

## Release Notes – PS People Version 2.22.46



*This document is applicable to System Administrators only.*

This document provides information about new features and fixes in version 2.22.46 of PS People.

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### Where to Get More Help and Information



Support portal - <https://www.iris.co.uk/iriscommunity>

Help site PS Financials v6 - <https://help.iris.co.uk/education/financialsv6/>

Help site IRIS Financials v7 - <https://help.iris.co.uk/education/financials/>

## 1. School Workforce Census

School Workforce Census checks have been strengthened for 2022. This release includes the following fixes:

### 1.1. Staff Issues

1.1.1 Query 6540Q — At least one staff record in this school’s return should show a role of Head Teacher or Executive Head Teacher

The check function now correctly includes query 6540Q, which identifies that you do not have an individual at the location that has a role of either Headteacher or Executive Head Teacher. This matches the Department for Education (DfE) guidance for when this should trigger. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

1.1.2 Error 6510 — There is more than one record with the same NI Number

The check function previously included those marked as in statistical return when checking for duplicate National Insurance (NI) numbers. As a result, organisations received error 6510 in the check function but not on COLLECT. Both the check and the submit function now exclude any individuals where this field is not selected.

Excluded individuals can be found in the check function under **Excluded from Census** at the bottom of the **Check Workforce Census** when run for a location.

1.1.3 Query 6550Q — At least one staff record in this school's return should show a Role of SEN Coordinator under a current contract. Where SENCO is missing, please add this additional role to the appropriate open contract staff record.

The check function now includes query 6550Q, which identifies that you do not have an individual at the location that has a role of SEN Coordinator. This matches the DfE guidance on when this should trigger. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

## 1.2. Contract/Service Level Issues

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1.2.1 Error 4360 — Contract has invalid end date for this census.

Error 4360, seen when contracts had ended prior to the previous academic year and still set to be included, now resolved. Organisations are required to go through each contravening contract and set **Include in SWC** to **No in Employment History**. The check and submit function now identifies where contracts have ended prior to the previous academic year and automatically excludes them.

1.2.2 Query 4377Q — Contract/Service Agreement end date should be on or prior to Census Reference Date for this type of contract or agreement

Query 4377Q now only triggers where the contract end date is after the reference date. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

1.2.3 Error 4380 — Contract/Service Agreement Type is Fixed Term therefore End Date must be specified.

Error 4380 now only triggers if the contract end date is blank.

1.2.4 Query 4390Q — Destination code has been provided therefore contract end date should be specified: If it cannot be supplied, please give a reason in a return level note.

Query 4390Q no longer triggers where a fixed term contract has a contract end date after the census date. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

1.2.5 Error 4580 — Destination code is invalid.

Error 4580 now only triggers if destination has been left blank or an invalid code has been used, where an end date is present.

1.2.6 Errors 4585 — Leaving Reason is invalid

Error 4585 now only triggers if the leaving reason has been left blank or an invalid code has been used, where an end date is present.

### 1.2.7 Error 4600 — Origin is invalid

Error 4600 now only trigger where the post is **Teaching** or **Teaching Assistant**, and the origin is blank or an invalid code has been used.

### 1.2.8 Error 4610 — Origin must be provided for teachers and teaching assistant who joined after 2009-08-31

Error 4610 no longer triggers if the post is **Leadership – Non-Teacher, Other Support Staff, or Advisory Teacher**. This error only relates to contracts and does not include service level agreements.

## 1.3. Payment Issues

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1.3.1 Error 4490 – Pay range is invalid for the given Post. Head Teachers, Deputy Heads and Assistant Heads must be paid under the ‘Leadership Pay Range’ or an ‘Other Pay Range’.

Error 4490 now triggers if the appropriate post is selected.

### 1.3.2 Error 4515 — No payment information has been provided

Previously error 4515 no longer triggers when the contract end date is after the census reference date, therefore producing a false positive. Although the payment information was correctly outputting on the submission file, the check was triggering the error.

1.3.3 Query 4521Q — Please supply the Framework under which Leadership Teacher is being paid, that is, ‘Pre 2014’ framework or ‘2014’ framework.

The check has been strengthened so that if the post is Executive Head Teacher, Head Teacher, Deputy Head Teacher or Assistant Head Teacher, not only is it checking whether the pay range is set to leadership, but triggers an error if a pay framework isn’t set.

1.3.4 Query 4522Q — Teacher is being paid under ‘Pre 2014’ framework even though they arrived after 31 August 2014: Please supply a reason in a return level note.

Query 4522Q no longer triggers when pay framework is set to ‘2014’ This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

1.3.5 Error 4530 — Base Pay is in invalid format. Format must be 999999.99

Base pay errors now based on the correctly formatted amount rather than the original calculation.

1.3.6 Error 4540 — If staff member is not paid by a Daily Rate then Base Pay must be provided

No longer receiving a false positive when daily rate is set to **no** and the base pay is being output onto the submission correctly.

1.3.7 Query 4545Q — Staff member appears to be paid less than the minimum wage for apprentices, please supply a reason in a return level note.

The calculation has been updated to the latest DfE figure of £4.81 The calculation now checks **base pay** is greater than **hours per week** multiplied by **weeks per year** multiplied by 4.81. This is the calculation given by DfE. Historical contract is excluded in the calculation method.

### 1.3.8 Error 4760 — Full Time Equivalent (FTE) hours per week is missing

Improved error handling to make sure all contracts in **Employment History** have the whole time equivalent field set. If left blank, error 4760 is generated. Whole time equivalent settings are now checked to make sure the operator is set as **Weeks & Hours ratio**, and that the hours per week are greater than 0.

