



Business World HR Form Guide

CONTRACTUAL CHANGE FORM

Shropshire Council

Contents

		Page
1	Introduction	1
2	Navigation	2
3	To set up a contractual change form	2
4	Headteacher Approval	12
5	Additional Information	12

1. Introduction

The following guide provides information to the Headteacher, Office Manager/Administrator or delegated person to ensure they are familiar with the process of setting up a contractual change into a position which already exists on the school's establishment. Contractual changes refer to changes that apply to the Resource. Once the form has been completed at school level it workflows to Payroll.

For changes that also affect the position refer to 'Business World HR Form - Position Change'. If this is a new position that doesn't currently exist on your

establishment, then please follow the guidance for completing a 'New Position Form' first which is explained in 'Business World HR Form Guide – New Position Form'.

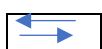
2. Navigating Business World

Please refer to the 'Business World HR How To – Navigate' for additional tips for manoeuvring Business World.

2.1 The Tab key

Please ensure that you are familiar with the tab key.

Use the TAB button on your keypad, to move from one field to the next to work through the form.



Also become familiar with the scroll bars to move the screen up and down or left to right.

3.0 To set up A CONTRACTUAL CHANGE for a Resource

The Headteacher and school Administrator can view the forms section of Business World to complete the appropriate paperwork to inform Payroll of a contractual change.

Please note - you will need to save as draft as you work down the form.

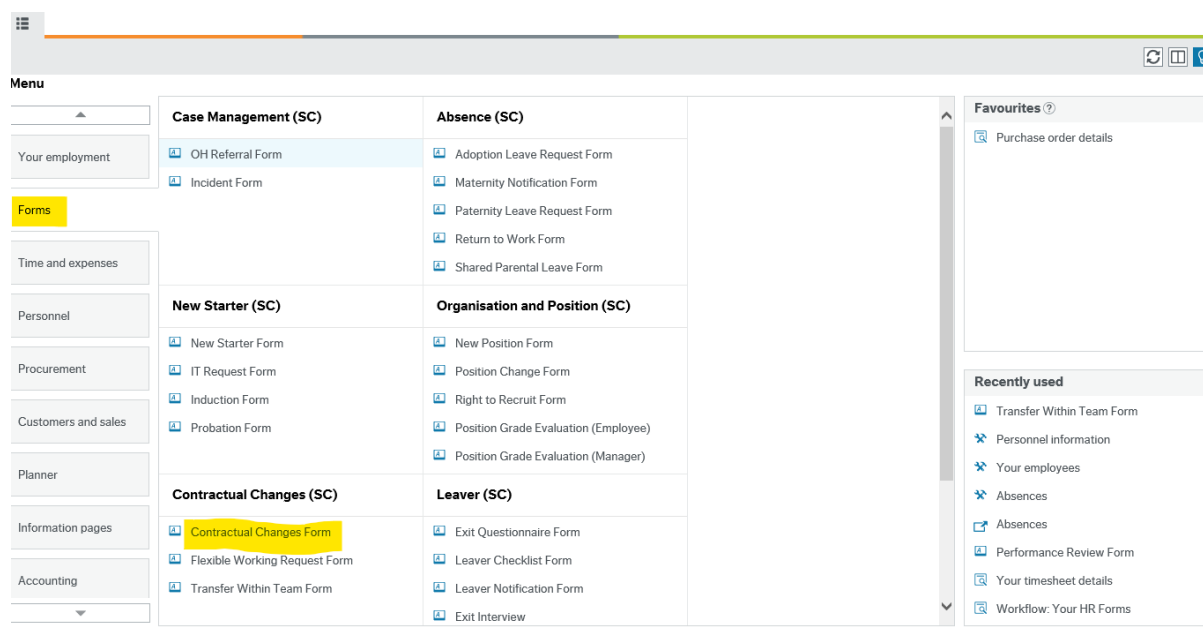
Warning - should BW time out before you submit the form, your form will not be saved!!

STEP 1

Log in to Business World

Navigate to Forms - Contractual Changes (SC) - Contractual Changes Form.

Click Forms and then Click Contractual Changes Form.



STEP 2

The following window will appear below:

Form	Form ID *
FRMCONCHG W904	[NEW] [NEW]
Form description*	
Contractual Change Form	
Form owner	
Sian Mann 220190	

Form – pre-populated.

[New ID] – pre-populated, this box will create a new form auto number.

Form Description - this form will auto populate with the type of form.

Form Owner – this will auto populate with the form owner name.

