

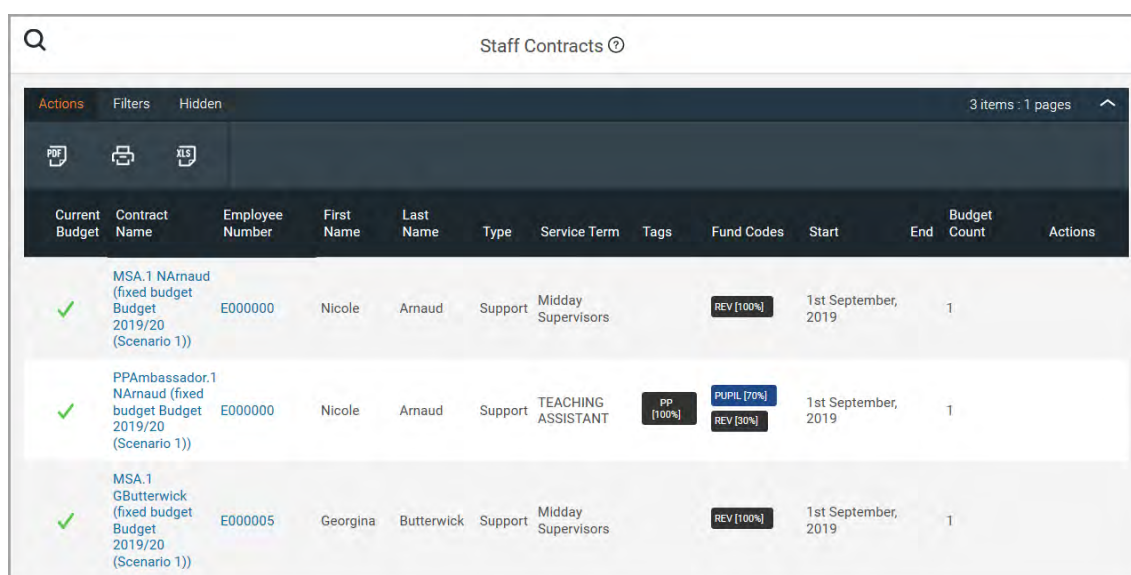
## Create and Manage Staff Contracts in IRIS Financial Planner

Salary costs account for the majority 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.

Staff contracts are unique within your planner because they can exist across several budgets. This makes it easy and trouble-free if any changes are required to a contract – the changes are made across all budgets. It is, however, possible to set a contract to a single budget enabling you to create a variety of budgeting scenarios where you can assess the impact of any staffing changes or restructures.

## Viewing Existing Staff Contracts

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 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

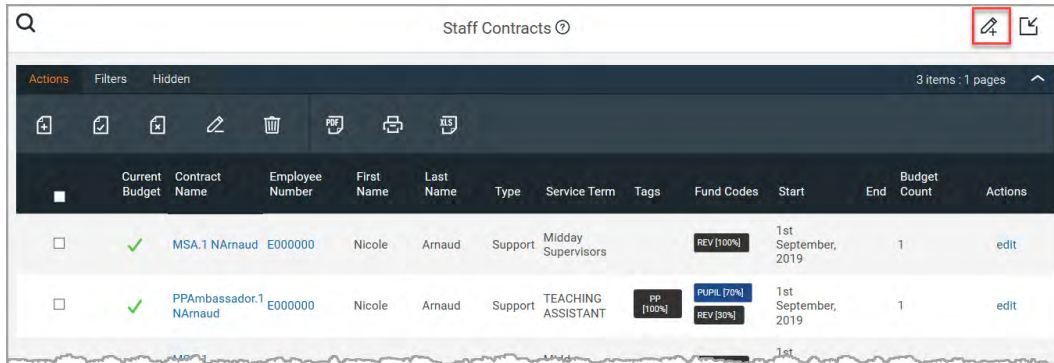
- The **Salary Forecast** tab is system generated based on the information entered in the **Salary Details** tab together with whichever budget is selected as the current budget.

Salary forecast for current budget	Base salary	National Insurance [NI]	Superannuation	Total
2019/20	9,240.86	696.04	0.00	9,936.91
September 2019	763.71	23.58	0.00	787.29
October 2019	763.71	23.58	0.00	787.29
November 2019	763.71	23.58	0.00	787.29
December 2019	763.71	23.58	0.00	787.29
January 2020	763.71	74.16	0.00	837.87
February 2020	763.71	74.16	0.00	837.87
March 2020	763.71	74.16	0.00	837.87
April 2020	778.98	75.85	0.00	854.83
May 2020	778.98	75.85	0.00	854.83
June 2020	778.98	75.85	0.00	854.83
July 2020	778.98	75.85	0.00	854.83
August 2020	778.98	75.85	0.00	854.83

- Clicking on any year will expand the view to provide a monthly breakdown by year.

