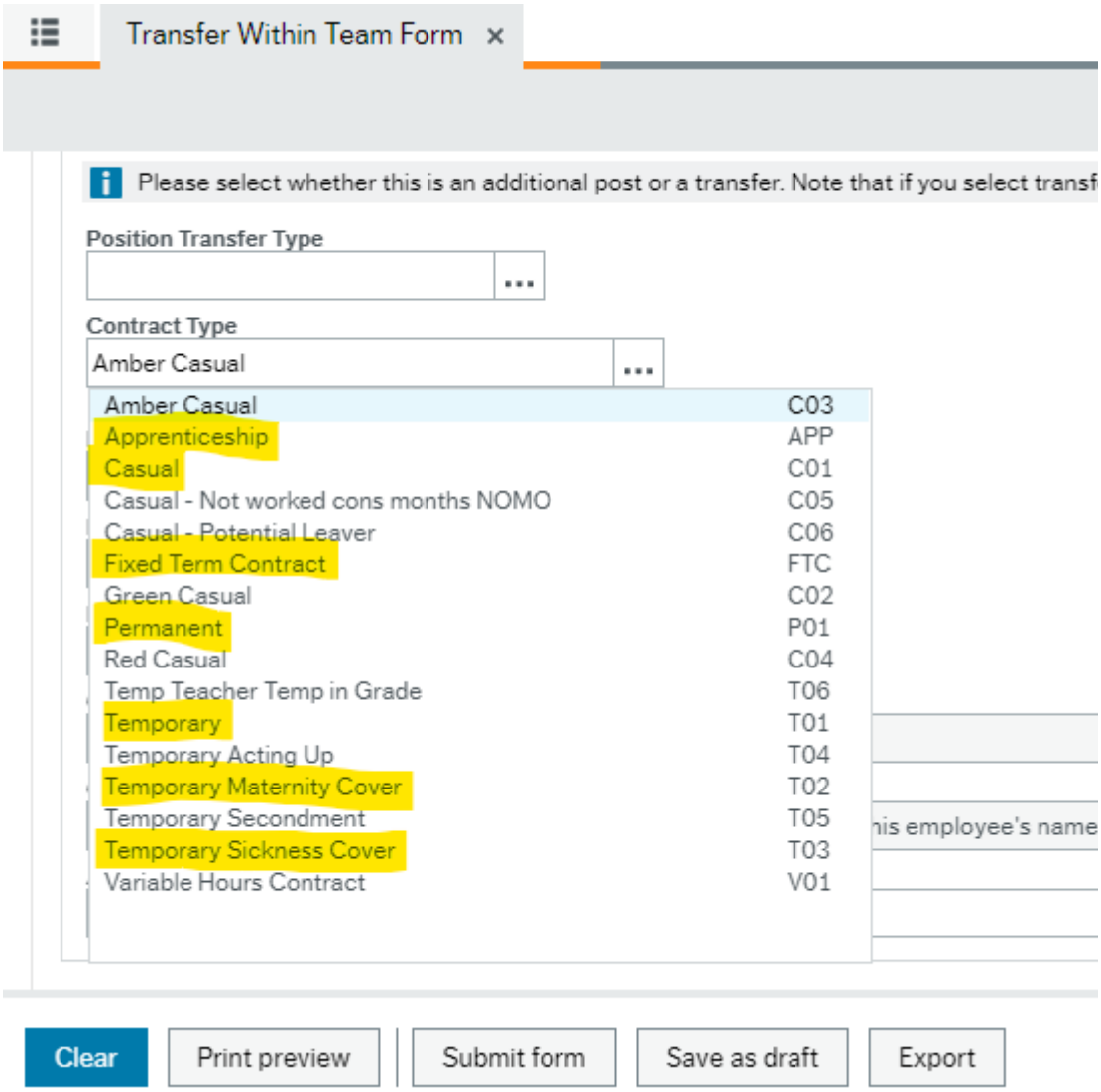
Position Transfer Type – press SPACEBAR and scroll down to Transfer – select the relevant one and press TAB to move to the next box.

