



Business World HR Form Guide NEW STARTER 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 setting up a new starter into a position which already exists on the school's establishment. When the form has been completed at school level it workflows to Payroll.

If, however, the new starter is to start in a new position that doesn't currently exist on your establishment, then please follow the guidance for completing a 'New Position Form' first which is explained in 'Business World HR Form Guide – New Position Form'. When the new position has been set up the New Starter Form can then be completed.

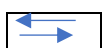
2. Navigating Business World

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.

2.2 Saving the form

Please note, you will need to complete this form down to and including the Step 6 '**Additional Details Continued**' in one sitting before you can save it. Once it has been saved you will then have the function to attach the relevant new starter documents.

Warning - should Business World time out before you complete the form this far, your form will not be saved!!

2.3 Scan your new starter documents

Prior to completing the form, please ensure that you have scanned and saved all of the new starter documents that will accompany your New Starter Form.

The new starter documentation will need to be attached to the form as described below, before the SUBMIT button is pressed. The form will be workflowed for approval to either your Line Manager (Headteacher) or direct

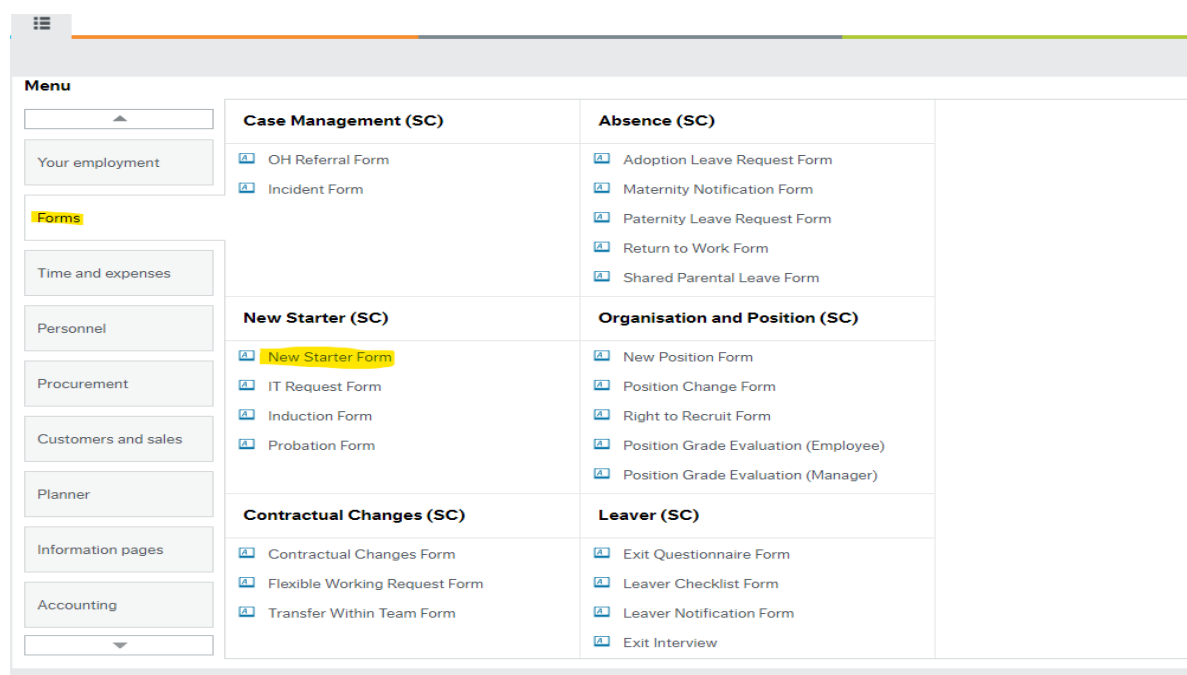
to Payroll depending on your authorisation levels at your school. The form will be rejected by Payroll if the correct forms are not attached.

3. To set up A NEW STARTER into an EXISTING POSITION

Log in to Business World.

STEP 1

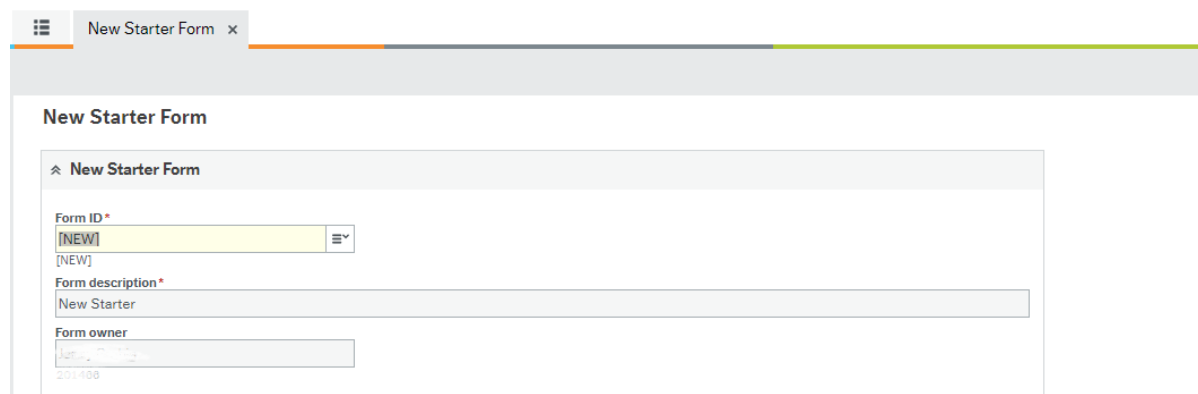
Click 'Forms', click New Starter Form:



STEP 2

A New Starter Form will open.

The first section is auto completed, use the TAB key to move down to the 'Personal Details' section.



STEP 3

Complete the Personal Details Screen:

The screenshot shows the 'Personal Details' form. The 'Date of Birth' field is highlighted with a yellow circle and contains the text '11/08/1991'. Other fields include Title (Mr), First Name (Joe), Surname (Bloggs), NI Number (AB123456C), Email Address (joe.bloggs@btinternet.com), and Post Code (SY2 6ND).

Title – click in the field and select the title and TAB to the next field, complete the fields.

Click the calendar icon to select the Date of Birth, as shown below:

The screenshot shows the 'Personal Details' form with a calendar pop-up for the 'Date of Birth' field. The calendar is set to August 1991, and the date '11' is selected. The 'Date of Birth' field in the form now displays '11/08/1991'.

If the Resource already has an additional position within the school, or if they may have moved from another school, they will already have a Resource ID, please use the 'Current Emp ID (If appl)' tab as shown below:

The screenshot shows the 'Personal Details' form with the 'Current Emp ID (If appl)' field highlighted in yellow. The form contains the same information as the previous screenshots, including Title (Mr), First Name (Joe), Surname (Bloggs), NI Number (AB123456C), Email Address (joe.bloggs@btinternet.com), and Post Code (SY2 6ND).

STEP 4

Complete the Position Details Box.

Please do not print as this version is likely to change (September 2019, version 1)

Press the 'SPACEBAR' on your keyboard to populate the list of available positions in your establishment, click the relevant one, use the TAB key and the next two boxes will pre-populate.

The screenshot shows the 'New Starter Form' interface. On the left, a dropdown menu for 'Position' is open, listing various roles such as 'Administrator and PA to the Headteacher', 'Teaching Assistant L1', 'Teaching Assistant L2', 'Forest School Assistant', 'Teaching Assistant L3', 'Caretaker L2', 'Higher Level Teaching Assistant SEND', 'Lunchtime Supervisory Assistant', 'Lunchtime Supervisory Assistant', 'Headteacher', 'Teacher- TLR', 'Teacher- MPR', 'Primary School Casual', 'Primary School Supply', 'Primary School Supply', and 'Cook'. To the right of the dropdown are several input fields: 'Position No', 'Job Family', 'Weeks Per Year' (set to 0.00), 'End Date (If App)', 'Paystep', 'Manager of Post', 'Start Date', 'Hours Per Week' (set to 0.00), 'Annual Salary' (set to 0.00), and 'Position Code'.

Press the 'SPACEBAR' on your keyboard to populate the list of available work schedules.

Use the highlighted 37 hours for all support staff who have term time contracts and also for casuals:

The screenshot shows the 'New Starter Form' interface with the 'Work Schedule' dropdown menu open. The menu lists various work schedules, with the '37 Hrs (7.4 / 7.4 / 7.4 / 7.4 / 7.4 / 0 / 0)' option highlighted in yellow. Other options include '37 Hrs (0 / 0 / 7.4 / 7.4 / 7.4 / 7.4 / 7.4)', '37 Hrs (0 / 9.5 / 9.5 / 9.5 / 9.5 / 0 / 0)', '37 Hrs (0/7.4/7.4/7.4/7.4/0)', '37 Hrs (0/9.25/9.25/9.25/9.25/0/0)', '37 Hrs (10 / 8.5 / 10 / 8.5 / 0 / 0 / 0)', '37 Hrs (5.29 / 5.29 / 5.29 / 5.29 / 5.29 / 5.29 / 5.29)', '37 Hrs (6 / 6 / 5 / 5 / 5 / 5 / 5)', '37 Hrs (6 / 9.5 / 6 / 9.5 / 6 / 0 / 0)', '37 Hrs (7 / 5 / 5 / 5 / 5 / 5 / 5)', '37 Hrs (7 / 7 / 7 / 8 / 8 / 0 / 0)', '37 Hrs (7.25 / 7.25 / 7.25 / 7.25 / 8 / 0 / 0)', '37 Hrs (7.4 / 7.4 / 7.4 / 0 / 0 / 7.4 / 7.4)', '37 Hrs (7.4 / 7.4 / 7.4 / 7.4 / 7.4 / 0 / 0)', '37 Hrs (7.5 / 7.25 / 7.5 / 7.25 / 7.5 / 0 / 0)', '37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 7 / 0 / 0)', '37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 7)', '37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 0 / 0)', and '37 Hrs (7.5 / 7.5 / 8.5 / 7.5 / 6 / 0 / 0)'. To the right of the dropdown are input fields for 'Position No', 'Job Family', 'Weeks Per Year' (set to 44.00), 'End Date (If App)', 'Paystep', 'Manager of Post', 'Start Date', 'Hours Per Week' (set to 0.00), 'Annual Salary' (set to 0.00), and 'Position Code' (set to Local Government Workers).

