Business World User Guide
HR for Schools

Shropshire Council

Embridge Consulting
Driving value from your business systems

Contents

1. General Information

1.1. Introduction

This manual has been written to help you work with the Schools' Administration & approvals element of Business World. As several services will be using Business World, this user guide is specific to the area for which it is written.

You must also be familiar with Microsoft Windows and understand workflow (which is covered in the E-Learning introduction courses).

1.2. Conventions in this document:

This manual uses icons to illustrate comments with the following purposes

Warning

Useful tips

Best Practice

Navigate to:

Personnel → Work schedule → Day type master file

[***] Key from the PC keyboard e.g. Press **[Tab]**

This User Guide covers:

- Your employees and HR screens
- Dealing with Absences (staff sickness)
- Adding Competencies to the BW system
- Raising appropriate BW Forms for recruitment, org & position changes
- Running Reports

2. Overview

The Business World ERP system (Enterprise Resource Planning system) has been implemented across all Shropshire Council's legal entities, including maintained schools. It brings together a collaborative way of working and standardises and streamlines common actions within Finance, HR and Payroll to all employees.

The Business World system ensures the unique user, when logged in, is handed access rights pertaining to their role within the School and Shropshire Council, whether that is the Head Teacher, Business Manager or Administrators.

Schools use the "Line Manager" reporting system, where an Administrator/Manager acts as the system manager to all staff, and the Head Teacher is their Line Manager, and can see all reportees within their School. Workflow depends on whether it is HR or Financial based. HR will follow the Line Manager route, but not all Finance will end up at the Head; it may stop at the Business Manager or finance staff member for your school.

Many paper and electronic forms are now incorporated in the BW system and have "workflow" and safeguards built alongside them to ensure they are completed correctly, are directed to the correct recipient always, and that the Head, HR Admin Team, Payroll or the employee are notified accordingly. Workflow is automatically assigned on completion in Business World.

Business World replaces the current HR, Payroll and Finance systems in use at Shropshire Council.

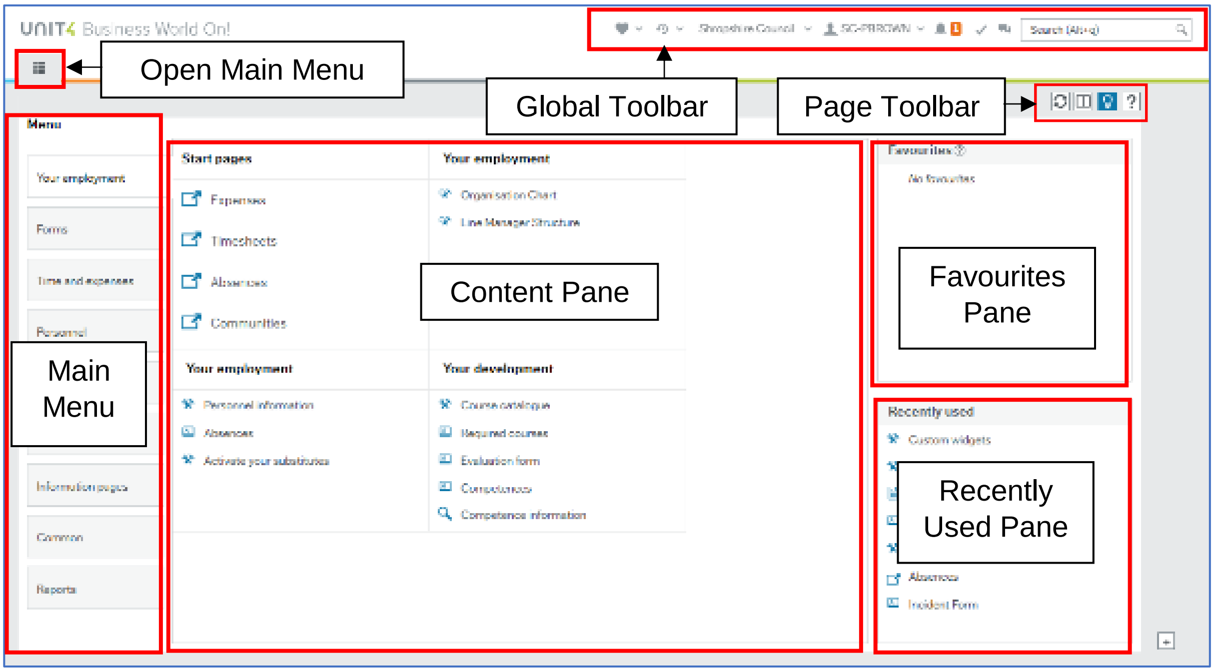
Embridge Consulting

Driving value from your business systems

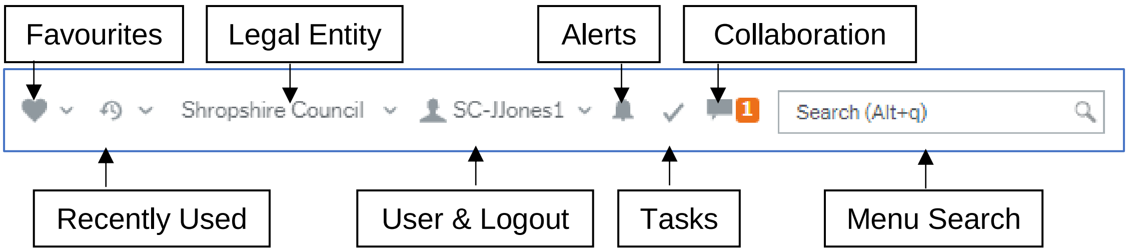
3. Navigation

3.1. The Employee Home Page

When you log on to Business World you will ‘land’ on the Employee Home Page.



The Global Toolbar is visible from everywhere in Business World (BW).

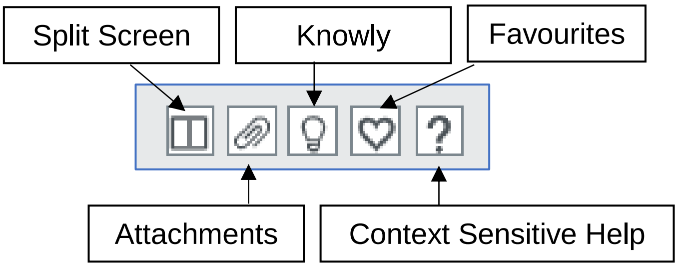


- **Favourites** – opens the list of favourite shortcuts
- **Recently Used** – opens the list of recently used pages
- **Legal Entity** – displays the organisation you are logged into
- **User & Logout** – displays your user name and the drop down contains options, including Logout
- **Alerts** – is where your alerts are accessed from. A white number on an orange background indicates how many Alerts you have
- **Tasks** – is where your tasks are accessed from. A white number on an orange background indicates how many Tasks you have

- **Collaboration** – is a messaging function for BW users that allows you to add screenshots and BW links
- **Menu Search** – allows you to search for, then open screens

3.3. Page Toolbar

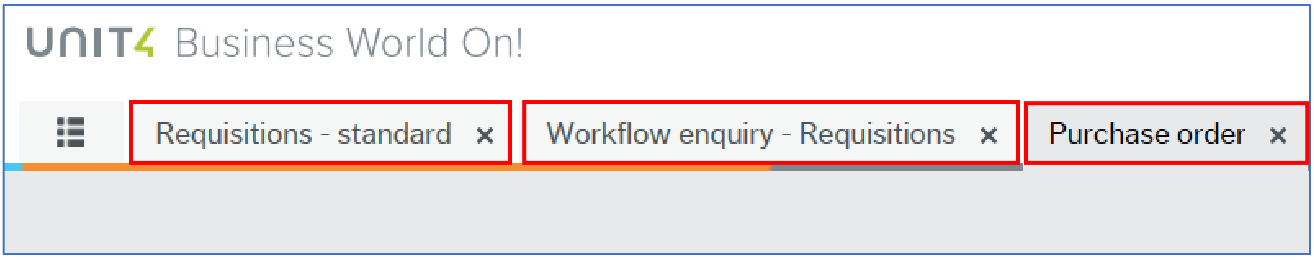
The Page Toolbar icons will change to reflect the open screen.



- **Split Screen** – allows two screens to be open at the same time
- **Attachments** – allows files to be added to records
- **Knowly** – is a means of sharing knowledge with other users or recording notes for yourself
- **Favourites** – opens the list of favourite shortcuts
- **Context Sensitive Help** – opens Help for the screen that is active

3.4. Screen Tabs

It is possible to have multiple screens opened in BW and each will open in its own tab.

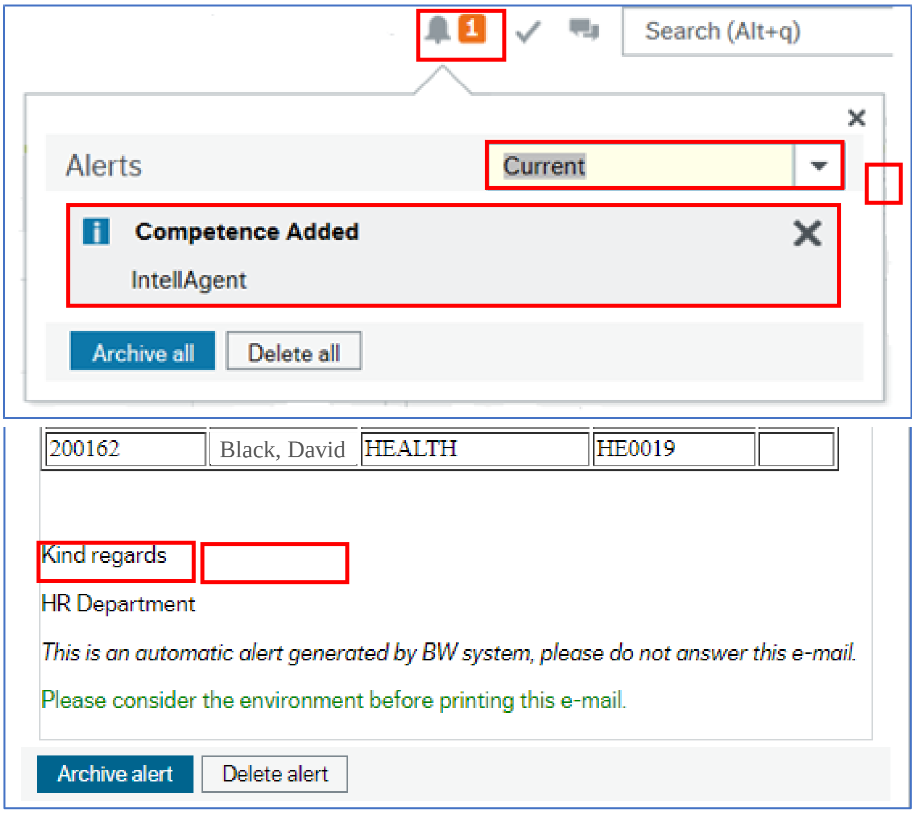


3.5. Alerts

An **Alert** provides information that may be useful to you. They do not require actioning to progress anything, but they may be related to an action or triggered by an action which has taken place in a Workflow.

An example would be when you add a competence.

If you have any **Alerts**, a number will appear telling you how many.



When you have read the information, you can:

- Click the **X** to close the screen. This will keep the alert in the list
- Click **Archive alert**, to send the alert to the archive
- Click **Delete alert** to remove the alert

3.6. Tasks

3.6.1 Overview

Workflow Tasks are generated by BW according to a set of rules which are:

- Specific to each type of transaction, Form or screen
- Specific to each Legal Entity, School and approval level

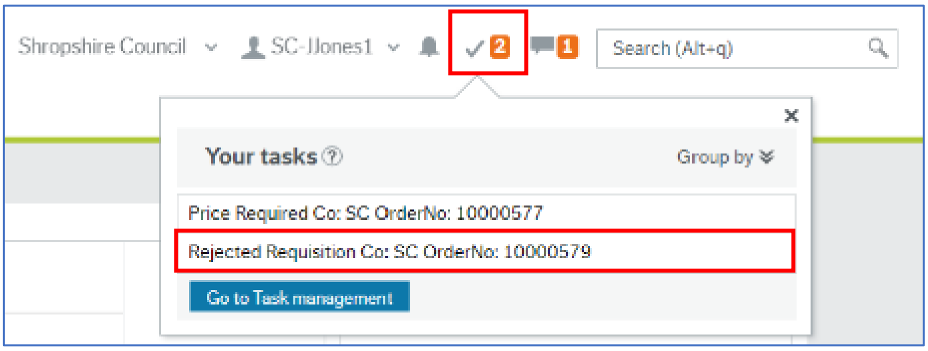
The Workflow Tasks ensure that:

- The correct person or team is notified of an action requirement
- A link is provided to open the record requiring action

- The relevant action options are available

The example below is for a Rejected Requisition task.

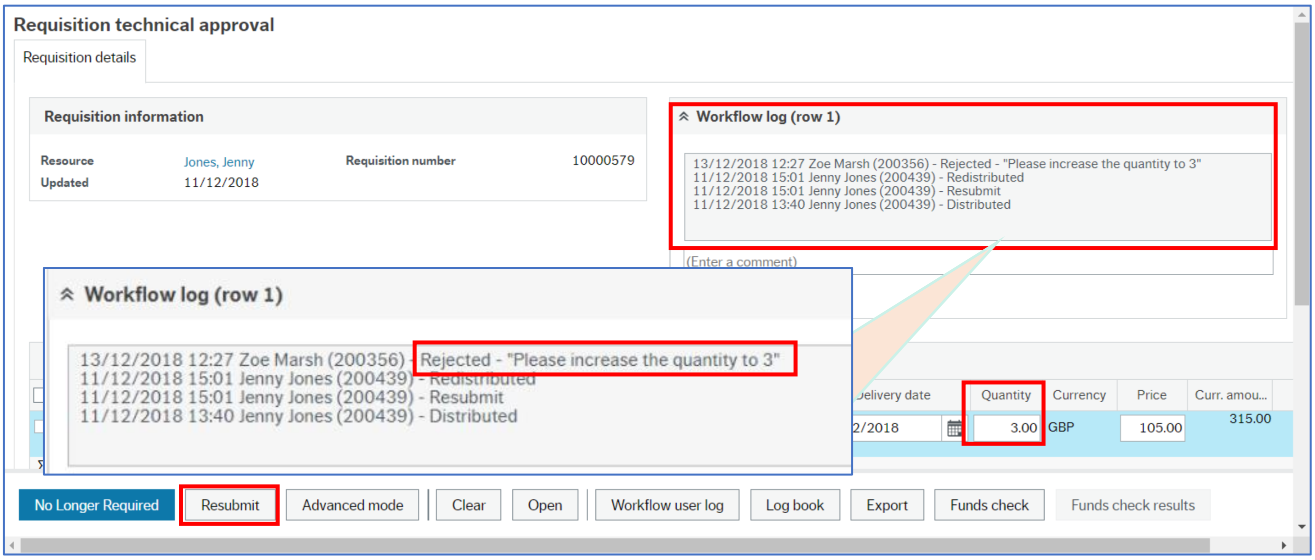
1. Click **Tasks**



You can click an individual line to open a specific task or you can click **Go to Task management** to open the task manager with all tasks available.

3.6.2 Action a Specific Task

1. Click the required task



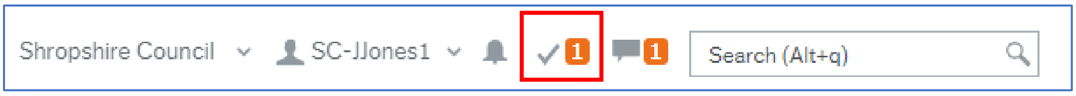
2. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:

- Click **No Longer Required** if the requisition, or product line, is to be cancelled or
- Enter the changes and click **Resubmit**

The Success popup will open.

3. Click **OK**

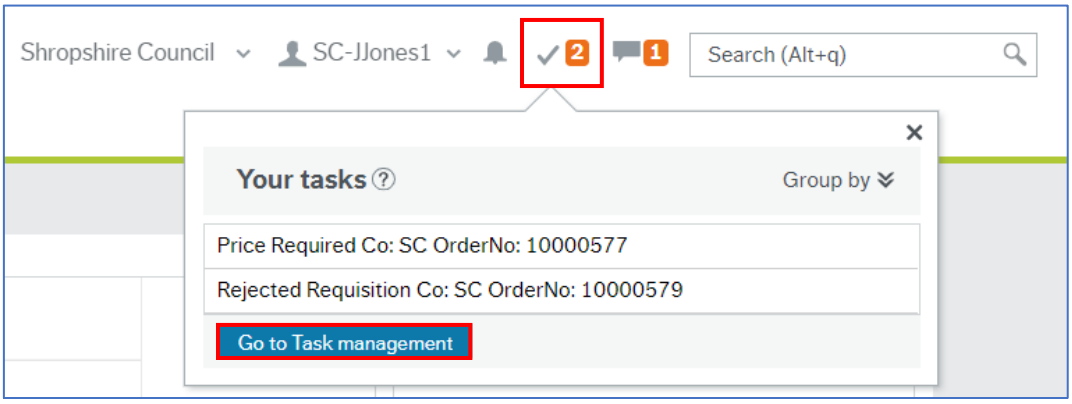
The number of outstanding Tasks is reduced.



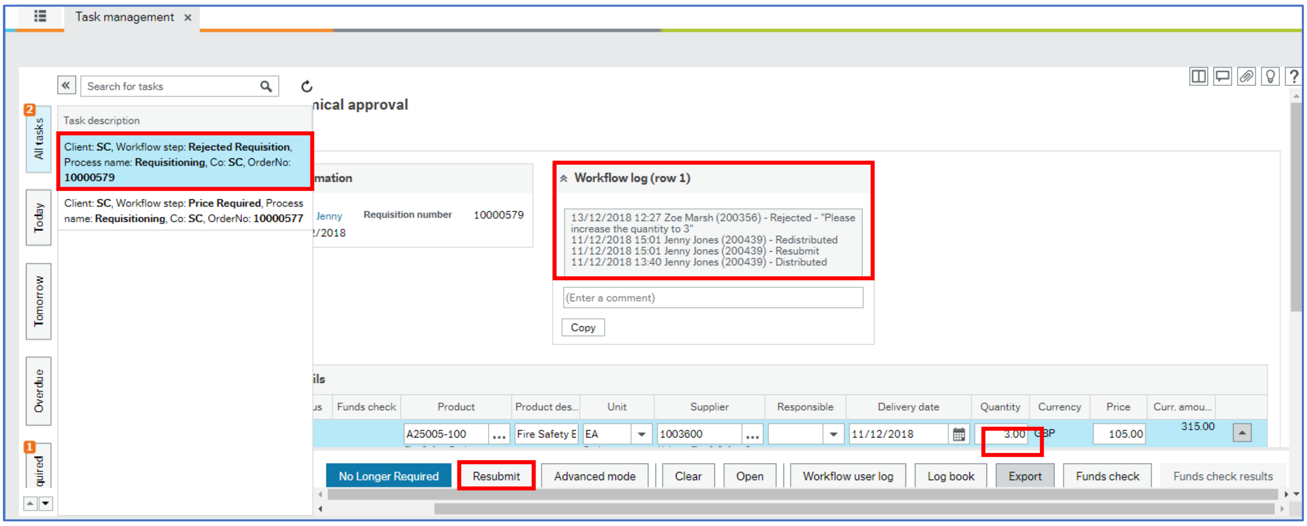
Embridge Consulting
Driving value from your business systems

3.6.3 Action a Task from the Task Manager

1. Click **Tasks**



2. Click **Go to Task management**
3. Select the Task type – in this case **Rejected Requisition**
4. Click the required task

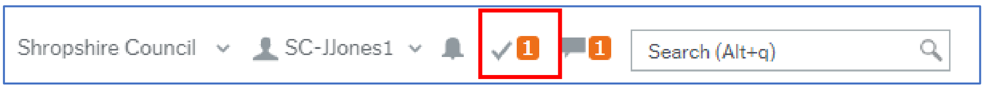


5. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:
   - Click **No Longer Required** if the requisition, or product line, is to be cancelled or
   - Enter the changes and click **Resubmit**

The **Success** popup will open.

6. Click **OK**

The number of outstanding Tasks is reduced.

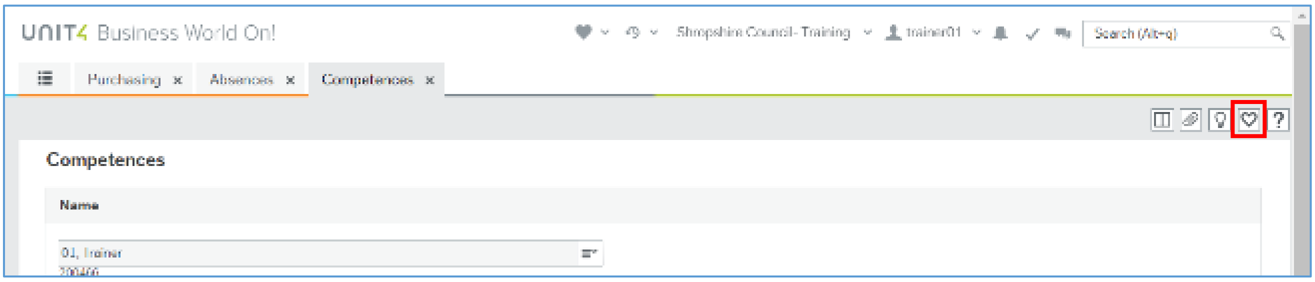


3.7. Favourites

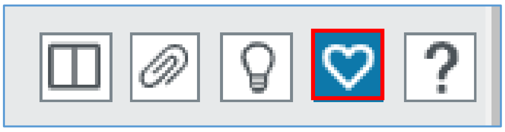
Favourites is a means of creating shortcuts to the screens you use most often.

3.7.1 Add to Favourites

1. Navigate to the required screen



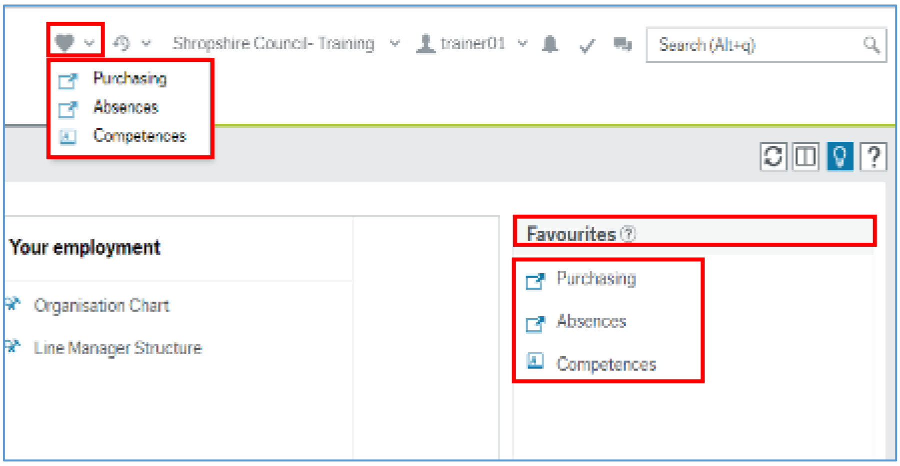
2. Click **Mark as favourite**



The icon will become blue. Clicking it again will remove it from the favourites list.

3.7.2 View Favourites

Favourites can be accessed from the dashboard in two places.



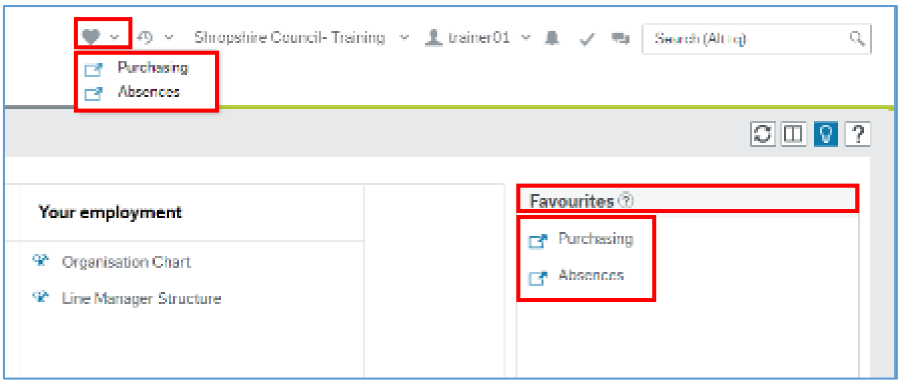
- The **Favourites** icon on the Global Toolbar produces a popup list of screen shortcuts
- The **Favourites** pane contains the same list of screen shortcuts

1. Click any of the links listed to open them

3.7.3 Remove from Favourites

1. Open the screen to be removed from Favourites

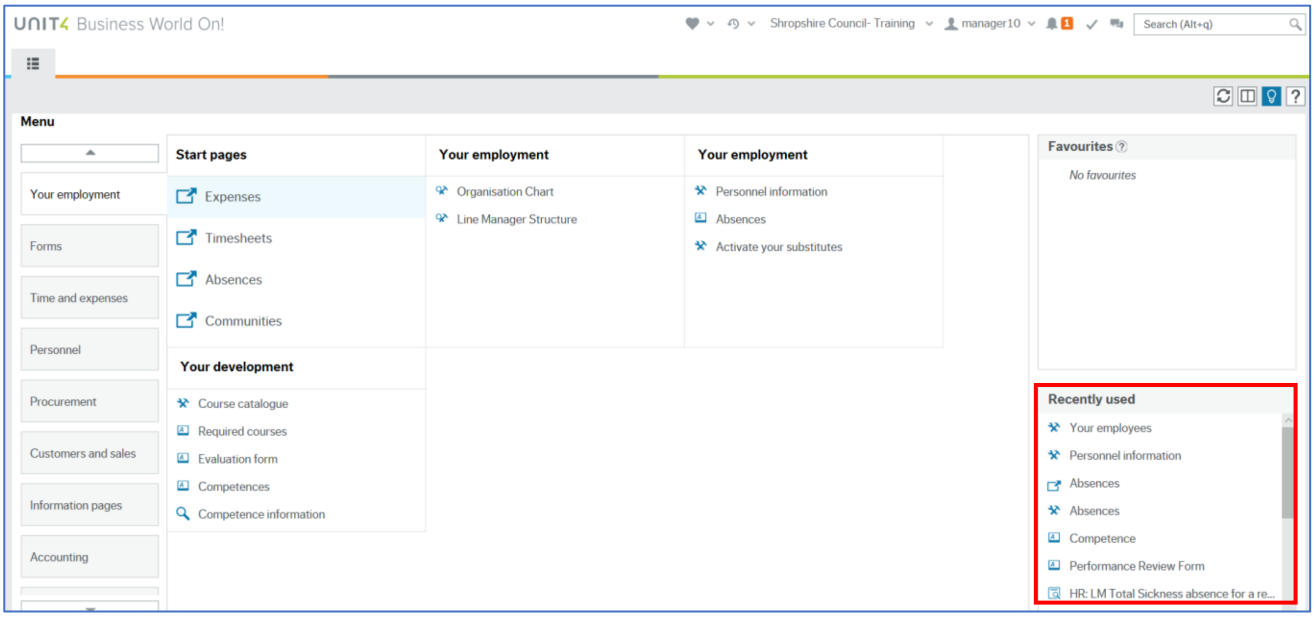
2. Click the blue **Remove from favourites** icon



In this example the Competences screen has been removed from Favourites.

3.8. Recently Used

The **Recently used** pane is a list of shortcuts to the 20 most recently opened screens, whether or not they are in the Favourites pane.

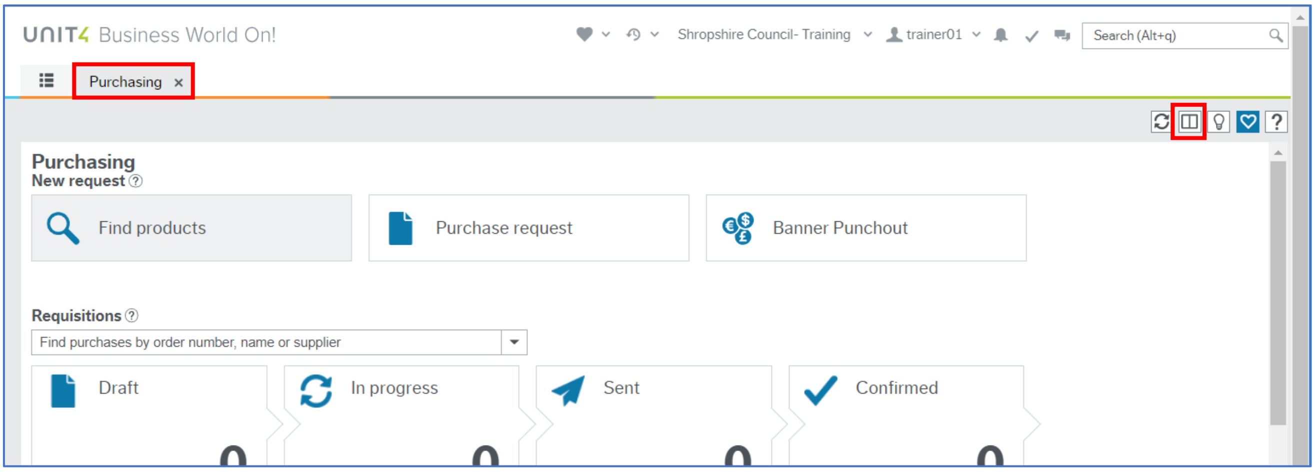


Each new screen that is opened is automatically added to the **Recently used** pane.

3.9. Split View

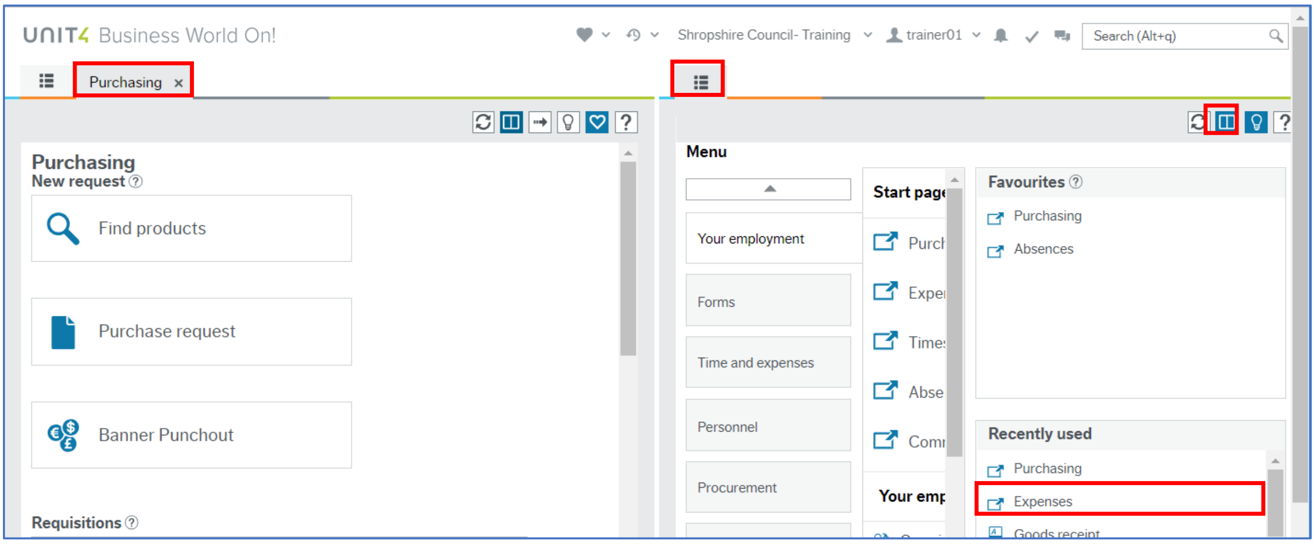
The **Split View** function allows you to have two screens open at the same time.

3.9.1 Open Two Screens

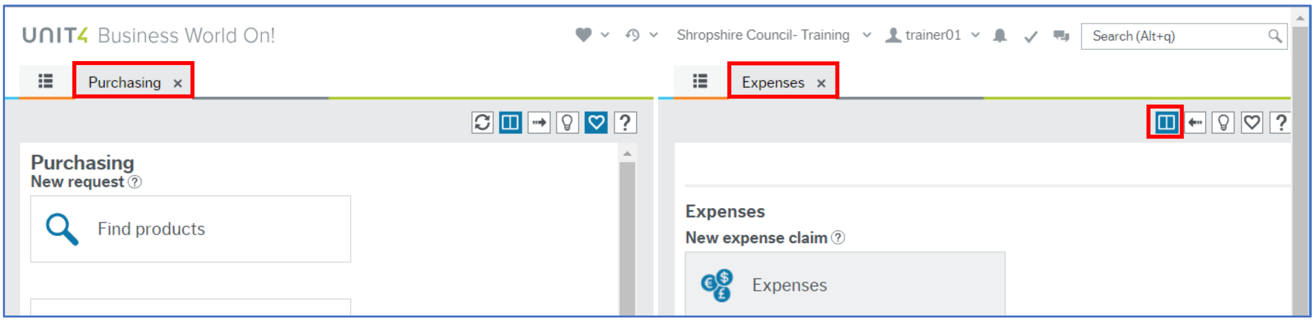


1. Open the first screen that you want. **Purchasing** in this example
2. Click **Split screen**

The **Menu** is now open to the right of the selected screen and the split view icon is blue.



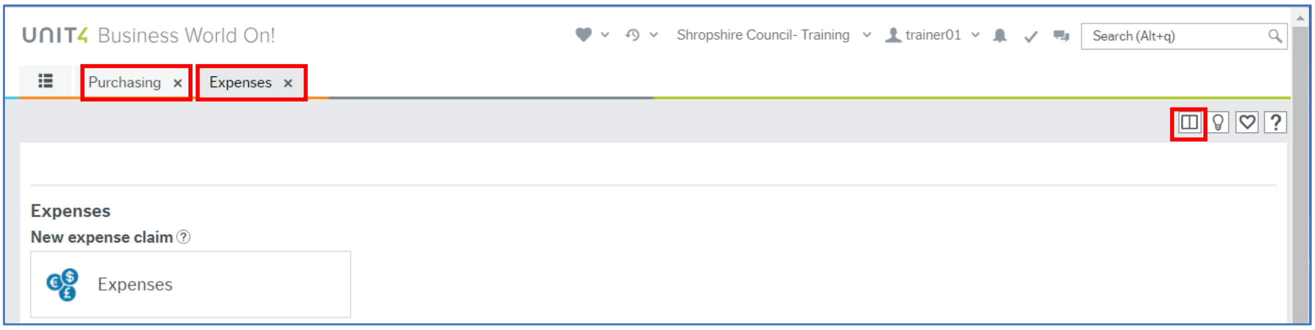
3. Select the next screen to be opened from the menu, **Expenses** in this example



Both the **Purchasing** and **Expenses** screens are open at the same time.

