

SIMS

Producing the School Workforce Census 2010 Return

Applicable to 7.132 Onwards

Handbook



CAPITA
CHILDREN'S SERVICES

Revision History

Version	Change Description	Date
Summer 2010 - v1.0	Initial Release	10/06/10

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Providing Feedback on Documentation

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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01 | Getting Started with the School Workforce Census Return

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Overview

The School Workforce Census Return focuses on staff data for both teachers and support staff with contracts or Service Agreements of one month or greater. The return covers basic staff information, contract information, service agreement information, curriculum, qualification and absence information.

The School Workforce Census 2010 Return collects the following data items for staff members:

- Staff details
- Contract details
- Service Agreement details
- