04

Creating the School Workforce Census

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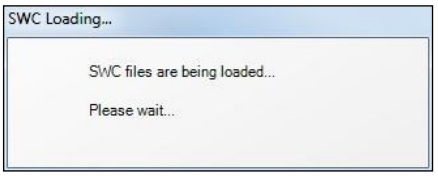
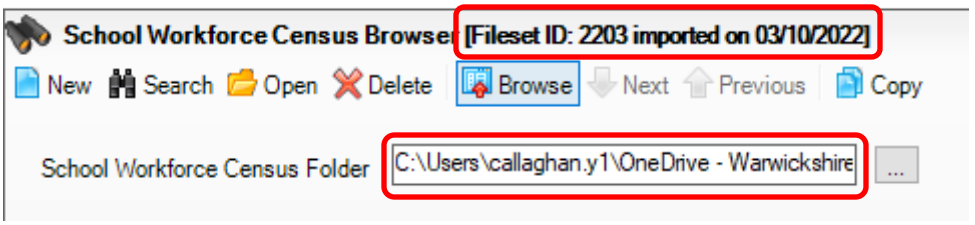
Please note - The following graphics, which include dates, names etc. are for illustrative purposes only

Step 1 – Checking School Workforce settings

- Select **Routines | Statutory Returns | School Workforce Census** to load the School Workforce Census.



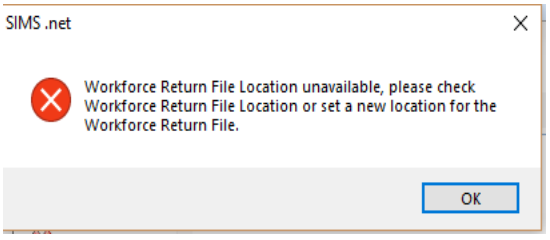
When the files are loaded, the **School Workforce Census** browser is displayed. [**Fileset ID 2203** or later] should be displayed in the browser header. Any updated filesets notifications will be emailed to schools.



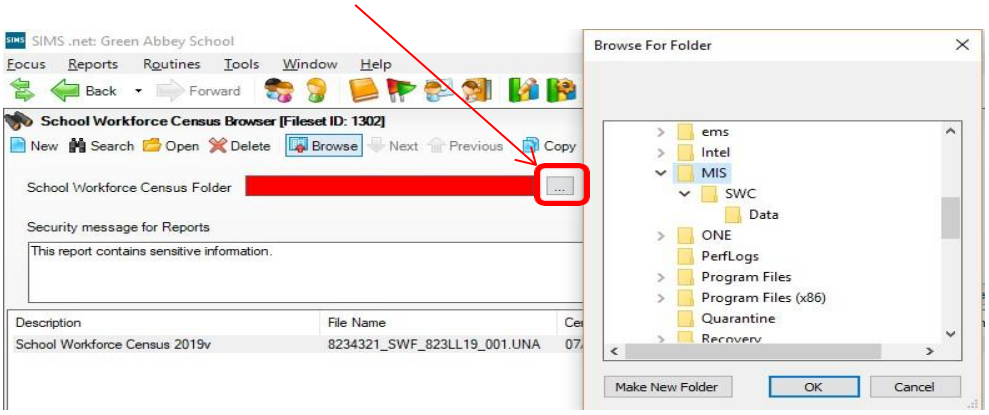
Ensure that the **School Workforce Census Folder** path is selected correctly. For example, the SWC path should read **AdminShared- Y\\MIS\SWC\Data**

Configuring the Census Folder

If the file path is not displayed correctly, the following message will appear, schools will need to alter the path. Follow the steps below:



- Click on the **Browse** button to display the **Browse for Folder** panel



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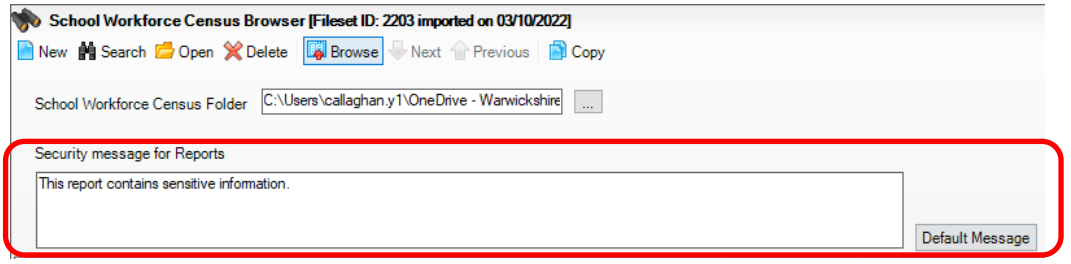
- Navigate to a location where the Census files are to be saved: usually **Y://MIS/SWC/Data**
- Click **OK** and **OK** again to confirm the change of the location of the folder.
- The path should now be displayed correctly.
- Make a note of the path, you will need it when uploading your Dry Run and final return to **COLLECT**

***NB**: Should schools need to change the location of the folder, ensure that only authorised personnel have access, as the folder will contain sensitive data*

Specify the Security Message for Reports



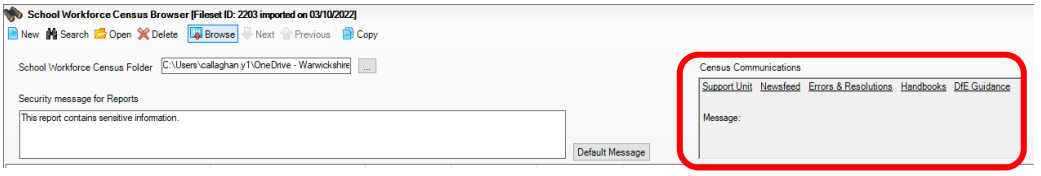
The **Security message for Reports** panel, the text displayed is included in the header of each report that will be produced later.

The default text "**This report contains sensitive information**" may be edited, if required.

To change the message, overtype with the text required. If the original message is required, click on the **Default Message** button.

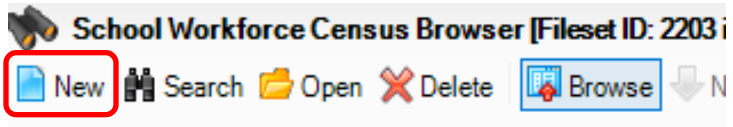
Census Communications

A new area within the browse section is Census Communications, here links to useful websites for Support Units, Newsfeed, Errors & Resolutions, handbooks and DfE Guidance



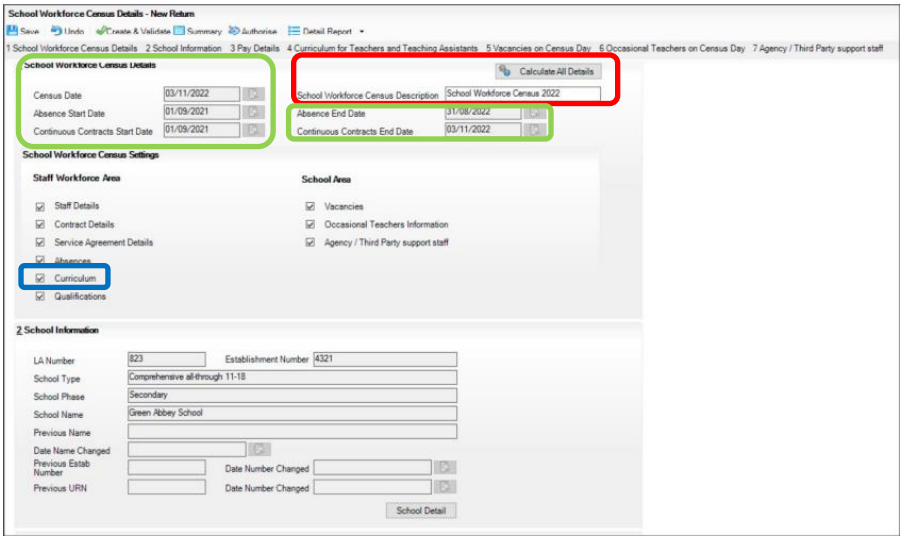
Step 2 - Creating a New School Workforce Census

- Click **New** from the top menu bar.



Panel 1 - School Workforce Census Details/School Workforce Census Settings

The **School Workforce Census Details** and the **School Workforce Census Settings** panel displays key collection dates and data for the CENSUS Return. These dates and data are read-only and **cannot** be edited (ringed in Green)

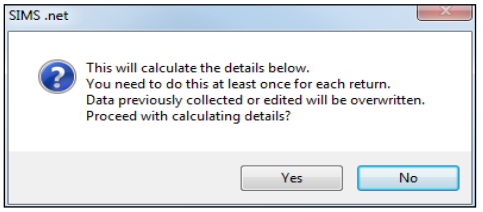


The **Calculate All Details** button is displayed in certain circumstances (ringed in Red) Under this you will find the '**School Workforce Census Description**' box, by default it will display **School Workforce Census 2023**. This field can be edited, and is particularly useful when distinguishing between dry runs and actual **CENSUS** Returns by entering a different version no. e.g. **School Workforce Census 2023v1**

The **Curriculum** option (ringed in Blue) is displayed for **Secondary and All-Through schools only.**

Click on the 'Calculate All Details' button to populate the applicable panels on the **School Workforce Census Details**. Enabling you to work on the data.

- Click **Yes** to the following message



Primary, Junior, Infant & Special Schools only

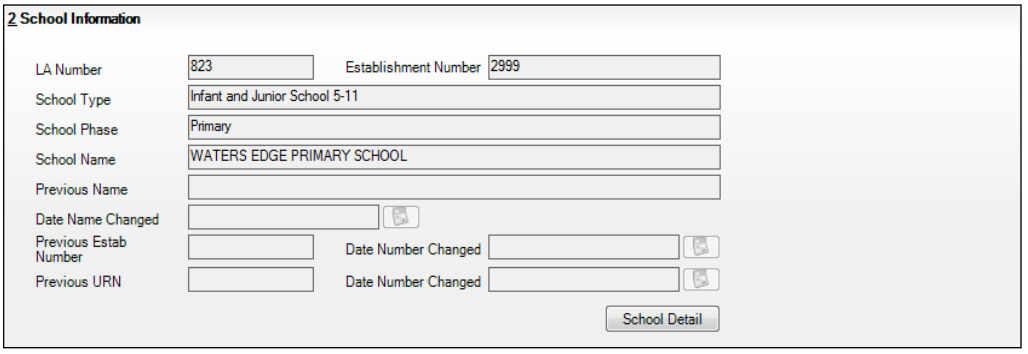
NB: The **Calculate All Details** button will only be displayed if the **Allow editing of Base Pay** box under **Tools/Setups/Statutory Return Tools/School Workforce Census Settings** has been checked **(see** Book **02 – Before you Begin)**

IMPORTANT: Unless schools need to create a brand-new Census, the **Calculate All Details** routine must **NOT** be used again, as any manual changes made in the calculated panels will be overwritten and will have to be re-entered.

*The CENSUS Return can be saved at any point by clicking the **Save** button.*

Panel 2 - School Information

The **School Information** panel displays read-only information. **Ensure** the details are correct for the school. (If School Details displayed are incorrect, see Book **02 – Before you Begin** page 2 for further advice)



Panel 3 - Pay Details

Non-Leadership and **Leadership** panels will only be displayed if a tick has been entered into the **Allow editing of Base Pay** in the **School Workforce Census Settings (**see Book **02 – Before you Begin** page 4 for further guidance**)**

The pay details are retrieved/calculated from SIMS Personnel and displayed in the **Pay Details** panel.