3.9.2 Return to a Single Screen

1. Click the blue **Split View** icon

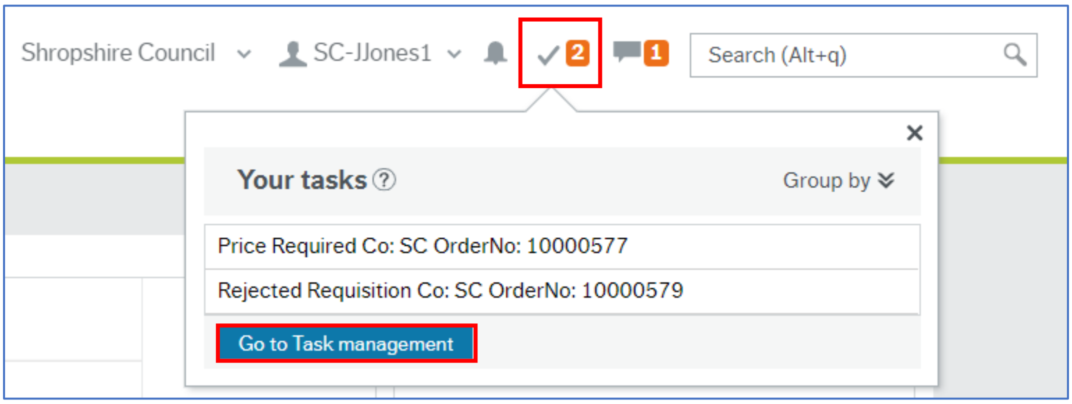


A single screen remains open but there are now two screen tabs available.

The **Split view** icon is now white.

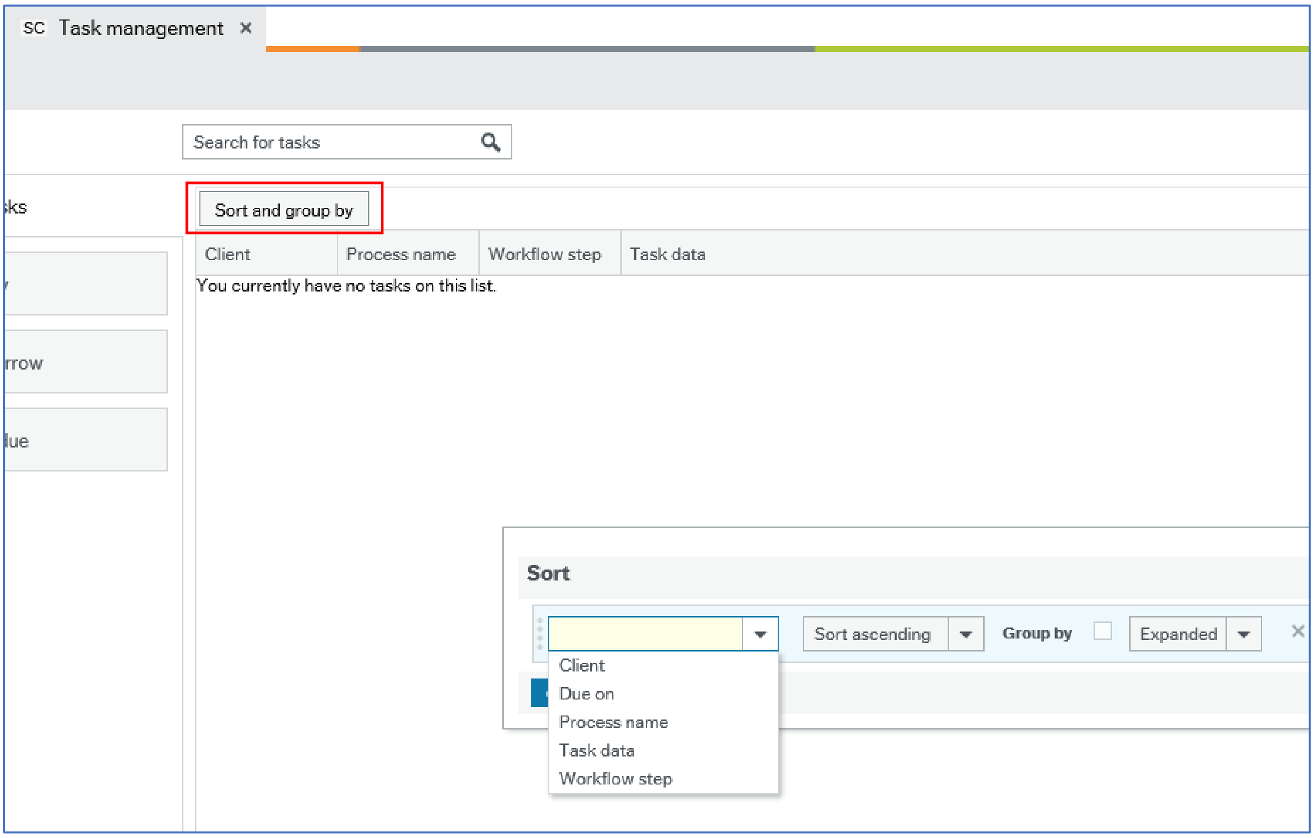
3.9.3 Task management

As touched on in section 3.6 Tasks can be organised and grouped to make them easier to sort and see which is a priority to action.



If you select task management or type this into the search bar, you will be taken to the task management window

Once in Task management click on “Sort and Group by” to perform a more detailed sort.



If this isn’t required you can use the tabs down the left of the screen to select which workflows you wish to work through by element type.

3.10. What sort of tasks could you receive?

As a Line Manager you will receive many tasks, some of the more common tasks will be:

- Annual leave requests
- Timesheet
- Expenses
- Forms

4. Personnel Information & Your Employee Records

The Personnel screen is the primary HR record. It is also visible to Payroll staff, as well as HR Business Partners and those with the appropriate HR Menu Access Roles in BW. This screen is primarily used for all in-month HR administration, such as position changes, hours changes, secondments and leavers, but is viewable to employees in real-time.

A slimmed down version of this screen is accessible to Schools' Administrators, Heads and other staff, where this screen is known as **Your employees** or **Personnel information**, respectively. All staff with access are expected to maintain certain information for themselves, such as the **Contact information** tab and their current address and contact details, although, within Schools, this may be the responsibility of the Administrators and other office staff.

To see your own personnel information, navigate to:

Your employment → Your employment → Personnel information

To see your School's staff information, navigate to:

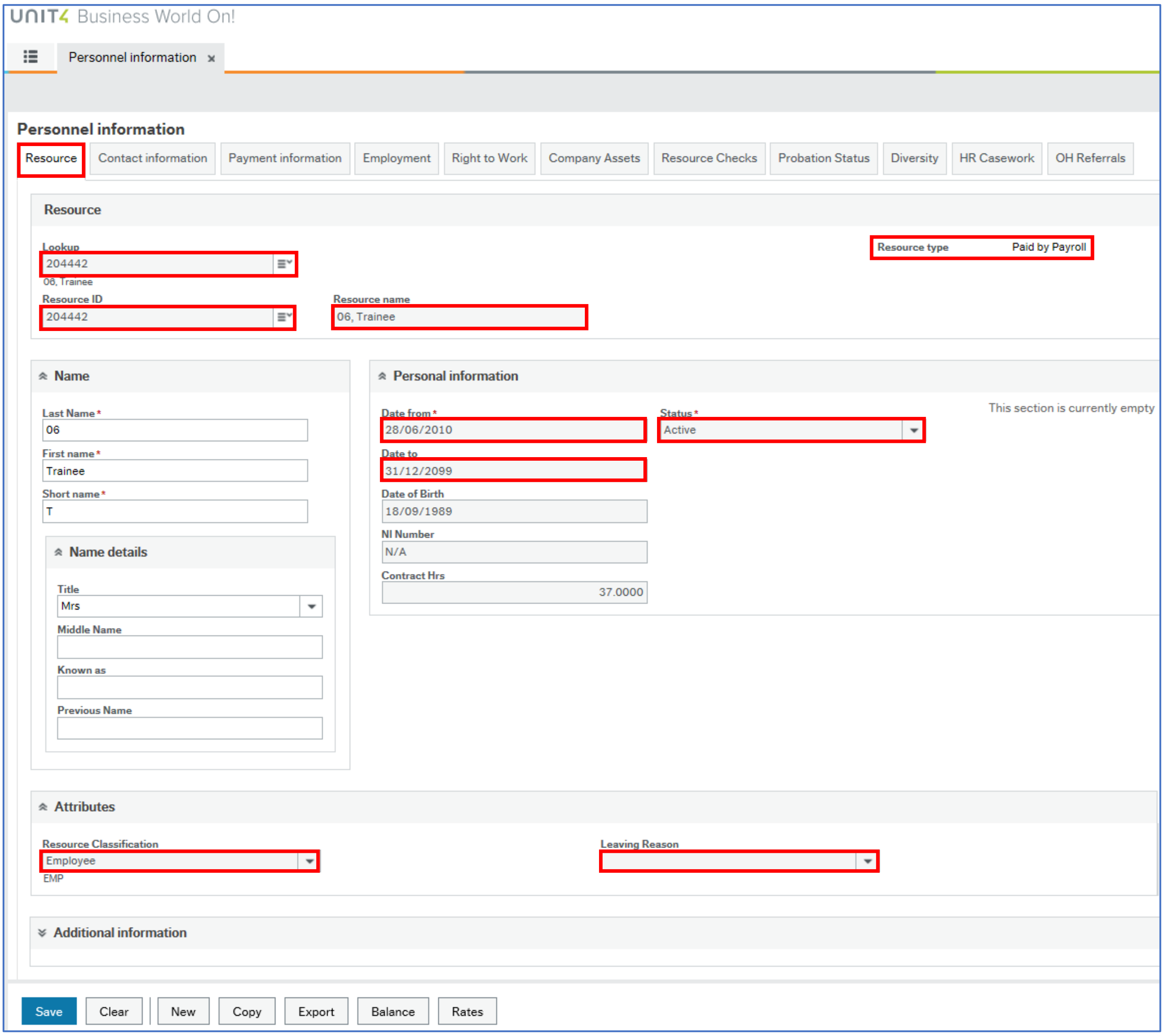
Personnel → Personnel → Your employees

Different user roles have different levels of access to the HR screens. The table below shows some of the screens that can be seen by the different user types.

Tab	HR	Employee	Line Manager	OH
Resource	✓	✓	✓	✓
Contact information	✓	✓	✓	✓
Relations	✓	✓	✗	✗
Payment Information	✓	✓	✗	✗
Payroll	✓	✓	✗	✗
Employment	✓	✓	✓	✗
Personnel	✓	✓	✓	✗
Line Management	✗	✓	✓	✗
Action Overview	✓	✗	✗	✗
Right to Work	✓	✓	✓	✗
Company Assets	✓	✓	✓	✗
Resource Checks	✓	✓	✓	✗
Probation Status	✓	✓	✓	✗
Diversity	✓	✓	✗	✗
HR Casework	✓	✗	✗	✗
OH Referrals	✓	✗	✗	✓
OH Activity	✗	✗	✗	✓
Pension Auto-enrolment	✓	✓	✗	✗
Apprenticeship info	✓	✓	✗	✗
School Workforce Census	✓	✗	✗	✗
SWC Curriculum	✓	✗	✓	✗

4.1. Resource Tab

This is the “header record‟ for the Resource record. It is used to show basic information such as name, start and finish dates, birthdate, etc.



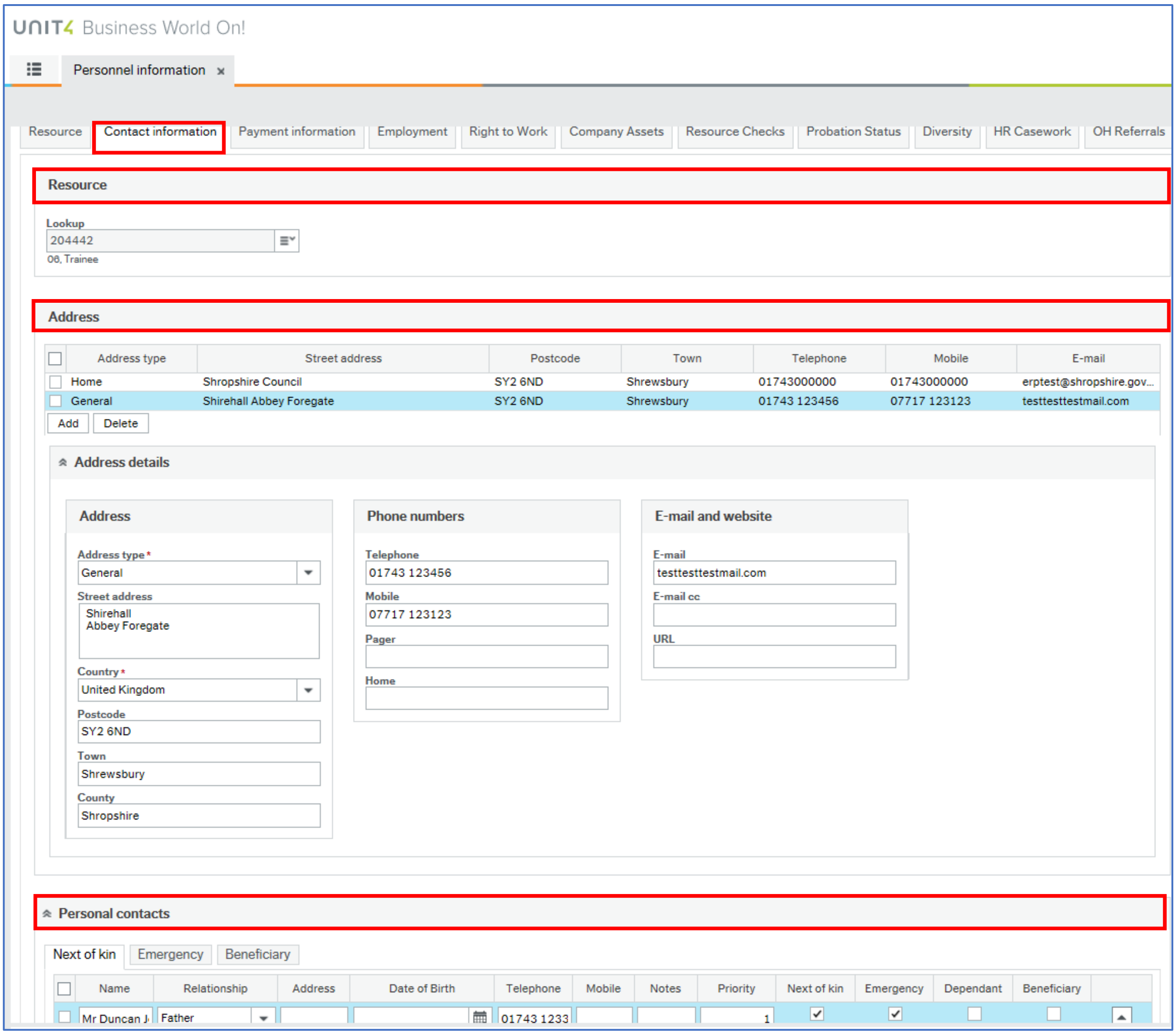
Below is a table of some of the fields that may need further explanation.

Field	**Description**
Lookup	The field to use Type-Ahead to look for a name (first or surname)
Resource ID/Name	The staff member’s HR/Payroll unique number and name
Date from	The date this resource started at the Council/Other entities

Date to	Defaults to 31/12/2099 when the end date is not known
Status	The options are: Active, Parked, Closed and Terminated. Resources in use must be Active. When a resource leaves, the **Date to** is completed and the status changed to Closed
Resource type	Paid by Payroll (most common), Agency (Invoice), Trainee etc
Resource classification	Employee, Members, Apprentice, Agency Temp etc.
Leaving reason	Should be blank unless Status is closed

4.2. Contact Information Tab

This tab is used to record all contact details for a resource. Every resource must have a **General** address which is used to record details of where they work and a **Home** address.



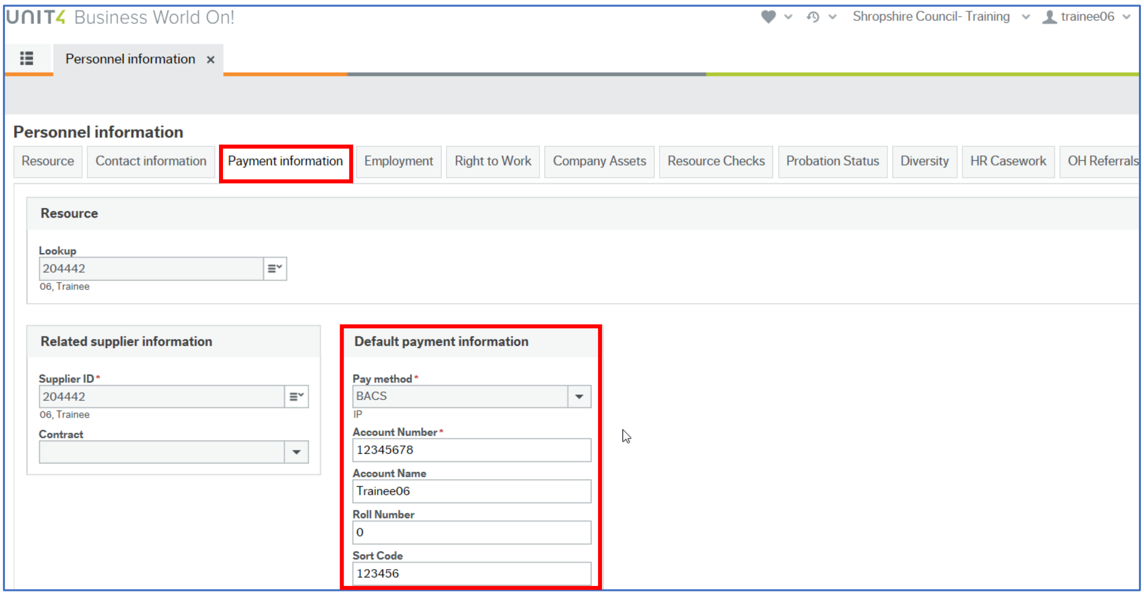
There are three sections on this tab:

- **Resource** – use Type-Ahead to look for a name (first or surname)
- **Address** – every resource must have a **General** address which is used to record details of where they work and a **Home** address
- **Personal contacts** – this section has three tabs for **Next of Kin**, **Emergency** and **Beneficiary** contact details, which is updated by the employee

.

4.3. Payment Information Tab- Personnel information screen only

This tab is where the personal bank details for the resource are kept. It is added when the person starts as part of the starter details and initial creation process and bank account details can be updated by the resource.

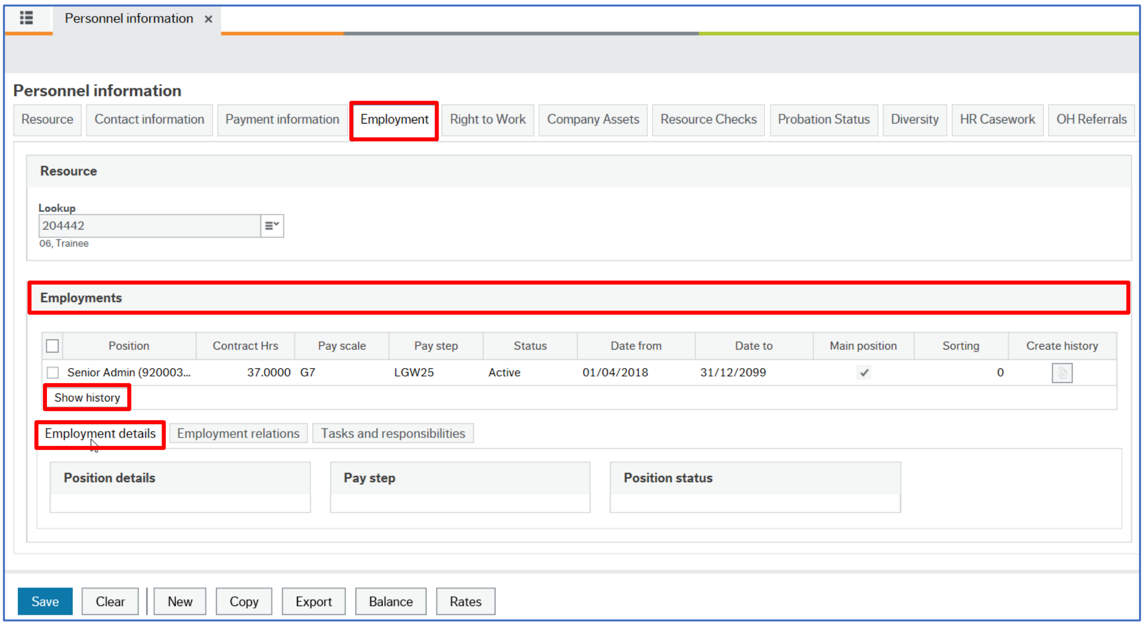


4.4. Employment Tab

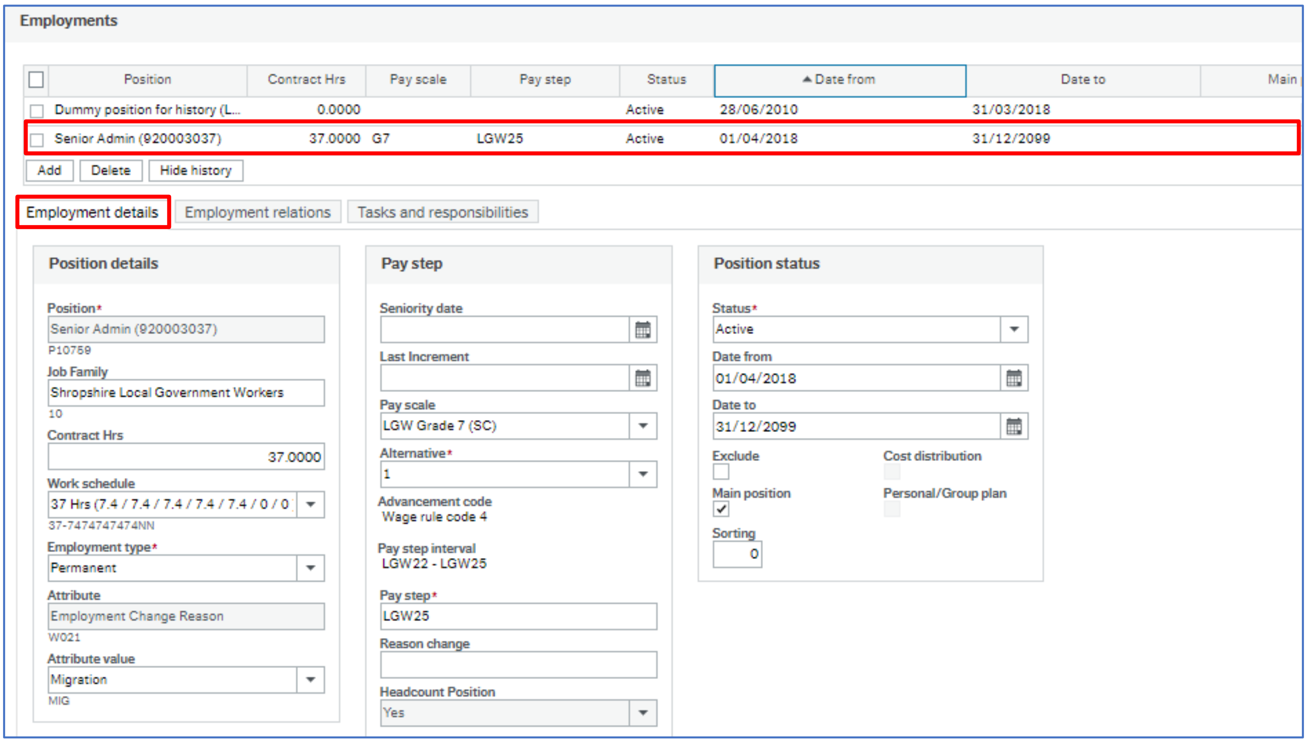
This is the screen that links a resource to a position.

Once a position is linked to a resource by HR, the current and main position details will be displayed when this screen is first accessed.

The screen has two sections. An upper section in which the data relating to the main position is displayed in row form, and a lower section in which the position(s) actual details and position history can be displayed.



1. Click on **Show history** to reveal previous Positions held by this resource



2. Click on the row to reveal the bottom half of the screen's data

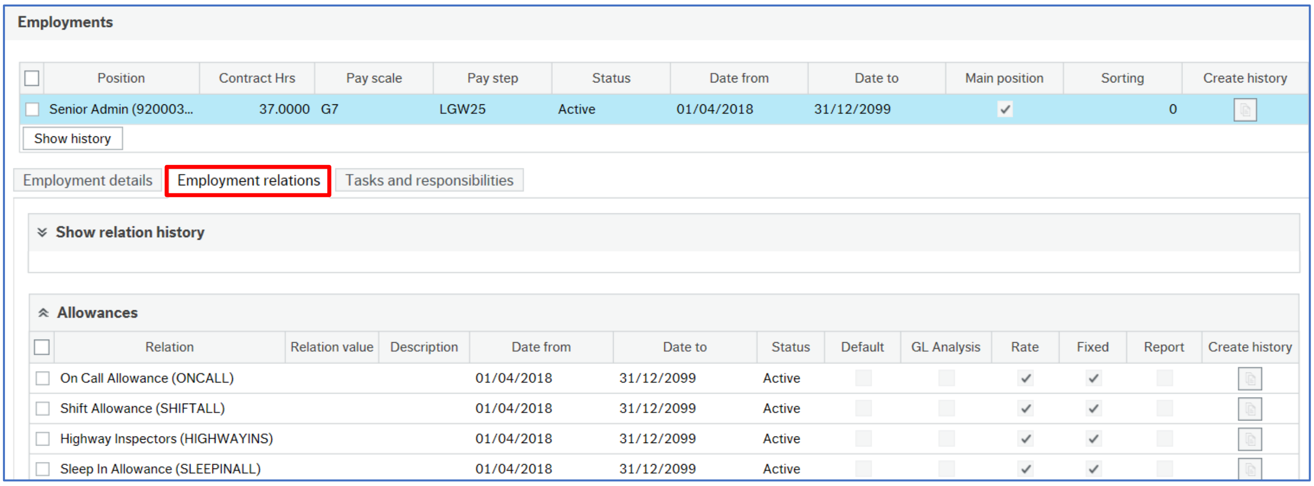
4.4.1 Employment Details Section

This shows detailed information for the selected position in the Employment section.

Field	**Description**
Position	This is the Position to which the resource is linked. Hover over this to reveal the Position ID code P******
Job Family	The corresponding Job Family will be displayed here (associated terms and conditions)
Contract hrs	This person's agreed hours in this Position
Work schedule	Every resource needs to be linked to a work schedule to correctly record their absence
Employment type	Whether this is a Permanent, Temporary acting up or Casual position etc. Many values exist- See dropdown arrow
Attribute	Relates directly to Attribute value field below. Acts as a heading only
Attribute value	The reason for change, should this position and data have been changed. Will show **Migration** if no c hange has happened
Pay scale	Shows the default values of pay scale, interval and interval pay step related directly from the Position register. Applies to all in this Position, but tailored individually here for the Resource should it be necessary

Reason change	Will show one of 2 reasons (Cost of Living Increase or Incremental Increase) should the Pay step have been altered
Position status	Shows the status of the position on the record. Options are: **Active**: Position is active and therefore in use **Parked**: Position temporarily closed **Closed**: Position is closed, but can be re-opened **Terminated**: Position is closed - cannot be re-opened
Date from	The date that this person started in this Position only
Date to	Will show 31/12/2099 if this is the current Position, except where it is a known end date e.g. FTC. Historical positions will show when the person left that position
Main position	Ticked if this Position is their only or substantive Position. Should a person have more than one Position then only one is ticked if both are current or within date. Main Position is normally ticked for the Position with most hours attributed to it

4.4.2 Employment Tab- Employment Relations



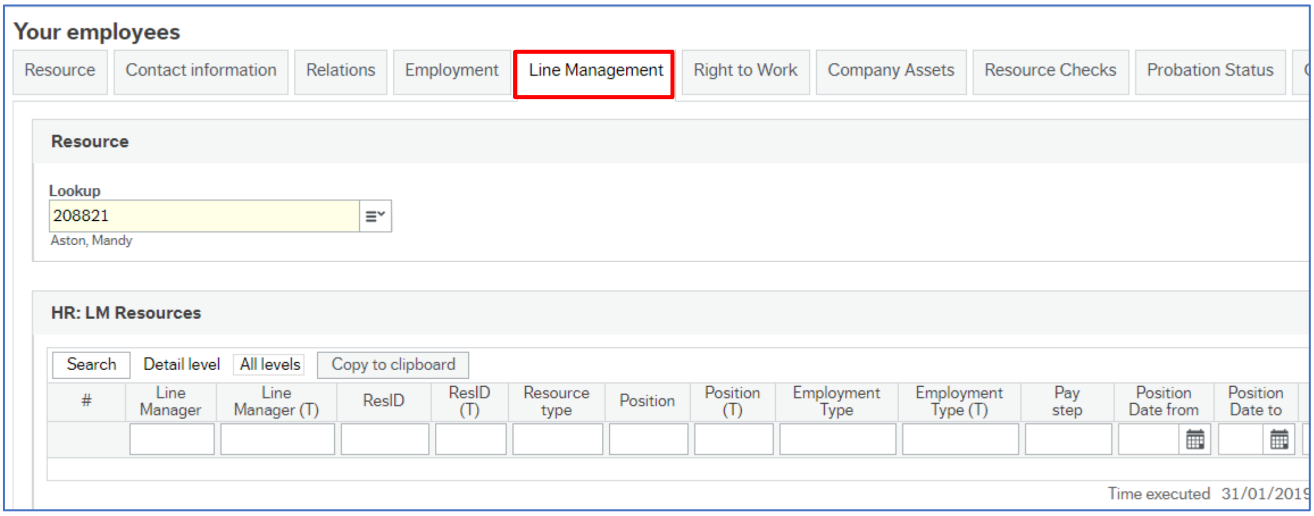
Employment relations are a sub-set of relations that relate to the person or resource in this Position and therefore different to the Relations tab.

4.4.3 Employment Tab- Tasks & responsibilities

Not used at Shropshire Council & other Legal Entities

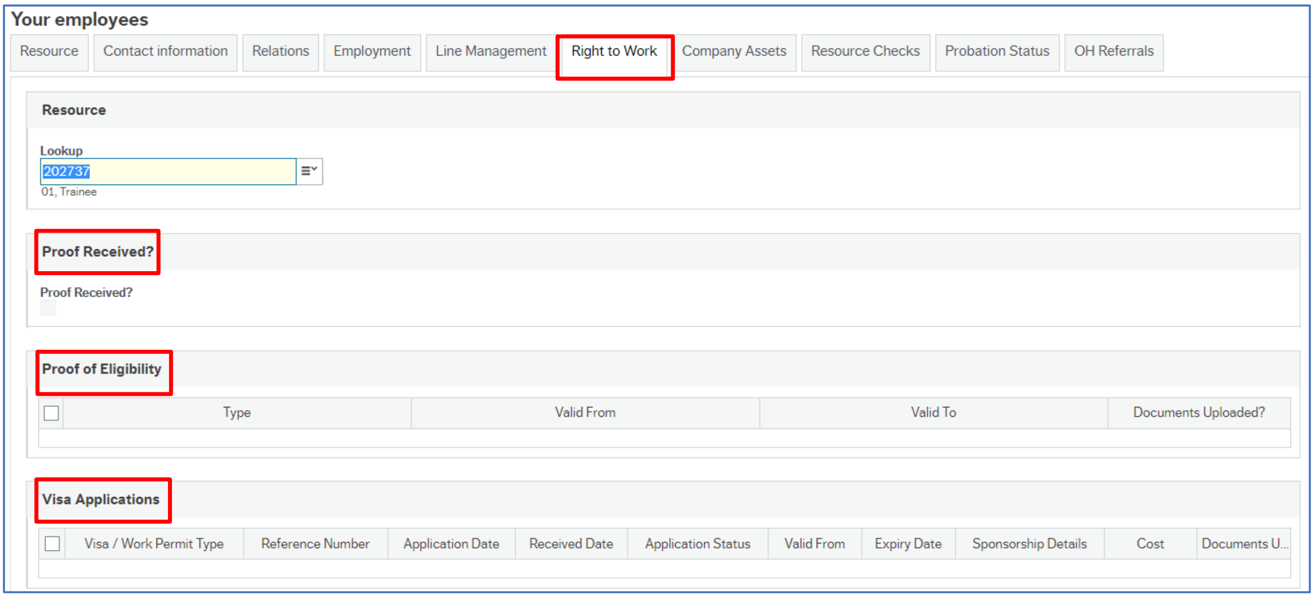
4.5. Line Management Tab- Your employees screen only

On this tab it's possible to see who the resource reports to other than their line manager, which for Schools is the Administrator or Head. If the person only reports to the person viewing this screen, this will be blank.



4.6. Right to Work Tab

This screen is used to capture the right to work details relating to the resource.



Proof Received- Declaration for a new starter or those on continuous checks that proof has been received

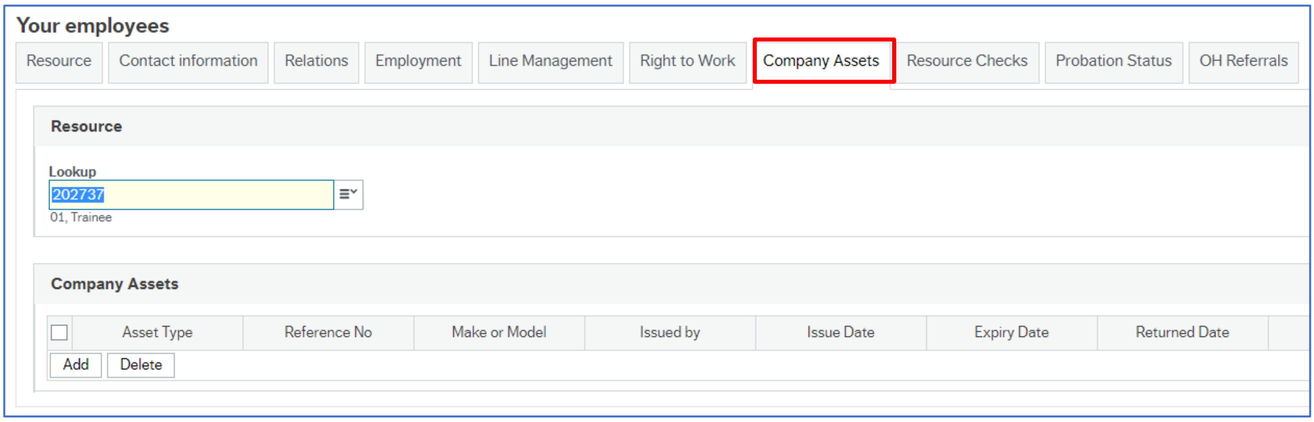
Proof of Eligibility – Documentation that supports eligibility, such as Immigration status documents, Work permit, Certificate of Naturalisation etc.