Transfer	When an employee moves from one position into another within the school.
Transfer - promotion	When the employee is promoted within the school.
Transfer act-up	When the employee is covering a more senior position (e.g. Deputy covering Headteacher position).
Transfer - end	DON'T use this option.

New Position – press SPACEBAR and scroll down to the position the Resource is moving to – select the relevant one and press TAB to move to the next box:



TAB to the next box Contract Type. Press SPACEBAR and select the relevant contract type - highlighted are the types to use:



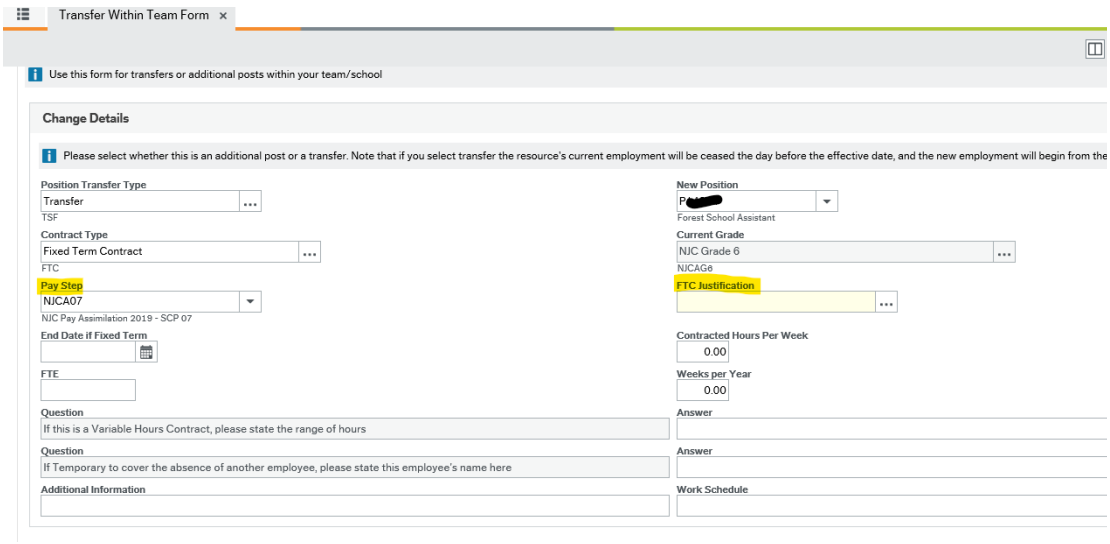
The highlighted options are the options to be used:

Amber Casual	DON'T use this option
Apprenticeship	can be used.
Casual	can be used.
Casual Not worked cons months NOMO	DON'T use this option.
Casual Potential Leaver	DON'T use this option.
Fixed Term Contract	can be used. Use this option when an end date is known. Also use this option for secondments.
Green Casual	DON'T use this option.
Permanent	can be used.
Red Casual	DON'T use this option.
Temp Teacher Temp in Grade	DON'T use this option.