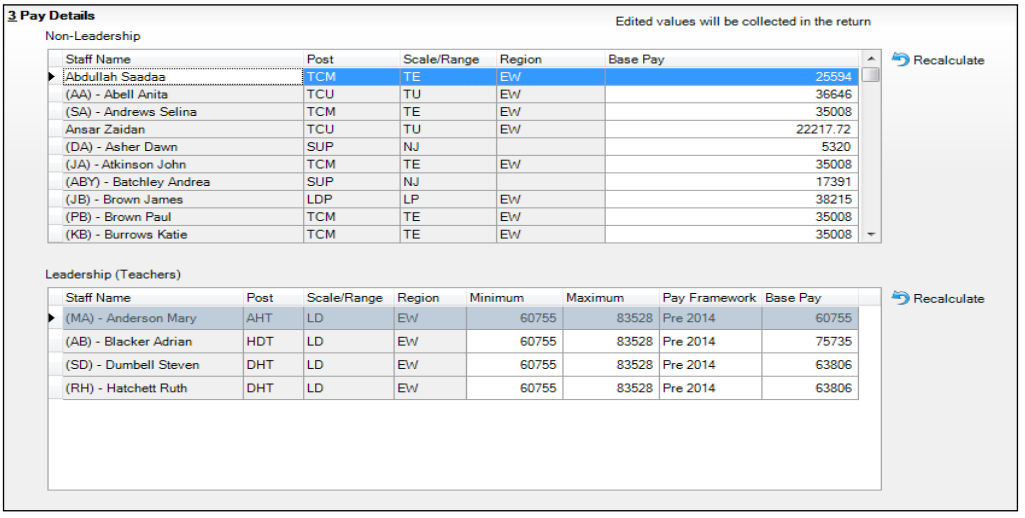
NB:

- *Base pay for part-time staff must be reported as <u>the actual annual salary</u> and <u>not</u> the full-time equivalent.*
- *Base pay is not collected for staff paid on a daily rate*
- *Base Pay does not include any Allowance payments*
- Base Pay is not collected for closed contracts

The panel where the **Base Pay** is displayed can be edited, if required, e.g. Academies that do not use the National Pay Scales might need to edit the pay details.

IMPORTANT if schools need to edit the **Base Pay** column, do not click on the **Recalculate** button as any manual changes will be lost.

3 Pay Details– Non-Leadership



3 Pay Details

Edited values will be collected in the return

Non-Leadership

Staff Name	Post	Scale/Range	Region	Base Pay
Abdullah Saadaa	TCM	TE	EW	25594
(AA) - Abell Anita	TCU	TU	EW	36646
(SA) - Andrews Selina	TCM	TE	EW	35008
Ansar Zaidan	TCU	TU	EW	22217.72
(DA) - Asher Dawn	SUP	NJ		5320
(JA) - Atkinson John	TCM	TE	EW	35008
(ABY) - Batchley Andrea	SUP	NJ		17391
(JB) - Brown James	LDP	LP	EW	38215
(PB) - Brown Paul	TCM	TE	EW	35008
(KB) - Burrows Katie	TCM	TE	EW	35008

Recalculate

Leadership (Teachers)