Visa Application – All types of Visa or Work Permit applications for applicable staff should be listed here

It is only possible to update these fields if you have "Update access".

4.7. Company Assets Tab

This screen is used to monitor the company assets (mobile phone, laptop, key pass, PPE etc) and control the issue to, and return of assets from the resource.

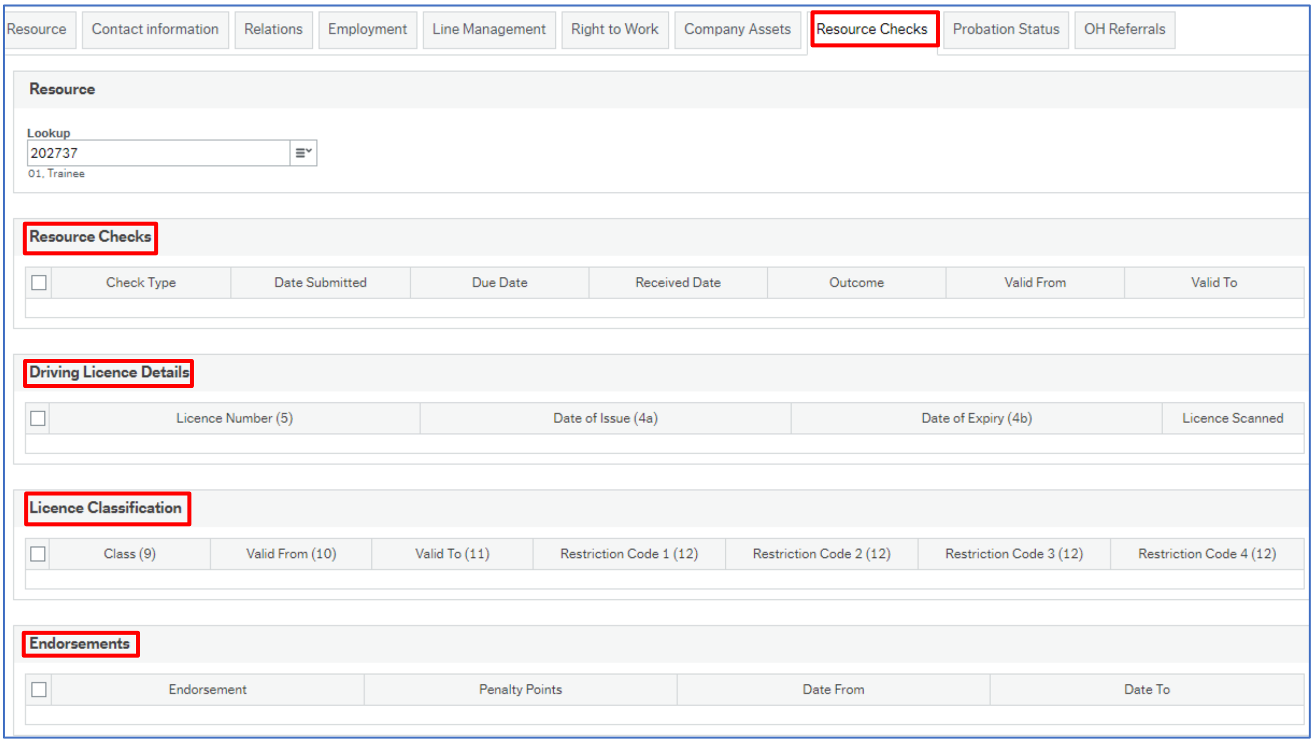


To update this tab, if have “Update” access:

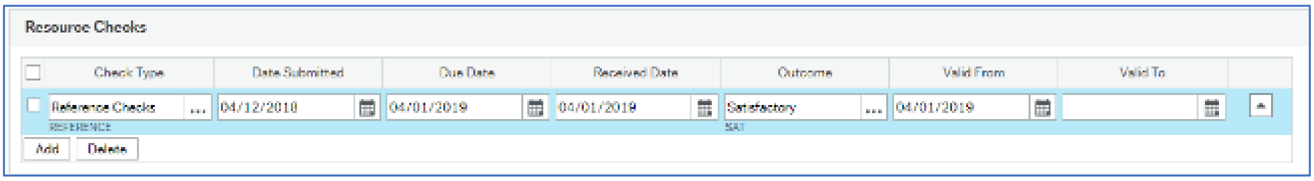
1. Click **Add** to insert a new row
2. Press **[Space bar]** to select the **Asset Type**
3. In **Reference No** enter the asset ID
4. Ensure all **Date** fields are complete
5. Add any relevant comment for this asset e.g. Slight scratch on laptop
6. Click **Save** when each row is complete
7. When an asset is handed back ensure **Return date** is completed, and click **Save**

4.8. Resource Checks Tab

This tab is normally completed retrospectively by HR when a resource has started. Pre-employment checks will take place outside of BW but recorded within BW once the resource record has been created after the recruitment process.

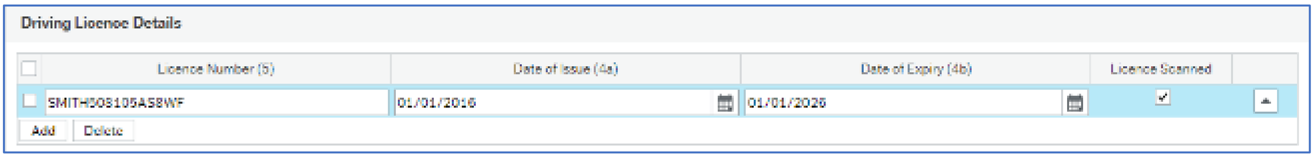


Used when Reference, Criminal, Security Clearance checks are required.



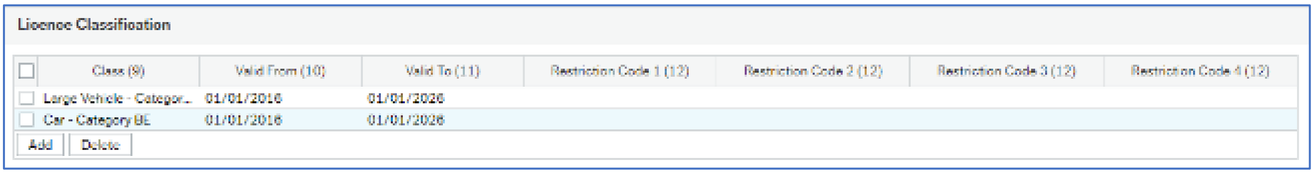
4.8.2 Driving Licence Checks Section

Used when licence details must be recorded for drivers or users of business approved vehicles.



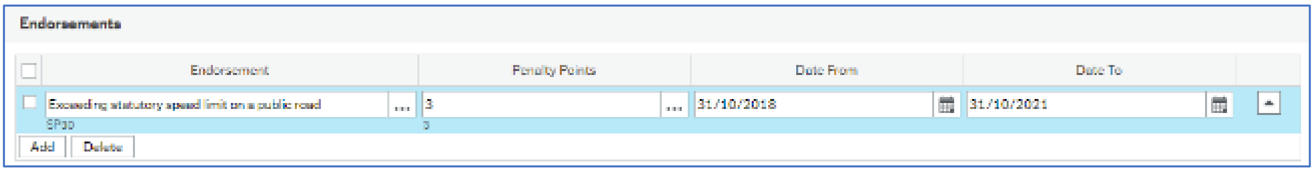
4.8.3 Licence Classification Section

Multiple class vehicular licences and relevant dates are added and maintained here.



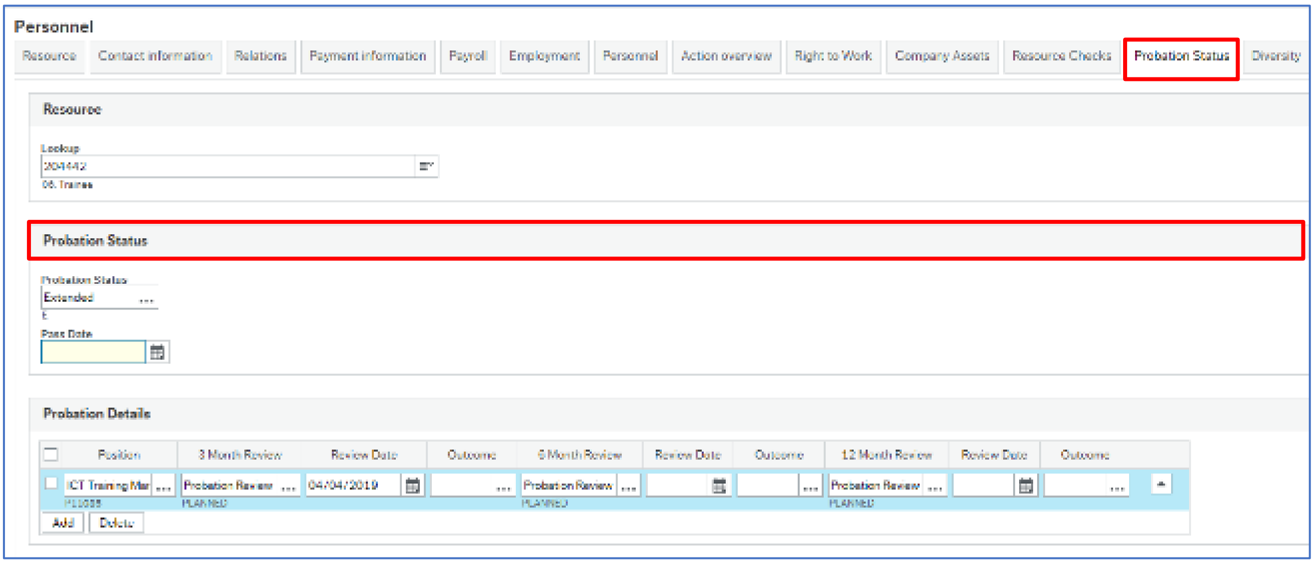
4.8.4 Endorsements Section

Any driving licence endorsements will be recorded here.



4.9. Probation Status Tab

This is completed for a Starter or where it is necessary for an employee to go on a probation period. It will be automatically completed for a new starter but can be added to/edited and updated locally in schools as necessary. Once updated, an alert will be sent to the Administrator/manager. Should the outcome be unsuccessful, this may invoke the Leaver Process and you should contact HR for advice.



4.9.1 Probation Status Section

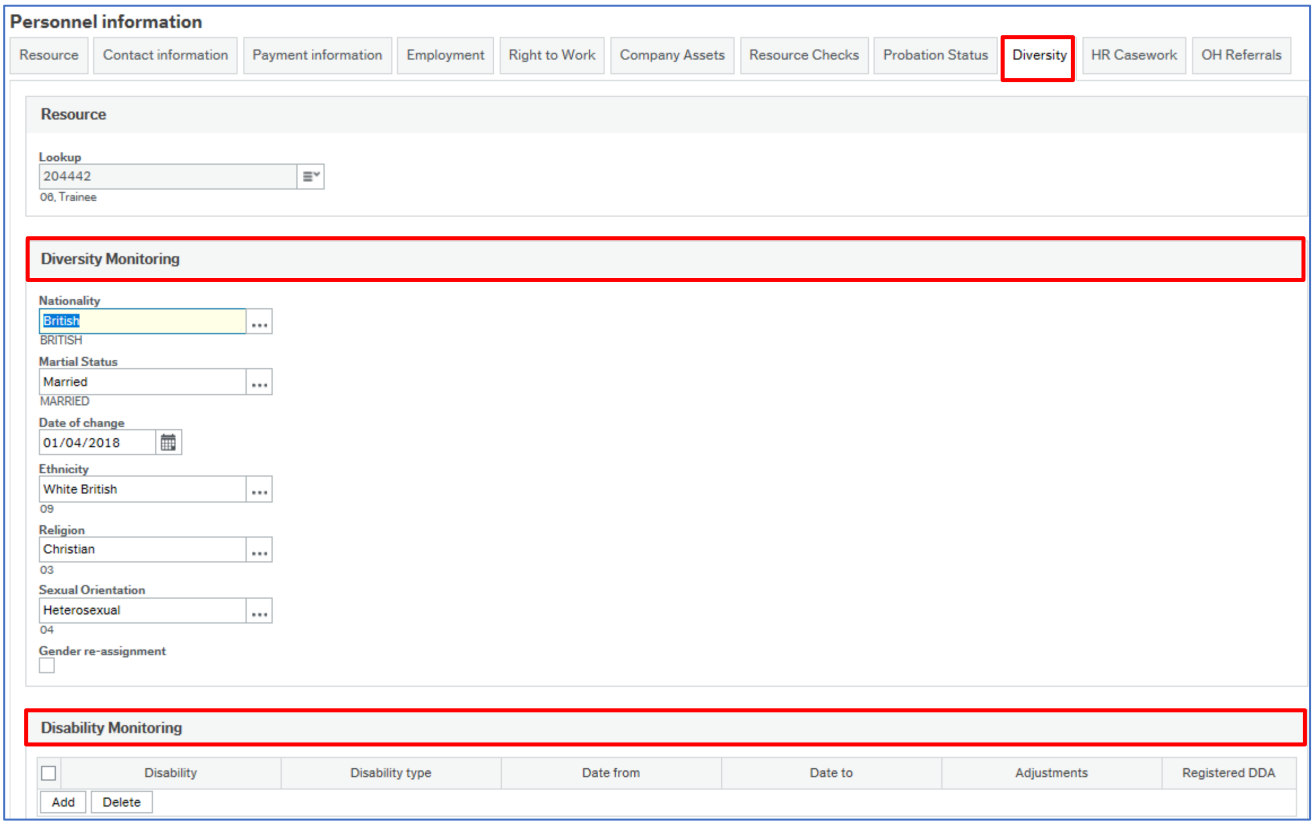
1. Press **[Space bar]** to select the **Probation Status**
2. Enter the **Pass Date** when the person has passed the probation
3. Click **Save**

4.9.2 Probation Details Section

1. Press **[Space bar]** to select the **Position**
2. In the **3 Month Review** field (and at a later date, the **6** and **12 Month Reviews**) press **[Space bar]** to select **Complete** or **Planned**, as applicable
3. Once the review meeting has taken place (in 3 months) update the **Outcome** field as **Extended**, **Successful** or **Unsuccessful**
4. Depending on the Outcome of the 3 Month review, then the 6 Month Review should be set as **Planned** and a date set accordingly
5. Repeat the process again

4.10. Diversity Tab- Personnel Information screen only

This is completed by HR from the Recruitment Monitoring Form but can be maintained by both HR and the Resource.



This tab has two sections:

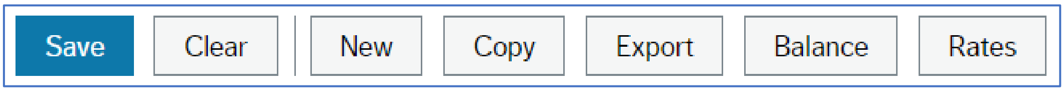
- **Diversity Monitoring** – for Nationality, Ethnicity, Religion etc
- **Disability Monitoring –** Disability, Dates, Adjustments and Registered DDA

4.11. OH Referrals Tab- Personnel Information screen only

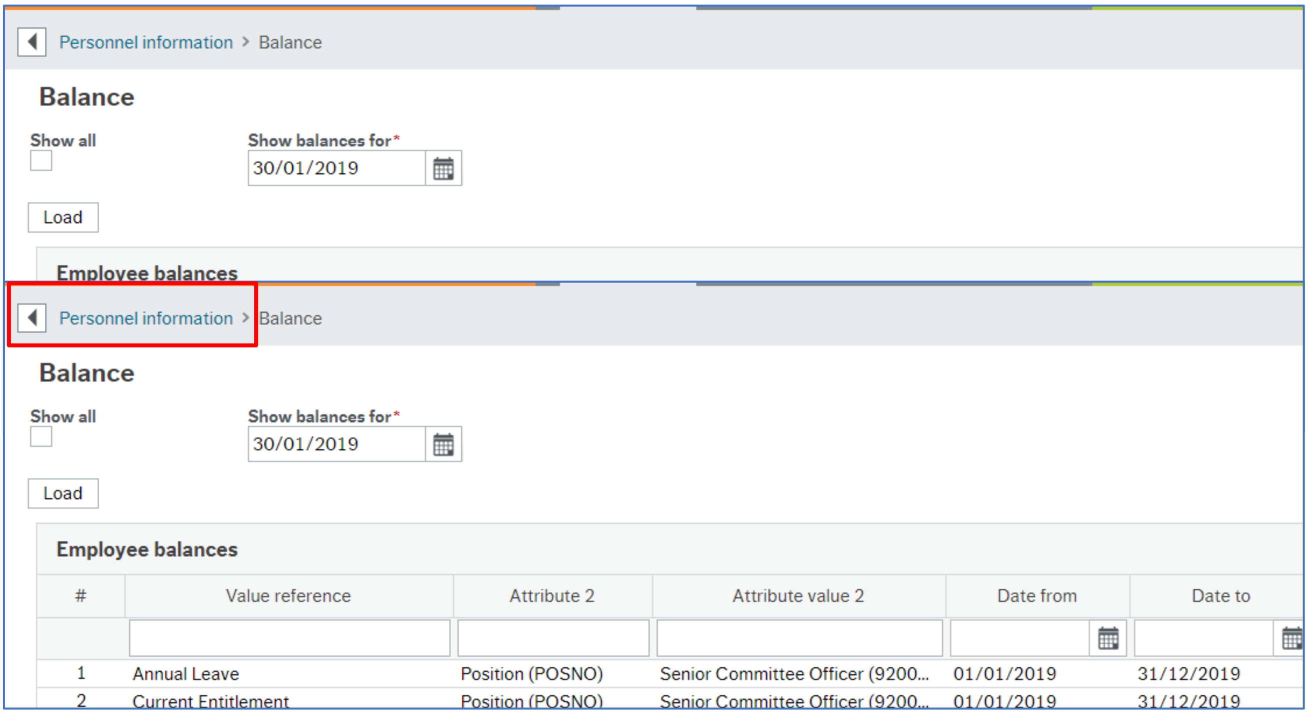
This is updated from the details on the relevant **OH Referral Form** each time the form is saved with a Schools' resource applied.

4.12. Action Buttons- bottom of personnel screens

The action buttons apply to the Personnel information screen, whichever variant is being viewed.



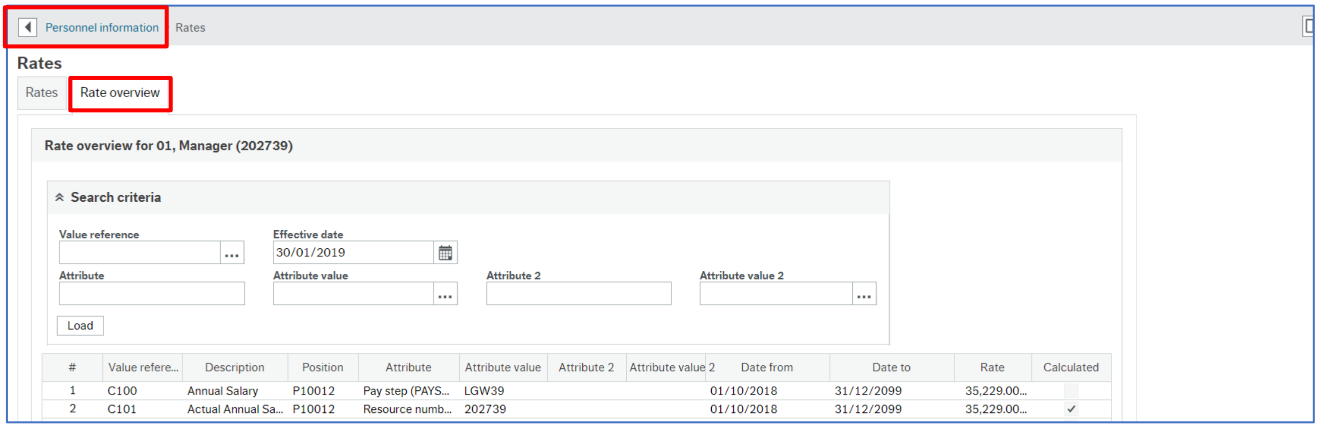
- **Save** - this will save any changes made to the record
- **Clear –** this normally clears the current data. Does not work on Personnel information
- **New** – for **HR use only** when creating new resources. It is not used by **Schools**
- **Copy** - for **HR use only** when creating new resources. It is not used by **Schools**
- **Export –** this produces a report that could be printed



2. Click **Personnel information** to return to the previous screen

4.12.2 Rates Screen – Rates Overview Tab

1. Click **Rates**

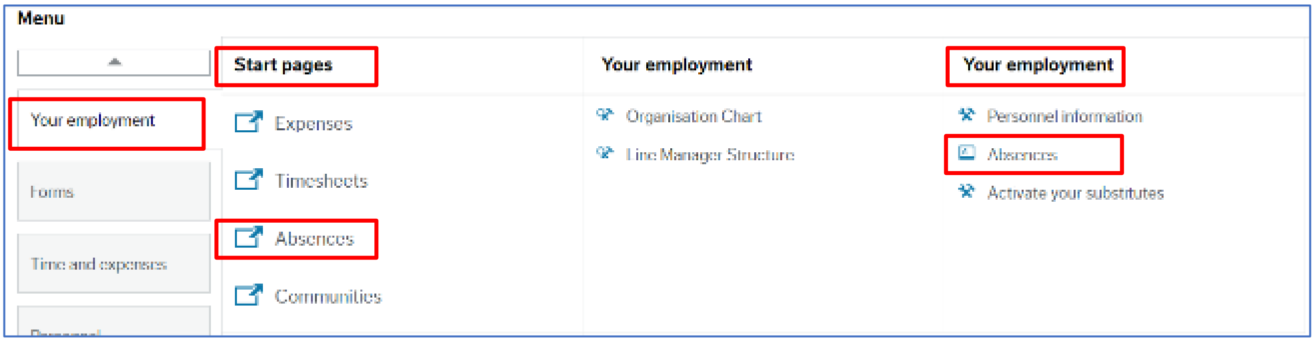


2. Click **Rates overview**
3. Click **Personnel information** to return to the previous screen

Embridge Consulting
Driving value from your business systems

5. Unplanned Absences

Schools' Administrators, Heads and those with the "Line Manager" role can access Absence from two places, but each has a different use:



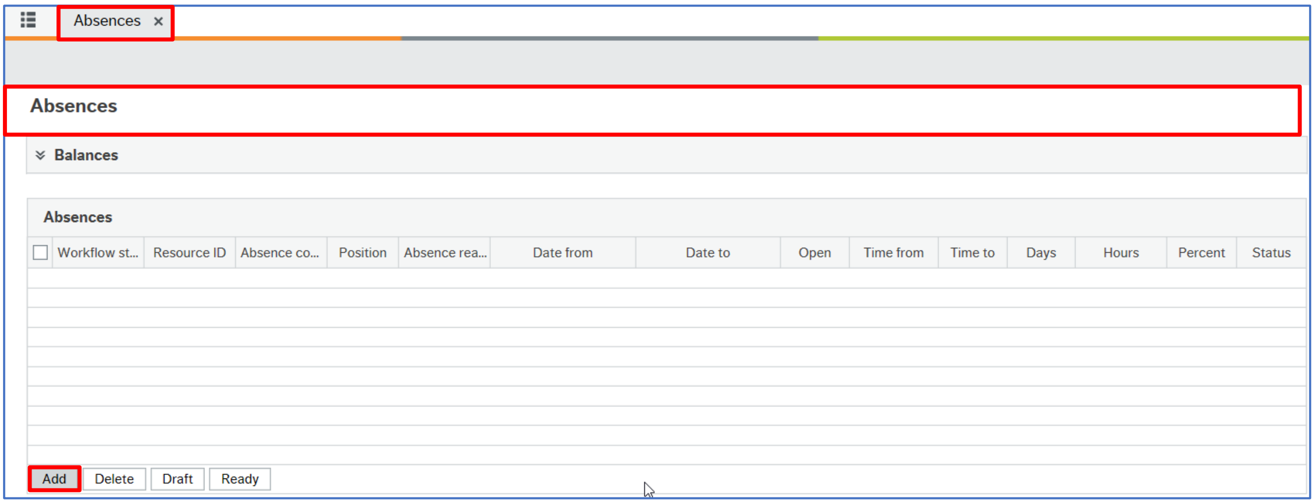
Your employment → Start pages → Absences is used to request Annual Leave and planned absences primarily for yourself, but can be used if the staff member cannot access by themselves. This is only for those who record Annual Leave or normal planned absences, which for the most part will not be teaching staff.

Your employment → Your employment → Absences is used to report unplanned absences for the School's staff, especially Sick type absences.

5.1. Sickness Absences- Recording Sickness

Staff sickness must be recorded in Business World and will apply to all Schools staff. It will the responsibility of the Administrator or persons with "Line Manager" role. To record staff sickness or unplanned absences, navigate to:

Your employment → Your employment → Absences



5.1.1 Absences Section

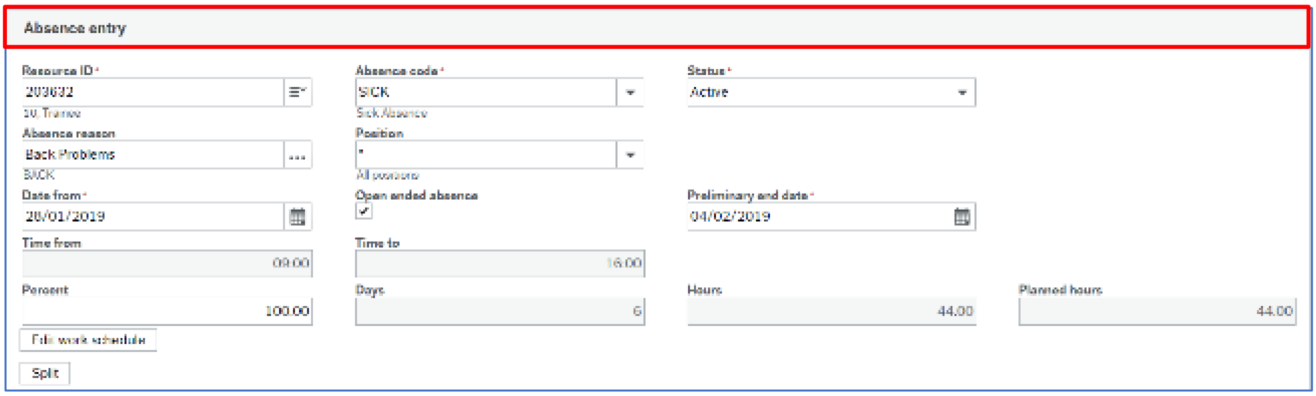
This section records the history of absences and is populated from the entries made in the **Absence entry** section and it updates each time you tab out of a field in the Absence entry section. It is also the place where absence entry begins.

1. Click **Add**

The **Absence entry** section opens

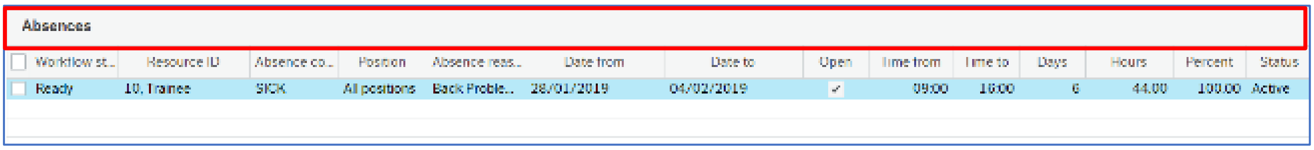
5.1.2 Absence Entry Section

As this section is completed, the screen will change depending on the options used.



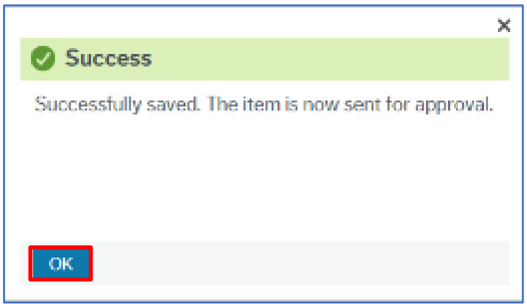
1. **Resource ID** – press **[Space bar]** or use type ahead to select the resource
2. **Absence code** – select the type of absence from the drop down e.g. Sick
3. **Status** – this defaults to Active
4. **Absence reason** – use the Type-Ahead to provide the known reason
5. **Position** – select All positions from the drop down or leave as default if only Position
6. **Date from** – enter the date the absence began
7. **Open ended absence** – if the return date is known, leave blank. If the return date is not known, select the **Open ended absence** check box and go to **Preliminary end date**
8. **Date to / Preliminary end date** – this field name will change if **Open ended absence** is selected. Enter the relevant date the absence finishes (inclusive). If Open ended, choose a reasonable return date.
9. **Percent** – leave as default 100.00

The Absences section is populated with the details.



10. Click **Save**

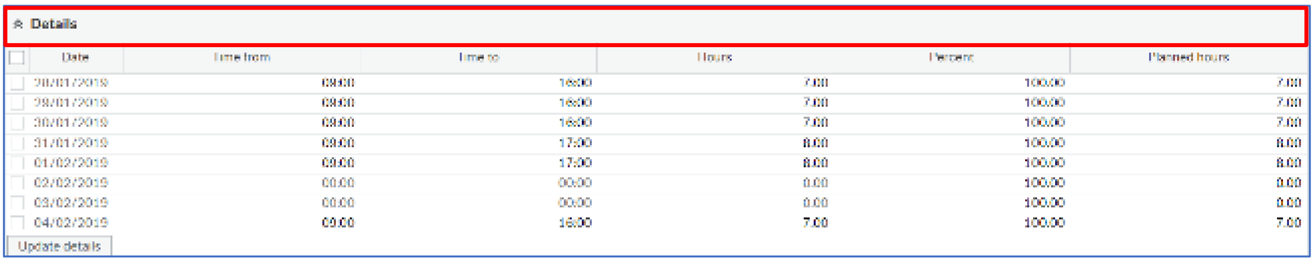
The **Success** popup opens.



11. Click **OK**

5.1.3 Details Section

1. Click **Details**



Date	Time from	Time to	Hours	Percent	Planned hours
28/01/2019	09:00	16:00	7.00	100.00	7.00
29/01/2019	09:00	16:00	7.00	100.00	7.00
30/01/2019	09:00	16:00	7.00	100.00	7.00
31/01/2019	09:00	17:00	8.00	100.00	8.00
01/02/2019	09:00	17:00	8.00	100.00	8.00
02/02/2019	00:00	00:00	0.00	100.00	0.00
03/02/2019	00:00	00:00	0.00	100.00	0.00
04/02/2019	09:00	16:00	7.00	100.00	7.00

This section displays the work schedule for the resource.

5.2. Sickness Absences- Adjusting a Sickness Record

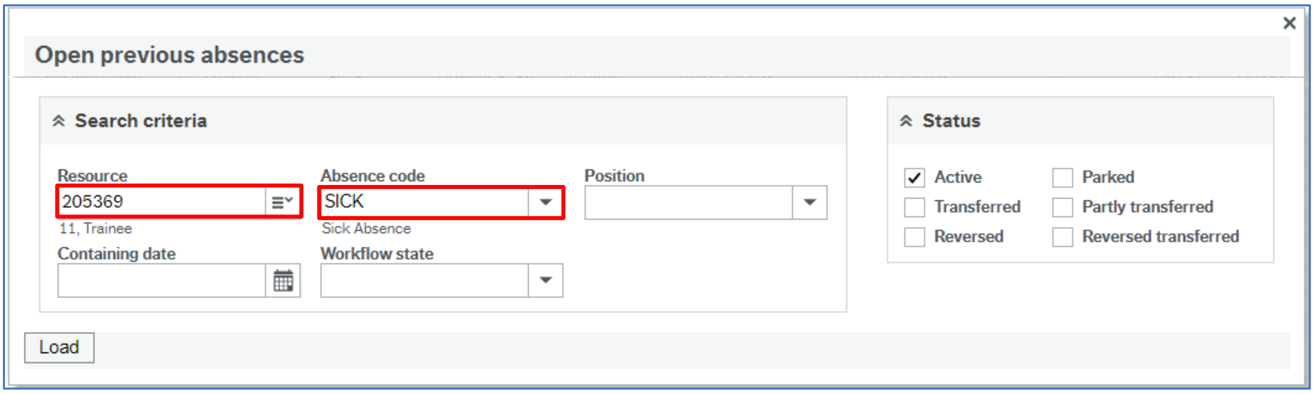
On occasion, when an Absence has been recorded incorrectly, it will be necessary to open that Absence line and correct it. This is more prevalent for those Sick type absences where an “Open ended” date, known as “preliminary end date” was recorded. It is very important the correct amount of days of absence is recorded as this may affect that person’s pay.