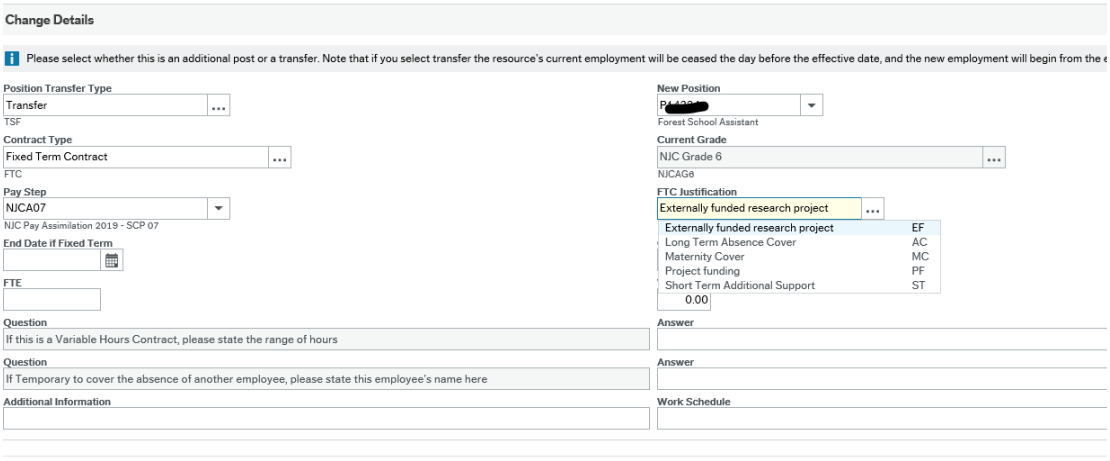
Temporary	can be used. Use this option when an end date is not known.
Temporary Acting Up	DON'T use this option.
Temporary Maternity Cover	can be used. Use this option when an end date is not known.
Temporary Secondment	DON'T use this option.
Temporary Sickness Cover	can be used.
Variable Hours Contract	DON'T use this option.

Current Grade will auto populate from the New Position tab.

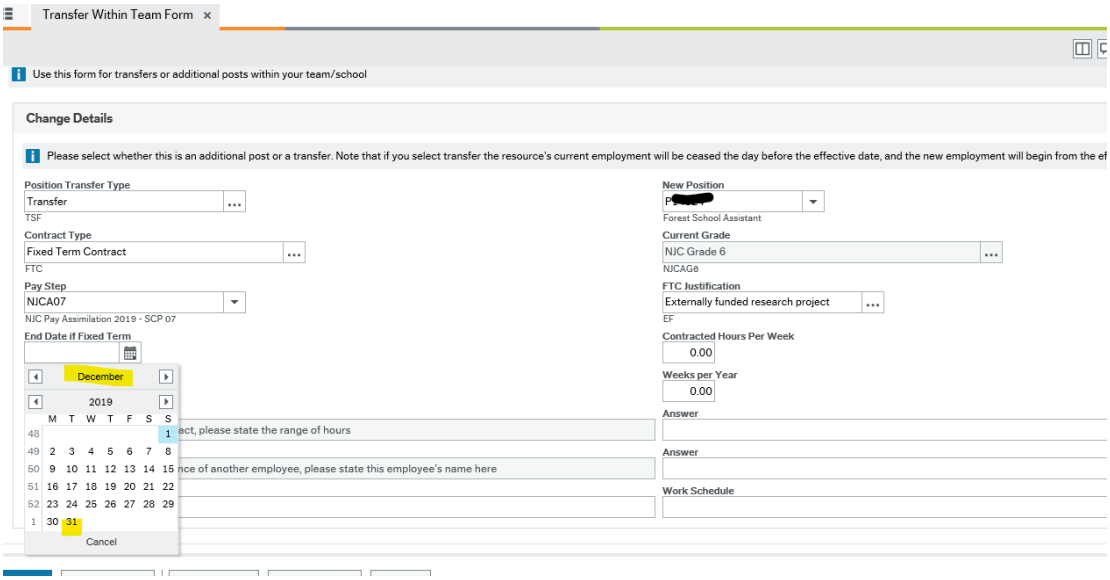
TAB to the Pay Step box, press SPACEBAR and select the appropriate pay point:



Fixed Term Justification – select one of the following if it is a fixed term contract. If permanent leave blank.



Enter date using the calendar for when the fixed term contract is to. **Please note that Business World is set up to cease paying the employee on the End Date entered**, therefore you must monitor and review fixed term contracts in a timely manner to ensure they are processed as a Leaver or a Contractual Changes amendment is completed:



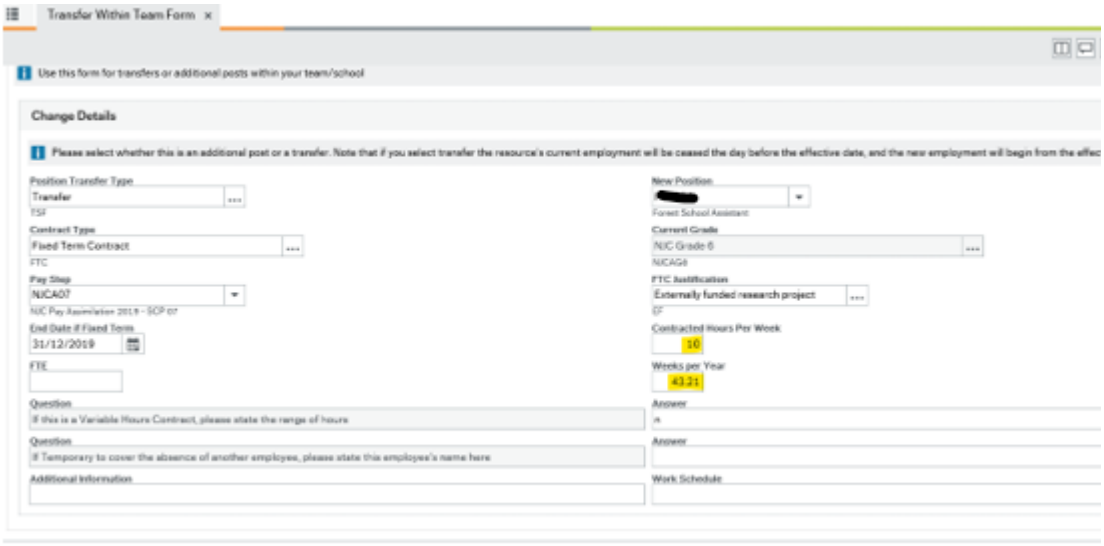
TAB to next box and type in how many hours the contract will be for. Enter the hours as a decimal, e.g. 12 hours 30 minutes is 12.50, 15 minutes is 0.25, 45 minutes is 0.75.

Please refer to the' Part-time Teachers Pay and Working Arrangements Guidance', Appendix B 'Completing the Part-Time Teachers Calculator' on the SLG to calculate and enter the **FTE hours for a part time teacher**. This is important to ensure they are paid pro rata to a full-time teacher at your school.

Weeks per year – see information below, being mindful of previous continuous service to ensure that their entitlement is correct:

School Support Staff	Less than 5 years' service	More than 5 years' service
Term time only	43.21	44
Term time + 1 week (PD Days)	44.21	45
Term time + 2 weeks	45.21	46
Term time + 3 weeks	46.21	47
Term time + 4 weeks	47.21	48
Term time + 1 PD Day	43.35	44.18
Term time + 2 PD Days	43.58	44.41
Term time + 3 PD Days	43.80	44.64
Term time + 4 PD Days	44.03	44.87
Term time + 1 week and 1 PD Day	44.48	45.34
Term time + 1 week and 2 PD Days	44.71	45.57
Term time + 1 week and 3 PD Days	44.94	45.80