Use 32.5 for Teacher/Supply Teachers/Deputy/Headteacher positions:

The screenshot shows a close-up of the 'Work Schedule' dropdown menu. The '32.5' option is highlighted in yellow. Below it, several '32.5 Hrs' options are listed with their respective weekly hour patterns: '32.5 Hrs (5.5 / 7.5 / 7.5 / 7.5 / 4.5 / 0 / 0)', '32.5 Hrs (6.5 / 0 / 6.5 / 0 / 6.5 / 6.5 / 6.5)', and '32.5 Hrs (6.5 / 6.5 / 6.5 / 6.5 / 6.5 / 0 / 0)'. At the bottom, a 'Rolling 2 Week - 0 hrs (0 / 0 / 0 / 0 / 0 / 0 / 0) - 32.5 hrs (6.5 / ...)' option is visible. To the right of the dropdown are input fields for '32.5TEACHERGEN', '32.5-5575757545', '33-65N65N656565', '32.5-66666N', and 'R2 -0032.5'.

For positions that have a 52.14 week per year contract, please select the appropriate work schedule for their specific hours. These are the hours per day Monday – Sunday.

TAB to **Weeks Per Year** and type in the weeks per year – see chart below:

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Please use this reference guide, 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

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Complete the start date using the calendar function, select the date. Ensure that where teachers start at the beginning of term the start dates are 01/09, 01/01 and normally the first day back after the Easter holidays. Support staff also normally start on these dates. Then TAB to the next box:

Select the contract type by pressing 'SPACEBAR' to view the list of pre-populated options:

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.

Cont'd below

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.

Then TAB and enter the End Date if required for an Apprenticeship or Fixed Term Contract, click on the calendar. **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:

End Date (If App)



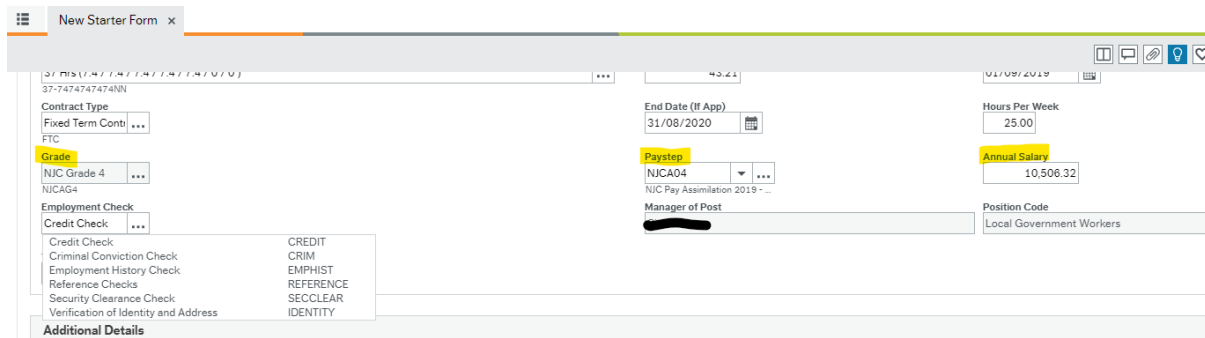
Type in Hours per week – this is a free text field:

Hours Per Week

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.

The grade will pre-populate from the position you select, to enter the information for pay step, press 'SPACEBAR' on your keyboard, select as appropriate. Press the TAB key. This will populate the annual salary:



The screenshot shows the 'New Starter Form' interface. Key fields include:

- Contract Type:** Fixed Term Contr (FTC)
- Grade:** NJC Grade 4
- End Date (If App):** 31/08/2020
- Hours Per Week:** 25.00
- Paystep:** NJCA04
- Annual Salary:** 10,506.32
- Position Code:** Local Government Workers

Additional details include Employment Check options (Credit Check, Criminal Conviction Check, etc.) and a list of check types (CREDIT, CRIM, EMPHIST, REFERENCE, SECCLEAR, IDENTITY).

Employment Checks:

DON'T select any of the options.

Employment Check	
Credit Check	CREDIT
Criminal Conviction Check	CRIM
Employment History Check	EMPHIST
Reference Checks	REFERENCE
Security Clearance Check	SECCLEAR
Verification of Identity and Address	IDENTITY

The Manager of the Position, Position Code and Team Name will auto-populate:

The screenshot shows a 'New Starter Form' with several fields. The 'Manager of Post' field is highlighted in yellow and contains a redacted name. The 'Position Code' field is also highlighted in yellow and contains 'Local Government Workers'. The 'Team Name' field is highlighted in yellow and contains 'Primary School'. Other visible fields include 'Contract Type' (Fixed Term Conti), 'End Date (If App)' (31/08/2020), 'Hours Per Week' (25.00), 'Grade' (NIC Grade 4), 'Paystep' (NICA04), and 'Annual Salary' (10,506.32).