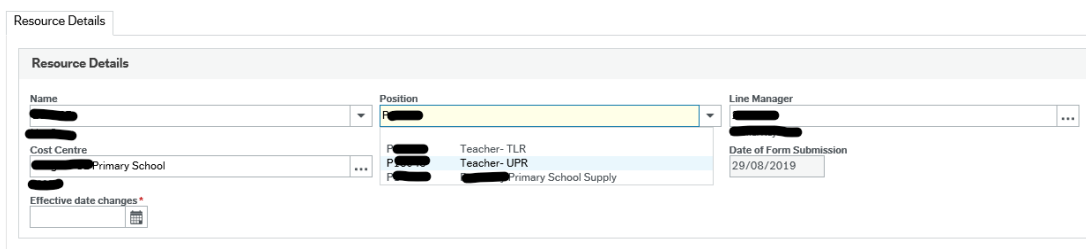
STEP 3

Click in the Form owner box and using the TAB key, TAB to the next section Resource Details.

The screenshot shows the 'Resource Details' form with the following fields:

- Name:** A dropdown menu with a list of names (partially obscured by a redacted area).
- Position:** A dropdown menu.
- Line Manager:** A dropdown menu.
- Resource Start Date:** A date input field with a calendar icon.
- Date of Form Submission:** A date input field showing '29/08/2019'.

Name - press SPACEBAR and the drop down menu will appear, select the Resource from your establishment by clicking with your mouse and TAB to the next box.



The screenshot shows the 'Resource Details' form. The 'Name' field is a dropdown menu. The 'Position' field is a dropdown menu with a list of options: 'Teacher- TLR', 'Teacher- UPR', and 'Primary School Supply'. The 'Line Manager' field is a text box with a search icon. The 'Cost Centre' field is a text box with a search icon. The 'Resource Start Date' field is a date field with a calendar icon. The 'Date of Form Submission' field is a date field. The 'Effective date changes' field is a text box with a calendar icon.

Position – press SPACEBAR and the positions will drop down for you to select the relevant position the change is for.

Using the TAB key on your keyboard, TAB through the boxes to the Effective Date of change.

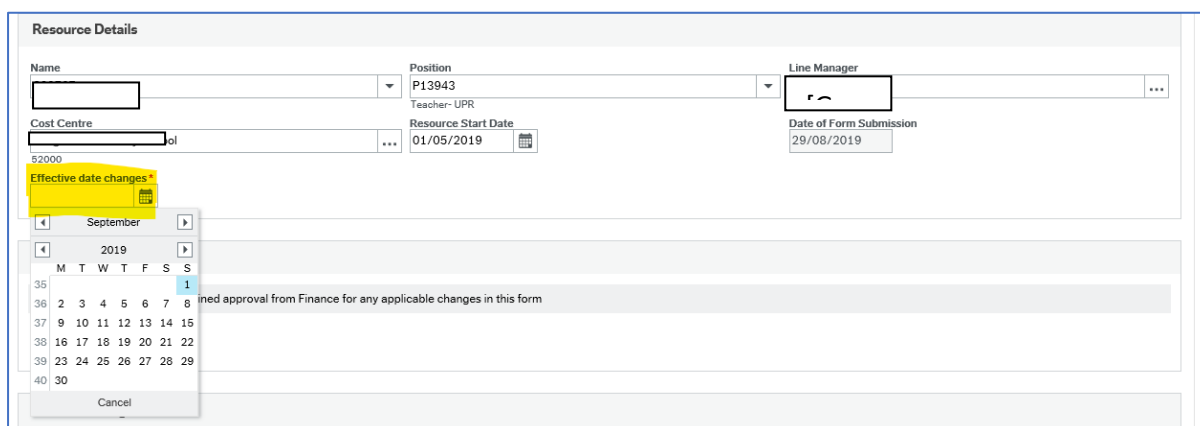
Line Manager – this box will auto populate.

Cost Centre – this box will auto populate.

Resource Start Date – this box will auto populate.

Date of Form Submission – this box will auto populate.

Effective date of change – use the calendar to choose the date you want the change to happen.



The screenshot shows the 'Resource Details' form with the 'Effective date changes' field highlighted in yellow. A calendar is open, showing the month of September 2019. The date 1st is selected. The calendar has a 'Cancel' button at the bottom.

STEP 4

TAB to the next section 'Finance Approval'.

Finance Approval - Click **YES** on the dropdown menu to confirm that your Head teacher has authorised this change. Tab key to the next section.