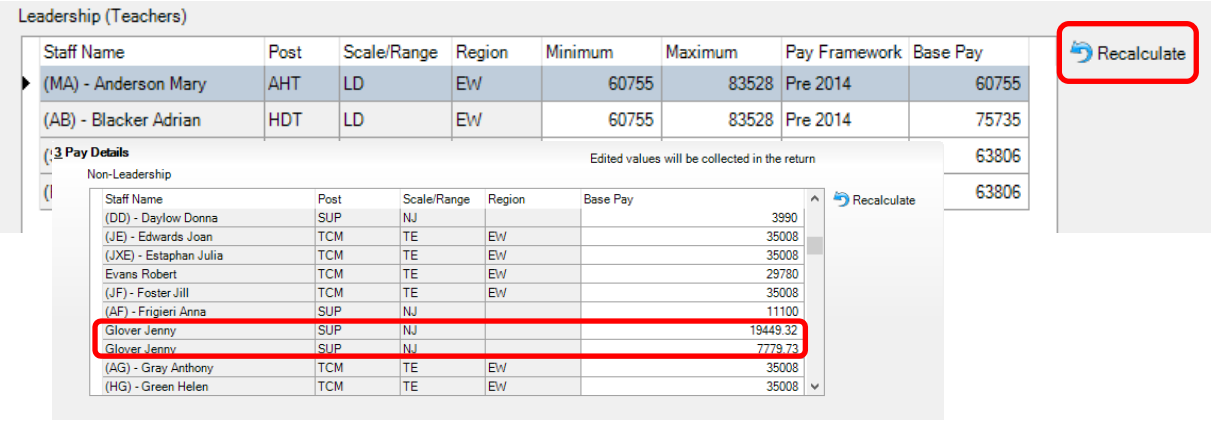
Staff Name	Post	Scale/Range	Region	Minimum	Maximum	Pay Framework	Base Pay
(MA) - Anderson Mary	AHT	LD	EW	60755	83528	Pre 2014	60755
(AB) - Blacker Adrian	HDT	LD	EW	60755	83528	Pre 2014	75735
(SD) - Dumbell Steven	DHT	LD	EW	60755	83528	Pre 2014	63806
(RH) - Hatchett Ruth	DHT	LD	EW	60755	83528	Pre 2014	63806

Recalculate

It is possible for a staff member to appear twice in the panel: For example, Jenny Glover a Teaching Assistant, who is also a Midday Supervisor is displayed twice as she has two contracts.

3 Pay Details – Leadership (Teachers)

Each leadership teacher has a basic salary range within which they can expect to be paid while they remain in the same post at the same school.



Leadership (Teachers)

Staff Name	Post	Scale/Range	Region	Minimum	Maximum	Pay Framework	Base Pay
(MA) - Anderson Mary	AHT	LD	EW	60755	83528	Pre 2014	60755
(AB) - Blacker Adrian	HDT	LD	EW	60755	83528	Pre 2014	75735
							63806
							63806

Recalculate

3 Pay Details

Edited values will be collected in the return

Non-Leadership

Staff Name	Post	Scale/Range	Region	Base Pay
(DD) - Daylow Donna	SUP	NJ		3990
(JE) - Edwards Joan	TCM	TE	EW	35008
(JXE) - Estaphan Julia	TCM	TE	EW	35008
Evans Robert	TCM	TE	EW	29780
(JF) - Foster Jill	TCM	TE	EW	35008
(AF) - Frigieri Anna	SUP	NJ		11100
Glover Jenny	SUP	NJ		19449.32
Glover Jenny	SUP	NJ		7779.73
(AG) - Gray Anthony	TCM	TE	EW	35008
(HG) - Green Helen	TCM	TE	EW	35008

Recalculate

- The **Pay Framework**, under which the Leadership teachers are paid, is calculated from SIMS Personnel but can be edited, if required. Select from the drop-down list:
- **Pre 2014** framework (for contracts with a start date before 01/09/2014).
- **2014** framework (for contracts with a start date from 01/09/2014).

Recalculate

If amendments to a staff Contracts in SIMS Personnel have been made, click on the **Recalculate** button (ringed in Red) to pull through the data to the **Pay Details** panel for either **Non-Leadership** or **Leadership (teachers)**,

Leadership (Teachers)

Staff Name	Post	Scale/Range	Region	Minimum	Maximum	Pay Framework	Base Pay
(MA) - Anderson Mary	AHT	LD	EW	60755	83528	Pre 2014	60755
(AB) - Blacker Adrian	HDT	LD	EW	60755	83528	Pre 2014	75735
(SD) - Dumbell Steven	DHT	LD	EW	60755	83528	Pre 2014	63806
(RH) - Hatchett Ruth	DHT	LD	EW	60755	83528	Pre 2014	63806