5.2.1 Changing a submitted Sickness Absence

To open a previous absence, navigate to:

Your employment → Your employment → Absences

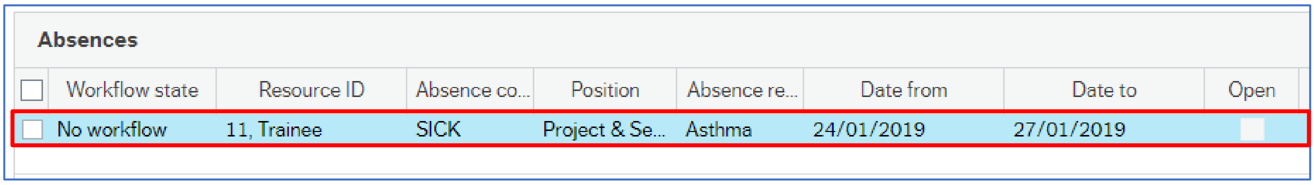
1. Click **Open**
2. In the dialogue box that appears, enter the **Resource** name and **Absence** code of **Sick**



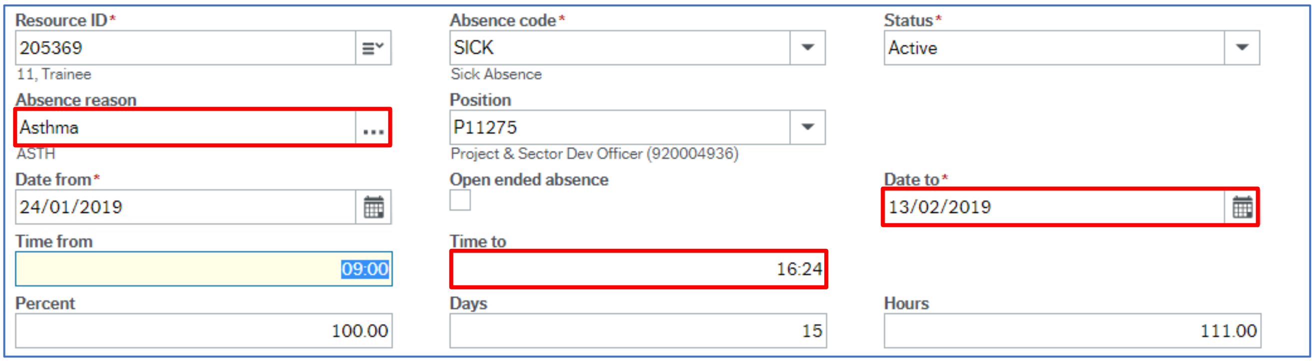
3. Take note of the status section. The following Statuses mean:

- **Active**- still in the system and ready to be edited
- **Transferred**- take over to Payroll for payroll calculations, if they apply
- **Reversed** – those Transferred by Payroll, but then “reversed” as they were incorrect
- **Parked**- any absence that did not enter Worfkflow due to being “parked” up to edit later (these, if found, should be dealt with- delete or process through)
- **Partly Transferred**- where a long-term absence across 2 Payroll periods has had the first part taken over by Payroll, but the second part is still available to the User
- **Reversed Transferred**- those that had been fully processes by Payroll, beyond Payroll Processing, but were found to be incorrect/needing removal

4. Leave the tick in Active, as they ought to be still active unless this is beyond the Payroll cut-off date for your School
5. Click **Load**
6. Click on the Absence row that needs changing



7. In the Details section below, make the change to the **Date to**, **Time**, **Absence reason** etc.



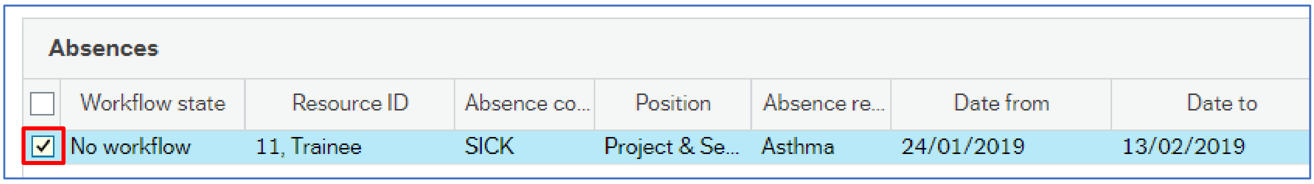
8. Double check your entries then click **Save**

9. The Success banner will appear and the Workflow status will change to “**Workflow in progress**”. This, in turn, will become “**No workflow**” as this is self-approving by Heads and Admin staff and those with access to this screen

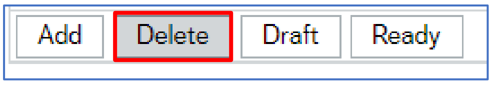
5.2.2 Deleting a submitted Sickness Absence

If you have entered an Absence for the wrong person you can delete the transaction altogether. Note - this is not possible if it is Transferred or Partly Transferred to Payroll. Contact SC Payroll if this is the case.

1. Follow all the steps previously, up to step 6
2. Once loaded, click on the row to check the details, in case this is not the correct one to delete
3. Tick the **check-box** on the left of the row of Absence (or rows, as necessary)



4. Click **Delete**. The row will disappear and will not be transferred by Payroll



6. Competencies

Competencies need to be recorded for Schools' staff if they are not on the BW system already. Example are Educational & Professional qualifications or Job-related competencies.

You can enter a Competence from two places, but each has a different use.

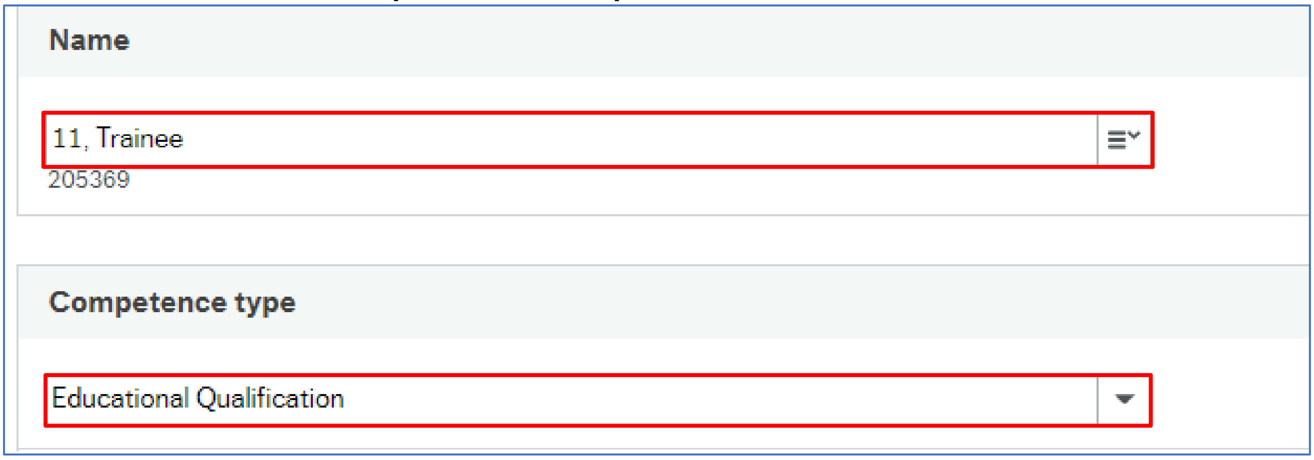
Your employment → Your development → Competences is used to enter competences for yourself.

Personnel → Competence → Competence is used to record competences for other School staff and yourself, if required.

6.1. Staff Competence Entry

To record staff competences, navigate to:

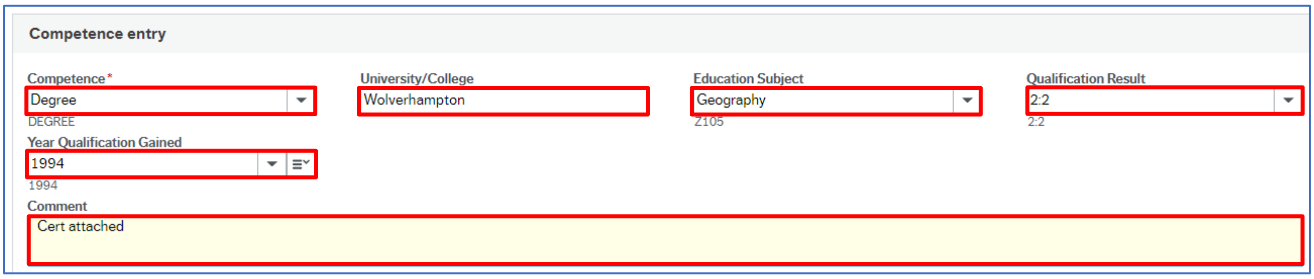
Personnel → Competence → Competence



1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type –** select the type of competence from the drop down
3. **Competence –** click **Add** to open Competence entry

6.1.1 Competence Entry Section

As this section is completed, the screen will change depending on the options used.

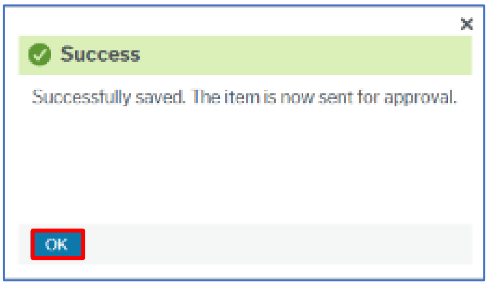


1. **Competence** - select the competence from the drop down, for example choose **Degree**
2. **University/College –** type this in (free text field)
3. **Education Subject –** enter the membership end date**,** if time limited

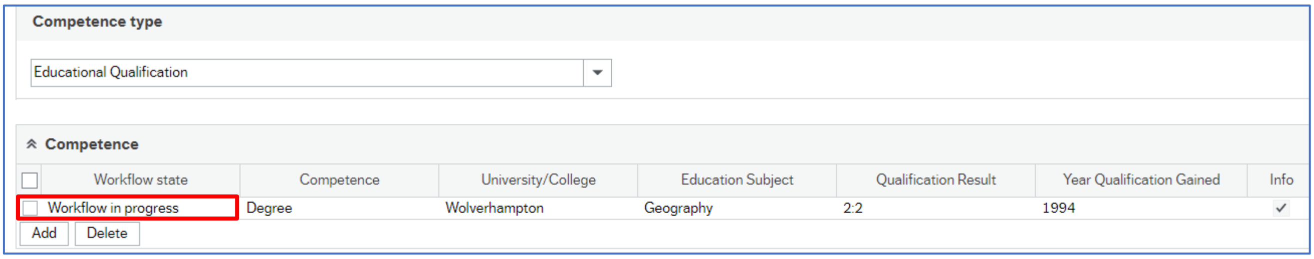
4. **Qualification result**- choose from the drop-down
5. **Comment** – relevant comments can be entered e.g. certificate attached
6. Use the **paperclip** to add a scanned image of the qualification. This is required as part of HR confirmation checks. See Attachments- page 36
7. Click **Save**

The **Success** popup opens.

8. Click **OK**

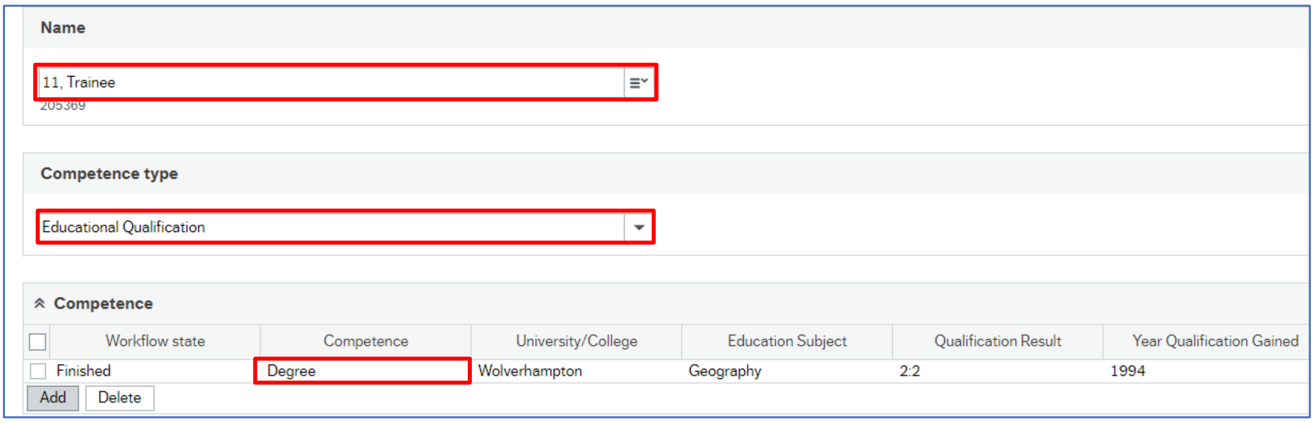


The Competence section is populated with the details. Note- at first the **Workflow state** field will state "**Workflow in Progress**" but will then become "**Finished**", as this is self-approving.



6.1.2 Viewing Current Competencies

Viewing a Competence for staff members is a case of reloading the name, then the Competence Type. Alternatively, use a Global report such as HR: LM Current Competence Record per Resource.



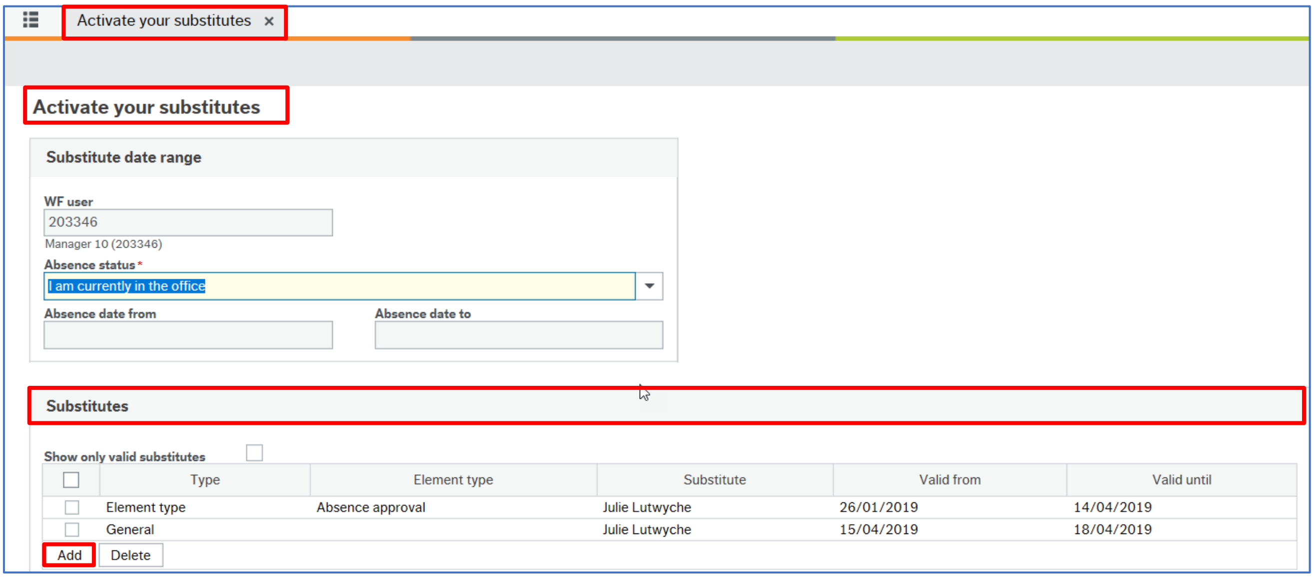
1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type –** select the type of competence from the drop down
3. **Competence –** use the dropdown to choose Educational Qualification, for example

7. Activating Your Substitutes

In the event of a planned absence, such as Annual Leave, you can nominate a Substitute to act on your behalf to receive Tasks and Alerts, and to action them with the same levels of approval as yourself. You can do this as a General substitute where one person assumes all your responsibilities or by individual elements where you have several substitutes responsible for different areas. In both cases, you can only select a substitute from a pre-defined list of resources.

Navigate to:

Your employment → Your employment → Activate your substitutes



In the Substitutes section:

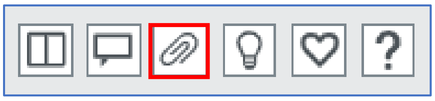
1. Click **Add** to open a new line
2. **Type** - select the type of substitute from the drop down, **Element** or **General**
3. **Element type –** press **[Space bar]** or use type ahead to select the type of element if it is not a **General** substitute
4. **Substitute –** press **[Space bar]** or use type ahead to select the substitute
5. **Valid from** – enter the substitute start date
6. **Valid until** – enter the substitute end date
7. Click **Save**

8. Attachments

It is possible to add supporting attachments of any standard file format to records in BW. The documents are added to the Document Archive and can be seen by anybody who has access to the relevant record.

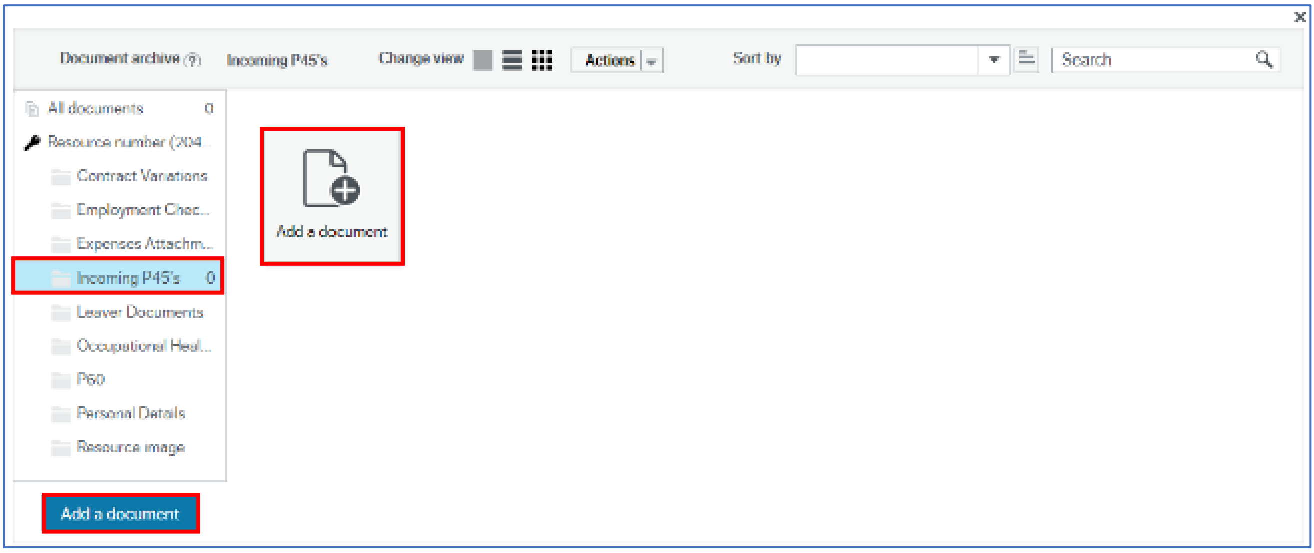
8.1. Adding Attachments

1. Navigate to the required person or position record

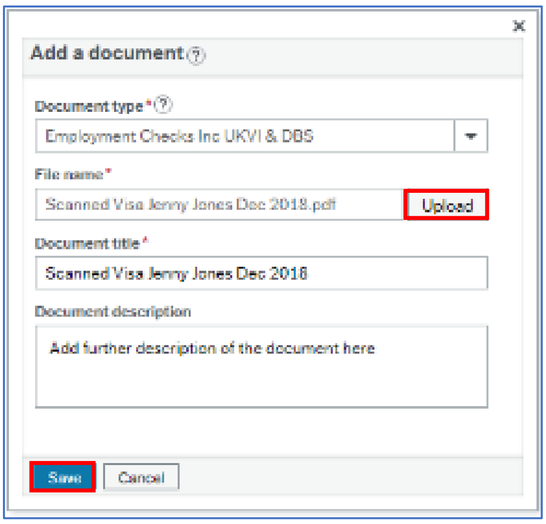


2. Click **Open documents**

The **Document Archive** popup opens. Ensure the popup-blocker is not on.

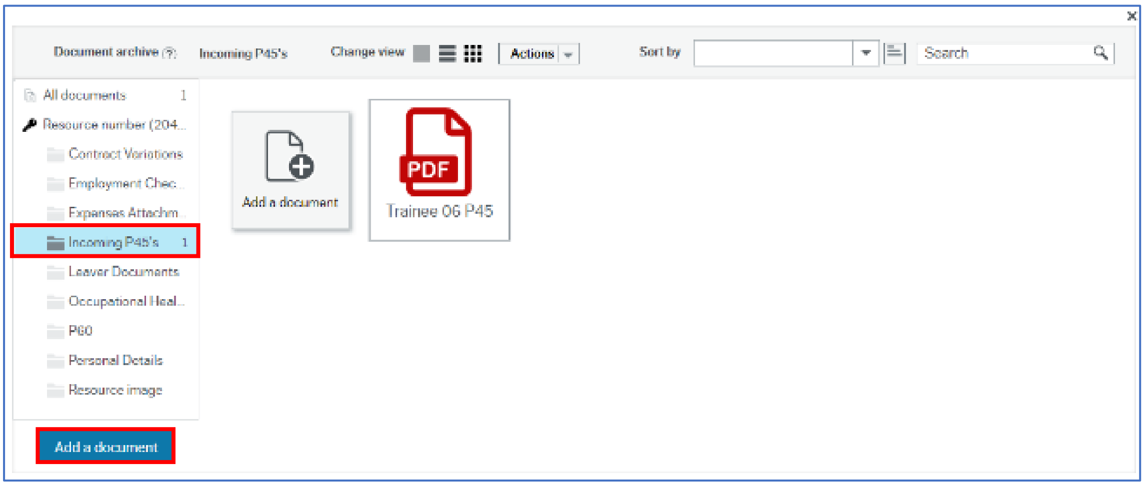


3. Select the correct folder for the attachment to be added to
4. Click **Add a document**, the icon or the button
5. Click **Upload** to locate the required file



7. Enter a **Document description**
8. Click **Save**

The **Add a document** popup closes.

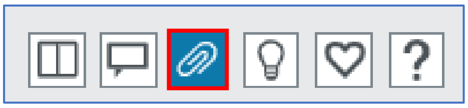


The document appears in the **Document archive**, the folder it is in is indicated with the number of documents in that folder and the All documents folder shows how many documents in total are held against the person or position.

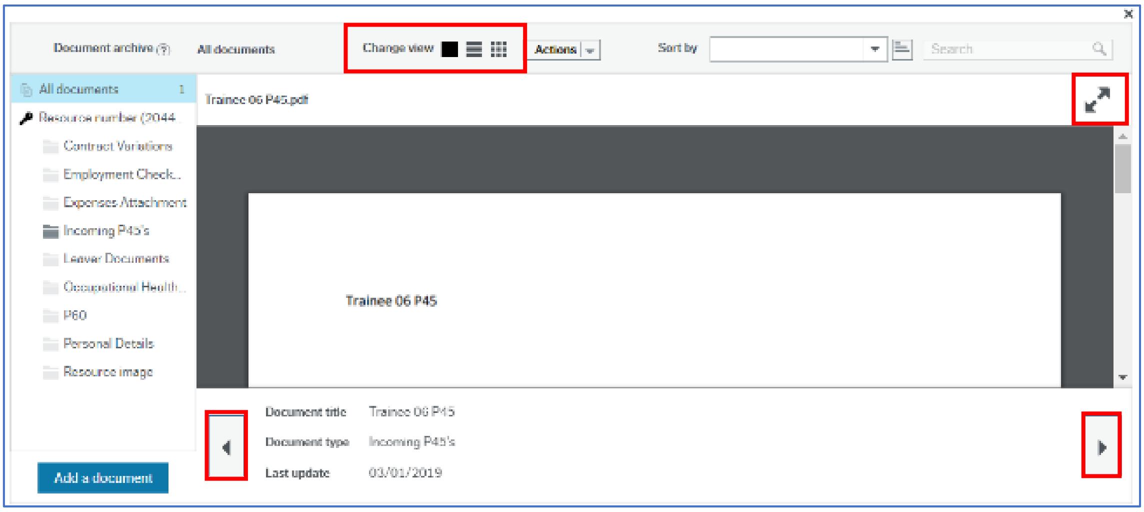
9. Close the **Document archive**

8.2. Viewing Attachments

If a record has attachments in the Document archive, the **View documents** icon will be blue.



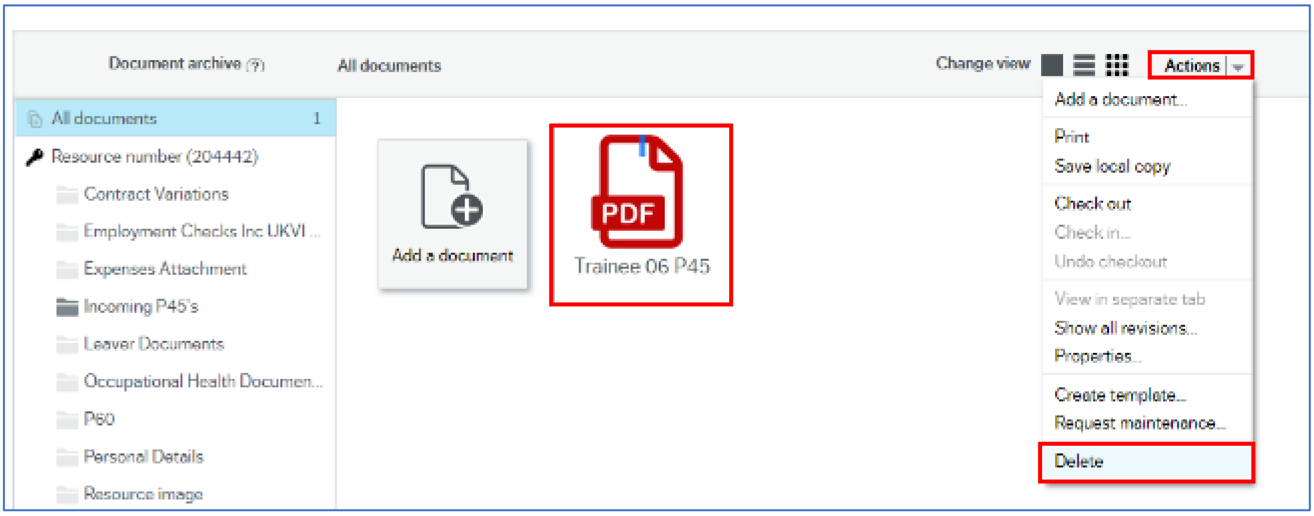
1. Click **View documents** to open the **Document archive**
2. Click on the folder you wish to view documents within or select **All documents**



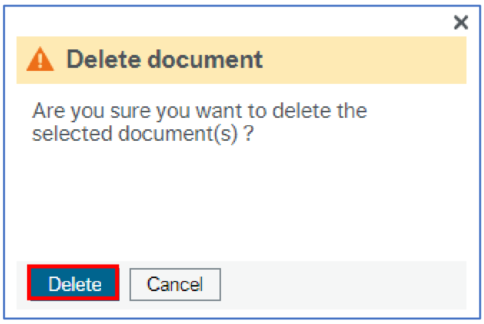
3. Click **Full screen**  to maximise the image size
4. Click the direction arrows to navigate to additional attachments
5. Click the **Change vie**w icons to return to all attachments

8.3. Deleting Attachments

1. You should only delete attachments you have uploaded in error. Do not delete any other attachments. Click once on the attachment to be deleted



2. Click **Actions**
3. Select **Delete**



4. Click **Delete** on the confirmation popup

9. Forms

9.1. Forms

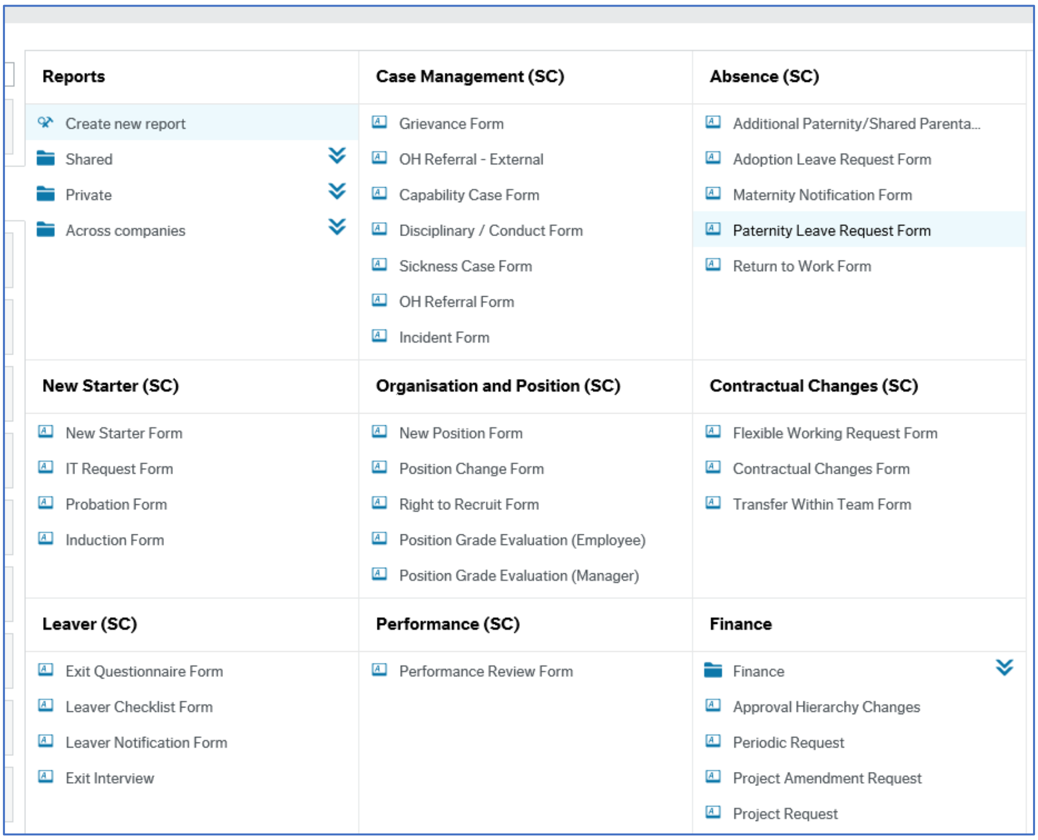
Forms should be named in line with the organisation naming convention to ensure that no sensitive data is added into the form title.

The naming convention is:

Form Description/Resource ID/Initials/School Name/mm/yy

9.2. Form Introduction

Forms are all stored within the forms tab from the main menu in various sections.



Review this user guides section Error! Reference source not found., for more summary information about each form, when it is to be used and the documents that are to be attached with the form.

To attach a document to a form, you should complete the form details first, and then click **Save as draft**. Then you can attach the documents as required and then if needed, click **Submit form**.

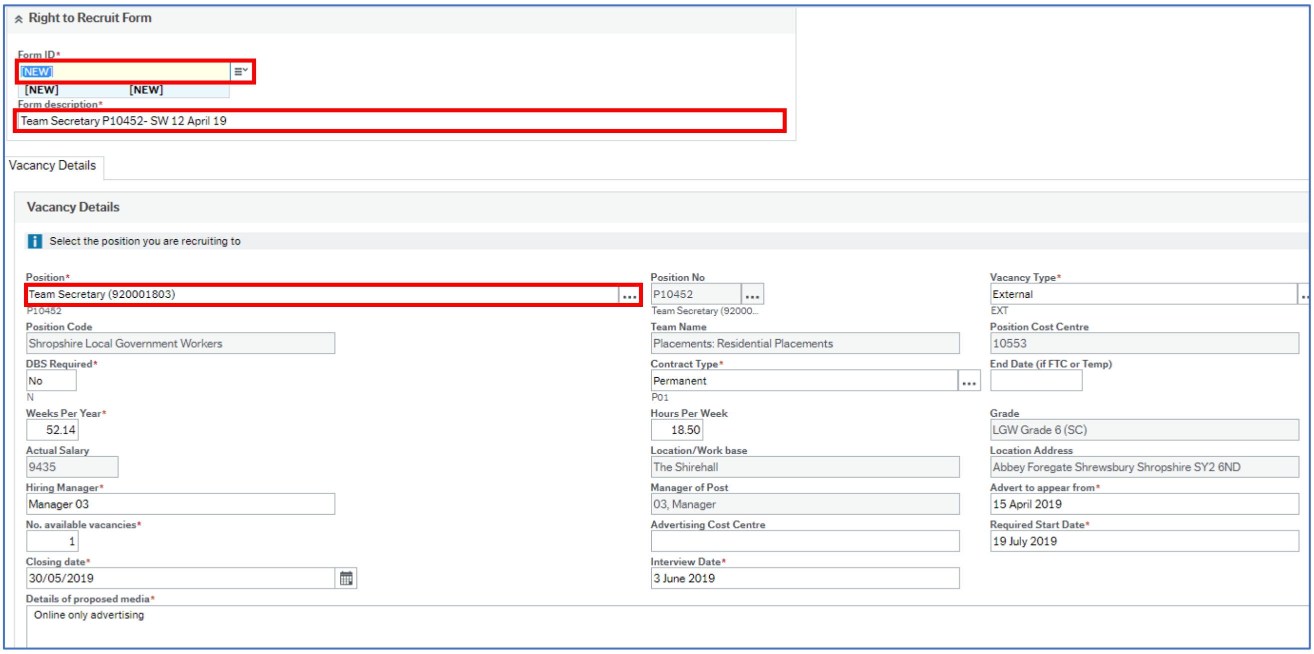
Forms are sent for approval where needed to the appropriate approvers.

Some forms are designed that you should retrieve a previously saved or submitted form and update this with the latest details at a later date or a later stage in the staff member’s induction or probation.

9.3. Right to Recruit Form

Once you know the position number to recruit to and an up-to-date and evaluated Job Description and Person Specification, you will then need to complete the **Right to Recruit** Form in Business World.

This must be completed, as without this, you may not be able to proceed with advertising your campaign. The purpose of the questionnaire is to ensure that a check can take place as to whether there may be any health problems that could affect a prospective candidate's ability to undertake the duties of the post at the point of making an offer.