The screenshot shows a web form with two main sections. The first section is titled 'Finance Approval' and contains an information icon (i) followed by the text: 'Please confirm you have gained approval from Finance for any applicable changes in this form'. Below this is a dropdown menu labeled 'Finance Approval'. The second section is titled 'Position Change' and contains an information icon (i) followed by the text: 'Please confirm you have submitted a position change form if this contractual change requires a change to the position. HR may reject this change if this has not been submitted.' Below this is a dropdown menu labeled 'Change to Position'.

Position Change – click **NO** if this is a standard change to the Resource’s contract.

Click **YES** if this change is also a change to the position on the establishment. You will need to complete a Position Change Form first (see separate guidance).

NA – DON’T select this option.

STEP 5

Change Details

Click in the ‘Type of Change’ box and press **SPACE BAR** to display the list of options of changes:

Additional Increment – use this if an additional increment is being awarded. Use this option if the Resource has been put on the wrong pay point within a grade.

Additional Payment – this may be Honorariums/any TLR’s and Special Needs Allowance and some schools pay First Aid allowance.

Change in Hours – select if the hours are being increased or reduced.

Change in Working Schedule – this won’t be applicable as schools are on standard hours.

Change in Working Weeks – when a Resource has 5 years’ service or has additional PD days the working weeks may change. See table of working weeks in the ‘Business World HR Form Guide – New Starters’.

Change to Contract Type – e.g. changing from fixed term to permanent contract.

Extension to Fixed Term Dates – to extend a fixed term contract (if the contract is not extended the Resource will only be paid to the fixed term date). See ‘Business World HR - How To Report on Fixed Term Contract End Dates’.

Please do not print as this version is likely to change (September 2019, version 1)

Click on the option you want with the mouse and then press TAB on your keyboard. This will open and populate another tab:

The screenshot shows a form titled "Change Details". At the top, there is an information icon and the text "Please indicate the type of change". Below this is a dropdown menu labeled "Type of Change*". The dropdown is open, showing a list of options with their corresponding values:

Type of Change	Value
Additional Increment	40
Additional Payment	10
Change in Hours	20
Change in Working Schedule	70
Change in Working Weeks	80
Change to Contract Type	60
Extension to Fixed Term Dates	30

At the bottom of the form, there are two buttons: "Save as draft" and "Export".

If you select Additional Increment and press TAB, a new section will open for completion:

The screenshot shows the "Resource Details" form with the "Additional Increment" tab selected. The form is partially visible, showing the tab header and the beginning of the content area.

If you select Change in Hours and press TAB, a new section will open for completion:

The screenshot shows the "Resource Details" form with the "Change in hours" tab selected. The form is partially visible, showing the tab header and the beginning of the content area.

A new tab will open depending on the 'Type of Change' selected.

The tabs will appear as shown.

You are able to add as many changes that relate to the Resource in that position as are required. In the example shown below, complete the Change in Hours section, before opening another Type of Change.

The screenshot shows the "Resource Details" form with the "Change in hours" tab selected. The tab header "Change in hours" is circled in red. A blue arrow points from the text "Click on the change in hours header." to the circled tab header. The form content is partially visible, showing fields for Name, Position, Line Manager, Cost Centre, Resource Start Date, and Date of Form Submission (08/08/2019).

STEP 6

e.g: Change in Hours

Click on the change in hours header.

Current hours and current FTE – this box will be auto populated from the position.

Please do not print as this version is likely to change (September 2019, version 1)

TAB to New Contracted Hours - input 'New Contracted Hours' for support staff and 'New FTE' for teachers.

Enter the hours as a decimal e.g. 12 hours 30 minutes is 12.50, 15 minutes is 0.25, 45 minutes is 0.75.

Please refer to the Part Time Teachers Pay and Working Arrangements Guidance Appendix B 'Completing the Schools Part Time Teachers Calculator Guidance' on the Schools Learning Gateway to calculate and enter the FTE hours for a part time teacher. This is really important to ensure they are paid pro rata to a full time teacher at your school.