STEP 5

Additional Details

Reason for Recruitment – press 'SPACEBAR' on your keyboard to select a drop-down menu for the reason why you have recruited this new Resource:

The screenshot shows the 'Additional Details' section of the form. The 'Reason for Recruitment' dropdown menu is open, showing options: CASSUP, EXPRESS, MATCOVER, NOTONLINE, OTHER, SECONDMENT, SICKCOVER, and TRANSADD. The 'CASSUP' option is selected. Other fields include 'If other please specify', 'Politically Restricted', 'Working Pattern (Corp)', and 'Teacher DFE No'.

Casual or Supply recruitment – following recruitment for casual or supply staff.

Expression of Interest – where internal letters of expression were requested.

Maternity Cover – to cover a member of staff who is commencing maternity/adoption.

Recruitment Campaign not online – any external recruitment campaign but not using Hire Serve.

Other – if the reason is different to those listed, select and complete the 'if other please specify' box to state the reasons.

Secondment – the new starter is covering a colleague on secondment.

Sickness Cover – the new starter is covering a colleague on sickness absence.

Transfer or Additional Position not online – the new starter is taking on another position at the school.

Working Pattern (Corp) – leave empty, it does not apply to schools.

Essential Car User – No.

Politically restricted positions – No. Please see further information regarding this in your recruitment processes.

Teacher DFE number - complete if the form refers to a new teacher to your establishment.

Reasons for Start (SCH) - select the reason why the new starter is commencing at your establishment. The application form should give some indication as to where they worked previously, alternatively ask the new starter so you can input accurate information which informs the Schools Workforce Census.

Step 6

Additional Details Continued

This section will need to be completed before you can save the form. If Business World times out before this section is completed your work will be lost.

If you need to provide any additional information, please select Yes/No:

Yes – if you need to add additional information about the Resource (e.g. if they have an existing post within school and this is an additional position).

Yes – if the new Resource needs an additional payment (e.g. if it is a teacher and they require a Teaching & Learning Responsibility Allowance).

Yes – add any variable hours contract details (e.g. if a teaching assistant position might need to do lunch cover).

Yes - if you want to add any other information you might want to mention that you haven't already given on the form.

Yes – where the form is for maternity, sickness or secondment cover – detail the name of the person they are covering.

To enter the details, click in the **Additional Info** box, read the text, then delete it and type your comments for Payroll.

Select **No** if you have nothing else to add to your form.

The screenshot shows a web form titled 'New Starter Form'. The 'Additional Details Cont' section is expanded, showing a question: 'Do you wish to provide any additional information, such as variable hours, special requirements, information relating to additional payments?, or attaching supporting documents'. Below this is a 'Yes or No' dropdown menu with 'Yes' selected. The 'Additional Info' field is highlighted in yellow and contains the text: 'Please write any additional information special requirements to assist with the processing of the form. You may also attach relevant supporting documents to the form such as applications or references'. Below this are sections for 'Variable hours details', 'Additional Payment Type?', and 'Start Date Add Payment'.

Additional Payment Type. Complete the start and end date of any temporary additional payments i.e. TLRs and SEN allowances. **Please can you enter the full amount for the allowance and Business World will pro-rata it for you.**

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You are now able to SAVE AS DRAFT – Click on button at bottom of page:

Make a note of the form reference number, you will need it to log back into the form later, or to follow the progress of the submitted form. You can now either continue with the form or log out and log back in later.

STEP 7

To retrieve a form that has been saved as draft

Case Management (SC)	Absence (SC)
<ul style="list-style-type: none">OH Referral FormIncident Form	<ul style="list-style-type: none">Adoption Leave Request FormMaternity Notification FormPaternity Leave Request FormReturn to Work FormShared Parental Leave Form
New Starter (SC)	Organisation and Position (SC)
<ul style="list-style-type: none">New Starter FormIT Request FormInduction FormProbation Form	<ul style="list-style-type: none">New Position FormPosition Change FormRight to Recruit FormPosition Grade Evaluation (Employee)Position Grade Evaluation (Manager)
Contractual Changes (SC)	Leaver (SC)
<ul style="list-style-type: none">Contractual Changes FormFlexible Working Request FormTransfer Within Team Form	<ul style="list-style-type: none">Exit Questionnaire FormLeaver Checklist FormLeaver Notification FormExit Interview

Click next to 'New' and press SPACEBAR on your keyboard, this will bring up your saved forms. **Click on the form you are looking for and press TAB, the saved form will reload.**

New Starter Form

Form ID * [NEW] [NEW] [NEWS10000399 New Starter]

New Starter

Form owner

Personal Details

This form is only to be used for pre-approved recruitment of applicants not being hired through Unit 4 Recruitment

Title [] First Name [] Surname []

Date of Birth [] Other forenames [] Known as First Name []

NI Number [] Email Address [] Contact Telephone No. []

Address Line 1 [] Town [] Country []

The retrieved form will appear.

