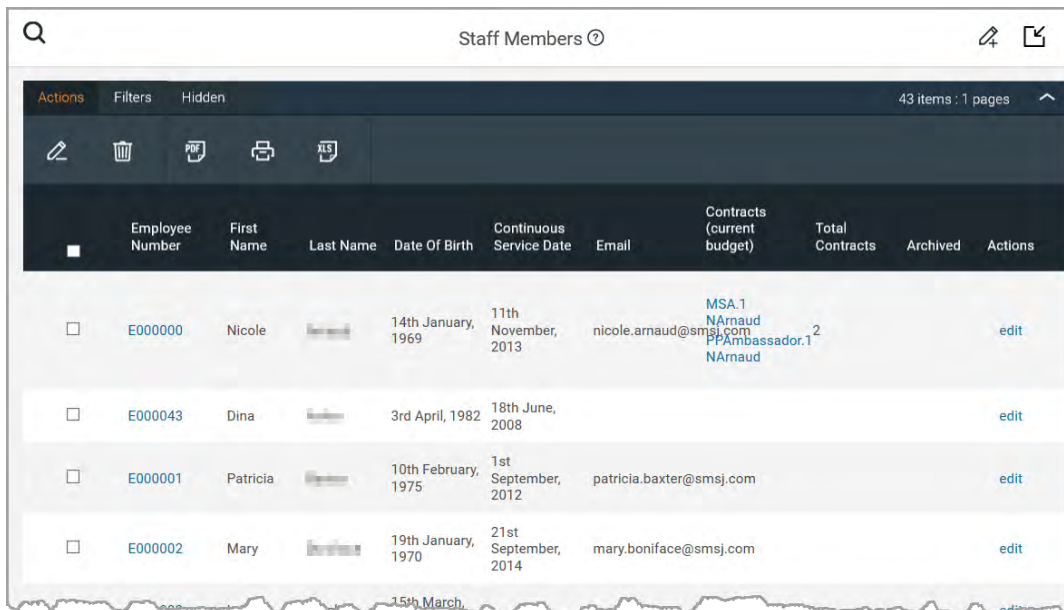


Add Staff Members and Contracts in IRIS Financial Planner

Staff salaries form the largest part of an academy/MAT budget. When calculating salaries, it is important to consider pay awards, National Insurance, superannuation, increments, allowances, maternity cover, secondments, overtime, etc.

A full list of staff members can be accessed by selecting **Staffing > Staff Members** from the sidebar menu. The list includes all staff across all budgets in the planner. All staff members must have a unique Employee Number. We recommend that the number on your payroll file is used as this is how the Salary Monitor reconciles monthly files.



Employee Number	First Name	Last Name	Date Of Birth	Continuous Service Date	Email	Contracts (current budget)	Total Contracts	Archived	Actions
E000000	Nicole	[REDACTED]	14th January, 1969	11th November, 2013	nicole.arnaud@smsj.com	MSA.1 NArnaud smsj.com P Ambassador.1 NArnaud	2		edit
E000043	Dina	[REDACTED]	3rd April, 1982	18th June, 2008					edit
E000001	Patricia	[REDACTED]	10th February, 1975	1st September, 2012	patricia.baxter@smsj.com				edit
E000002	Mary	[REDACTED]	19th January, 1970	21st September, 2014	mary.boniface@smsj.com				edit