Change in Working Schedule

Use 32.5 for teacher/supply teacher/Deputy/Headteacher positions:

Work Schedule	
32.5	...
32.5 hours Teacher General WS	32.5TEACHERGEN
32.5 Hrs (5.5 / 7.5 / 7.5 / 7.5 / 4.5 / 0 / 0)	32.5-5575757545
32.5 Hrs (6.5 / 0 / 6.5 / 0 / 6.5 / 6.5 / 6.5)	33-65N65N656565
32.5 Hrs (6.5 / 6.5 / 6.5 / 6.5 / 6.5 / 0 / 0)	32.5-66666NN
Rolling 2 Week - 0 hrs (0 / 0 / 0 / 0 / 0 / 0 / 0) - 32.5 hrs (6.5 / ...	R2 -0032.5

Use 37 hours standard for everyone else:

Position*	
Teaching Assistant L1	
Work Schedule	
37	...
37 Hrs (0 / 0 / 7.4 / 7.4 / 7.4 / 7.4 / 7.4)	37-N6177777
37 Hrs (0 / 9.5 / 9.5 / 9.5 / 9.5 / 0 / 0)	37-N65656565
37 Hrs (0 / 7.4 / 7.4 / 7.4 / 7.4 / 7.4 / 0)	37-N07474747474
37 Hrs (0 / 9.25 / 9.25 / 9.25 / 9.25 / 0 / 0)	37-N6292929292
37 Hrs (10 / 8.5 / 10 / 8.5 / 0 / 0 / 0)	37-1818NN
37 Hrs (5.29 / 5.29 / 5.29 / 5.29 / 5.29 / 5.29 / 5.29)	37-5555555
37 Hrs (6 / 6 / 5 / 5 / 5 / 5 / 5)	37-6655555
37 Hrs (6 / 9.5 / 6 / 9.5 / 6 / 0 / 0)	37-69666NN
37 Hrs (7 / 8 / 8 / 8 / 8 / 5 / 3)	37-1555555
37 Hrs (7 / 7 / 8 / 8 / 0 / 0 / 0)	37-77788NN
37 Hrs (7.25 / 7.25 / 7.25 / 7.25 / 8 / 0 / 0)	37-7778NN
37 Hrs (7.4 / 7.4 / 7.4 / 0 / 0 / 7.4 / 7.4)	37-7474747474
37 Hrs (7.4 / 7.4 / 7.4 / 7.4 / 7.4 / 0 / 0)	37-7474747474NN
37 Hrs (7.5 / 7.25 / 7.5 / 7.25 / 7.5 / 0 / 0)	37-7575757575NN
37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 7.7 / 0 / 0)	37-77777NN
37 Hrs (7.5 / 7.5 / 7.5 / 7.7)	37-85757575
37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 0 / 0)	37-7575757575NN
37 Hrs (7.5 / 7.5 / 7.5 / 7.5 / 0 / 0)	37-7575757566NN

Variable Hours Contract – use this if a teaching assistant is covering a supervisory assistant role too.

Resource Details | Change in hours

Change in hours

Please input the current contract hours if you are only changing the work schedule. You should aim to always choose from the available work schedules where possible, if you cannot, please specify below in additional information the work schedule in detail. HR will scrutinise any new schedule and reject any that are not genuinely new.

Current hours 13.00	Current FTE 10.00
New Contracted Hours 0.00	New FTE (if applicable) 0.00
Current Work Schedule 32.5 hours Teacher General WS 32.5TEACHERGEN	New Work Schedule
Variable Hours Contract If this is a Variable Hours Contract, please state the range of hours	Range of hours
Additional Information	
Question Do you wish to add another change as part of this change form?	Answer
Type of Change	

Additional Information – please add any additional information that may assist HR with your form.

STEP 7

Do you need to make another change to this position? Click **YES** if you need to change something else (e.g. make the fixed term contract permanent in this position).

For this example we chose Change contract type.

Press TAB to open new window tab

TAB to the New Contract Type

Press SPACEBAR for drop down options

See screen print

Resource Details | Change in hours | **Contract Type**

Contract Type

Current Contract Type P01	New Contract Type
Additional Information	
Question Do you wish to add another change as part of this change form ?	Answer
Type of Change	

Please select option of contract types below:

Contract Type	Code
Amber Casual	C03
Apprenticeship	APP
Casual	C01
Casual - Not worked cons months NOMO	C05
Casual - Potential Leaver	C06
Fixed Term Contract	FTC
Green Casual	C02
Permanent	P01
Red Casual	C04
Temp Teacher Temp in Grade	T06
Temporary	T01
Temporary Acting Up	T04
Temporary Maternity Cover	T02
Temporary Secondment	T05
Temporary Sickness Cover	T03
Variable Hours Contract	V01

New Contract Type

The highlighted options are the options to be used:

- Amber Casual – DON'T use this option.
- Apprenticeship – can be used.
- Casual – can be used.
- Casual Not worked cons months NOMO – DON'T use this option.
- Casual Potential Leaver – DON'T use this option.
- Fixed Term Contract – can be used, also use for secondments. Use when the end date is known.
- Green Casual – DON'T use this option.
- Permanent – can be used.
- Red Casual – DON'T use this option.
- Temp Teacher Temp in Grade - DON'T use.
- Temporary – can be used. Use when the end date is not known.
- Temporary acting up – DON'T use.
- Temporary Maternity Cover – can be used.
- Temporary Secondment – DON'T use.
- Temporary sickness cover – can be used.
- Variable hours contract – DON'T use.