### 1.3.9 Query 4765Q — FTE hours normally expected to be at least 24 and no greater than 40

Error 4765Q no longer triggers when a contract end date is in the future. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

### 1.3.10 Error 4820 — Additional payment amount is in an invalid format. Format must be 999999.99

Additional payment amount errors now based on the correctly formatted amount rather than the original calculation.

### 1.3.11 Error 4832 — Pay End Date cannot be before Pay Start Date

Error 4832 no longer triggers when the pay end date is blank. Additionally, a record cannot have an end date before the start date regardless of whether it has been manually input or imported into the system.

### 1.3.12 Error 4833 — Start and end dates of TLR3 payment must be provided

End dates for TLR3 payments are no longer excluded from the submission. Additionally, error 4833 now includes end dates, so is now triggered where start dates, end dates, or both are missing.

### 1.3.13 Query 4834Q — Additional payment start date is before beginning of previous academic year: please supply a reason in a return level note.

TLR1 and TLR2 additional payment types no longer trigger query 4834Q if there is no start date. According to DfE guidelines, the error only triggers if there is a start date which is before 31st August of the year prior to **Census Reference Date**. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

### 1.3.14 Query 6530Q — The same person has a total FTE ratio greater than 1.5

The FTE ratio is now calculated across all active contracts rather than whether a single contract was above 1.5 FTE. Where a salary has not been applied, the system uses the notional FTE rather than the actual FTE. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

## 1.4. Role Issues

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### 1.4.1 Error 4720 — Post inconsistent with Role

Error 4720 now includes the link between role identifier of Higher Level Teaching Assistant and post of Teaching Assistant. The role identifiers allowed for posts **Leadership Non-Teacher** and **Other Support Staff** has been updated to include additional codes as per DfE guidance.

1.4.2 Query 4722Q — Post appears to be inconsistent with Role Identifier. Non-teaching Post has a role associated for a staff member that would be expected to be normally filled by a teacher.

Query 4722Q now triggers for all invalid post to role combinations. Additionally, this list has been extended to include a more comprehensive list of combinations. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

1.4.3 Query 4725Q — Role of TASS (Teaching Assistant) or HLTA (Higher Level Teaching Assistant) should normally be linked to post of TAS (Teaching Assistant)

Query 4725Q no longer produces a false positive when a role of HLTA was used. This is a query only so if the data is correct, you should submit a return level note explaining your reasons when submitting in COLLECT.

## 2. SCHOOL WORKFORCE CENSUS INPUT

### 2.1. New Feature: Pay Range and Pay Framework should be against the person and not the Salary Grade

Additional fields have been added to the **Workforce Census** tab of **HR Record > Employment > Employment History**:

The screenshot shows a software interface for the 'Workforce Census' tab. It contains several dropdown menus and a date field. The 'Pay Range' and 'Pay Framework' fields at the bottom are highlighted with a blue rectangular box. The 'Pay Range' is set to 'Leadership' and the 'Pay Framework' is set to '2014'. Other visible fields include 'Include in SWC' (Yes), 'Safeguarded Salary' (False), 'Origin' (Teaching post within the LA sector (scho)), 'Daily Rate' (No), 'Pay Review Date' (01/04/2021), 'Leaving Reason', 'Destination', 'LA School Level' (School), 'Post' (Head Teacher\*), and 'Role Identifier' (Head Teacher). At the bottom, there are buttons for 'Copy', 'Snapshot', 'Salary', 'Save', and 'Close'.

By default, if **Pay Range** and **Pay Framework** are set in **Employment History** for the individual contract, they are the primary fields output in the XML submission file to be uploaded to COLLECT. If blank, then the submission uses the values set on the salary grade.

## 2.2. Census fields in HR Record (SWC) & Contracts (SWC) are no longer mandatory

Relevant **Submit Workforce Census** (SWC) fields no longer mandatory as specified by DfE guidelines.

The two-way synchronisation between SWC fields has been improved — either field can update the other when completed where this data is used elsewhere in the system. The exception to this are **Teacher Number** and **Disability** as these fields are used for different purposes across the system and could therefore cause data issues if enabled.

## 3. Submit Workforce Census

### 3.1. New Feature: Submitting the Workforce Census for Multiple Locations

You can now report multiple locations under the one submission in **Personnel > Functions > Submit School Workforce Census**:

To submit multiple locations in one submission, assign an establishment number to a selected location (**Personnel > Definitions > Your Organisation > Location**). The establishment number is visible next to the location in the submission function. More than one selected locations with an establishment number, results in an establishment mismatch error.

**Location** can no longer be left blank when running submission files for all locations.

### 3.2. New Feature: Remove previously entered data when returning to the Submit School Workforce Census window

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A new clear-down feature removes any previously submitted settings, files, and locations selected on the last run when leaving **Submit Workforce Census**.

The clear-down is not triggered if **Submit Workforce Census** remains open, allowing multiple submissions.

### 3.3. Submitting Workforce crashes when changing/removing query for Qualifying Query

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System errors are no longer generated when selecting a qualifying query in **Submit Workforce Census** or when trying to remove the qualifying query. Additionally, when clearing the selected query from the query tool, the query name now remains.

### 3.4. Additional payments not outputting into XML submission file

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A additional payments taken from **Fixed Payments/Deductions** are now correctly outputting into the XML submission file.

DOCUMENT REFERENCE	DESCRIPTION
AV-07102022-PS-RN-V22246	Initial release