Recalculate

Primary/Infant/Junior Schools may now continue to **Step 3 – Creating and Validating the Census**

Secondary's Only please continue to complete Panel 4

Panel 4 – Curriculum for Teachers and Teaching Assistants

4 Curriculum for Teachers and Teaching Assistants

Staff Name	General Subject	Hours Taught	Year Group Taught
(AA) - Abell Anita	(PSH) - Personal Social & Health Education (PSHE)	1	Curriculum Year 10
(AA) - Abell Anita	(SCI) - Science	4	Curriculum Year 11

***NB**: To minimise manual correcting of staff details, schools may wish to **Create** and **Validate** the Census at this stage to populate/update this panel.*

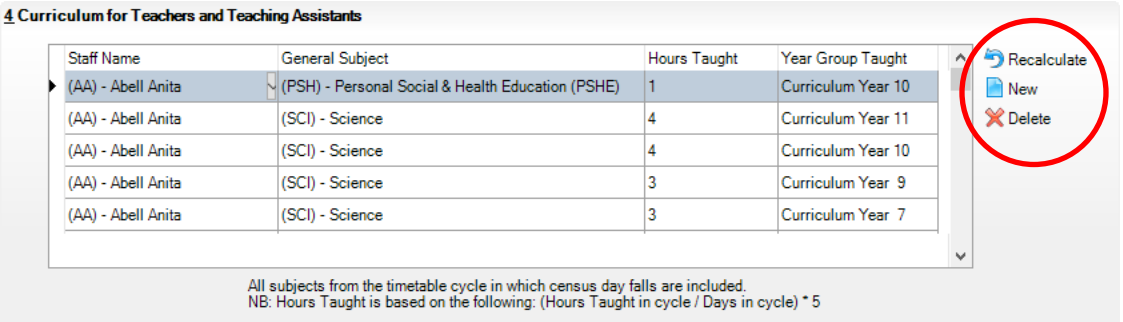
***NB:** The **Curriculum for Teachers and Teaching Assistants** panel is only populated if the timetable has been transferred from Nova-T into the relevant academic year in SIMS and if the subject codes have been mapped to DfE subjects. (See Book **02 - Before you Begin** – Mapping subjects to DfE codes)*

***NB:** Should schools need to **Add/Edit** staff in SIMS, SIMS must be restarted for their name to be available for selection from the **Staff Name** drop-down list.*

If after creating and validating, the Curriculum for Teachers panel is still missing staff members, schools may need to update Nova T. Once this has been done, click the **Recalculate** button to bring through the records (ringed in Red).

Curriculum records may be added manually to this list. For example, some staff may teach outside of the normal timetable, e.g. special support units, and will not be included here. To add a curriculum record, click the **New** button.

Please note that the description of the method used to calculate the hours is based on the DfE specification.



- Click **New** to display an additional row in the **Curriculum for Teachers and Teaching Assistants** panel.
- Click the **Staff Name** cell, select the required member of staff from the drop-down list.
- Click the **General Subject** cell, select the required subject, e.g. **(ENG) - English**, from the drop-down list.

***NB**: Subject codes displayed are the DfE subject codes, not the school's timetable subject codes.*

***NB**: Records are required on hours per National Curriculum Year group basis*

- Enter number of **Hours Taught**.
- Click **Year Group Taught** cell, then select the required National Curriculum Year from the drop-down list.

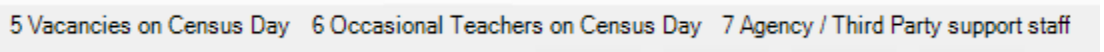
To permanently delete a manually entered record that is no longer required, highlight the record and then click the **Delete** button.

Records displayed in the **Curriculum for Teachers and Teaching Assistants** panel held in SIMS can be deleted temporarily but will be displayed again when the **Recalculate** or **Calculate All Details** button is clicked.