Step 8

Attachment of Application Form & References, DBS Documentation, Certificates, right to work, scanned copy of Medical approval. (The Medical Questionnaire is still a paper process at present).

Double Click on the paperclip:

New Starter Form

New Starter Form

Form ID *
NEWS10000399

New Starter
New Starter

Form description *
New Starter

Form owner
[Redacted]

Personal Details

Personal Details

This form is only to be used for pre-approved recruitment of applicants not being hired through Unit 4 Recruitment

Title Mr	First Name Joe	Surname Bloggs
Date of Birth 11/08/1991	Other forenames Paul	Known as First Name Joe
NI Number AB123456C	Email Address joe.bloggs@btinternet.com	Contact Telephone No. 01978 780780

Clear Print preview Submit form Save as draft Export

You will then see this screen below, click on Add a document:

New Starter Form

Document archive (?) All documents

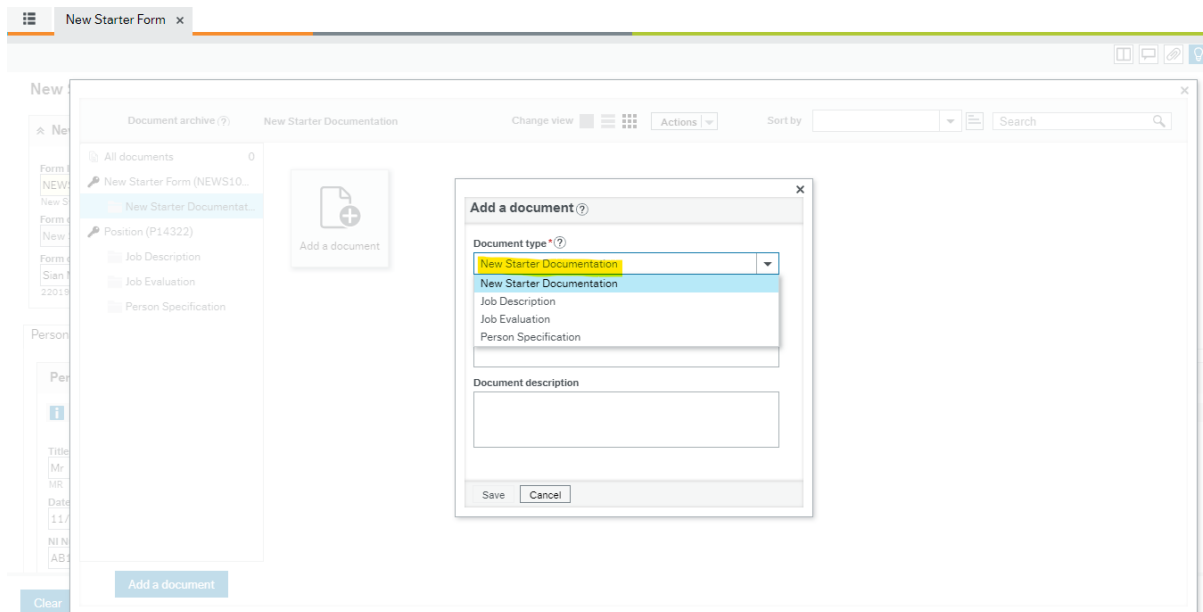
Change view Actions Sort by Search

- All documents 0
- New Starter Form (NEWS10...
- New Starter Documentat...
- Position (P14322)
 - Job Description
 - Job Evaluation
 - Person Specification

Add a document

Add a document

Document Type, select 'New Starter Documentation':