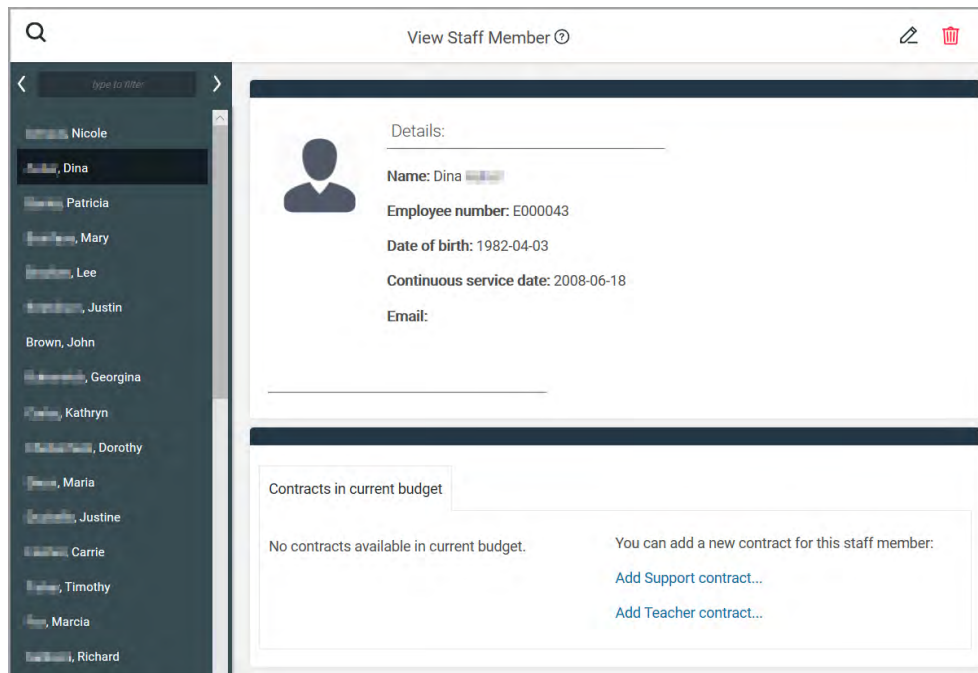
Viewing Members of Staff

1. Select **Staff > Staffing Members** from the sidebar menu. The **Staff Members** page is displayed. The **Contracts (current budget)** column lists all the contracts to which the employee is linked, for the current budget. The **Total Contracts** column lists the total number of contracts the employee has across all budgets in the planner.



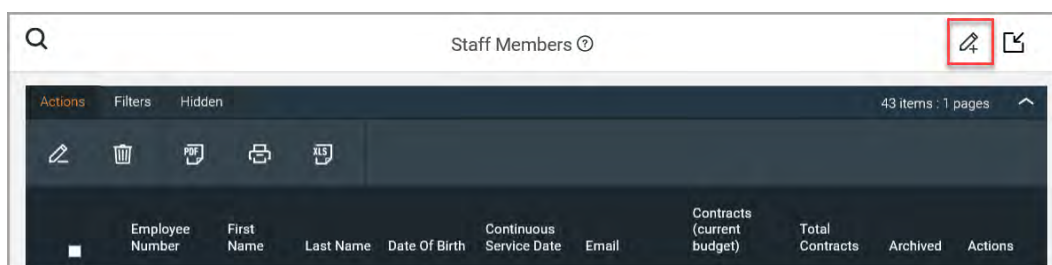
Employee Number	First Name	Last Name	Date Of Birth	Continuous Service Date	Email	Contracts (current budget)	Total Contracts	Archived	Actions
E000000	Nicole	[REDACTED]	14th January, 1969	11th November, 2013	nicole.arnaud@smsj.com	MSA.1 NArnaud smsj.com P Ambassador.1 NArnaud	2		edit
E000043	Dina	[REDACTED]	3rd April, 1982	18th June, 2008					edit

- To view an existing member of staff, click the blue **Employee Number** for the required member of staff. The **View Staff Member** page is displayed.

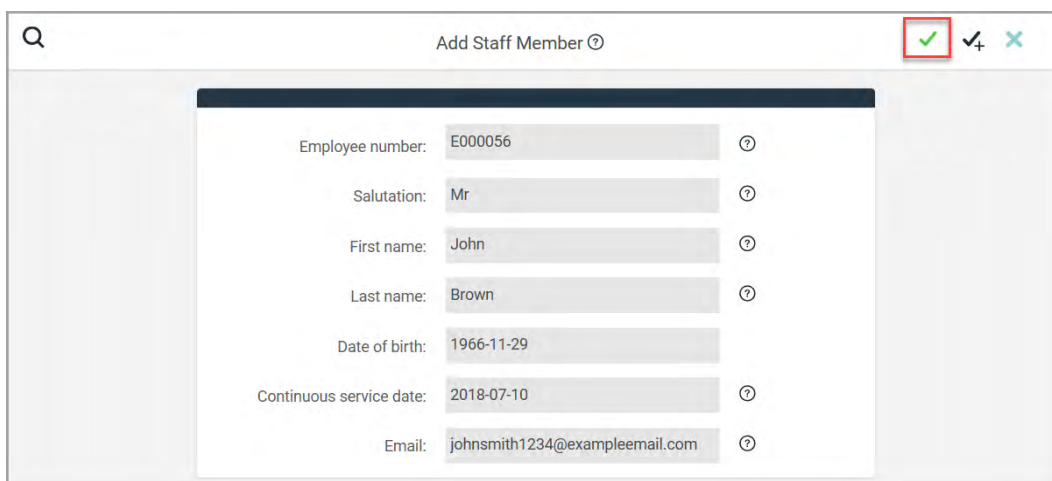


Adding/Editing Staff Members

- Select **Staff > Staffing Members** from the sidebar menu. The **Staff Members** page is displayed.