Step 3 - Creating and Validating the Census

As mentioned earlier in this document, the following 3 panels can only be dealt with on CENSUS day Thursday 2nd November 2023

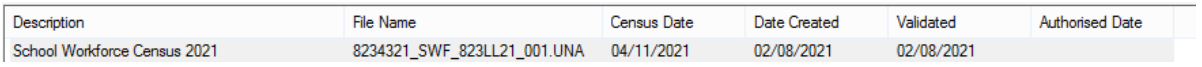
- **Vacancies on Census Day**
- **Occasional Teachers in school on Census Day**
- **Agency/Third Party Staff in school on Census Day**



Guidance on how to deal with these items is covered in **Book 05- Census Day Validating and Authorising your return**

If the School Workforce Census screen has been closed, use the following route to open, create and validate the Return.

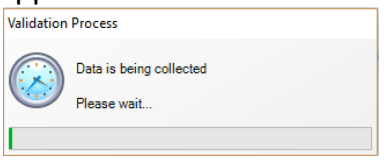
- Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.
- Highlight the CENSUS Return and either double-click or click **Open** to display the **School Workforce Census Details** page.



Description	File Name	Census Date	Date Created	Validated	Authorised Date
School Workforce Census 2021	8234321_SWF_823LL21_001.UNA	04/11/2021	02/08/2021	02/08/2021	

- Click **Create & Validate** to start the Create and Validate process. This may take some time.

- The following screen will appear as the Validation Process takes place



Step 4 - Resolve Errors and Queries

When the Create & Validate routine has finished, a list of Errors/Queries will be displayed.

Use **Appendix 03 –Errors and Validation Resolutions** for guidance on how to resolve Errors/Queries**.** This displays all the errors/queries in the CENSUS and how to fix them.

Failures/Errors are shown in RED:

NB: Typical error: **4228 – Qualified Status is missing for a teacher.** If the staff member **is** a teacher and the errors occur, then schools will need to add a qualification and check their post is correct.

Errors/Queries can be dealt one at a time using the **Validation Search**. Click on the drop-down arrow and select the Error/Query No. to be dealt with.

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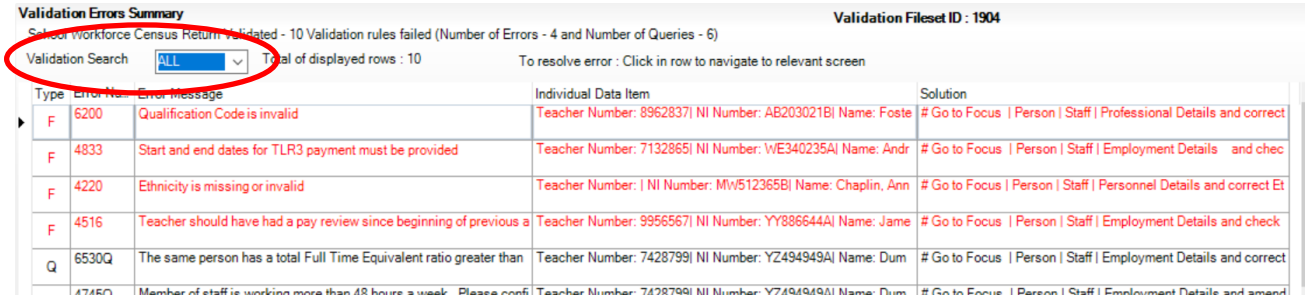
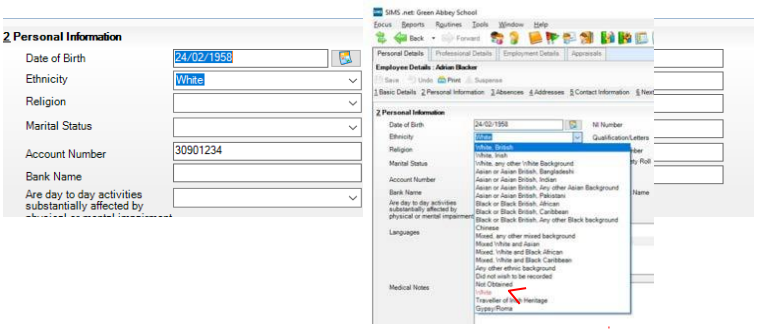


To correct a **Failure** for an individual Staff member, for example **Error 4220 Ethnicity is missing or invalid**

- Double-click on the appropriate **Error Message** row, the **Staff Detail** screen will open



The **Ethnicity** for this particular staff member, **White** is now invalid. Use the drop-down list to select the correct option e.g. **White British.** Or if the ethnicity is missing, select from the list offered.