## Creating/Editing a Staff Contract

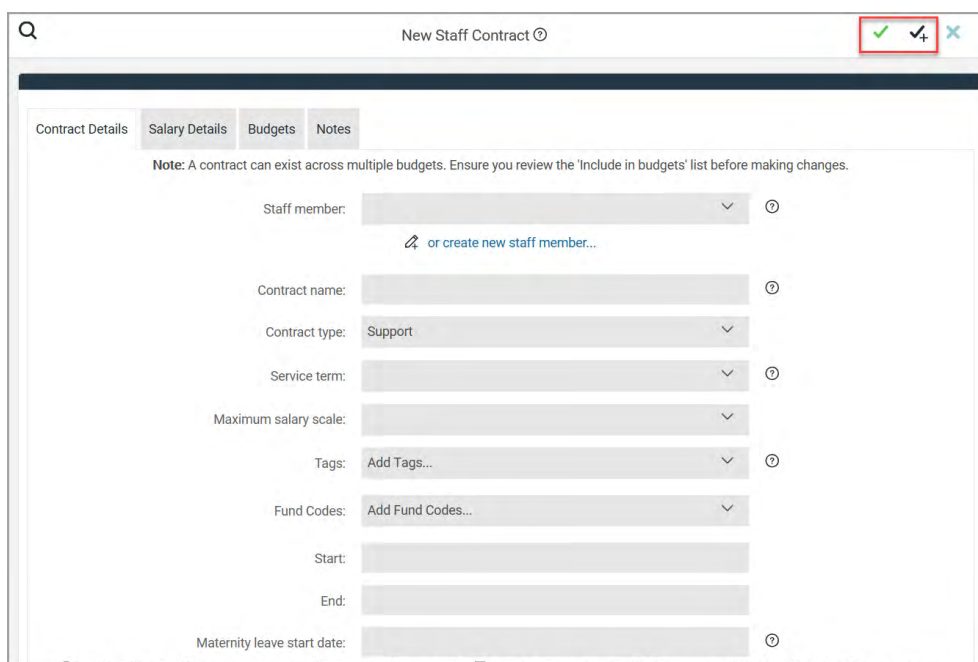
1. Select **Staffing > Staff Contracts** from the sidebar menu. The **Staff Contracts** page is displayed listing all available contracts within the planner.



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%] PUPIL [70%] REV [30%]	1st September, 2019		1	edit

- **To edit an existing contract** - click the **edit** link in the **Actions** column for the required. The **Edit Support Contract** page is displayed. Review/edit the required information as described in [Reviewing/Completing Staff Contract Details](#) on page 3 onwards.
- **To create a new contract** - click the **Add New** icon at the top of the page then select the type of contract from the drop-down menu as required. The **New Staff Contract** page is displayed with the **Contract Details** tab selected by default. Complete the required information as described in [Reviewing/Completing Staff Contract Details](#) on page 3 onwards.
- **To duplicate an existing contract** – the simplest way to create a new contract is to create a copy of an existing one. View the required contract as described in [Viewing Existing Staff Contracts](#) on page 1, click the **Action** icon (cog) at the top of the **View Contract** page, then select **Duplicate** from the drop-down menu. A new copy of the contract is displayed and can be reviewed/edited as described in [Reviewing/Completing Staff Contract Details](#) on page 3 onwards.

## Reviewing/Completing Staff Contract Details



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: Support Ⓞ

Service term:  Ⓞ

Maximum salary scale:  Ⓞ

Tags: Add Tags... Ⓞ

Fund Codes: Add Fund Codes... Ⓞ

Start:

End:

Maternity leave start date:  Ⓞ



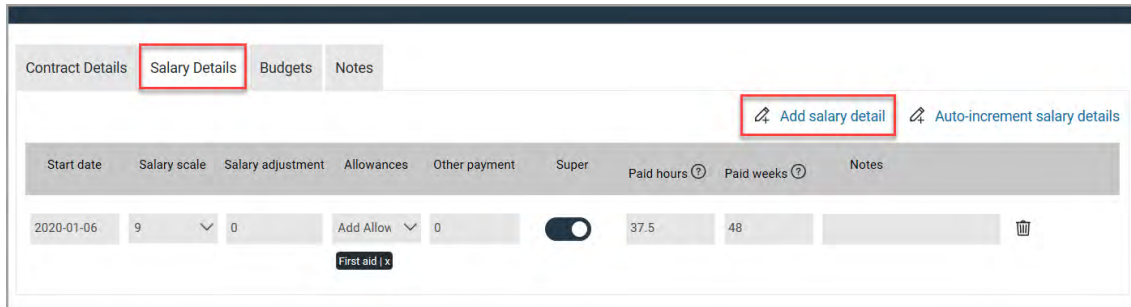
The **Contract Details** tab is displayed by default. Complete/review the following information.