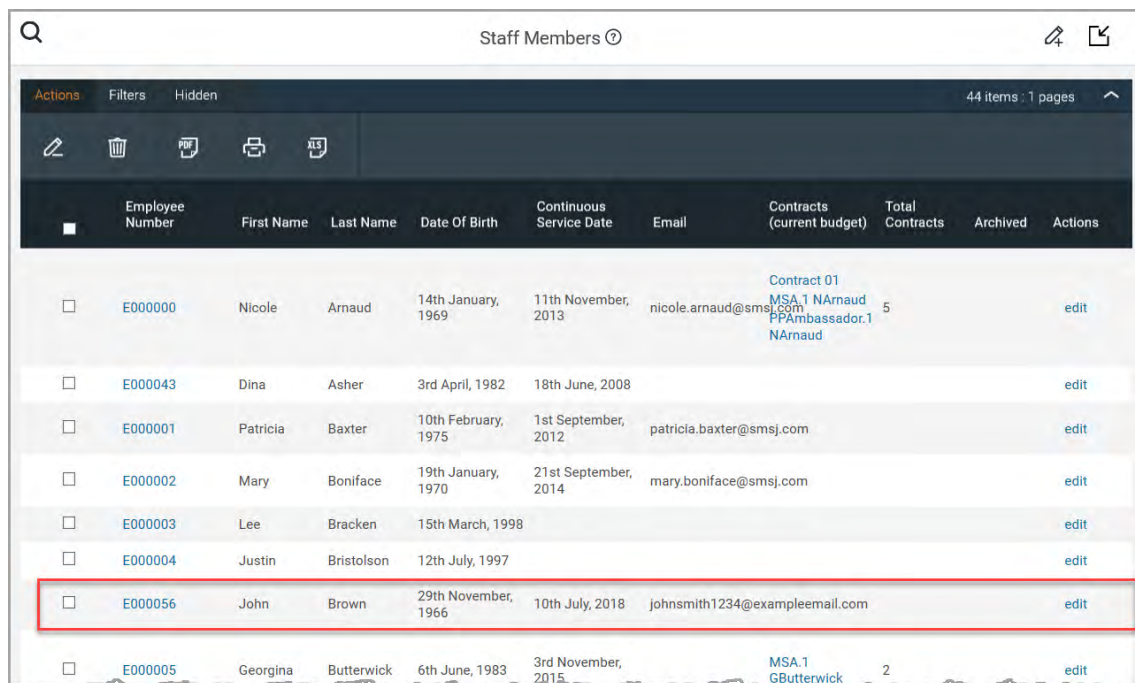
- To manually add a member of staff, click the **Add New** icon at the top of the page. The **Add Staff Member** page is displayed. To edit an existing member of staff, click the required blue **Employee Number** to select them.



3. Complete the information as follows:

FIELD	DESCRIPTION
Employee Number	Enter as it appears on the payroll report to allow for salary monitoring. Must be unique by planner.
Salutation	Mr, Mrs, Miss, etc.
First Name/Last Name	Employee's first or preferred name. Employee's last name.
Date of Birth	Required for employees under the age of 21 in order to correctly calculate National Insurance.
Continuous Service Date	Completed for information purposes only – it is not used for any calculations.
Email	Email address. Once saved this will become a hyperlink to a new email.

4. Click the **Save** icon (green tick) at the top of the page to save the record.
5. If further staff need to be added, click the **Save and Add New** button (black tick) to save, then create a new staff record.
6. You will be returned to the **Staff Members** page with the newly added staff member included in the list.