- Make changes to the staff data as per the **Failure message. Save** the record.
- Close the **Staff Detail** screen and the **Validation Errors Summary** screen will be displayed once again. The error will remain on the validation failure list until the **Create & Validate** functionality has been run again.

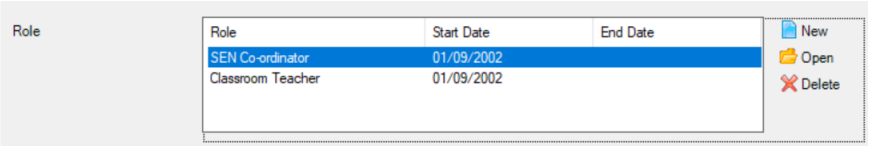
At this point you might find **Book 03 – Personnel Data collected from SIMS for the SWC** useful in assisting with adding/updating staff data, in relation to resolving Errors and Queries.

Queries are shown in BLACK:

All **Queries** will need to be checked and cleared if possible. If a query applies to an individual staff member, this will need to be dealt with in the same way as a **Failure**. **Double click** on the appropriate row and fix the query.

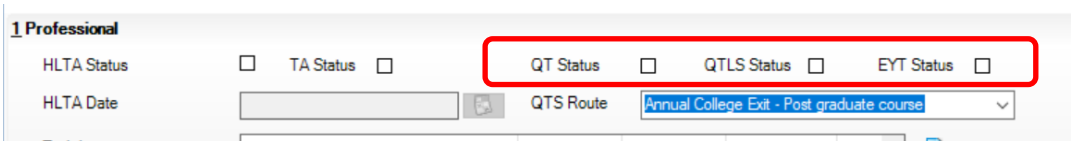
Common queries: **6550Q At least one staff record in this School's Return should show a role of SENCO (SEN Co-Ordinator) under a current Contract.** Where SENCO is missing, please add it to the appropriate Staff Record.

How to resolve: A Class Teacher who is the designated SENCO, the role can be added as an additional role within their Teacher Contract.



4470Q Qualified Status Incorrect with Pay Range Type –

How to resolve: Click into the query in the list, this will open the **Employment Details** tab, click on the **Professional Details** tab and enter a tick into *any or all of these boxes.



See **Book 03 – Personnel Data collected from SIMS**

If the query does not have an **Individual Data Item** indicated, refer to the **Solutions** column (to the right of the locations column) which will detail how to fix the query.

Continue to work through the list of errors until all **Failures** have been corrected and all **Queries** have been investigated.

NB: If a query is correct for the school a **Return Level Note** on the **COLLECT** website must be added.

Once all **Failures and Queries** have been resolved, **Create and Validate** again to clear the **Failures/Queries** from the list.

*If after using the Errors and Resolutions booklet a **Failure/**Query cannot be resolved, contact the **Service Desk (01926 414100)** and quote the error/query number.*

Step 5 – Running the Census Detail Reports

Running the **Detail** Reports enables schools to check Personnel data.

For example:

- *Missing Contracts/Service Agreements,*
- *Absences, Absence end dates if applicable, Working days lost.*

Check the reports that all applicable personnel have been included and updated in SIMS Personnel,

When all data/amendments have been entered into SIMS Personnel, run the **create and validate** routine to pull through amended data then check the Detailed Reports. Repeat this process as many times as is necessary, until you are satisfied your data is correct.