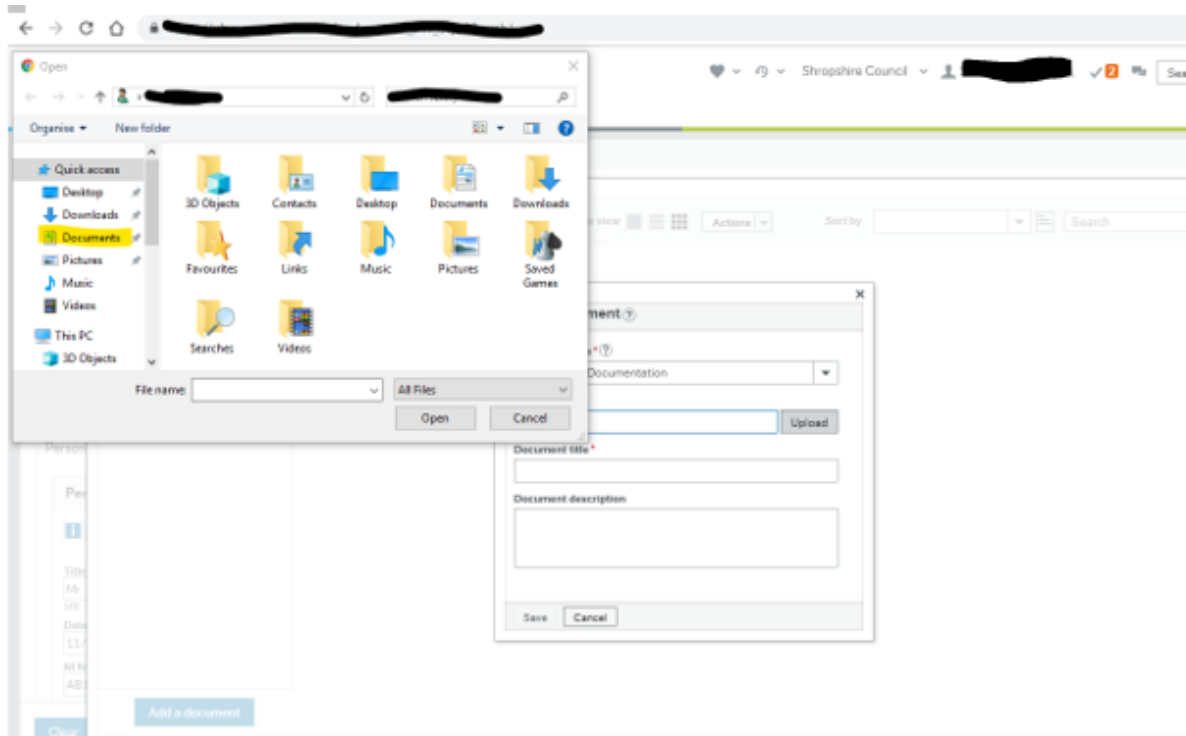


'File Name' Click 'Upload':

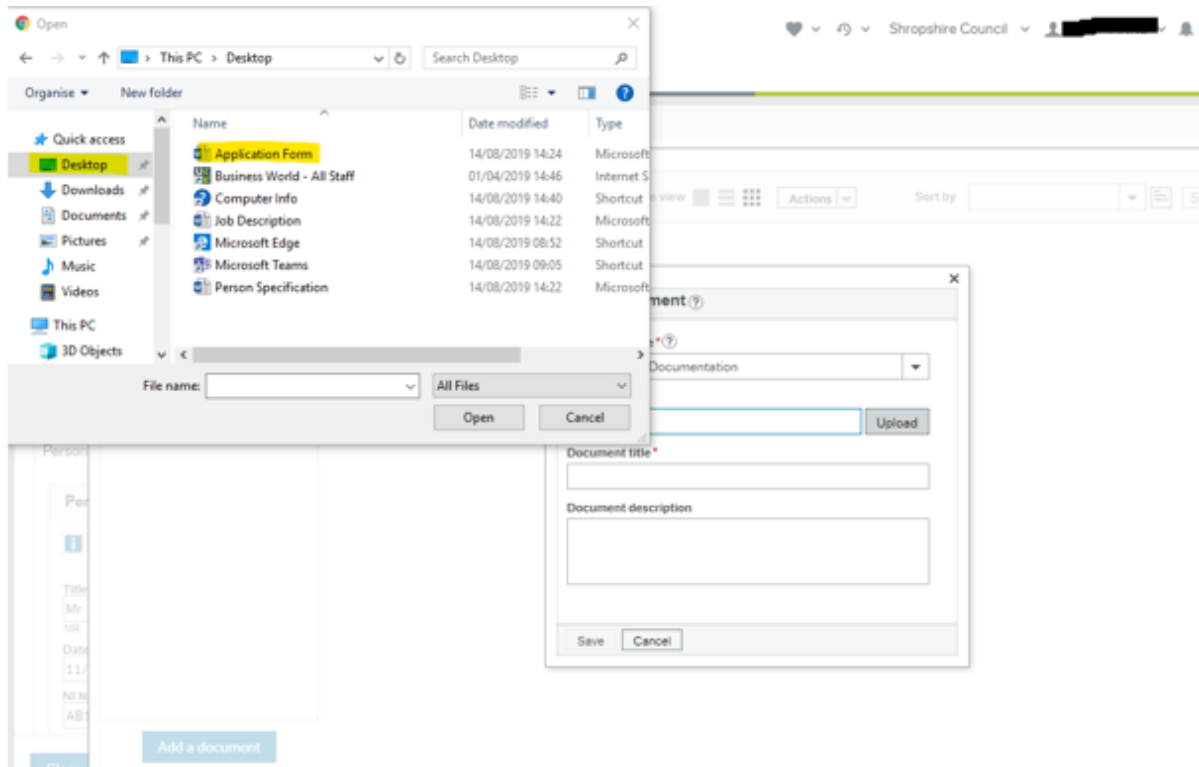
A screenshot of a form. It has a label 'File name*' above an input field. To the right of the input field is an 'Upload' button. Below the input field is another label 'Document title*' above another input field.

Find your folder where you have saved your documents to be uploaded. Ensure you only upload the documents that are relevant to this Resource. Double Click on the document to attach it, or click the document once then press 'Open'.