Staff Members

44 items : 1 pages

Employee Number	First Name	Last Name	Date Of Birth	Continuous Service Date	Email	Contracts (current budget)	Total Contracts	Archived	Actions
E000000	Nicole	Arnaud	14th January, 1969	11th November, 2013	nicole.arnaud@smsj.com	Contract 01 MSA.1 NArnaud PPAmbassador.1 NArnaud	5		edit
E000043	Dina	Asher	3rd April, 1982	18th June, 2008					edit
E000001	Patricia	Baxter	10th February, 1975	1st September, 2012	patricia.baxter@smsj.com				edit
E000002	Mary	Boniface	19th January, 1970	21st September, 2014	mary.boniface@smsj.com				edit
E000003	Lee	Bracken	15th March, 1998						edit
E000004	Justin	Bristolson	12th July, 1997						edit
E000056	John	Brown	29th November, 1966	10th July, 2018	johnsmith1234@exampleemail.com				edit
E000005	Georgina	Butterwick	6th June, 1983	3rd November, 2015		MSA.1 GButterwick	2		edit

Viewing Staff Contracts

Salary costs account for most of the expenditure within a budget. It is therefore essential that your staffing information is as accurate as possible when planning and monitoring your budget. The planner utilises the staff contract information to accurately forecast salaries for the duration of your budget.

1. Select **Staffing > Staff Contracts** from the sidebar menu. The **Staff Contracts** page is displayed listing all the available contracts within the planner. A green tick is displayed in the **Current Budget** column for all staff contracts included in the current budget. The **Budget Count** column lists the number of budgets the contract exists in.

Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service Term	Tags	Fund Codes	Start	End	Budget Count	Actions
✓	MSA.1 NArnaud (fixed budget Budget 2019/20 (Scenario 1))	E000000	Nicole	Arnaud	Support	Midday Supervisors		REV [100%]	1st September, 2019		1	
✓	PPAmbassador.1 NArnaud (fixed budget Budget 2019/20 (Scenario 1))	E000000	Nicole	Arnaud	Support	TEACHING ASSISTANT	PP [100%]	PUPIL [70%] REV [30%]	1st September, 2019		1	
✓	MSA.1 GButterwick (fixed budget Budget 2019/20 (Scenario 1))	E000005	Georgina	Butterwick	Support	Midday Supervisors		REV [100%]	1st September, 2019		1	

2. To view an existing contract, click the blue **Employee Number**. The **View Contract** page is displayed, containing a summary of the contract at the top, with further detail available via the four tabs in the lower section.

View Contract

Details:

Staff member: Nicole Arnaud
Contract name: Contract 01
Service term: Midday Supervisors - Midday Supervisors

Type: Support
Maximum salary scale: 9
Continuous service date: 11th Nov, 2013

Salary Forecast | Salary Details | Budgets | Code Mapping

Salary forecast for current budget	Base salary	National Insurance [NI]	Superannuation	Total
2019/20	12,611.40	1,245.26	0.00	13,856.66
2020/21	19,106.74	1,890.19	0.00	20,996.93
2021/22	19,106.74	1,892.86	0.00	20,999.60
2022/23	19,106.74	1,892.86	0.00	20,999.60

Creating/Editing Staff Contracts

Once of the simplest ways of creating a staff contract is to duplicate a similar, existing contract, then edit the differences.

1. Select **Staffing > Staff Contracts** from the sidebar menu. The **Staff Contracts** page is displayed listing all available contracts within the planner.

Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service Term	Tags	Fund Codes	Start	End	Budget Count	Actions
✓	MSA.1 NArnaud	E000000	Nicole	Arnaud	Support	Midday Supervisors		REV [100%]	1st September, 2019		1	edit
✓	PPAmbassador.1 NArnaud	E000000	Nicole	Arnaud	Support	TEACHING ASSISTANT		PP [100%] PAPIL [70%] REV [80%]	1st September, 2019		1	edit

- To edit an existing contract, click the required **edit** link in the **Actions** column. The **Edit Support Contract** page is displayed.
- To duplicate an existing contract, view the required contract as described in the previous section, then click the **Action** icon (cog) at the top of the **View Contract** page, and select **Duplicate** from the drop-down menu. A new copy of the contract is displayed and can be edited as required. The new copy is applied to the current contract only.
- To add a new contract, click the **Add New** icon at the top of the page then select **New Support contract** or **New Teacher contract** from the drop-down menu as required. The **New Staff /Teacher Contract** page is displayed with the **Contract Details** tab selected by default.