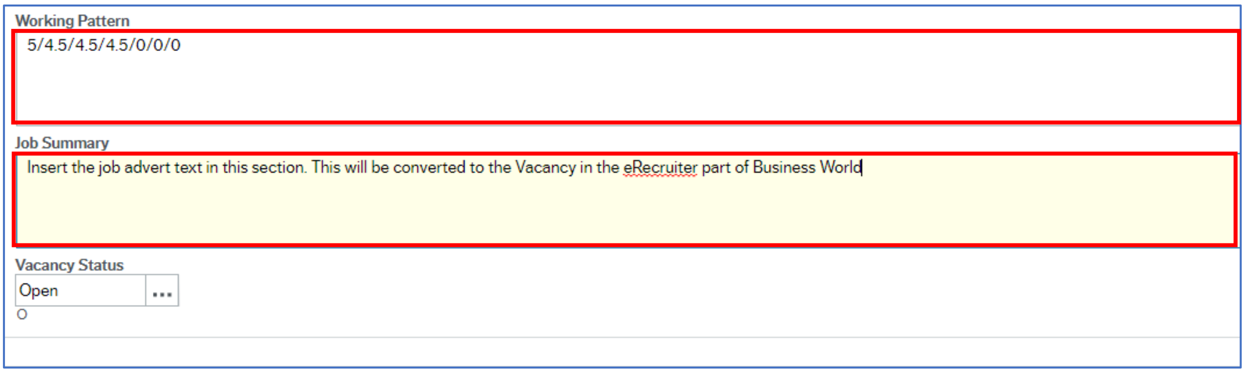

Right to Recruit Form
Form ID*
NEW
[NEW] [NEW]
Form description*
Team Secretary P10452- SW 12 April 19
Vacancy Details
Vacancy Details
Select the position you are recruiting to
Position*
Team Secretary (920001803)
P10452
Position No
P10452
Team Secretary (92000...
Vacancy Type*
External
EXT
Position Code
Shropshire Local Government Workers
Team Name
Placements: Residential Placements
Position Cost Centre
10553
DBS Required*
No
N
Contract Type*
Permanent
P01
End Date (if FTC or Temp)
Weeks Per Year*
52.14
Hours Per Week
18.50
Grade
LGW Grade 6 (SC)
Actual Salary
9435
Location/Work base
The Shirehall
Location Address
Abbey Foregate Shrewsbury Shropshire SY2 6ND
Hiring Manager*
Manager 03
Manager of Post
03, Manager
Advert to appear from*
15 April 2019
No. available vacancies*
1
Advertising Cost Centre
Required Start Date*
19 July 2019
Closing date*
30/05/2019
Interview Date*
3 June 2019
Details of proposed media*
Online only advertising

Navigate to:

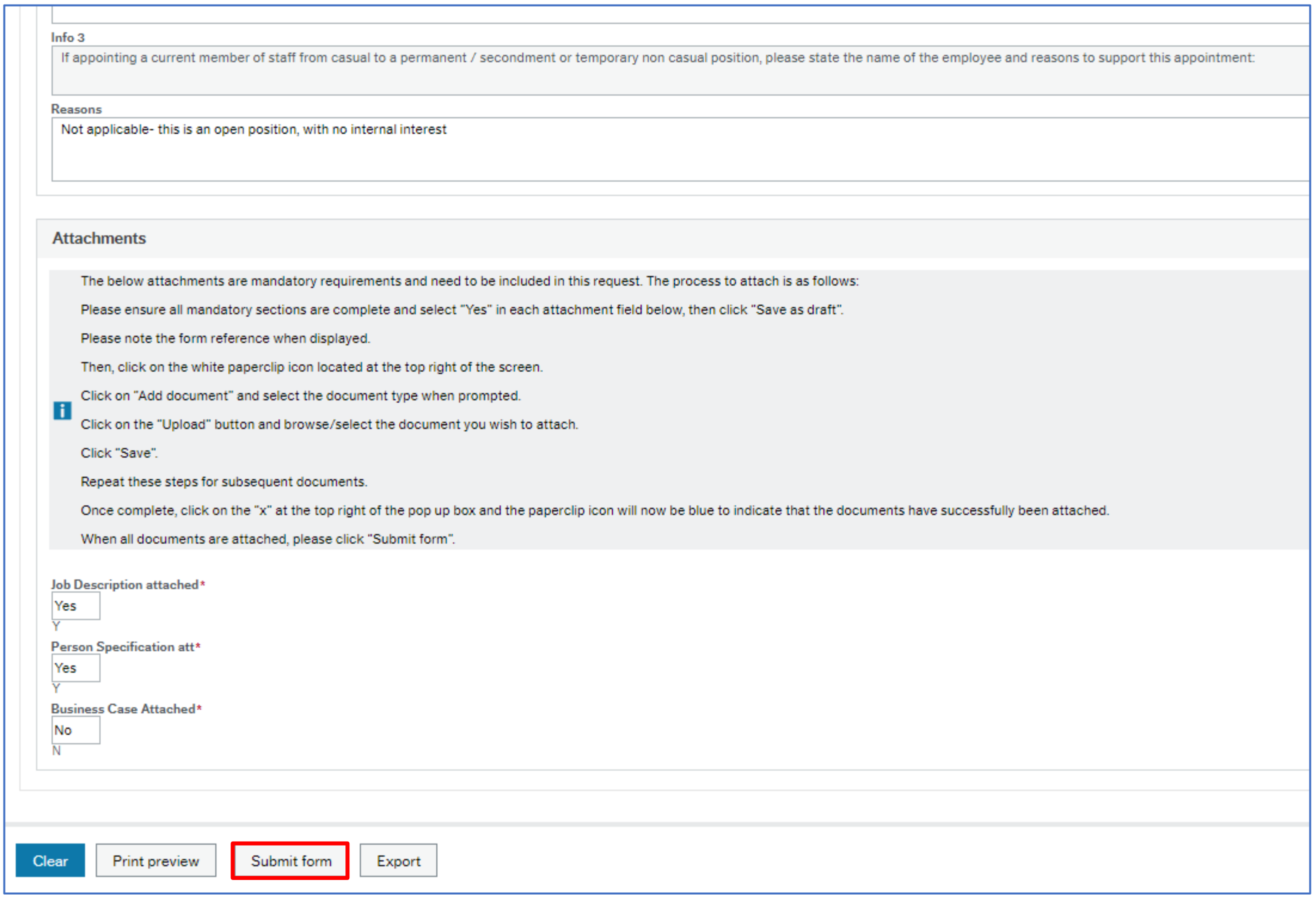
Forms→Organisation and Position→Right to Recruit Form

1. Ignore the **Form ID** field as an ID will populate automatically once the form is submitted
2. Complete the **Form description** - use something that will ensure this is unique to you and can be searched for later
3. **Position** - this will be a list of your Positions available to you as the Line Manager. Choose the one to be recruited to, i.e. a vacant or new position

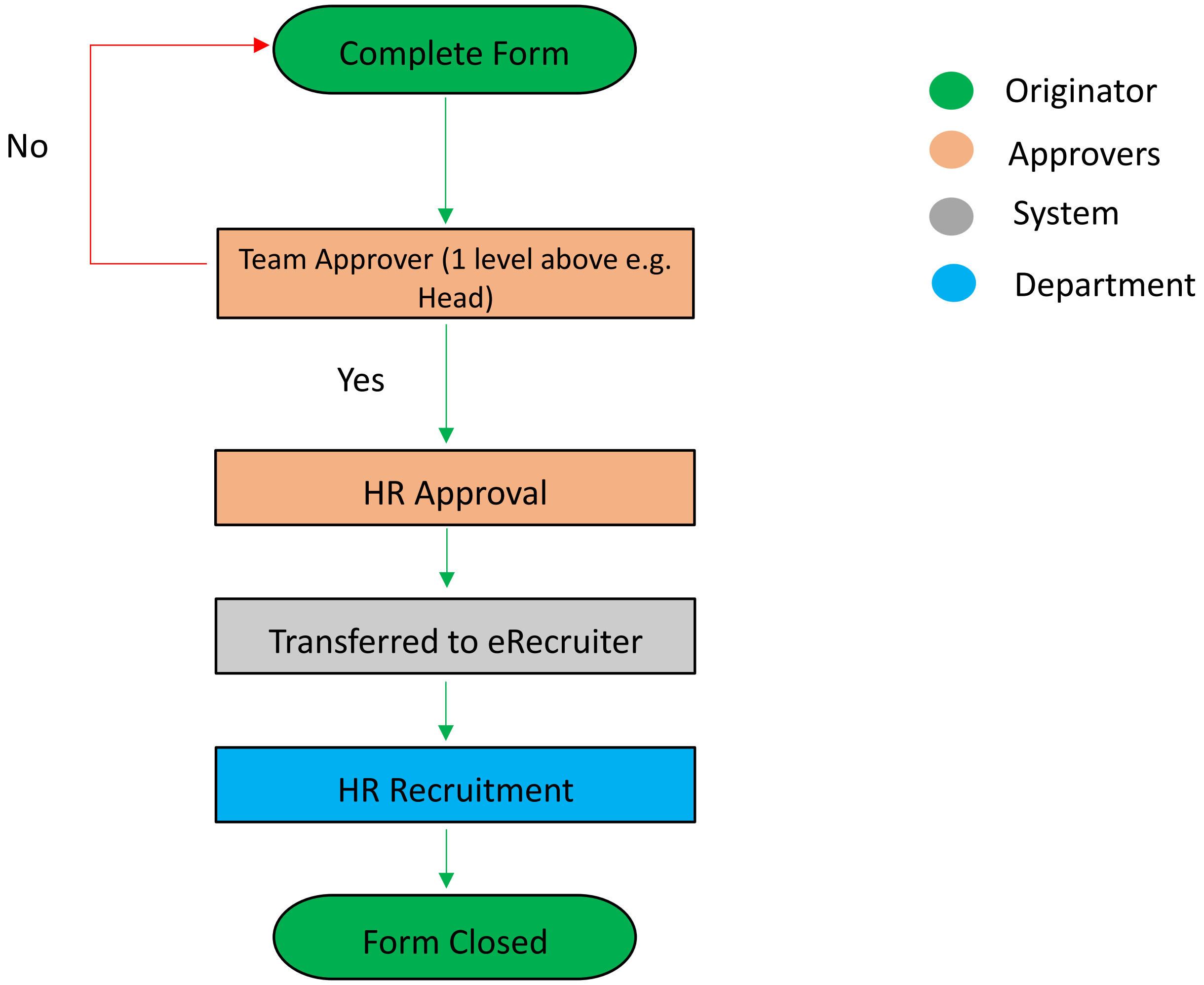
4. Ensure you complete as many fields as possible to enable the HR Recruitment Team to action as quickly as needed



5. **Working Pattern** - this should be in the format as above, where the hours per day are separated by a **/**
6. **Job Summary -** this is the text for the job advert. This needs to be in full, with as much detail as required
7. **Corporate** - fill out as per instructions on the screen information banners above each section
8. Attachments **must** be added with the declaration that you have done so. Use **Yes** (or **N**) in each box for each respective attachment. See page 36 for further guidance
9. Once complete, click **Submit form**. This saves it and sends for approval/review



9.3.1 Right to Recruit Form Approval - Schools

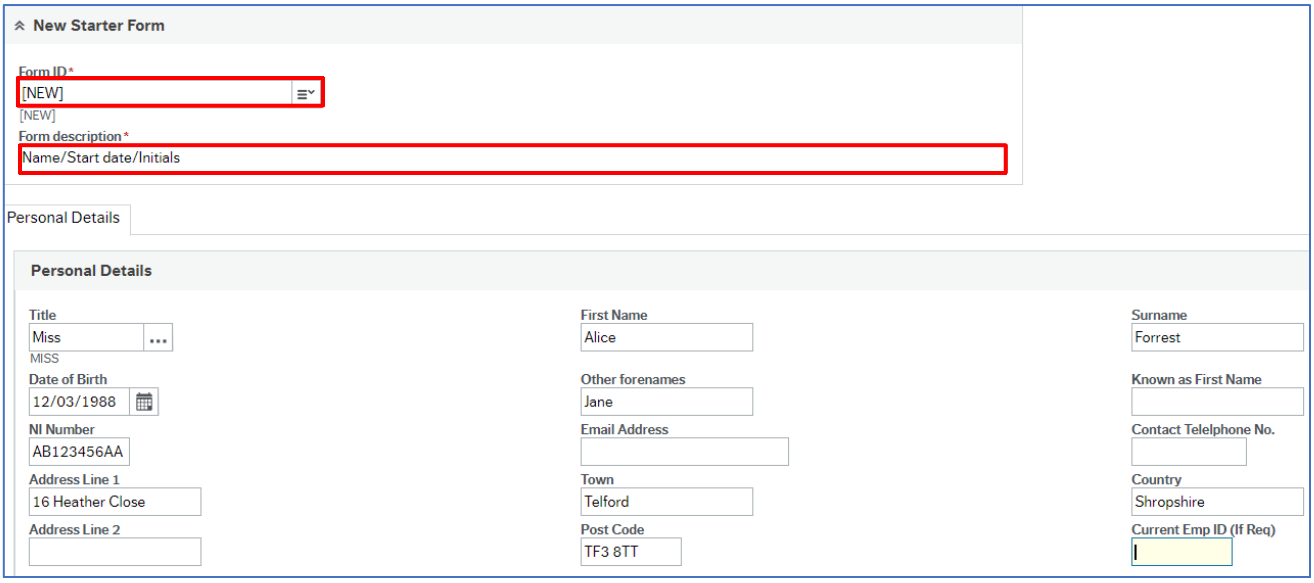


9.4. New Starter Form

This form is for when those Schools who hire directly, and outside the electronic system of e-Recruitment. It should be completed, ideally, as soon as the person has accepted an offer from the School and their joining is imminent.

Navigate to:

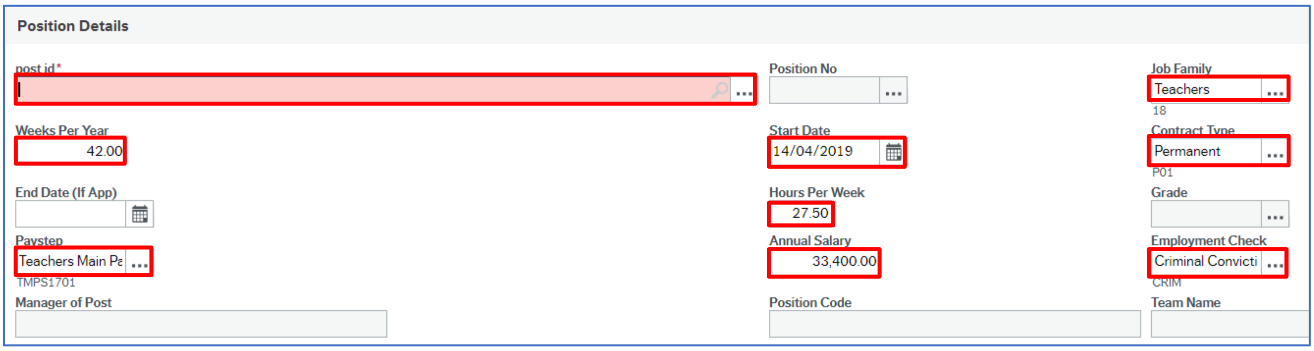
Forms → Forms→New Starter Form



1. Ignore the **Form ID** field as an ID will populate automatically once the form is submitted
2. Complete the **Form description** - use something that will ensure this is unique to you and can be searched for later

Most fields will be straight forward to fill out, should you have the information to hand.

9.4.1 Position Details Section



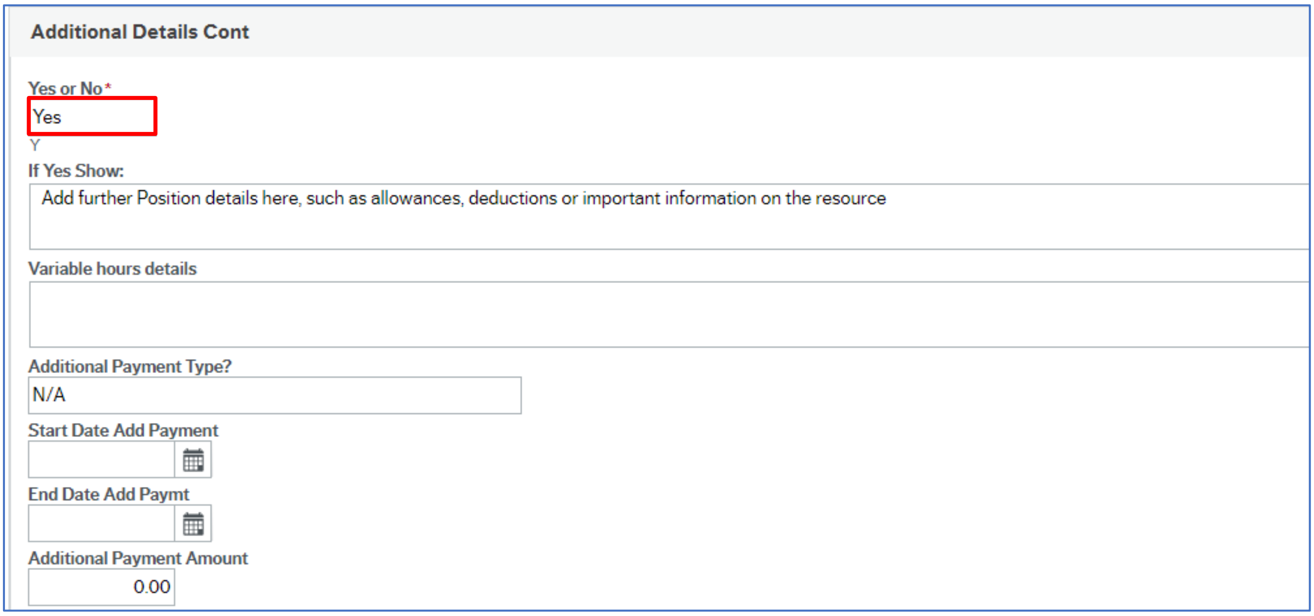
1. **Post ID** – press **[Space bar]** to select the relevant Position within the School
2. **Job Family** – press **[Space bar]** to select or start typing Teachers, for example
3. **Weeks per year** – is per the T&C/Contract or Position type
4. **Start date** – date of their actual first day of work
5. **Contract type** – Permanent or Temporary, for example
6. **Hours Per Week** – type in as a 2-decimal placed number e.g. 27.50 or 27.75
7. **Paystep** – use type-ahead or the Value Lookup ellipsis button to search for the value, or contact HR for advice
8. **Annual Salary** – the basic annual salary figure, if known at this point
9. **Employment check** – Choose the main employment check valid for this post

9.4.2 Additional Details Section

1. **Reason for Recruitment** – use Type-Ahead to pick from the available list
2. **If other please specify** – When the above doesn't have the right reason code for you
3. **Working pattern** – Not for Schools' use
4. **Essential Car User** – Y or N
5. **Politically restricted** – Y or N
6. **Teacher DFE No**. – Type in the whole number. Any forward slash (/) can be omitted
7. **Reason for Start (Sch)** – Enter the reason that the School has the new starter

9.4.3 Additional Details Section

If you choose **Yes** in the top field, the form will open out allowing you to add further information, payments etc. Repeat again lower down if required.


Additional Details Cont
Yes or No*
Yes
Y
If Yes Show:
Add further Position details here, such as allowances, deductions or important information on the resource
Variable hours details
Additional Payment Type?
N/A
Start Date Add Payment
End Date Add Paymt
Additional Payment Amount
0.00

1. Adding Yes, will open the form. Complete as necessary and repeat for the lower section, also called **Additional Details**.
2. Once complete, click **Submit form**

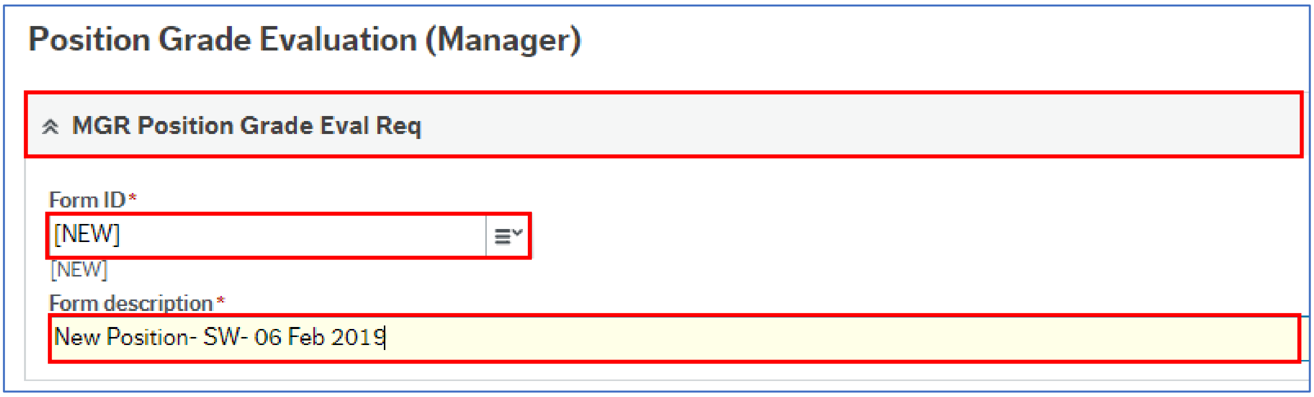
This will now workflow to HR. You can always use **Save as Draft** if you need more time to gather the correct information. You can then open this later by pressing [Space bar] in the **form ID** field.

9.5. Position Grade Evaluation (Manager) Form

This form has a workflow associated with that will require action by Payroll and will require prior approval by a corporate director. This example covers the change in pay grade option.

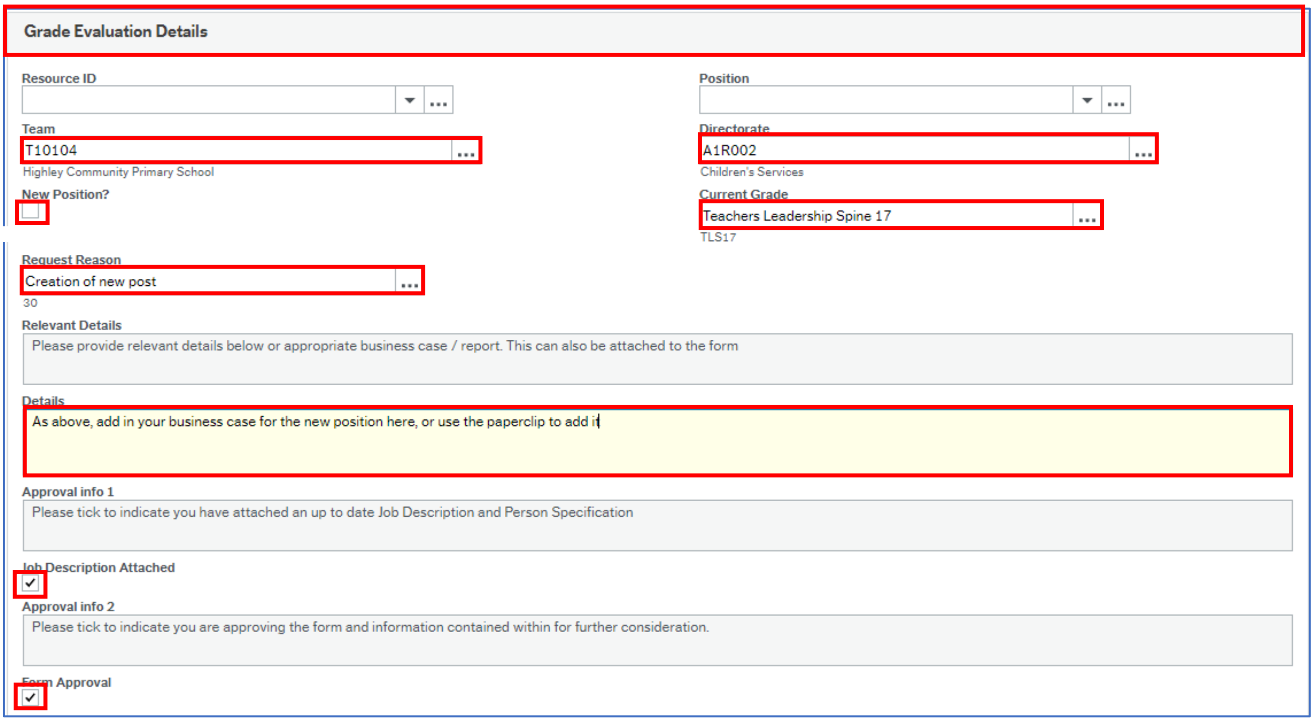
1. Navigate to

   Forms → Organisation and Position (SC) → Position Grade Evaluation (Manager)



This form is completed by the Manager requesting the change and starts with the Manager Grade Evaluation Details section by entering a **Form description** that is like a title/New position/date/ summary, making the form easier to search for at a later date.

9.5.1 Grade Evaluation Details Tab

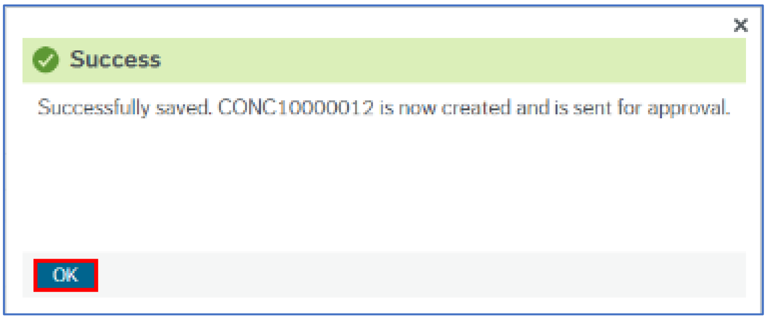


1. **Resource ID –** add an employee so you get the Position, Team and Directorate. Then take it out, to leave the Team and
2. **Position** – remove the Position number as this is for a New Position
3. **Team** – populated from the Position
4. **Directorate** - populated from the Position
5. **New Position**? – Tick this box
6. **Current Grade** – populated from the position you removed. Delete if this doesn't apply, or add from the Value lookup ellipsis button
7. **Request Reason** – press **[Space bar]** to select the reason (Creation of New Post)
8. **Details** – enter/attach relevant details or appropriate business case / report
9. **Job Description Attached** – tick and attach before submitting (save as draft first)
10. **Form Approval** – select to confirm

9.5.2 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow to the HR Business Partner
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



1. Click **OK** to close the message

9.5.3 Position Grade Evaluation Form (MGR) Workflow

This is currently under development.

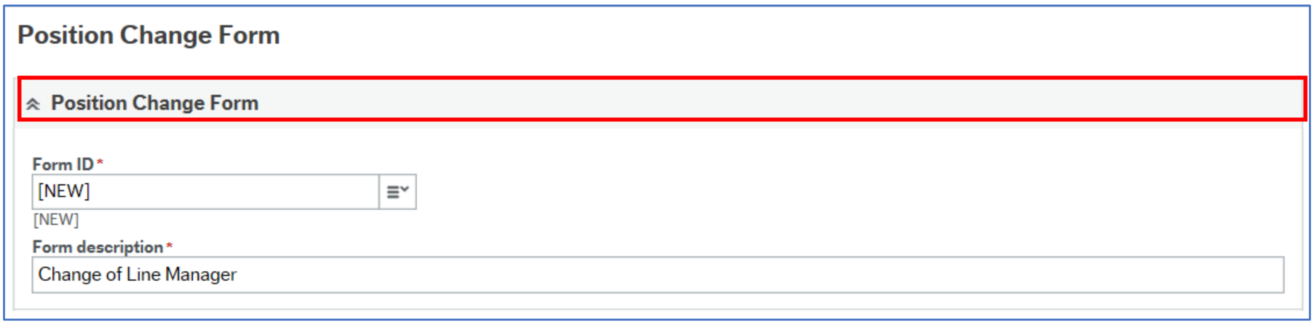
9.6. Position Change Form

The **Position Change Form** is used to **Amend** and **Close** positions. Use the Create Position Form to create a new post in the establishment.

Whilst this form is for all entities of the council, this could be for change of a Business Manager that currently doesn't report to the Head, or where you require a small organisation or reporting structure change.

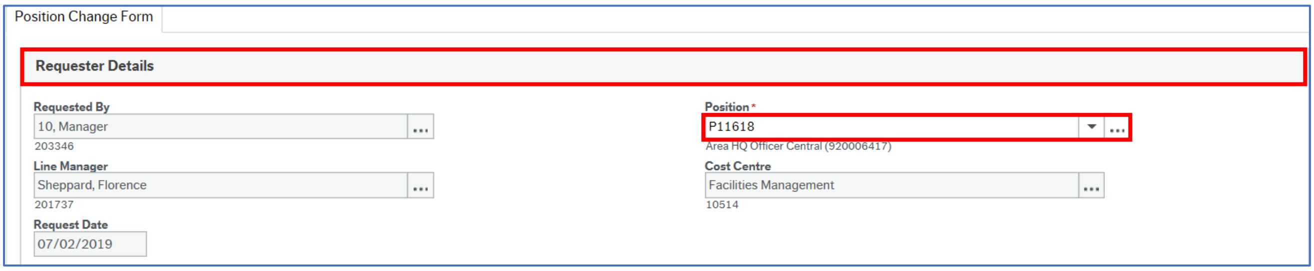
Navigate to

Forms → Organisation and Position (SC) → Position Change Form



The **Position Change Form** is completed by the "Line Manager" requesting the change and starts with the Position Change Form section by entering a Form description, which is like a title and summary, making the form easier to search for.

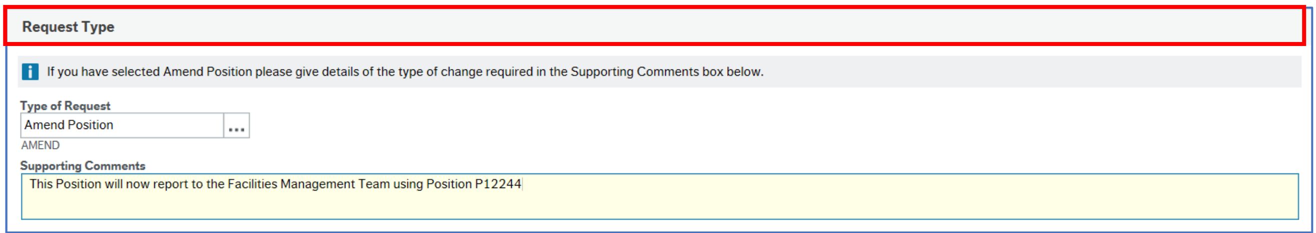
9.6.1 Requester Details Section



1. **Position** - press **[Space bar]** to select the position in which you are completing this form

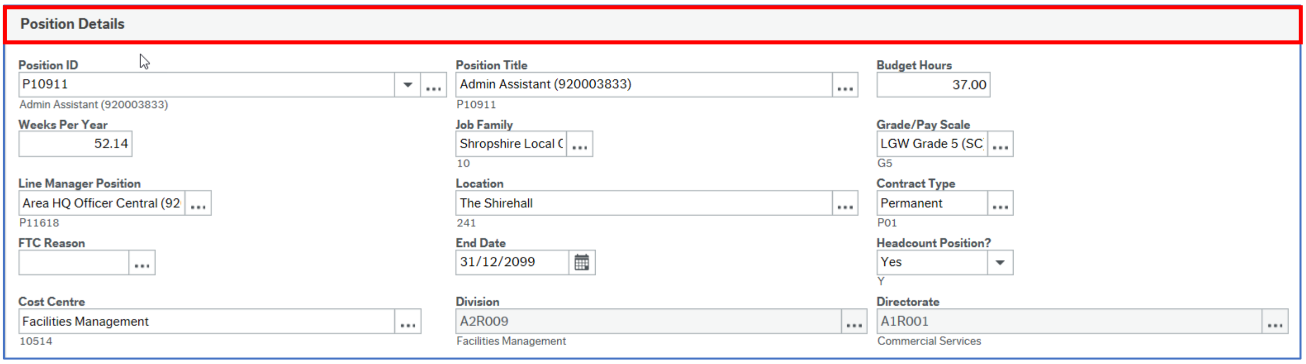
The remaining fields in this section are read only.

9.6.2 Request Type Section



1. **Type of Request** - press **[Space bar]** to select **Amend**
2. **Supporting Comments -** explain why the change is required

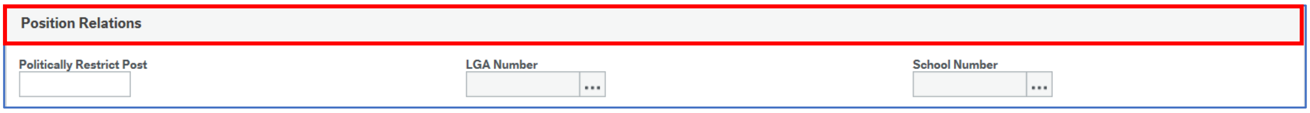
9.6.3 Position Details Section



1. **Position ID** - press **[Space bar]** to select the position to change

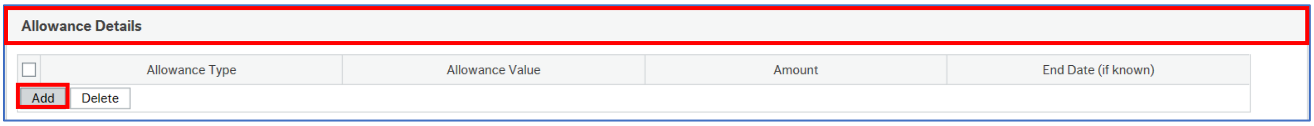
The remaining position details are populated.

9.6.4 Position Relations Section



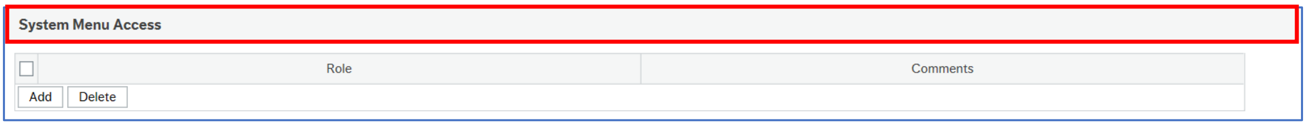
Enter **Y** or **N**, to whether, or not, this is a politically restricted post

9.6.5 Allowance Details Section



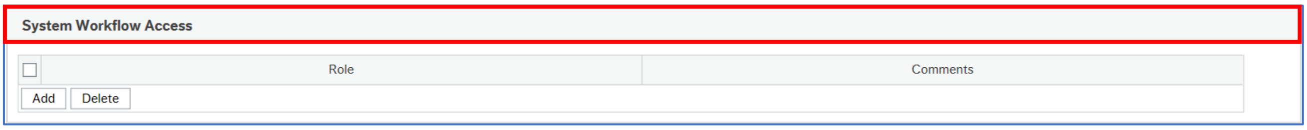
If this Position requires an additional Allowance that is always applicable to the post and not the person, click **Add** and enter the row detail here.