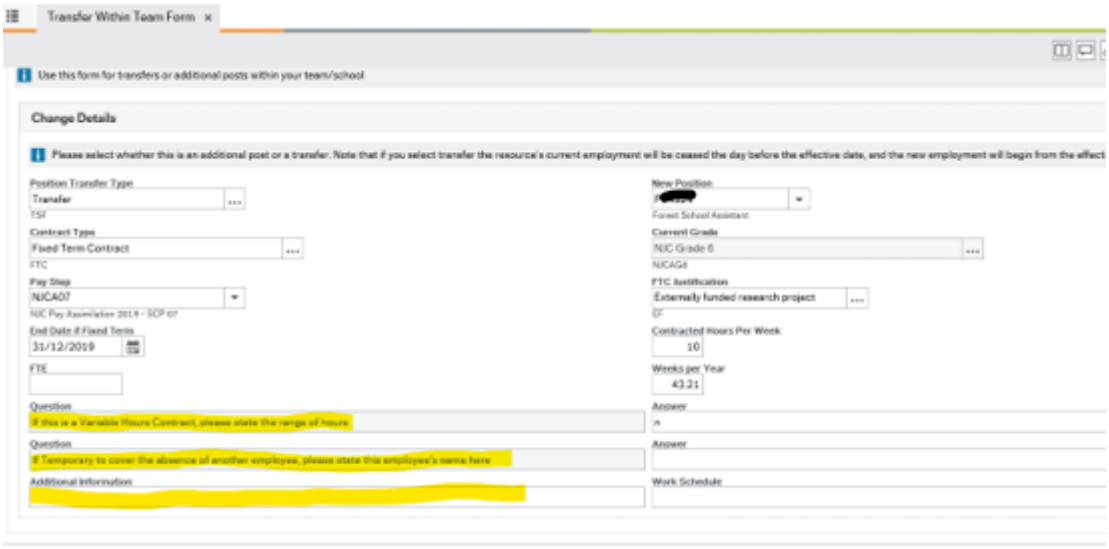
Term time + 1 week and 4 PD Days	45.16	46.03
Term time + 2 weeks and 1 PD Day	45.62	46.49
Term time + 2 weeks and 2 PD Days	45.85	46.72
Term time + 2 weeks and 3 PD Days	46.07	46.95
Term time + 2 weeks and 4 PD Days	46.30	47.19
Cleaning Assistants		
Term time + 3 weeks periodic cleaning	47	48
Cleaners in Charge		
Term Time + 4 weeks periodic Cleaning	49	
Term Time + 3 weeks periodic Cleaning + 5 years' service		49
Supervisory Assistants		
Term Time Only	43	43.57



Is this a Variable hours contract? Complete if applicable, this may be used for Teaching Assistants when covering Supervisory Assistant Roles.

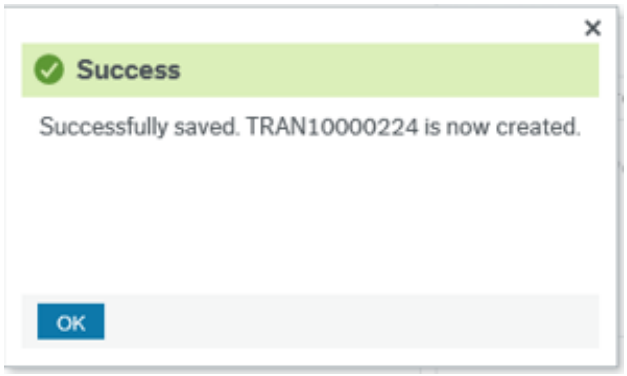
If Temporary to cover absence of another employee, please state this employee's name here – use this if they are on maternity leave or long term sickness.

Additional Information – add any additional information you feel could be relevant.



When you are happy that the form has been fully completed, press 'Submit Form' and it will workflow to your Headteacher for approval or direct to Payroll, depending on authorisations. **Make a note of the Form number**.

You will receive a 'Success message' see screen shot below:

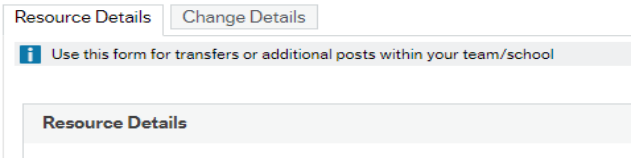


4. Headteacher Approval

If the 'Transfer Within Team Form' has been completed by an Office Manager/Administrator, once the form is submitted it will generally workflow to the Headteacher for approval.

The Headteacher will be alerted that a task is waiting:

Please refer to the 'Business World HR Form Guide – New Starter' section 4 for more detail regarding approving tasks. Ensure that both sections of the form are reviewed – 'Resource Details' and 'Change Details':



5. Additional Information

5.1 If you need to attach any documents please refer to the 'Business World HR Form Guide - New Starter', section 3, step 8.

5.2 If Payroll reject a New Starter Form they will state the reasons for the rejection in the Workflow Log comment box and the form will workflow back to the school and will show as a Task to action. Please read the comments and update the form as appropriate before resubmitting.