Please do not print as this version is likely to change (September 2019, version 1)

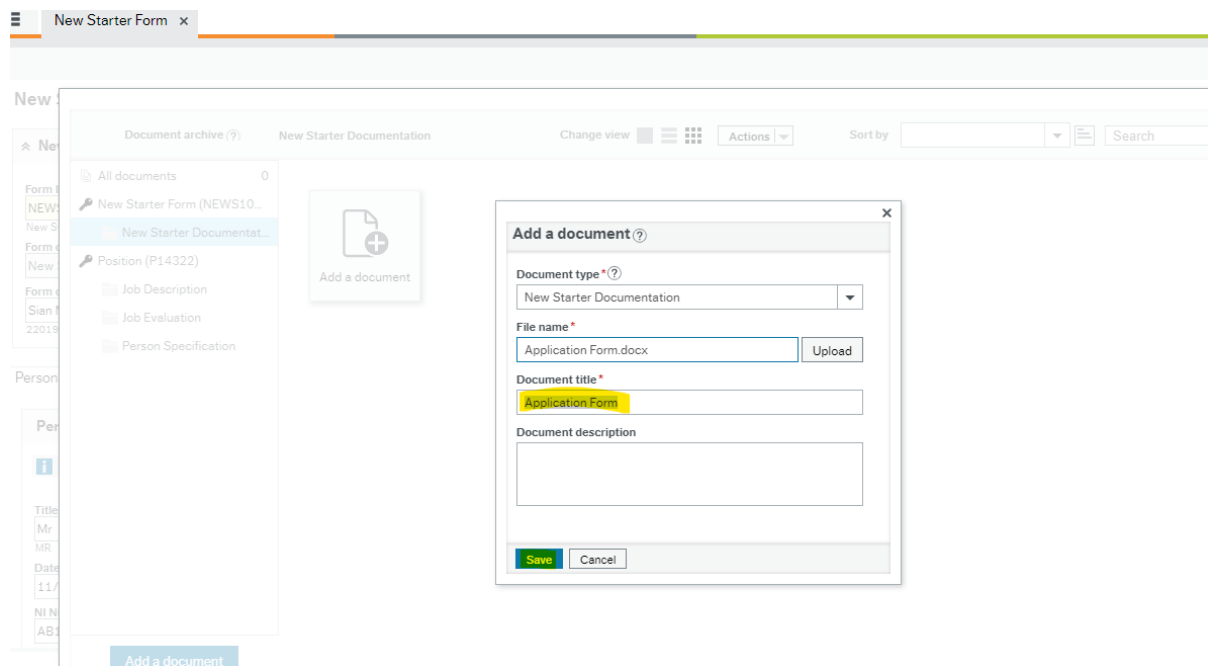


Select the appropriate document:

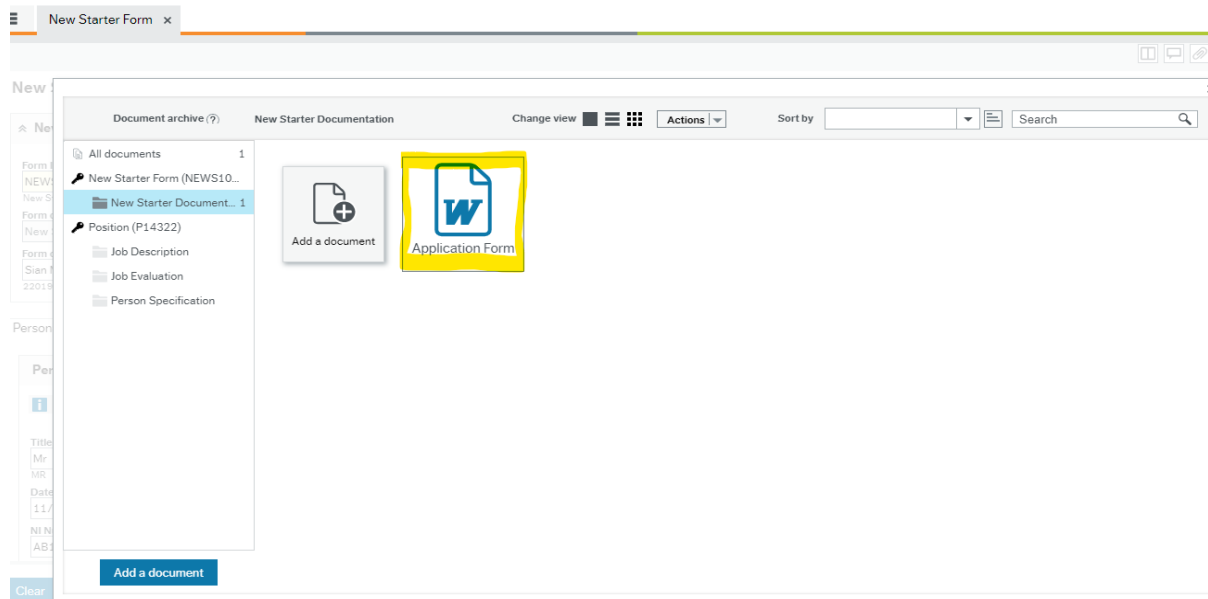


TAB through and press SAVE:

Please do not print as this version is likely to change (September 2019, version 1)

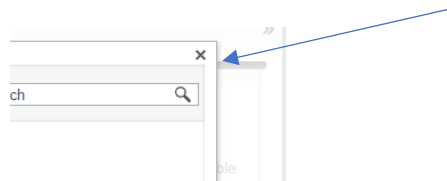


The application form has now been attached to the form:



Repeat the process to attach the other attachments.