FIELD	DESCRIPTION
<b>Staff member</b>	If the contract is an open position, you can leave this field blank (recommended), or use the drop-down list to select the staff member you are creating this contract for.
<b>Contract name</b>	This is a free text field, but the contract name must be unique.
<b>Contract type</b>	This drop-down list is automatically populated based on the selection made when the contract was created (e.g. <b>Teacher</b> or <b>Staff</b> ). If additional contract types have been created, they can be selected via this list.
<b>Service term</b>	Select the required service term that you want the contract to be reported on, from the drop-down list (mandatory).
<b>Maximum salary scale</b>	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.
<b>Tags</b>	Select any tags you want to use for reporting purposes, from the drop-down list (optional).
<b>Fund Codes</b>	Select any required funding codes from this drop-down list (optional).
<b>Start/End</b>	Select the start and end dates for this contract as required. Leave the <b>End</b> field blank unless this is a fixed term contract. If an end date is supplied, the system will stop forecasting costs after this date.
<b>Maternity leave start date</b>	Enter the start date for maternity leave if applicable.
<b>Return to work date</b>	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.
<b>Position</b>	Enter the position relating to the contract. This will show on the contract itself, the Staff by Year report and on any salary statements.
<b>Department</b>	Enter the department to which the contract relates, if required. This will appear on the Staff by Year report.

## Specifying the 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
<b>Start date</b>	Select the date from which this salary detail should be implemented. (Mandatory)
<b>Salary scale</b>	Select the required salary scale from the drop-down list. (Mandatory)
<b>Salary adjustment</b>	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.
<b>Allowances</b>	If applicable, select any allowances from this drop-down list, such as TLR.
<b>Other payment</b>	Add any other payments that are made.
<b>Super</b>	Turn this switch on if the contract will receive superannuation contributions.
<b>FTE</b>	Applicable to teachers only – specify the full time equivalent for this contract. (Mandatory)
<b>Paid Hours/Weeks</b>	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.
<b>Notes</b>	Add any explanatory notes as required.



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

## Automatically Incrementing the Salary for a Staff Contract

It is possible to automatically create salary increments for a staff contract, preventing the need to manually enter each required increment.

Start date	Salary scale	Salary adjustment	Allowances	Other payment	Super	Paid hours	Paid weeks	Notes
2020-01-06	6	0	Add Allow	0	<input checked="" type="checkbox"/>	37.5	48	
2020-04-01	7	0	Add Allow	0	<input checked="" type="checkbox"/>	37.5	48	
2021-04-01	8	0	Add Allow	0	<input checked="" type="checkbox"/>	37.5	48	
2022-04-01	9	0	Add Allow	0	<input checked="" type="checkbox"/>	37.5	48	

Ensure that the first line of salary detail has been completed then click the **Auto-increment salary details** hyperlink.

The salary scale is appropriately increased for each year within the budget, until the end of the contract or maximum scale point is reached. The increment date is derived from the **Salary Year Start** date defined for each contract type in the applicable budget settings.

## Selecting Budgets and Adding Notes

This section enables you to select the budgets to which the staff contract will be available. By assigning a contract to one budget, and not to another, it is easy to make comparisons/assess the implications of a specific contract/scenario.

1. Select the **Budgets** tab. This tab is used to select the budgets to which this contract should be applied.

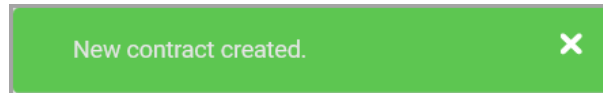
Include in budgets:

- Budget 2019/20 (Scenario 3)
- Budget 2019/20 (Scenario 2)
- Initial Budget 2019/20

2. Turn on the switches for the budgets that you want this contract to be applied to. At least one budget must be selected.
3. Select the **Notes** tab to provide more information about this contract.

## Saving the Changes

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** icon (black tick with + sign) to save the contract and create a new one.



## Ending a Staff Contract Due to Staff Departure

If a member of staff leaves, you will need to end their staff contract. It is important that this method is followed rather than deleting or excluding the contract from the budget scenario, as this removes accumulated costs up to the point in the year when the contract ends.

1. Select **Staffing > Staff Contracts** from the sidebar menu.
2. Click the **Edit** link adjacent to the required member of staff.
3. From the **Contract Details** page, scroll down (if necessary) to the **End** field, then select the date the staffing contract will end, i.e. the date the member of staff is leaving.

4. Click the **Save** icon (green tick) at the top of the page. The system will then end all calculations for this contract from the date selected.

## 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](mailto:documentation@psfinancials.com)

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