STEP 8

If you are making a contractual change to an 'Additional Payment' follow this guidance.

Additional Payment

Additional Payment – select the End date the payment is to be paid to.

Additional Payment Type – press SPACE BAR for drop down list, select the one you want and TAB to additional information.

STEP 9

If you are making a contractual change to 'working weeks' follow this guidance.

Working Weeks

Current Weeks – this box will auto populate.

New Weeks per year – input the new working weeks – see the Table in the Business World Guidance 'HR Form Guide – New Starter Form' for which weeks to choose.

STEP 10

If you are making a contractual change to 'further fixed term contract' follow this guidance.

Extension to Fixed Term Contract

Current Employment Date – this will auto populate with the date the current fixed term will cease.

Press TAB

New End Date – use Calendar to select date you want the contract to cease.

Press TAB

FTC Justification – press SPACEBAR and select from the drop down bar the reason for the extension.

Add any additional information you want to assist with the form.

Resource Details | Additional Payment | Change in hours | Working Weeks | **Extension to Fixed Term**

Extension to Fixed Term

Curr Employment End Date: 31/12/2009 | New End Date: []

FTC Justification: Externally funded research project

Externally funded research project EF
Long Term Absence Cover AC
Maternity Cover MC
Project funding PF
Short Term Additional Support ST

Question: Do you wish to add another change as part of this change form? | Answer: No

Type of Change: []

TAB to the end of form if you don't want to make any more changes to this position.

STEP 11

Click **NO** if you do not need to make any further changes.

Question: Do you wish to add another change as part of this change form? | Answer: No

Type of Change: []

STEP 12

There is an option to **SAVE AS DRAFT** before submitting a form. **Make a note of the form number.**

Clear | Print preview | Submit form | **Save as draft** | Export

To reopen the form later, follow Step 1, then in the Form ID box, delete (NEW) and press the space bar, select the form you wish to reopen, use the TAB key to load the form.

Contractual Changes Form

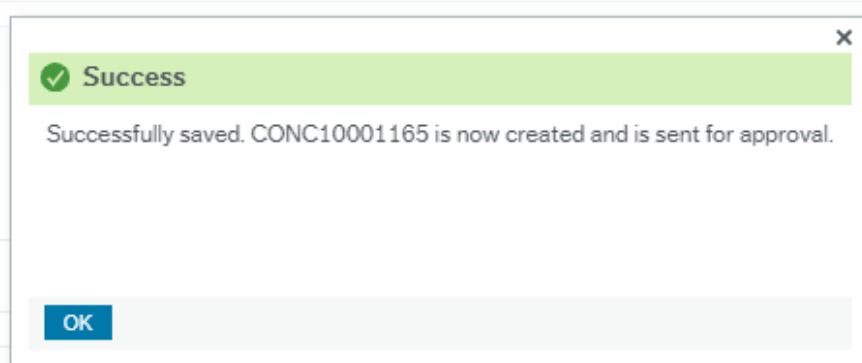
Contractual Changes Form

Form ID*: CONC10001166 | []
CONC10001166 Contractual Change Form

Form description*: Contractual Change Form

Form owner: []

When you are happy that the form has been fully completed and attachments have been added, press 'Submit Form' and it will work flow to your Headteacher for approval or direct to Payroll, depending on authorisations. **Make a note of the Form number.** You will receive a 'Success message'.



STEP 13

If the post holder has another position that you need to make changes to, you will need to open a new Contractual Change Form and select the relevant position and then input the changes.

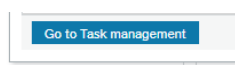
4. Headteacher Approval

If the Contractual Form has been completed by an Office Manager/Administrator, once the form is submitted it will generally workflow to the Headteacher for approval.

The Headteacher will be alerted that a task is waiting. This example shows that 5 tasks are awaiting action by the Headteacher:



Click on the number highlighted in red. Then click 'Go to Task Management':



A new window will open. On the left-hand side, the tasks can be grouped by Step or Process. Click Process.

Please refer to the New Starter Form which follows the same process for Headteacher approval and submission of forms to Payroll.

5. Additional Information

If you need to attach any documents to the Contractual Changes Form, please refer to 'Business World HR Forms – New Starters'.