Click the X to close the window.

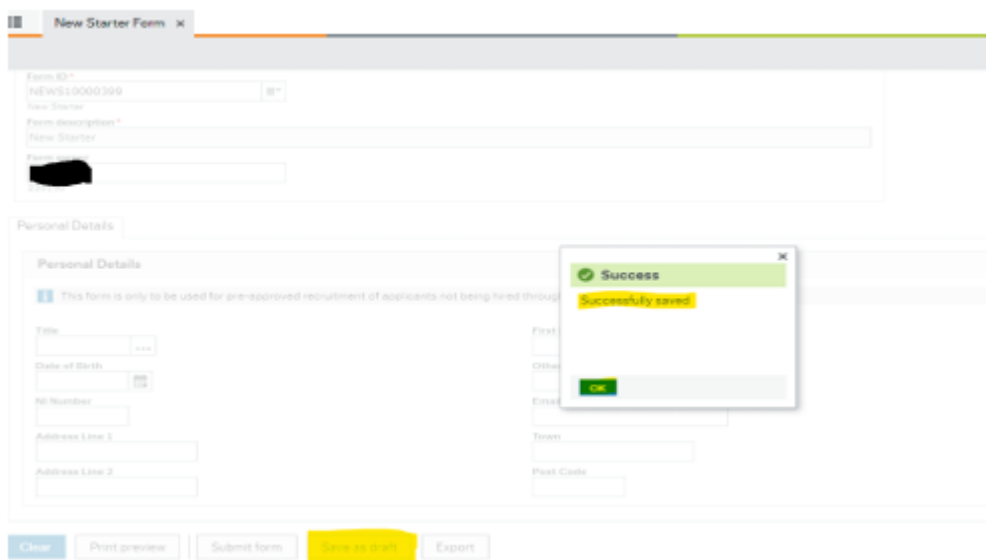


Please do not print as this version is likely to change (September 2019, version 1)

If you are not yet ready to submit the form, save as DRAFT and come back to it later.

When you are happy that the form has been fully completed and attachments have been added, press 'Submit Form' and it will work flow 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:



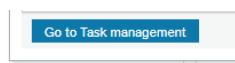
4. Headteacher Approval

If the New Starter 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. This example shows that 5 tasks are awaiting action by the Headteacher:



Click on the number highlighted in red. Then click 'Go to Task Management':



A new window will open. On the left-hand side, the tasks can be grouped by Step or Process. Click Process:

In this example, there are 2 New Starter Forms awaiting action. Click on the New Starter Form box.

Client	Process name	Workflow step	Co	Attr.value	Due on
SC	New Starter Form	Cancel Request	SC	NEWS10000248	
SC	New Starter Form	Cancel Request	SC	NEWS10000267	

Then Click in the first form and review the details.

Use the scroll bars to move across and down the page.

- **If all of the details are correct, the form can be approved.**
If all of the details are correct, click 'Approve'.
- **If the form is incorrect or has missing details it should be rejected.**

In this example the form should be rejected as there are several omissions, as shown below:

The NI Number has been omitted:

NI Number

...

The Start Date and Hours per week have been left blank:

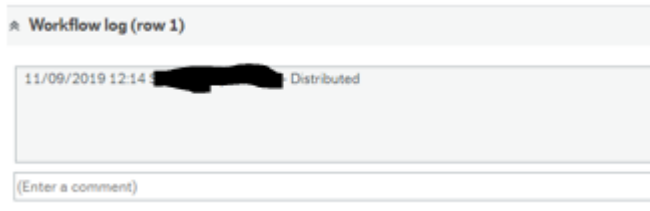
Start Date

Hours Per Week

The Pay Step has been left blank:

A screenshot of a form field labeled 'Paystep'. It consists of a small rectangular box with a downward-pointing arrow on the right side, followed by three dots '...', indicating a dropdown menu.

Before the form is rejected a comment needs to be made, so that the originator can amend the form accordingly. In the Workflow log, there is a section to enter a comment:

A screenshot of a 'Workflow log (row 1)' entry. The entry shows a timestamp '11/09/2019 12:14', a redacted name, and the status 'Distributed'. Below the entry is a text input field with the placeholder text '(Enter a comment)'. The input field is currently empty.

Enter a comment such as 'I have rejected this form, please can you complete the NI number, Start Date, Hours per week and Paystep'. Then click 'Reject', the form will workflow back to the originator to update and resubmit.

5. Additional Information

- 5.1 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.