## PS Financials
By IRIS

## Create Contract Types in IRIS Financial Planner

Some academies/MATs may need two or more types of Teacher (FTE) or Support (Non-FTE) contracts, each with differing rules for how many hours constitute one Full Time Equivalent, or differing pension, gratuity or inflation rates. Once created, the new contract types can be assigned by editing the applicable contract.

Viewing or Editing Existing Contract Types

1. Select **Settings > Contract Types** from the sidebar menu. The **Contract Types** page is displayed.
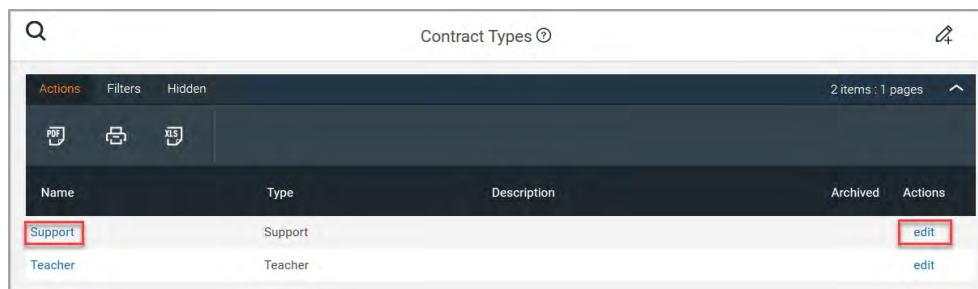
2. To view an existing contract type, click the blue name in the **Name** column. The **View Contract Type** window is displayed.
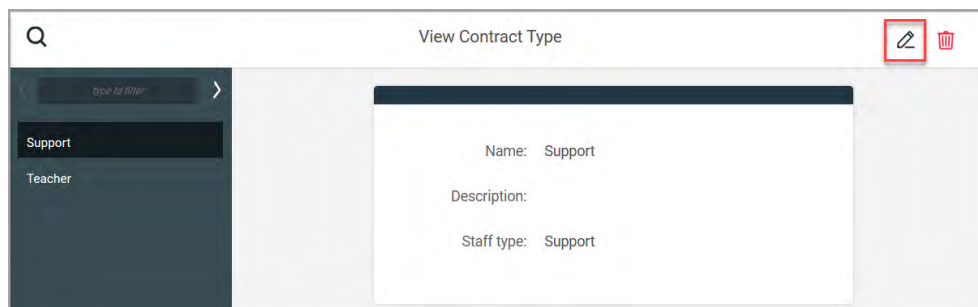

3. To edit an existing contract type, either click the **Edit** link under the **Actions** column on the **Contract Types** page or if viewing the contract type, click the **Edit** icon on the toolbar. Edit the details as described in the following section.

Create a New Contract Type

There may be occasions when a new contract type needs to be created. This is usually required for staff who have different contract settings such as full-time hours, rates of superannuation, etc.

1. Select **Settings > Contract Types** from the sidebar menu. The **Contract Types** page is displayed listing available contract types.
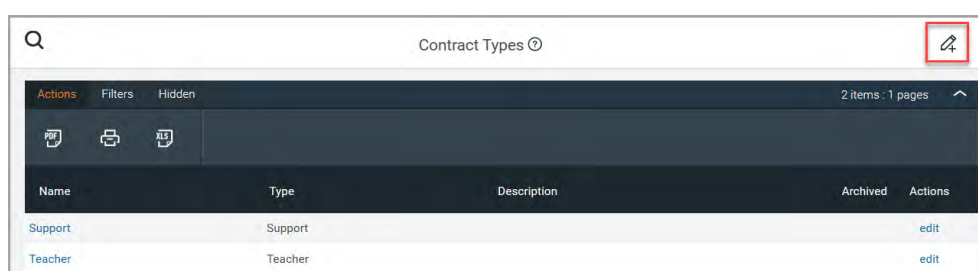
2. To create a new contract type, click the **Add New** icon at the top of the page. The **Create Contract Type** page is displayed.

3. Enter the **Name** as you want it to appear in Staff by Year reports and budget settings. If required, enter a **Description** to provide any additional information on the purpose of this contract type.

4. Select the type of contract from the **Staff type** drop-down list (either **Teacher** or **Support**), then click the **Save** icon (green tick). A message is displayed indicating that the new contract type has been successfully created.

New contract type "Office Staff" created.

5. You are returned to the **Contract Types** page with the new contract type added to the list. Once saved, you will then need to edit the budget settings, staff contracts, inflation and superannuation for the contract type.

Editing Staff Contract Settings in the Required Budget

1. Select **Settings > Budgets** from the sidebar menu. The **Budgets Page** is displayed.

2. Click the **Edits** link adjacent to the required budget. The **Edit Budget** page is displayed.

3. Select the **Staff contract settings** tab. Amend the **Hours**, **Weeks** and **Increment** month as required and set the **Region** if necessary. Click the **Save** icon (green tick) at the top of the page to save the changes.

4. If required, you can set new superannuation or inflation points as described in the separate *How to Create or Edit Superannuation and Inflation Points* guide.

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-CCT-IFP-1.0	Initial release