



Create Staffing Service Terms in IRIS Financial Planner

Service terms are used to categorise staff contracts. They allow for greater analysis of staffing costs by grouping similar contracts together. For reporting purposes, they can be mapped to a maximum of three budget codes and three cost centres for basic salary costs, NI and superannuation.

Creating/Editing Service Terms

1. Select **Settings > Staffing Service Terms** from the sidebar menu. The **Staffing Service Terms** page is displayed.

Service term	Description	Basic Budget Code	NI Budget Code	Super Budget Code	Basic Cost Centre	NI Cost Centre	Super Cost Centre	Archived	Actions
Midday Supervisors	Midday Supervisors	STJO2600	STJO2605	STJO2610	Support Basic	Support NI	Support Super		edit
TEACHING ASSISTANT	Teaching Assistant	STJO2200	STJO2205	STJO2210	Support Basic	Support NI	Support Super		edit

2. To edit an existing service term, click the **edit** link adjacent to the applicable term. The **Edit Service Term** page is displayed. To add a new service term, click the **Add New** icon at the top of the page. The **Create Service Term** page is displayed.

Service term: Midday Supervisors ⓘ

Description: Midday Supervisors ⓘ

Basic Salary Budget Code: STJO2600 - Midday Staff - Salaries ▾

National Insurance Budget Code: STJO2605 - Support Staff - NI ▾

Superannuation Budget Code: STJO2610 - Support Staff - Supn ▾

Basic Salary Cost Centre: Support Basic - Support Basic ▾

National Insurance Cost Centre: Support NI - Support NI ▾

Superannuation Cost Centre: Support Super - Support Super ▾

Archived: ⓘ

3. Complete or edit the fields in the page and select the applicable budget codes and cost centres as required. Click the **Save** icon (green tick) at the top of the page once the required information has been edited/added. If you want to create further service terms, click the **Save and Add New** icon (black tick).
4. You will be returned to the **Staffing Service Terms** page with the newly added service term included in the list.

Where to Get More Help and Information



Our currently available documentation can be found at the following address:

<https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation>

You can also utilise information on our Support Portal at the following address:

<https://psfinancials.zendesk.com>

Providing Feedback on our Documentation

If you have any feedback, comments or suggestions regarding our documentation, please email:



documentation@psfinancials.com

DOCUMENT REFERENCE	DESCRIPTION
TM-171219-CSS-IFP-1.0	Initial release