9.6.6 System Menu Access Section



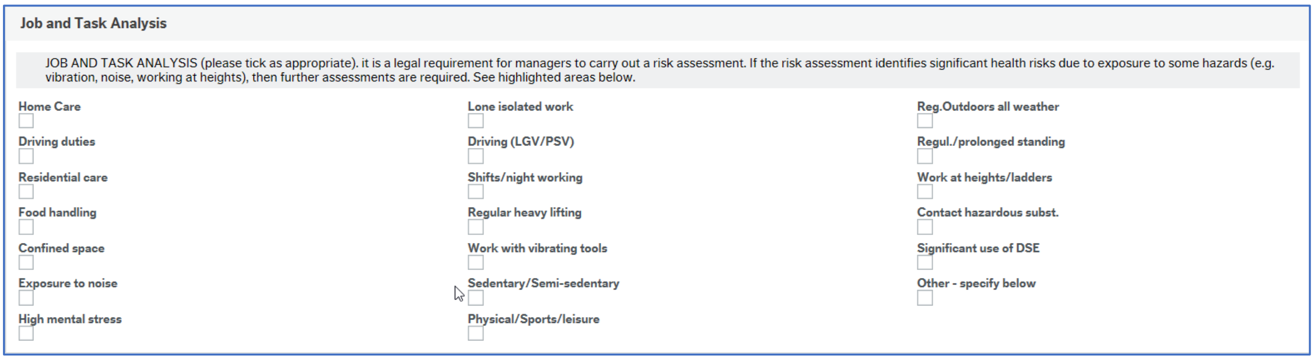
This can be left blank, unless you specifically need the Position to have further (or reduced) system access. Seek advice from Schools ICT Team.

9.6.7 System workflow Access Section



As above.

9.6.8 Job and Task Analysis Section

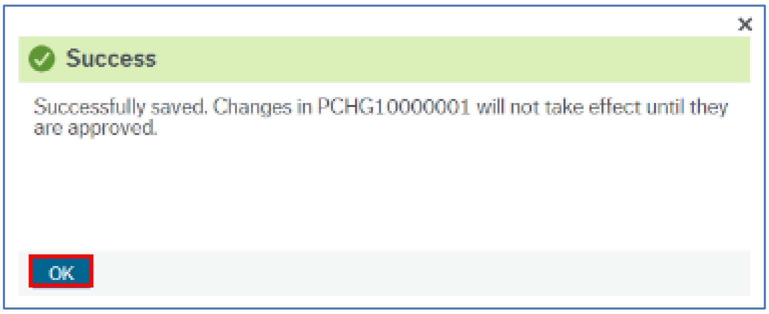


If the change being requested is impacted by any of the assessment types listed, they must be selected.

9.6.9 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



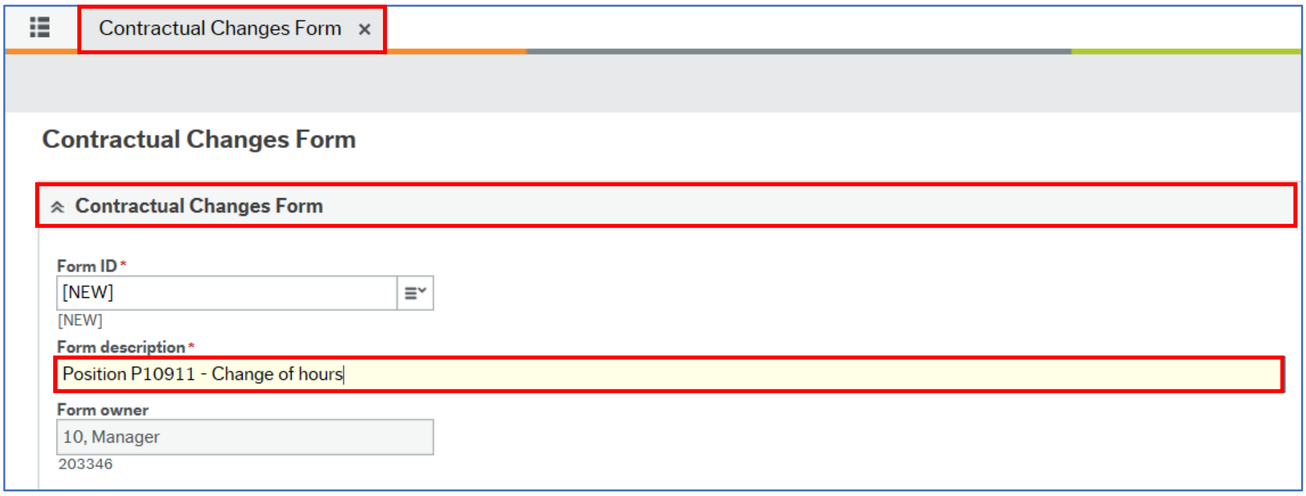
1. Click **OK** to close the message

9.7. Contractual Changes Form - Change in Hours

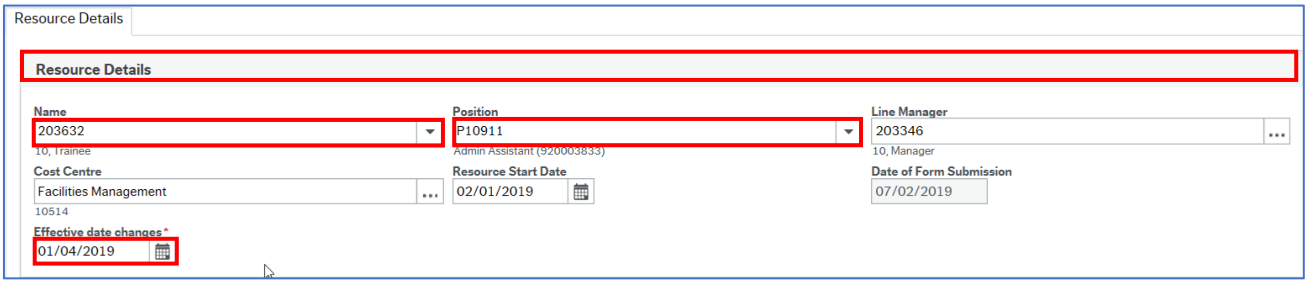
This form covers changes to contractual details, with the type of change being selected from within the form. This example covers the **Change in Hours** option. The Contractual Changes Form is completed by the Line Manager (Schools' Admin) requesting the change

Navigate to

Forms → Contractual Changes (SC) → Contractual Changes Form

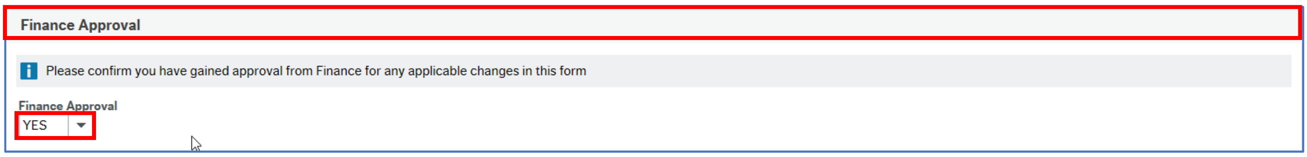


9.7.1 Resource Details Section



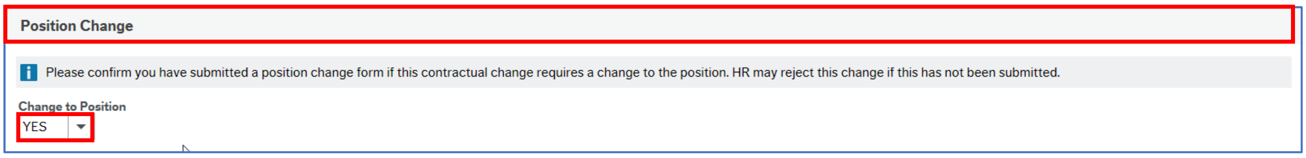
1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar

9.7.2 Finance Approval



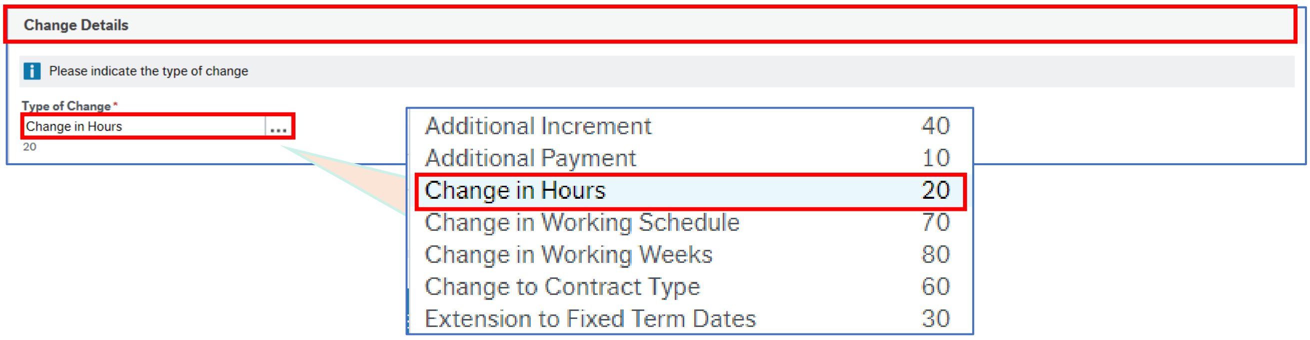
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.7.3 Position Change Section



1. **Change to Position –** select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

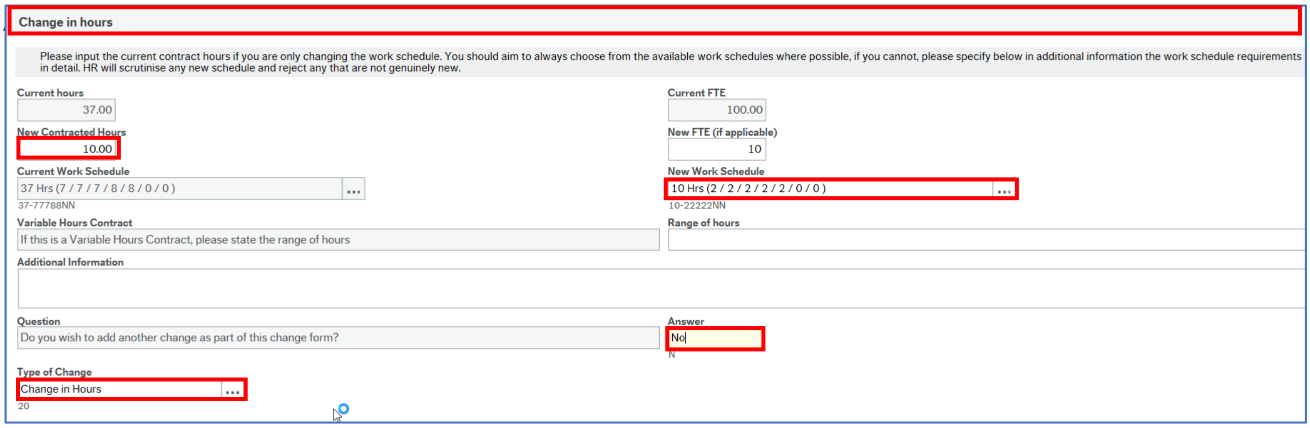
9.7.4 Change Details Section



1. **Type of Change –** select the type of change from the drop down

A second tab opens.

9.7.5 Change in Hours Tab

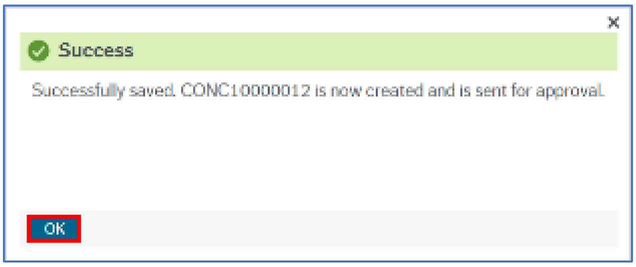


1. **New Contracted Hours –** enter the new hours
2. **New Work Schedule** - press **[Space bar]** to select the new work schedule
3. **Range of hours –** enter the range for Variable Hours Contracts
4. **Additional Information –** enter any additional details about the change
5. **Answer –** select **Yes** or **No** from the drop down to answer the question
6. **Type of Change –** select the type of change from the drop down

9.7.6 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



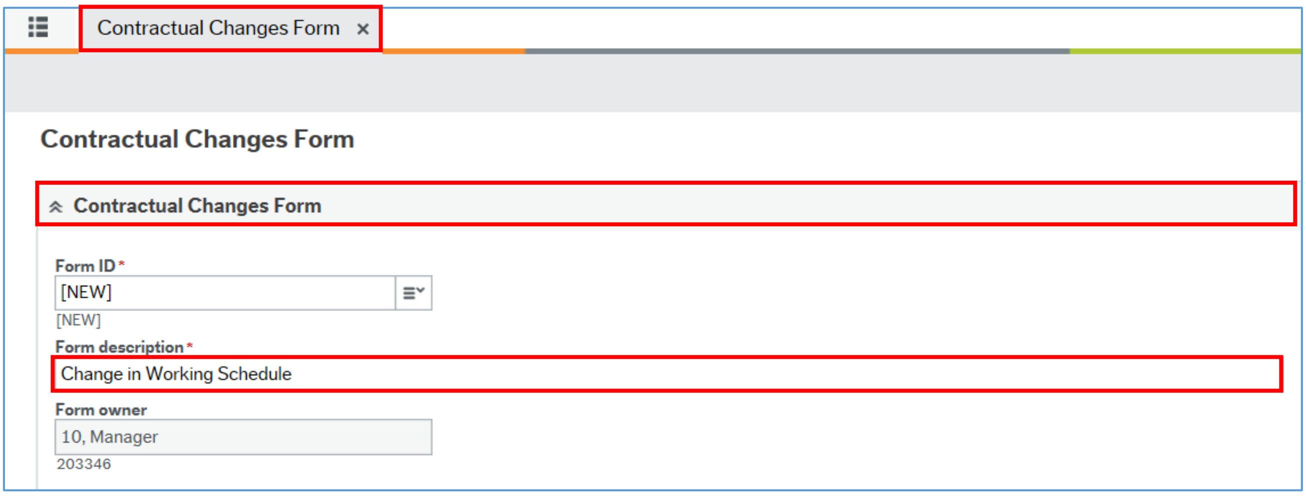
7. Click **OK** to close the message

9.8. Contractual Changes Form - Change in Working Schedule

This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Change in Working Schedule option.

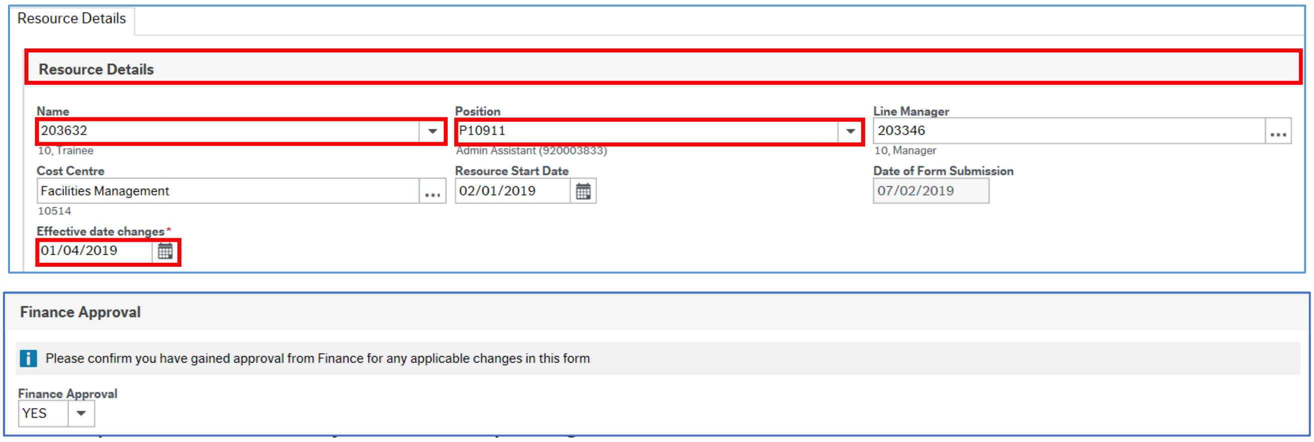
1. Navigate to

   Forms → Contractual Changes (SC) → Contractual Changes Form



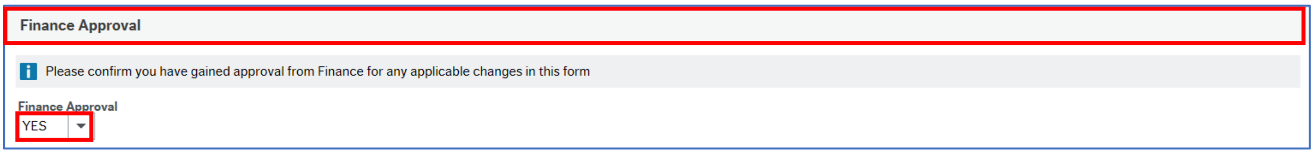
The **Contractual Changes** Form is completed by the Line Manager requesting the change and starts with the Contractual Changes Form section by entering a Form description, which is like a title and summary, making the form easier to search for.

9.8.1 Resource Details Section



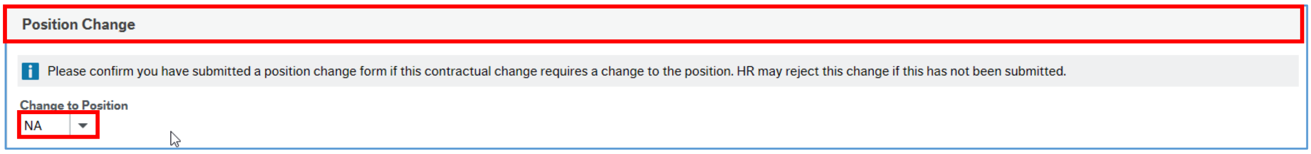
3. **Effective date changes –** enter by typing or using the calendar

9.8.2 Finance Approval



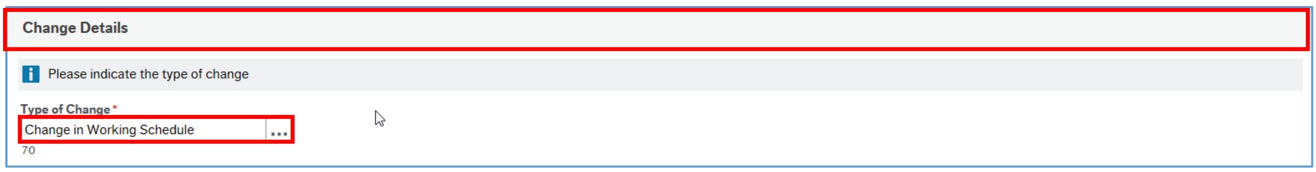
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.8.3 Position Change Section



1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

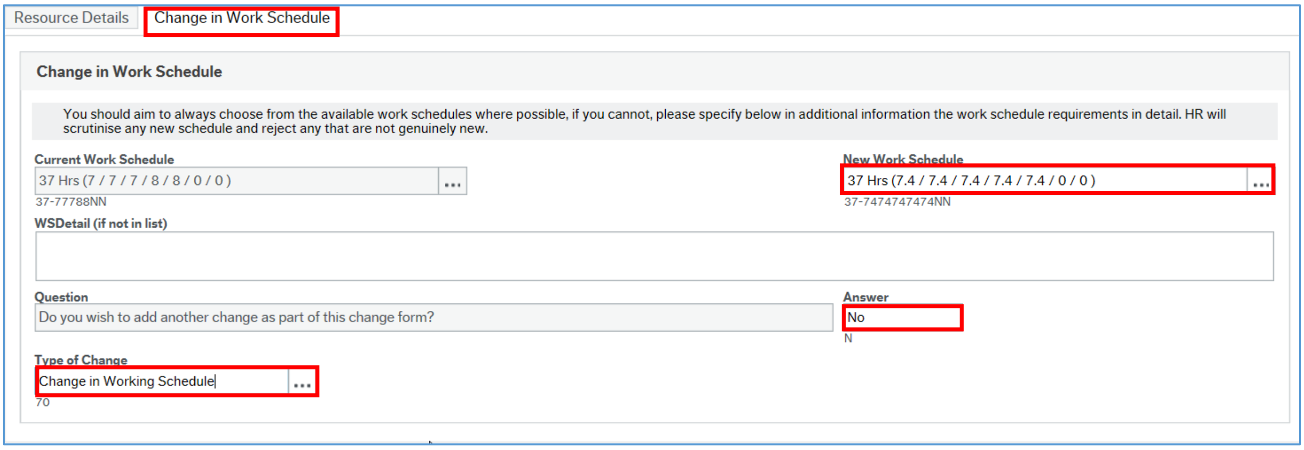
9.8.4 Change Details Section



1. **Type of Change** – select the type of change from the drop down

9.8.5 Change in Hours Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.

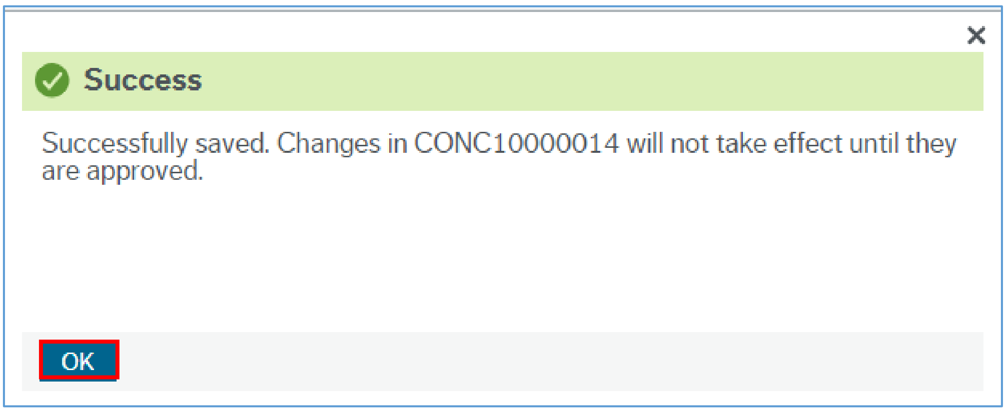


1. **New Work Schedule** - press **[Space bar]** to select the new work schedule, taking note of the daily hours work pattern. This is only the hours, not the start or finish times
2. **WSDetail (if not in list)** – enter the details if it is not in the list of new work schedules
3. **Answer** – select **Yes** or **No** from the drop down to answer the question
4. **Type of Change** – select the type of change from the drop down

9.8.6 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



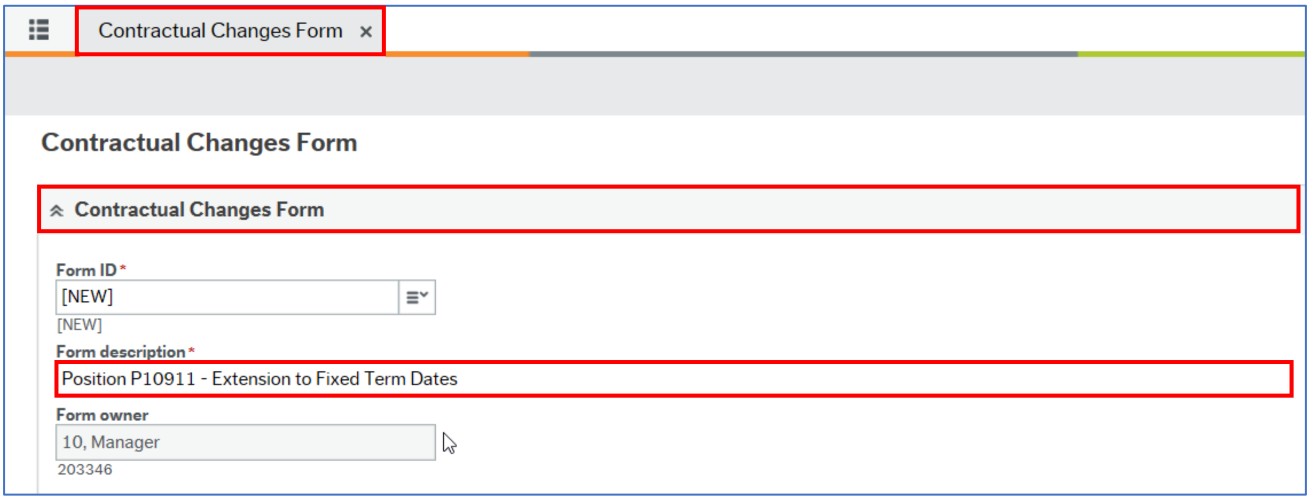
1. Click **OK** to close the message

9.9. Contractual Changes Form - Extension to Fixed Term Dates

This form covers changes to contractual details with the type of change being selected from within the form. This example covers the **Extension to Fixed Term Dates** option.

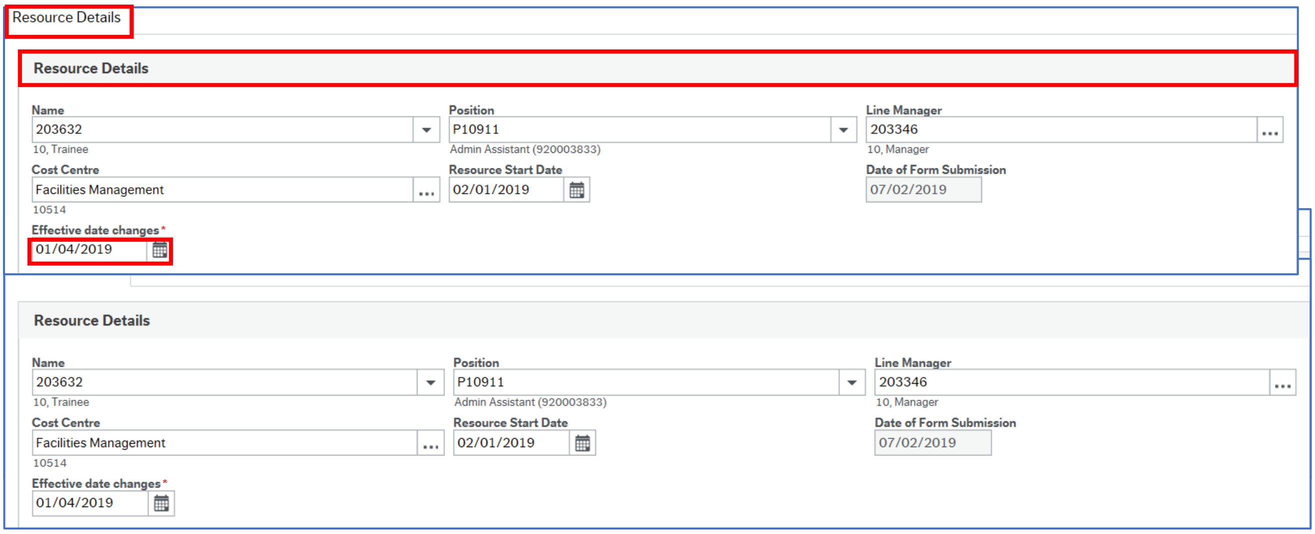
1. Navigate to

   Forms → Contractual Changes (SC) → Contractual Changes Form

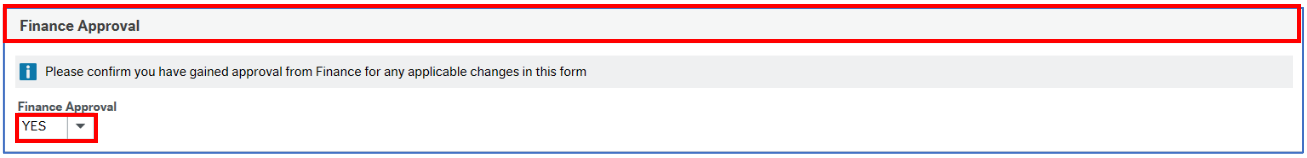


The Contractual Changes Form is completed by the Line Manager requesting the change and starts with the Contractual Changes Form section by entering a Form description, which is like a title and summary, making the form easier to search for.

9.9.1 Resource Details Section

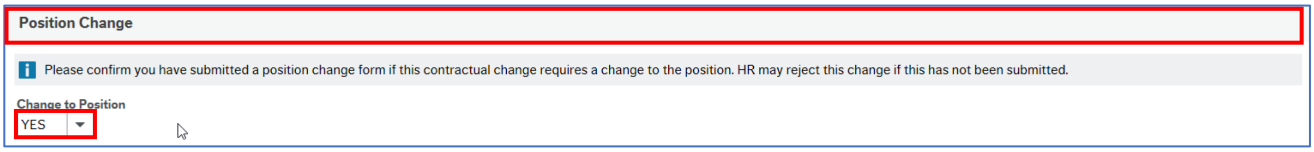


9.9.2 Finance Approval



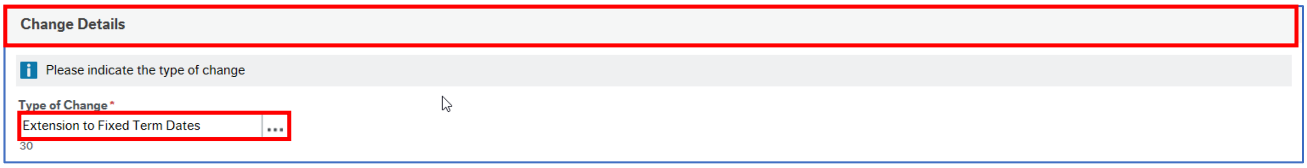
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.9.3 Position Change Section



1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

9.9.4 Change Details Section

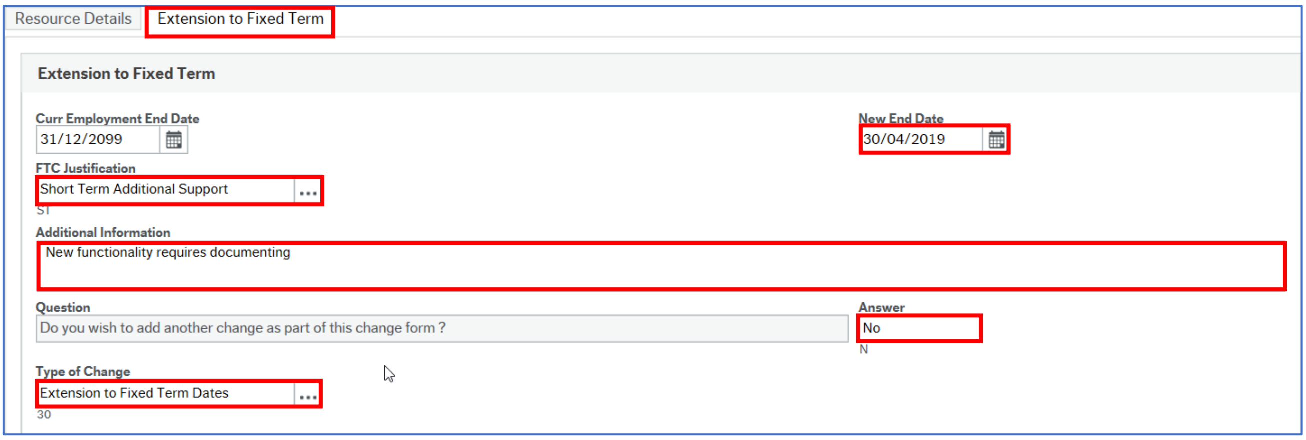


1. **Type of Change** – select the type of change from the drop down

A second tab opens.