2. The information in the following sections needs to be reviewed/completed.

Completing Contract Details

The **Contract Details** tab is displayed by default.

New Staff Contract

Contract Details | Salary Details | Budgets | Notes

Note: A contract can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making changes.

Staff member: or create new staff member...

Contract name:

Contract type:

Service term:

Maximum salary scale:

Tags:

Fund Codes:

Start:

End:

Maternity leave start date:



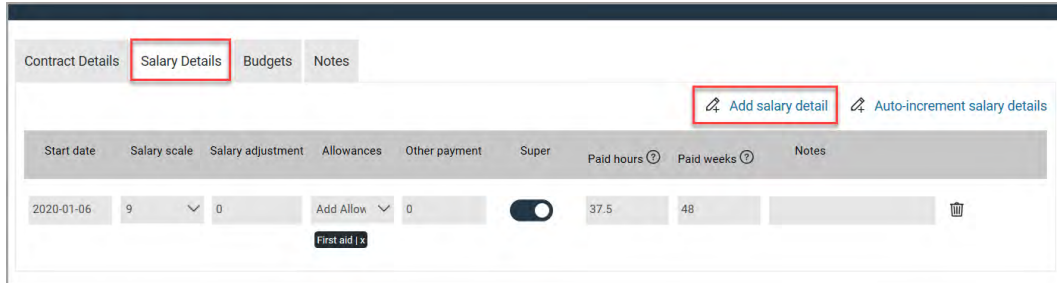
Complete/review the following information.

FIELD	DESCRIPTION
Staff member	If the contract is an open position, you can leave this field blank, or use the drop-down menu to select the staff member you are creating this contract for.
Contract name	This is a free text field, but the contract name must be unique.
Contract type	Select whether this is a Teacher or Support contract from the drop-down list.
Service term	Select the required service term from the drop-down list.
Maximum salary scale	Select the top band scale point for the contract, from the drop-down list. This will prevent the contract from incrementing past the top of this scale.
Tags	Select any tags you want to use for reporting purposes, from the drop-down list.
Fund Codes	Select any required funding codes from this drop-down list.
Start/End	Select the start and end dates for this contract as required. Leave the End field blank unless this is a fixed term contract. If an end date is supplied, the system will stop forecasting costs after this date.
Maternity leave start date	Enter the start date for maternity leave if applicable.
Return to work date	If a start date is provided for maternity leave, this date is mandatory as the dates are used to calculate the cost during the maternity period.
Position	Enter the position relating to the contract. This will show on the contract itself, the Staff by Year report and on any salary statements.
Department	Enter the department to which the contract relates, if required. This will appear on the Staff by Year report.

Specifying Salary Details for the Contract

The information provided on this tab is used by the software for forecasting purposes and therefore, accurate data must be provided so that forecasts can be calculated correctly.

1. Select the **Salary Details** tab.



2. Complete/review the following information as required:

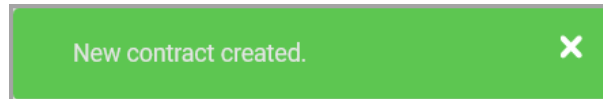
FIELD	DESCRIPTION
Start date	Select the date from which this salary detail should be implemented (mandatory).
Salary scale	Select the required salary scale from the drop-down list (mandatory).
Salary adjustment	If required, enter an amount to be added to (or a negative value to be deducted from) the salary scale amount. This will be added into the contract forecast.
Allowances & Other Payment	If applicable, select any allowances from this drop-down list, such as TLR and/or add any other payments as required.
Super	Turn this switch on if the contract will receive superannuation contributions.
FTE	Applicable to teachers only – adjust the full time equivalent for this contract if necessary.
Paid Hours/Weeks	Applicable to support contract only – enter the number of contractual hours to be worked per week/contractual weeks to be worked per year. This should include paid holidays.
Notes	Add any notes to provide more detail if required.



Note: The latest salary detail entry will continue to run until the end of the contract if no subsequent salary details are selected.

Saving the Contract

1. Once you are happy that all the required content has been added/amended, click the **Save** icon (green tick) to save the contract, or the **Save and Add New** icon (black tick with + sign) to save the contract and create a new one.



2. You will return to the **Staff Contracts** page with the new contract 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-ASC-IFP-1.0	Initial release