9.9.5 Extension to Fixed Term Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.

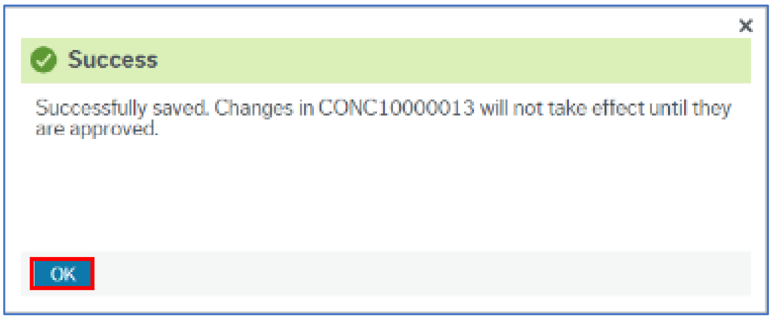


1. **New End Date** – enter the new contract end date
2. **FTC Justification** - press **[Space bar]** to select the justification
3. **Additional Information –** enter any additional details about the change
4. **Answer** – select **Yes** or **No** from the drop down to answer the question
5. **Type of Change** – select the type of change from the drop down

9.9.6 Action Buttons

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



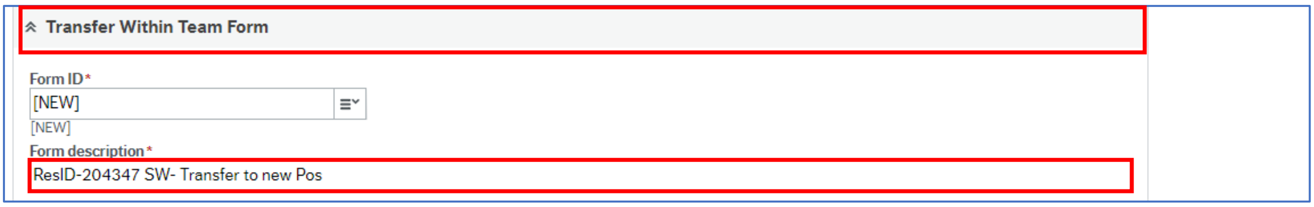
1. Click **OK** to close the message

9.10. Transfer Within Team Form- Maintained Schools Only

This form should be used to inform HR Admin that a person is to take on a new role within the School's team, only. This could be as an extra position to their current one or a complete transfer to another post will, in effect, terminate their current position just before they start in their new position

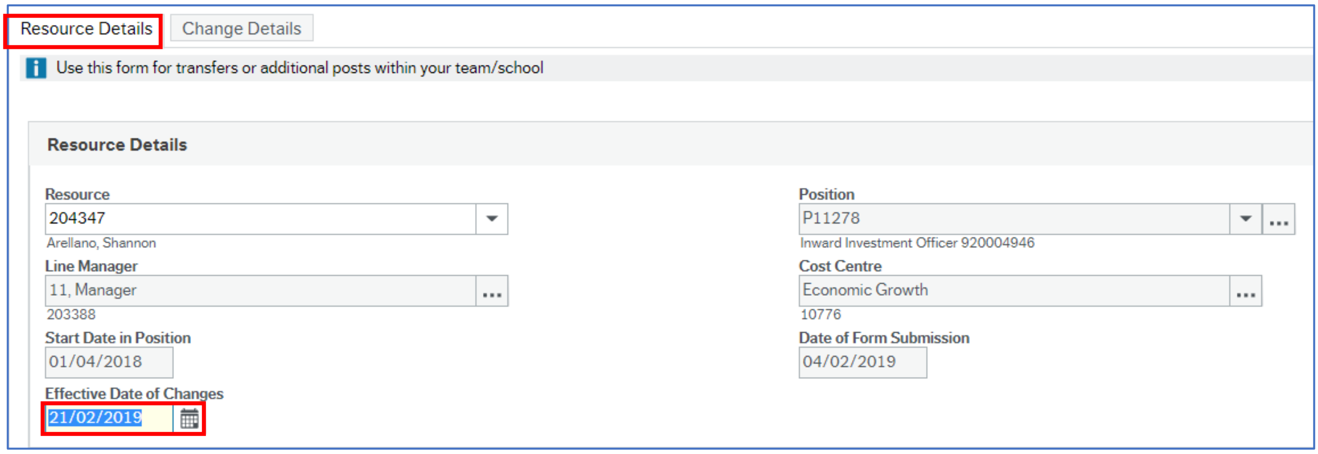
1. Navigate to

   Forms → Organisation and Position (SC) → Transfer Within Team Form



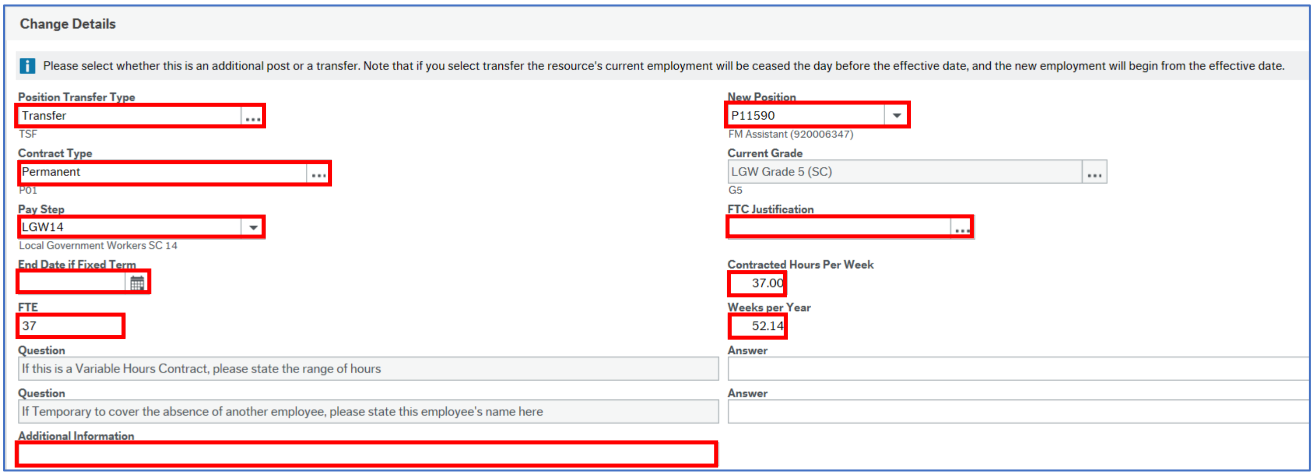
1. In **Form description**, use their ResID, your initials and append other relevant text, as above

9.10.1 Resource Details Section



1. **Resource**- Choose the resource to be transferred from the dropdown
2. **Effective Date of Change**- This will be the first day that this resource has this role/Position. This is important to get correct as it will affect pay. If this is a complete change not an additional post, this will end the current Position at midnight the date prior to
3. Go to **Change Details** tab

9.10.2 Change Details Section

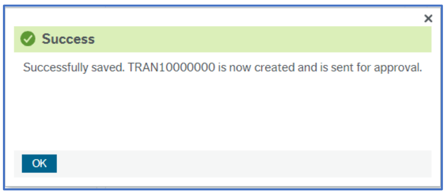


1. **Position Transfer Type** - For Transfers within your School team, use:

- **Transfer - Transfer to the new position only**
- **Transfer- Promotion – If you want it recognised as a promotion as well as a transfer**
- **Transfer- act-up – For when acting up in the newly transferred position only**
- **Transfer – end – When transferring back to the previous position, or to new position within the team, from a previous transfer**
- **Additional Position** – When the transfer is an extra post/position and their current still applies after the Effective Date of Changes

2. **New Position** – choose from the dropdown of your team's positions
3. **Contract type –** permanent, for example

4. **Pay Step –** choose from the list. Ordinarily, the top one (lowest/first step)
5. **FTC Justification** – If Contract Type is Fixed Term, then use the [Space bar] to view the small list of values. Choose one and press [Tab]
6. **End date if Fixed Term** – the last day that the FTC in this Position applies
7. **Contracted Hours Per Week** – new hours. Especially important if they have changed
8. **FTE** – Full Time Equivalent. The maximum hours for the position. Can be the same
9. **Weeks Per Year** – 39 or 52.14, for example
10. **Question & answer fields** – Answer as required. Free-text fields
11. **Additional information –** add any further valid or useful information to assist the process
12. Click **Submit form**. The form will now enter workflow for approval (or rejection) within the School and then onwards to HR Admin Team
13. Click **OK** to the Success message, below



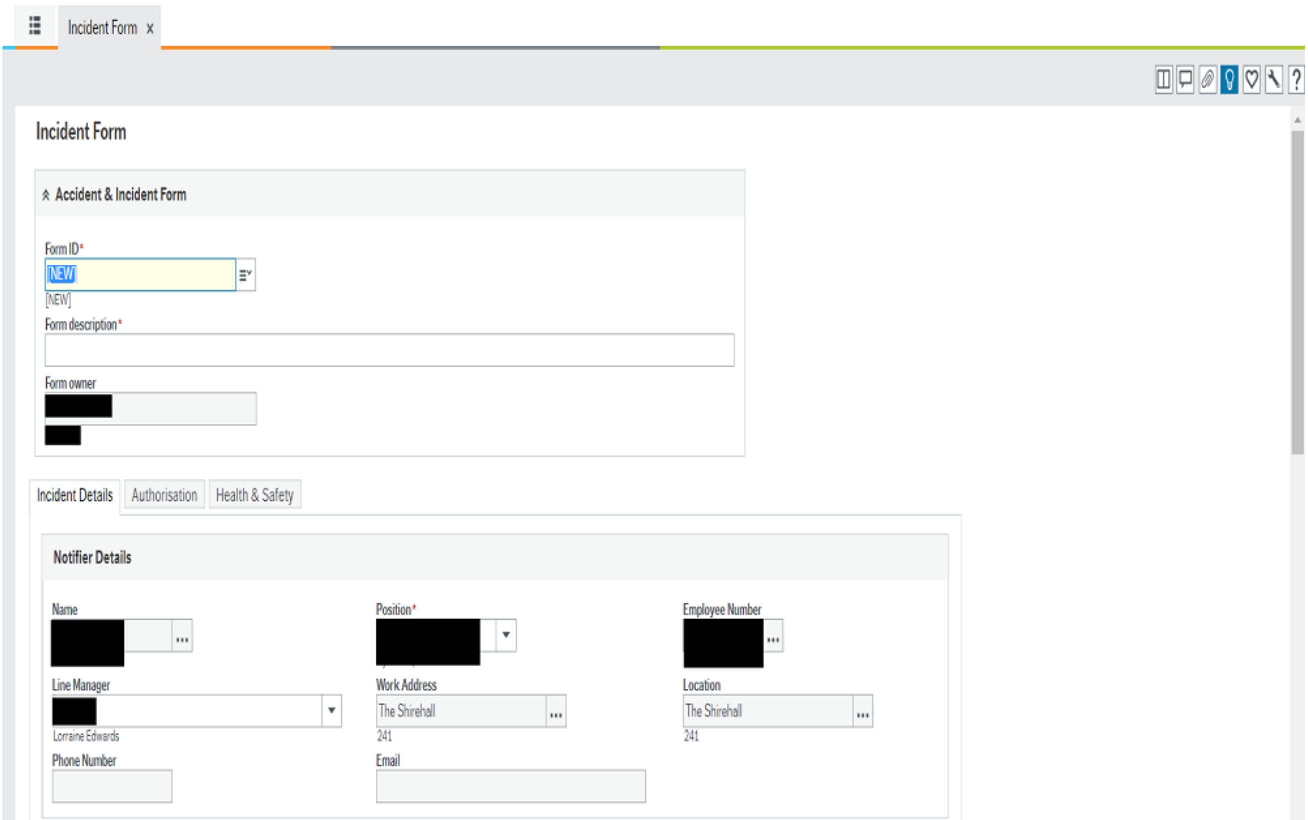
'Non- Maintained' Schools will need to use the Leaver and Starter/Recruitment process

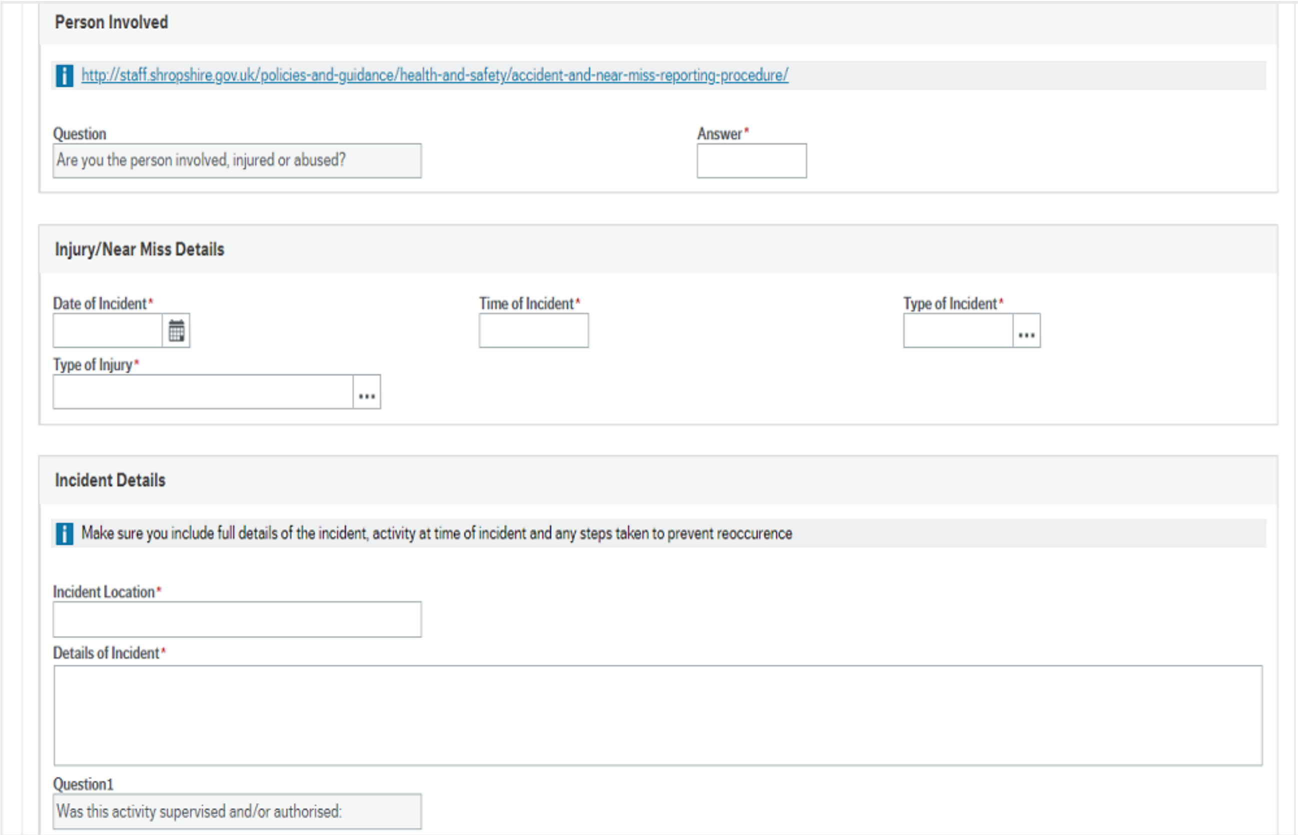
Embridge Consulting
Driving value from your business systems

9.11. Health and Safety Incident Form

The Incident Form in Business World is the official way to record and submit Accident and Incidents that occur within school. This begins with the form being raised using the naming convention at the start of the Forms section. Once this is complete and submitted, this form workflows to the Health and Safety team.

On opening the form, you will need to complete the following sections and then submit:





Person Involved

http://staff.shropshire.gov.uk/policies-and-guidance/health-and-safety/accident-and-near-miss-reporting-procedure/

Question
Are you the person involved, injured or abused?

Answer*

Injury/Near Miss Details

Date of Incident*

Time of Incident*

Type of Incident*

Type of Injury*

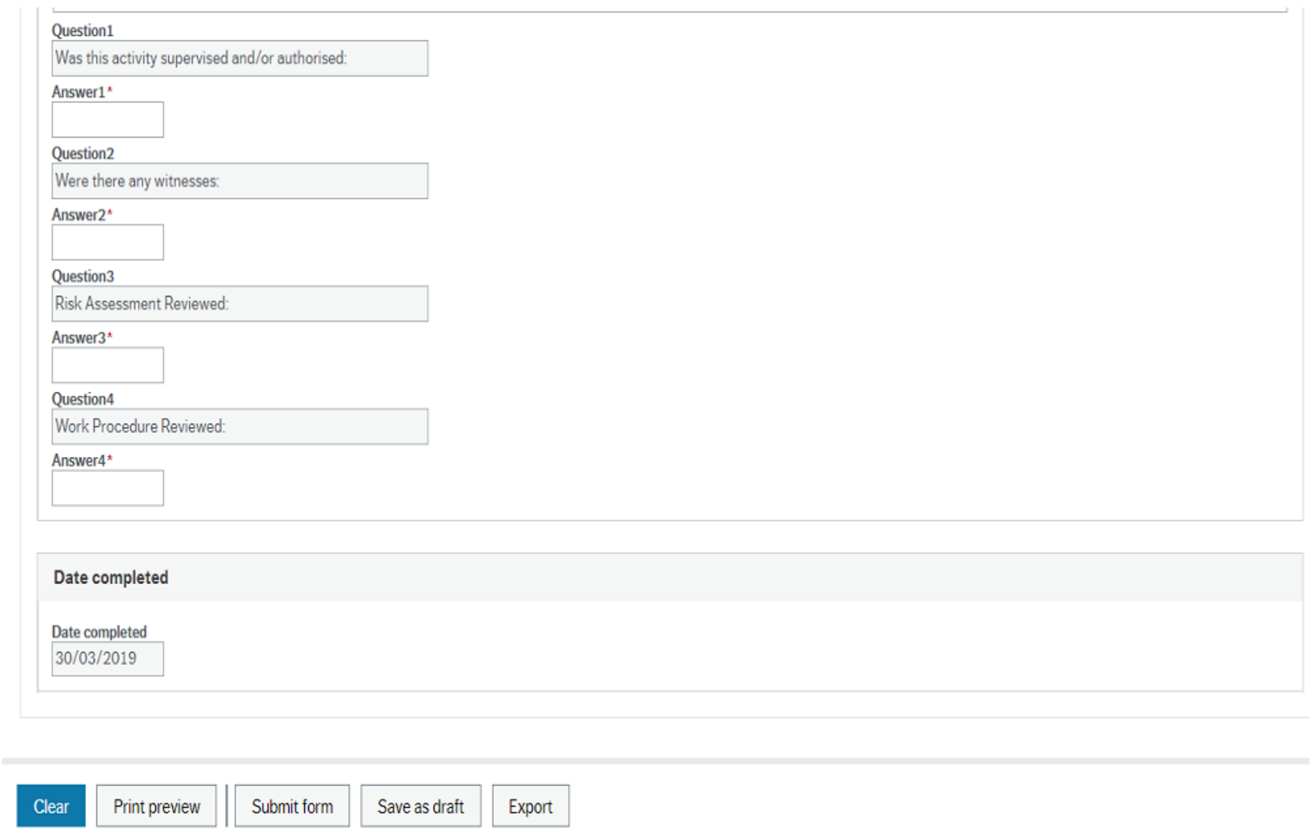
Incident Details

Make sure you include full details of the incident, activity at time of incident and any steps taken to prevent reoccurence

Incident Location*

Details of Incident*

Question1
Was this activity supervised and/or authorised:



Question1
Was this activity supervised and/or authorised:

Answer1*

Question2
Were there any witnesses:

Answer2*

Question3
Risk Assessment Reviewed:

Answer3*

Question4
Work Procedure Reviewed:

Answer4*

Date completed

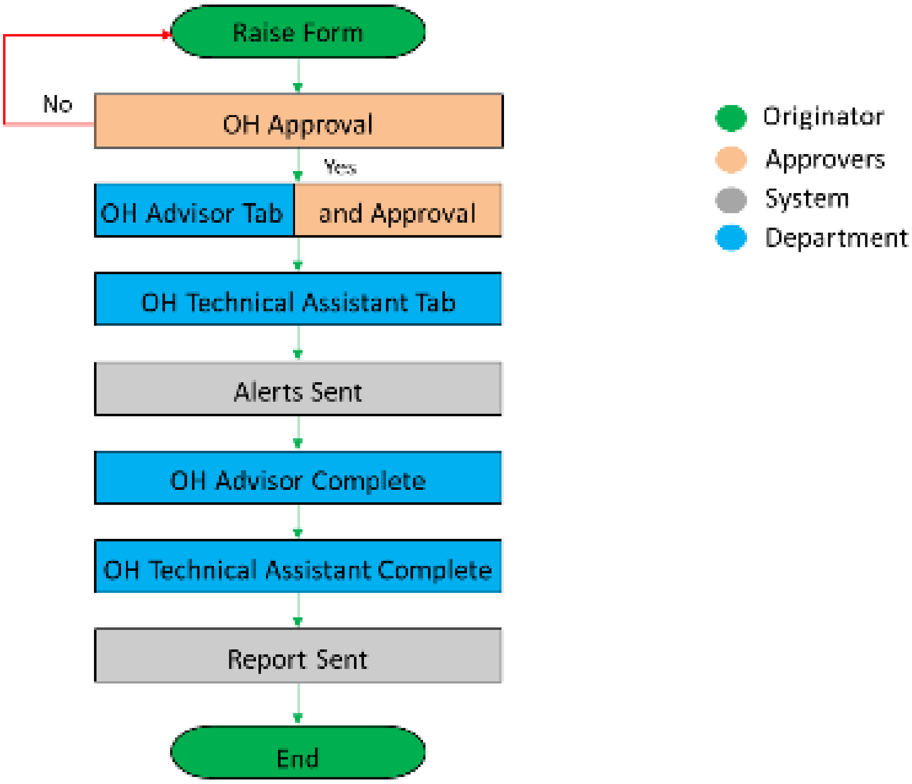
Date completed
30/03/2019

Clear | Print preview | Submit form | Save as draft | Export

9.12. OH Referral Form

9.12.1 OH Referral Process Workflow

The **Occupational Health** Form in Business World is the official way to start the Occupational Health referral process. This begins with the form being raised and the OH Referral Tab being completed by the Administrator or Head, and then following the steps outlined. Once this is complete and submitted, the below workflow is started on system.



- **OH Approval** – on being submitted the form is workflowed to the OH Advisor, who checks whether the OH Referral Tab has been completed correctly and has sufficient information to proceed. If not, the form is rejected with an explanation
- **OH Advisor Tab** – when the form is correct and the OH Advisor has determined the course of action; the details are entered on the OH Advisor Tab. The form is again submitted and it is workflowed to the OH Technical Assistant
- **OH Technical Assistant Tab** – the OH Advisor determination is actioned by the OH Technical Assistant and appointment details sent out
- **Alerts** - the HRO and the resource are notified that a referral has been made

At this point the form may go through several updates by both the OH Advisor and the OH Technical Assistant until the case is complete.

- **OH Advisor Complete** – the OH Advisor will triage the referral and inform the OH Technical Assistant what type of appointment is needed
- **OH Technical Complete** – the OH Tech Assistant will confirm on the form, then date when it was sent out to the resource

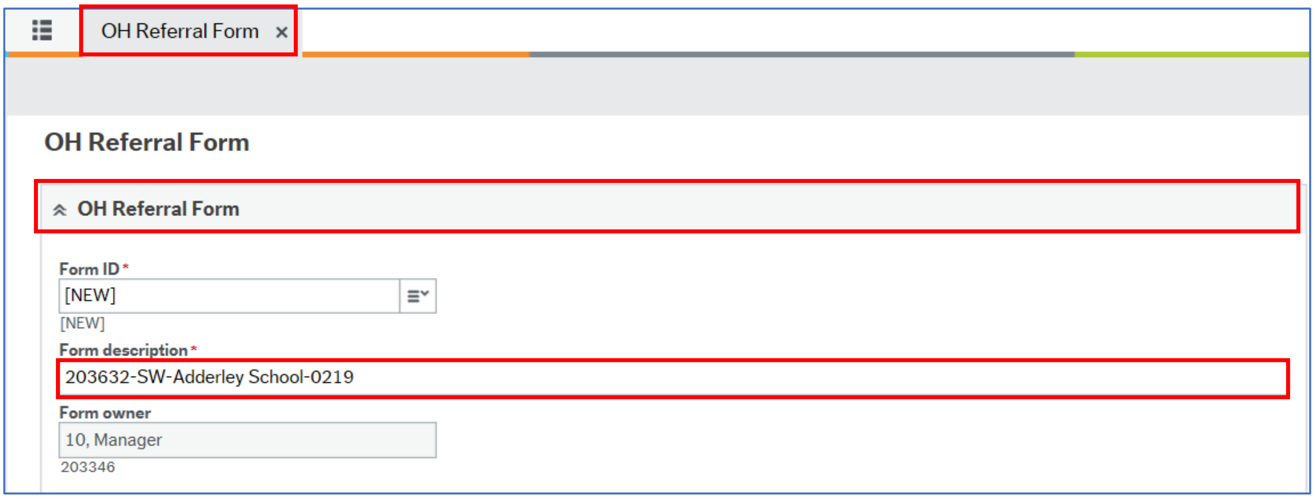
- **Report Sent** – the referral is complete and the final report is sent out

1. Navigate to

   Forms → Case Management (SC) → OH Referral Form

On opening, the form has ten sections.

9.12.2 OH Referral Form Section

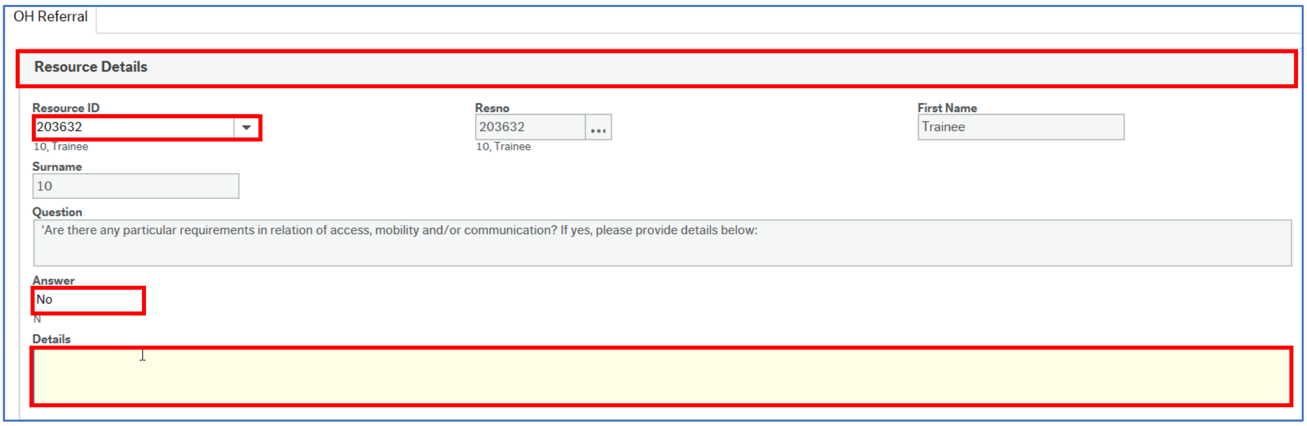


1. **Form** description***** - enter the **Form description** as:

- **Resource Number**
- **Initials**
- **Directorate** or **School**
- **MM/YY**

2. **Form owner** – is read only and is populated from the user record

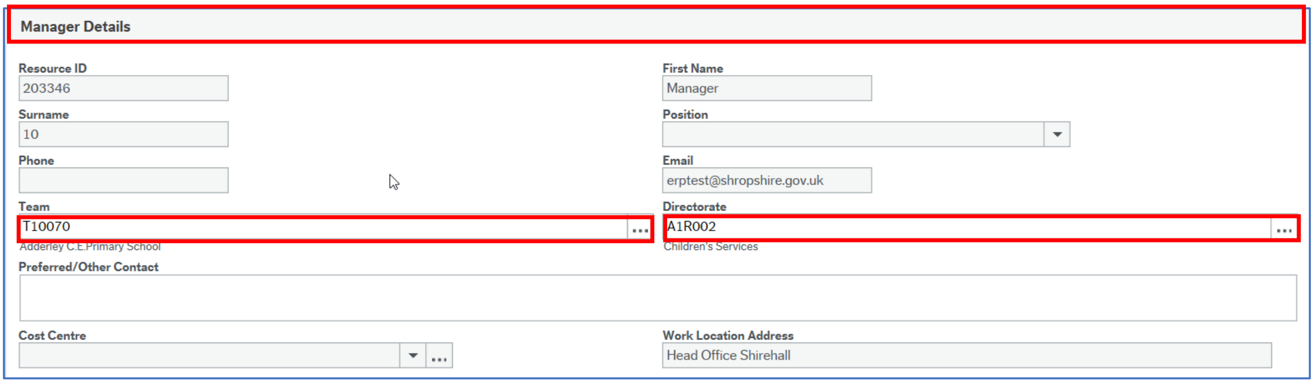
9.12.3 Resource Details Section



1. **Resource ID** – use type ahead or select from the drop down
2. **Resno** – is populated from the Resource ID selected
3. **First Name** – is populated from the Resource ID selected

4. **Surname –** is populated from the Resource ID selected
5. **Question –** is read only
6. **Answer** – press [**Spacebar**] to select **Yes** or **No** in response to the Question above
7. **Details –** if the answer to the question is **Yes**, enter the details of the requirement

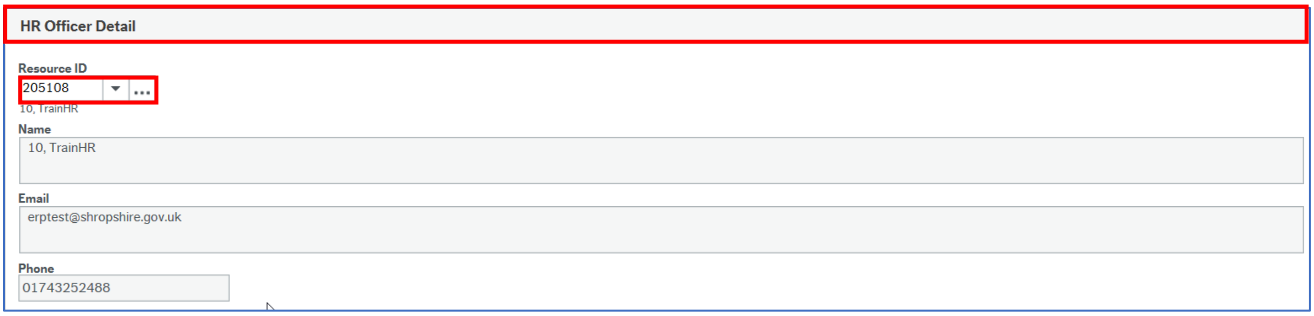
9.12.4 Manager Details Section



The first six fields, **Resource Id, First Name, Surname, Position, Phone** and **Email**, in this section are populated from the **Resource ID** selected in the OH Referral Section.

1. **Team –** use the lookup to select the team. This will be a code that represents your school
2. **Directorate –** is populated from the Team selected
3. **Preferred / Other Contact** – details of other contact can be entered here

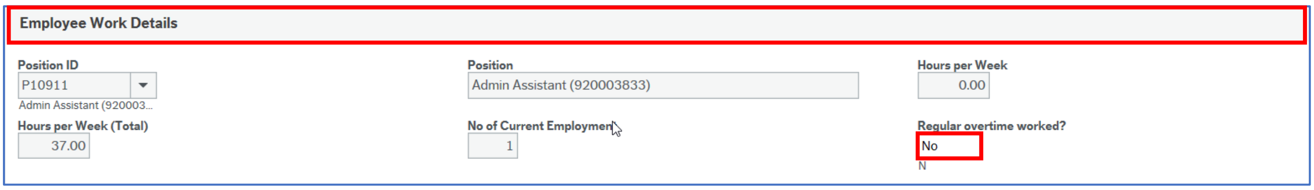
9.12.5 HR Officer Details Section



1. **Resource ID** –select from the drop down list your known HR

The other fields in this section are populated from the Resource ID selected.

9.12.6 Employee Work Details Section



This section is read only except for one field.

1. **Regular overtime worked? –** press [**Spacebar**] to select **Yes** or **No**

9.12.7 Work Related Hazards Section

Work Related Hazards

Hazard		Hazard check
Hazard 1	Generally office based sedentary work	Hazard check 1
Hazard 2	Display Screen Equipment	Hazard check 2
Hazard 3	Noise	Hazard check 3
Hazard 4	Chemicals and pesticides	Hazard check 4
Hazard 5	Driving	Hazard check 5
Hazard 6	Frequent hand washing	Hazard check 6
Hazard 7	Clinical waste	Hazard check 7
Hazard 8	Working with animals	Hazard check 8
Hazard 9	Unsociable hours/on call	Hazard check 9
Hazard 10	Lasers and radiation	Hazard check 10
Hazard 11	Working at heights	Hazard check 11
Hazard 12	Psychological stress	Hazard check 12
Hazard 13	Lone working	Hazard check 13
Hazard 14	Moving and handling	Hazard check 14
Hazard 15	Latex gloves	Hazard check 15
Hazard 16	Food handling	Hazard check 16
Hazard 17	Extreme temperatures	Hazard check 17

Other Details

Hazard		Hazard check
Hazard 18	Vulnerable service users and service users who have challenging behaviour	Hazard check 18
Hazard 19	Inhalation exposure to dust, fumes, mists, gases or vapours- specify below	Hazard check 19

Other Details

This section contains a series of 17 questions. Select the check box for each hazard that applies.

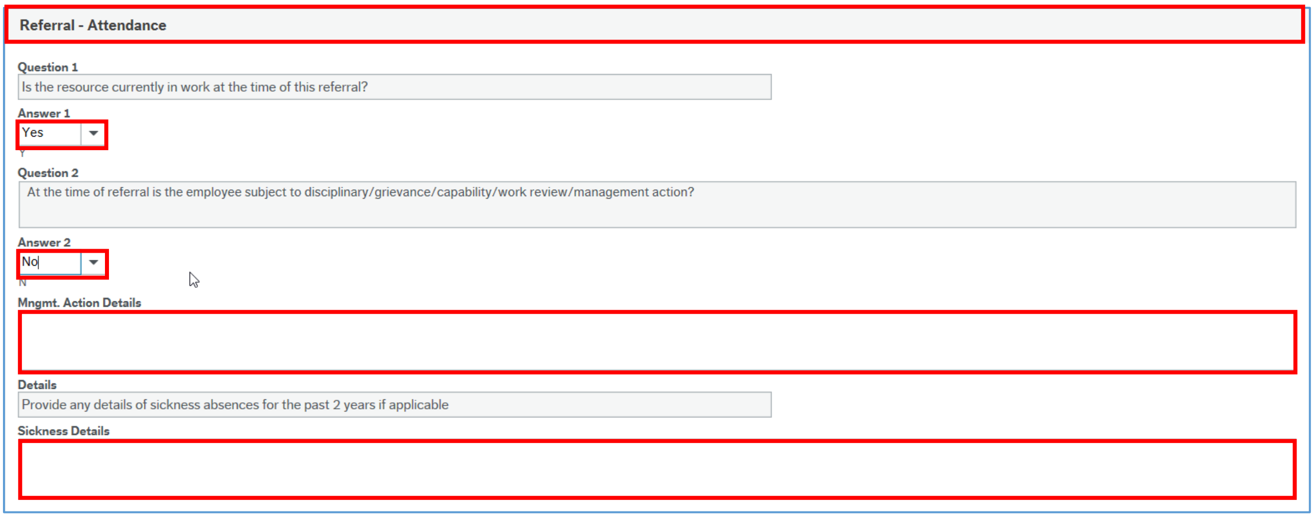
Other Details

1. **Other Details –** enter the details of each hazard selected

There are a further two questions. Select the check box for each hazard that applies.

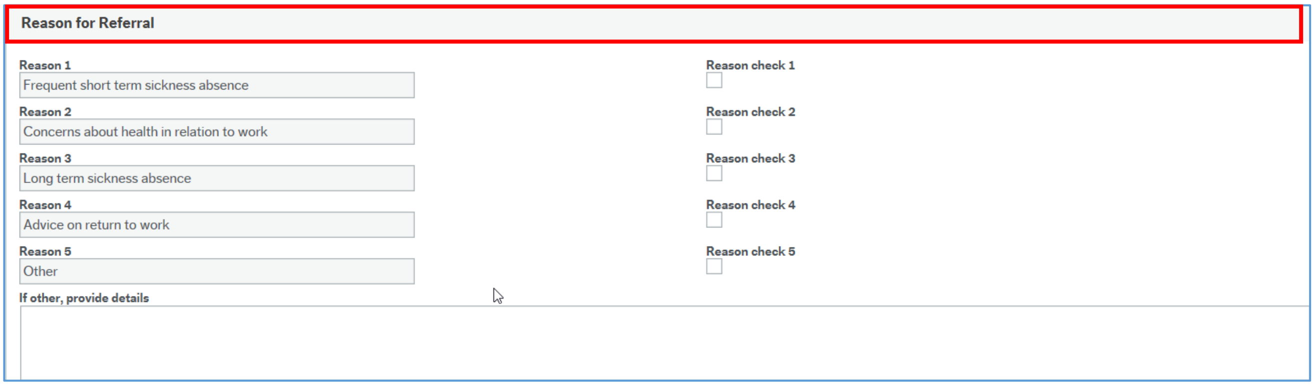
2. **Other Details –** enter the details of each of these hazards selected

9.12.8 Referral - Attendance Section



1. **Question 1** – the question is read only
2. **Answer –** press [**Spacebar**] to select **Yes** or **No** or select from the drop down
3. **Question 2** – the question is read only
4. **Answer –** press [**Spacebar**] to select **Yes** or **No** or select from the drop down
5. **Mngmt. Action Details** – enter the details of any management action taken
6. **Details** – the request is read only
7. **Sickness Details** – enter details of any relevant periods of sickness in the past 2 years

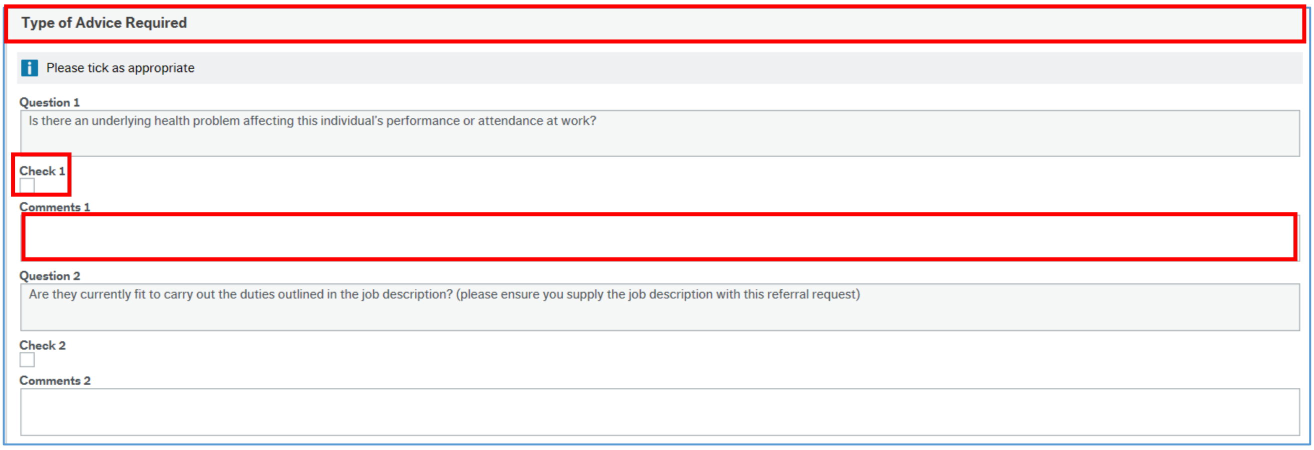
9.12.9 Reason for Referral Section



This section contains a series of 5 questions.

1. Select the check box for each reason that applies.
2. **if other, provide details** – enter the details of other reason if reason 5 is selected

9.12.10 Type of Advice Required Section


Type of Advice Required

Please tick as appropriate

Question 1
Is there an underlying health problem affecting this individual's performance or attendance at work?

Check 1

Comments 1

Question 2
Are they currently fit to carry out the duties outlined in the job description? (please ensure you supply the job description with this referral request)

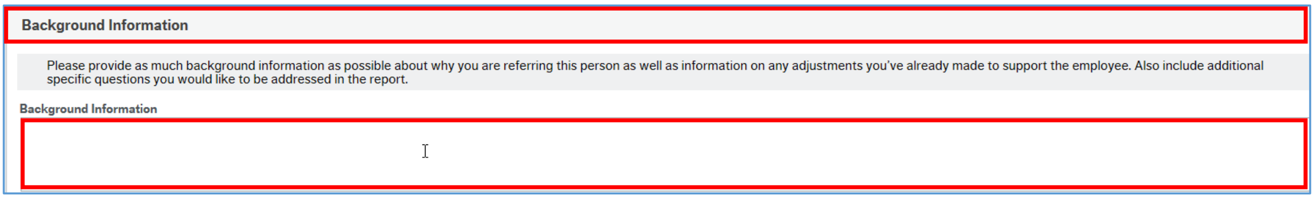
Check 2

Comments 2

This section contains a series of 8 questions.

1. Select the **check box** for each type of advice required then add any relevant **comment** for each one selected.
2. **Additional Info** – use this field to detail any other advice you might need or questions that may need answering

9.12.11 Background Information Section


Background Information

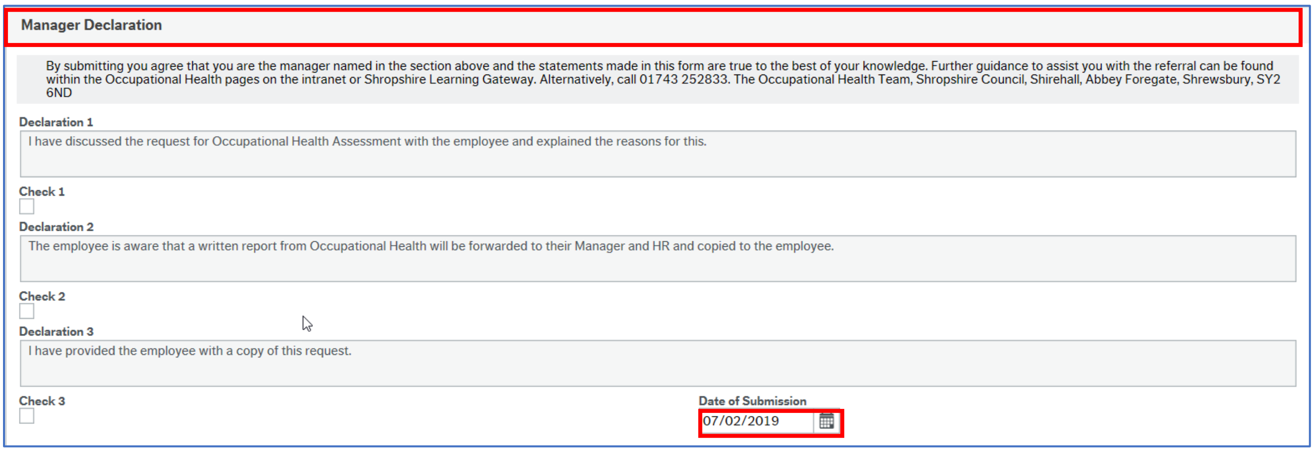
Please provide as much background information as possible about why you are referring this person as well as information on any adjustments you've already made to support the employee. Also include additional specific questions you would like to be addressed in the report.

Background Information

1. **Background Information** – provide as much background information as possible including reasons for referral and actions already taken

9.12.12 Manager Declaration Section

Each of the statements in this section should be selected as all of them should be complied with, in every case.


Manager Declaration

By submitting you agree that you are the manager named in the section above and the statements made in this form are true to the best of your knowledge. Further guidance to assist you with the referral can be found within the Occupational Health pages on the intranet or Shropshire Learning Gateway. Alternatively, call 01743 252833. The Occupational Health Team, Shropshire Council, Shirehall, Abbey Foregate, Shrewsbury, SY2 6ND

Declaration 1
I have discussed the request for Occupational Health Assessment with the employee and explained the reasons for this.

Check 1

Declaration 2
The employee is aware that a written report from Occupational Health will be forwarded to their Manager and HR and copied to the employee.

Check 2

Declaration 3
I have provided the employee with a copy of this request.

Check 3

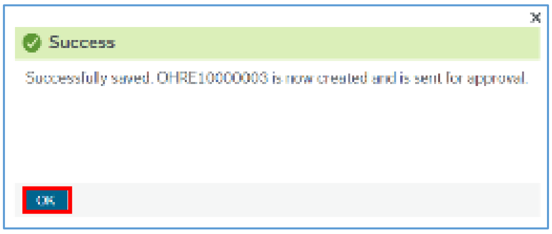
Date of Submission
07/02/2019

1. Select each of the declarations, when they have been actioned
2. **Date of Submission** – select the date using the calendar

9.12.13 Action Buttons

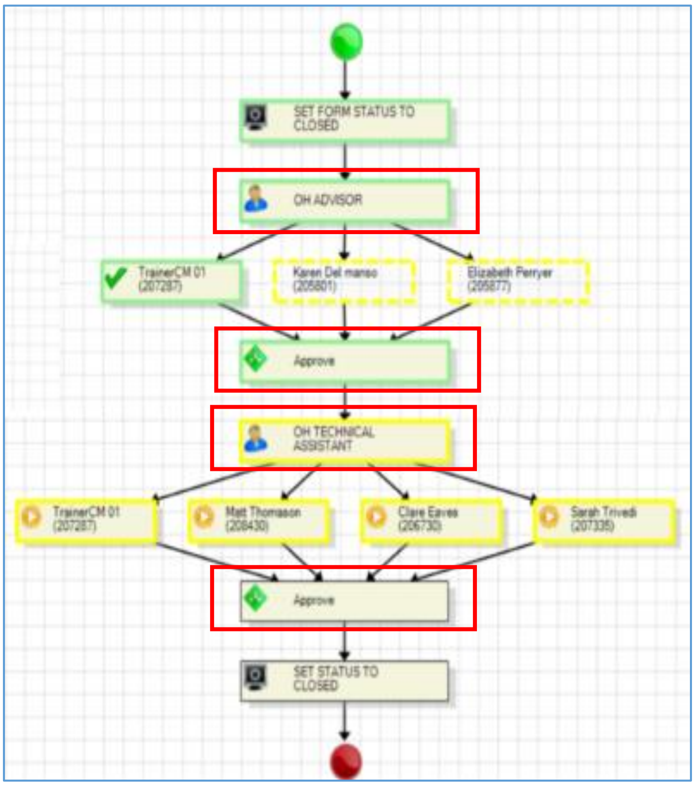
1. Click **Submit form**

The **Success** popup opens.



1. Click **OK**

9.12.14 OH Referral Form Workflow



The steps highlighted in red on the workflow diagram show the steps in the process when the form is submitted.

- **OH Approval** – on being submitted the form is workflowed to the OH Advisor, who checks whether the OH Referral Tab has been completed correctly and has sufficient information to proceed. If not, the form is rejected with an explanation
- **OH Advisor Tab** – when the form is correct and the OH Advisor has determined the course of action, the details are entered on the OH Advisor Tab. The form is again submitted and it is workflowed to the OH Technical Assistant
- **OH Technical Assistant Tab –** the OH Advisor determination is actioned by the OH Technical Assistant and appointment details sent out
- **Alerts** - the HRO and the resource are notified that a referral has been made

At this point the form may go through several updates by both the OH Advisor and the OH Technical Assistant until the case is complete.

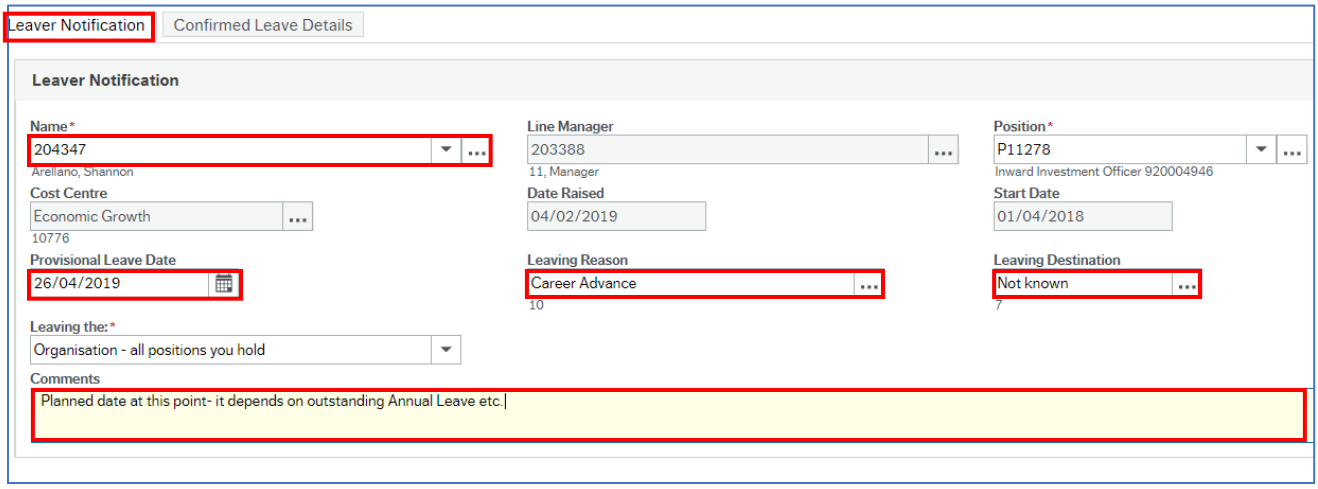
- **OH Advisor Complete** – the OH Advisor will triage the referral and inform the OH Technical Assistant what type of appointment is needed
- **OH Technical Complete –** the OH Tech Assistant will confirm on the form, then date when it was sent out to the resource
- **Report Sent –** the referral is complete and the final report is sent out

9.13. Leaver Forms

There are 4 different forms, 3 of which should be completed by Schools but are not mandatory, just good practise, and one that must be completed. The one that must be completed is the **Leaver Notification Form**, completed by the leaver themselves or the Administrator or Head Teacher on their behalf, should the employee not have access.

9.13.1 Leaver Notification Form- Leaving a Position or the Organisation

This form is also used for leaving a Position, as well as leaving the School or Shropshire Council altogether. This is the official starting point within Business World.

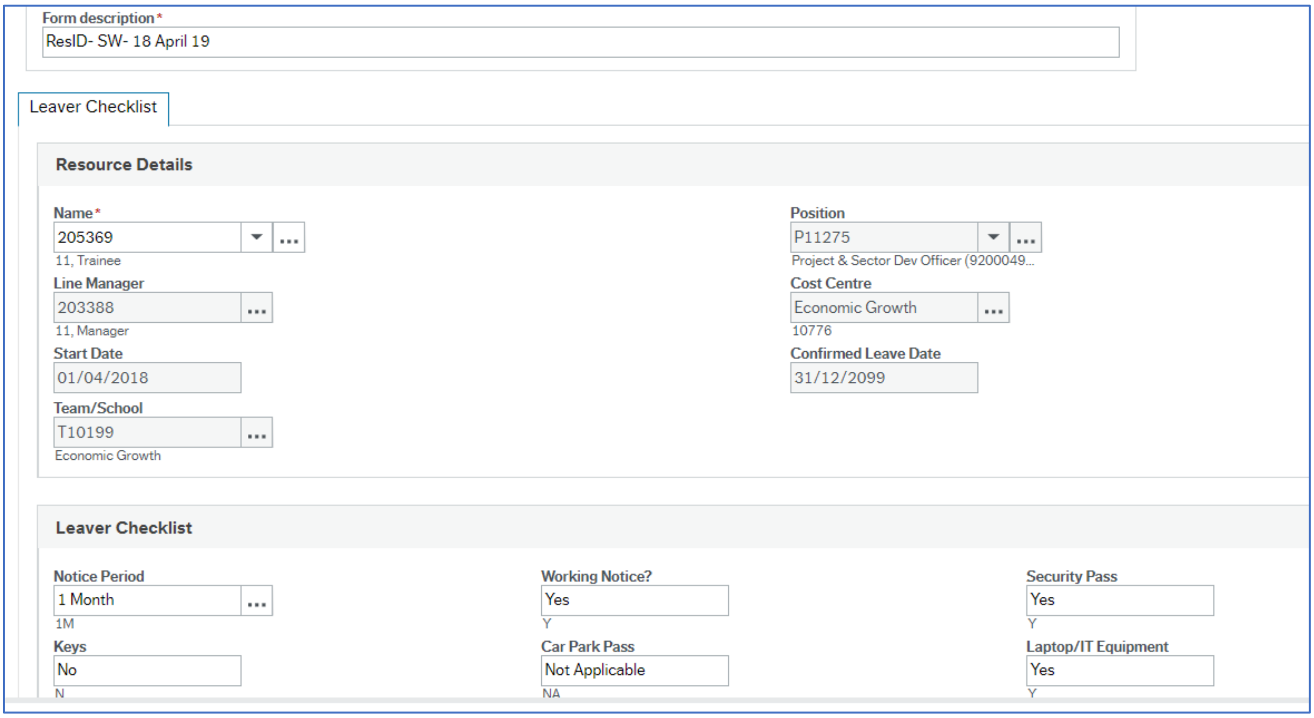


1. **Name** – Choose from the dropdown. You will only see reportees to you as the Administrator or all direct & indirect as the Head
2. **Provisional leave Date** – the intended date of leaving
3. **Leave Reason** – press [Space bar], use Type-Ahead or search using the ellipsis button
4. **Leave Destination** – as above. Type N for Not known, for example
5. **Comments** – comment here on anything else that could assist the approvers or HR
6. **Address Warning** – please take heed of this warning. It may be used for further correspondence once the employee has left the organisation
7. Click **Submit form**.

This will now go to the Head for approval (if it is not the Head in question) and then to the School 'Team approver' before workflowing to SC HR, and then Payroll. Once HR & Payroll have been notified, the second tab is completed that then confirms Holiday Balances (AL) and the actual leave date.

9.13.2 Leaver's Check List Form

This form can be used as the official record that the School has gone through all the necessary items such as laptops, uniform, keys etc. are checked off prior to the employee leaving the organisation, or position.


Form description*
ResID- SW- 18 April 19

Leaver Checklist

Resource Details

Name*
205369
11, Trainee

Position
P11275
Project & Sector Dev Officer (9200049...

Line Manager
203388
11, Manager

Cost Centre
Economic Growth
10776

Start Date
01/04/2018

Confirmed Leave Date
31/12/2099

Team/School
T10199
Economic Growth

Leaver Checklist

Notice Period
1 Month
1M

Working Notice?
Yes
Y

Security Pass
Yes
Y

Keys
No
N

Car Park Pass
Not Applicable
NA

Laptop/IT Equipment
Yes
Y

1. Use Type-Ahead (Space bar) to view the values that can be used. Most will be **Yes**, **No** or **N/A**
2. Click **Submit form** once you have completed this with the employee. This is workflowed to HR as a record

9.13.3 Exit interview form

This form is self-explanatory. The "Line Manager" needs to use type-ahead in the name field to produce the correct leaver's name and also use the Guidance Notes tab for reference.

9.13.4 Exit questionnaire form

To be completed by the Employee. All Schools' staff, where access allows, are encouraged to complete this as it provides the Council & HR with valuable information.

10. Reports

Reports work in one of two ways:

- **Fixed Criteria Reports** - open the report and click Search
- **Variable Criteria Reports** - open the report, enter Selection Criteria to filter the results, then click Search

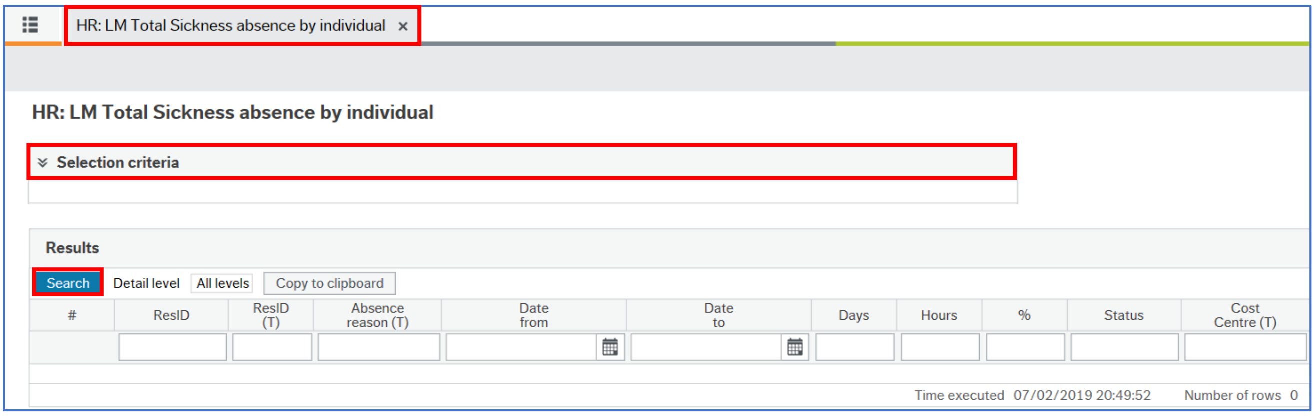
10.1. Fixed Criteria Report

This example uses the Total Sickness absence by individual report, which is a fixed criteria report.

Navigate to

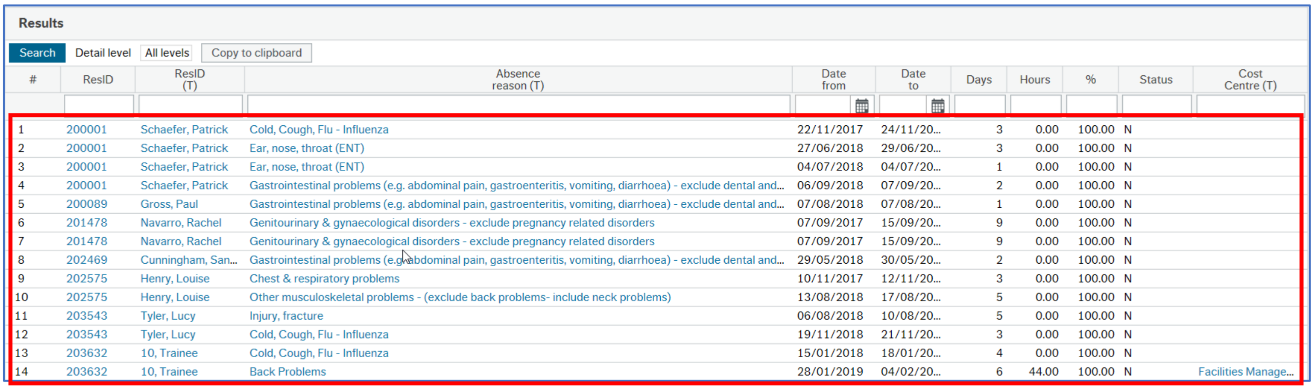
Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence

1. Select **HR: LM Total Sickness absence by individual**



The **Selection criteria** is read only.

2. Click **Search**



Results

Search | Detail level | All levels | Copy to clipboard

#	ResID	ResID (T)	Absence reason (T)	Date from	Date to	Days	Hours	%	Status	Cost Centre (T)
1	200001	Schaefer, Patrick	Cold, Cough, Flu - Influenza	22/11/2017	24/11/20...	3	0.00	100.00	N	
2	200001	Schaefer, Patrick	Ear, nose, throat (ENT)	27/06/2018	29/06/20...	3	0.00	100.00	N	
3	200001	Schaefer, Patrick	Ear, nose, throat (ENT)	04/07/2018	04/07/20...	1	0.00	100.00	N	
4	200001	Schaefer, Patrick	Gastrointestinal problems (e.g. abdominal pain, gastroenteritis, vomiting, diarrhoea) - exclude dental and...	06/09/2018	07/09/20...	2	0.00	100.00	N	
5	200089	Gross, Paul	Gastrointestinal problems (e.g. abdominal pain, gastroenteritis, vomiting, diarrhoea) - exclude dental and...	07/08/2018	07/08/20...	1	0.00	100.00	N	
6	201478	Navarro, Rachel	Genitourinary & gynaecological disorders - exclude pregnancy related disorders	07/09/2017	15/09/20...	9	0.00	100.00	N	
7	201478	Navarro, Rachel	Genitourinary & gynaecological disorders - exclude pregnancy related disorders	07/09/2017	15/09/20...	9	0.00	100.00	N	
8	202469	Cunningham, San...	Gastrointestinal problems (e.g. abdominal pain, gastroenteritis, vomiting, diarrhoea) - exclude dental and...	29/05/2018	30/05/20...	2	0.00	100.00	N	
9	202575	Henry, Louise	Chest & respiratory problems	10/11/2017	12/11/20...	3	0.00	100.00	N	
10	202575	Henry, Louise	Other musculoskeletal problems - (exclude back problems- include neck problems)	13/08/2018	17/08/20...	5	0.00	100.00	N	
11	203543	Tyler, Lucy	Injury, fracture	06/08/2018	10/08/20...	5	0.00	100.00	N	
12	203543	Tyler, Lucy	Cold, Cough, Flu - Influenza	19/11/2018	21/11/20...	3	0.00	100.00	N	
13	203632	10, Trainee	Cold, Cough, Flu - Influenza	15/01/2018	18/01/20...	4	0.00	100.00	N	
14	203632	10, Trainee	Back Problems	28/01/2019	04/02/20...	6	44.00	100.00	N	Facilities Manage...

The results are listed below the headings. Any field that is **blue**, is a hyperlink which will open a new tab with more detail about the field.

Embridge Consulting
Driving value from your business systems

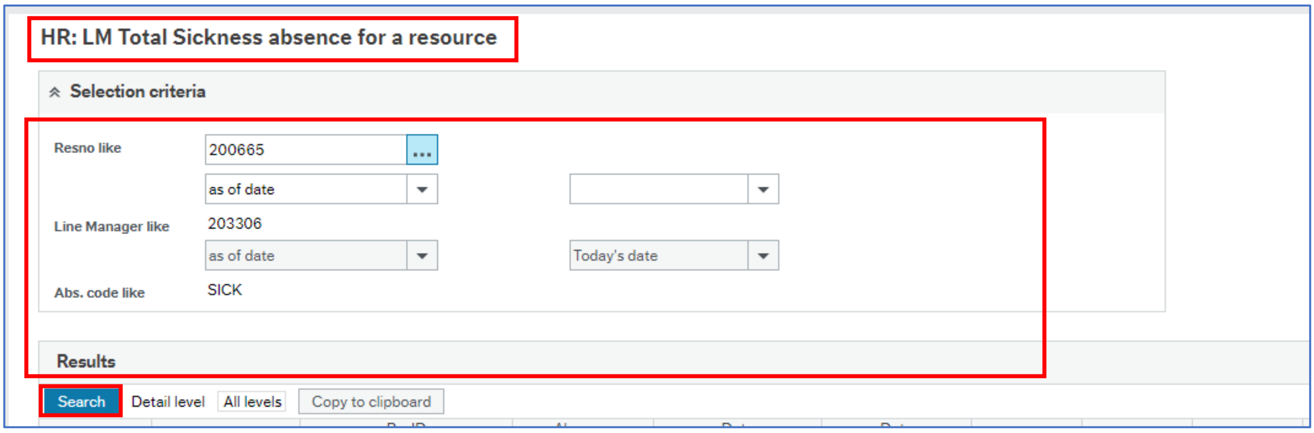
10.2. Variable Criteria Report

This example uses the Total Sickness absence for a resource report, which is a variable criteria report.

Navigate to

Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence

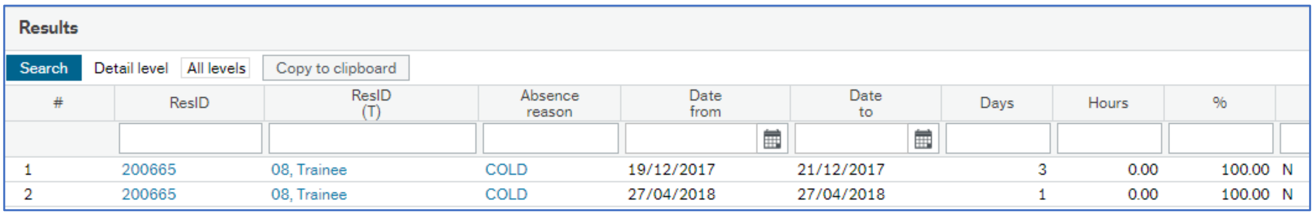
1. Select **HR: LM Total Sickness absence for a resource**



The **Selection criteria** section has fields in which criteria to report on can be determined. There may be multiple fields and they may work using lookups or calendars.

In this example, there are multiple variable criteria fields allowing you to specify any combination of Resno and/or dates.

2. Select the criteria
3. Click **Search**



Results

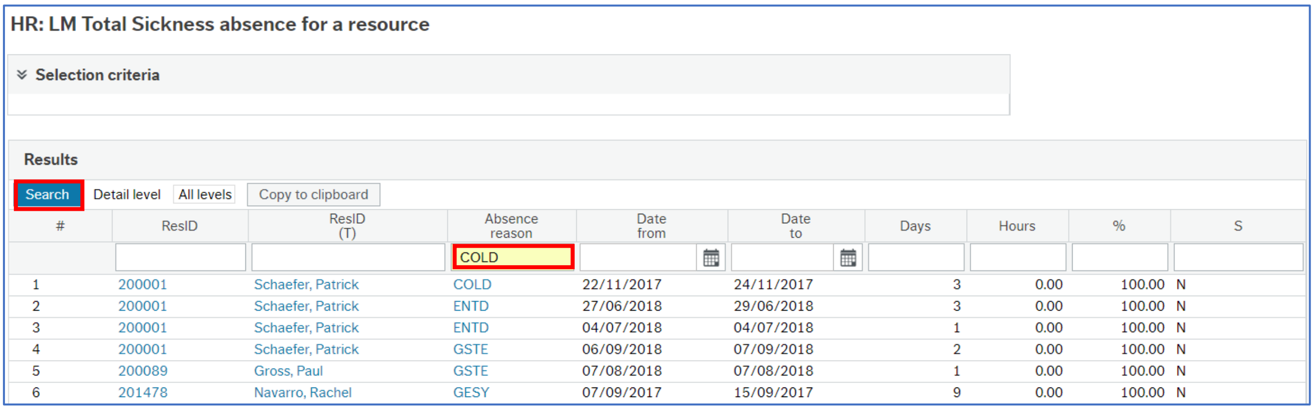
Search | Detail level | All levels | Copy to clipboard

#	ResID	ResID (T)	Absence reason	Date from	Date to	Days	Hours	%	
1	200665	08, Trainee	COLD	19/12/2017	21/12/2017	3	0.00	100.00	N
2	200665	08, Trainee	COLD	27/04/2018	27/04/2018	1	0.00	100.00	N

The results displayed are only for the criteria entered.

10.2.1 Filtering Results

Report results can be filtered by entering criteria in the **Filter Bar** and clicking **Search**. In this example the results are filtered on **Absence reason**.


HR: LM Total Sickness absence for a resource

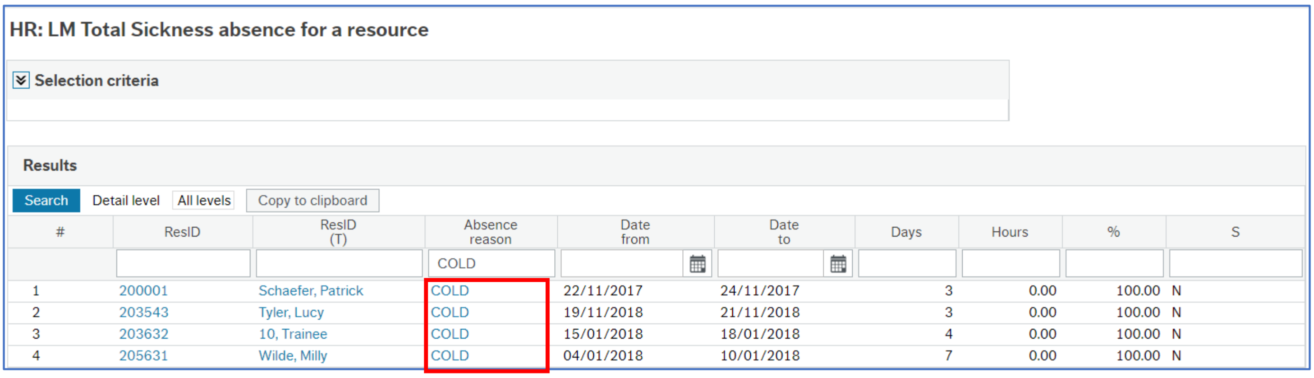
Selection criteria

Results

Search | Detail level | All levels | Copy to clipboard

#	ResID	ResID (T)	Absence reason	Date from	Date to	Days	Hours	%	S
			COLD						
1	200001	Schaefer, Patrick	COLD	22/11/2017	24/11/2017	3	0.00	100.00	N
2	200001	Schaefer, Patrick	ENTD	27/06/2018	29/06/2018	3	0.00	100.00	N
3	200001	Schaefer, Patrick	ENTD	04/07/2018	04/07/2018	1	0.00	100.00	N
4	200001	Schaefer, Patrick	GSTE	06/09/2018	07/09/2018	2	0.00	100.00	N
5	200089	Gross, Paul	GSTE	07/08/2018	07/08/2018	1	0.00	100.00	N
6	201478	Navarro, Rachel	GESY	07/09/2017	15/09/2017	9	0.00	100.00	N

1. Enter the filter criteria in the required field
2. Click **Search**


HR: LM Total Sickness absence for a resource

Selection criteria

Results

Search | Detail level | All levels | Copy to clipboard

#	ResID	ResID (T)	Absence reason	Date from	Date to	Days	Hours	%	S
			COLD						
1	200001	Schaefer, Patrick	COLD	22/11/2017	24/11/2017	3	0.00	100.00	N
2	203543	Tyler, Lucy	COLD	19/11/2018	21/11/2018	3	0.00	100.00	N
3	203632	10, Trainee	COLD	15/01/2018	18/01/2018	4	0.00	100.00	N
4	205631	Wilde, Milly	COLD	04/01/2018	10/01/2018	7	0.00	100.00	N

The results now only include those that match the filter criteria.

Filter criteria may be entered before the report is run to produce pre-filtered results.

11. Forms for school scenarios

Scenario	Form Required	Documents to Attach
Recruitment		
If a new post is required that isn't in your establishment	New Position Form	Job Evaluation if not already existing / Job Description / Person Specification
Job Evaluation of an existing post - restructure	Position Grade Evaluation (Manager)	Job Evaluation / Job Description / Person Specification
Vacancy to be advertised	Right to Recruit Form	Job Advert / Job Description / Person Specification /any additional information you would like the applicant to receive. (this may save admin time emailing applicants information)
New Starter		
New Starter to school if not using the full e-recruitment process through Hireserve	New Starter Form	Application form / References / Certificates / DBS Information
New Starter to school if using the full e-recruitment process through Hireserve	None	Certificates / References (if done manually and not online)
Additional post within existing school including Supply teachers	New Starter Form	
Informing IT about new starter to request access to system	IT Request Form	
Induction Form to be used on first day where employee will input bank details directly onto Business World. This will alert payroll that the new resource has started.	Induction Form	
Probation set up dates for new starters	Probation form	

Amendment to contract	**Form Required**	**Documents to Attach**
Hours/working weeks/change to contract type TEMP to PERM) /exension to fixed term dates	Amendment Form	
Additional payment / additional increment	Amendment Form	
Change in work schedule	Amendment Form	
Transfer of post within school (Teaching Assistant moving to another post within school)	Transfer Within Team Form	
Employee request to change working hours or working pattern.	Flexible working request	
Employee wants their grade re-evaluated	Position Grade Evaulation Employee	School to attach Job Descripton & Person Specification for workflow
Use this form if changes are required to a position , not a resource	Position change form	
Leaver		
Resource leaving a post	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Resource leaving establishment	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Leaver checklist	Leaver Checklist form	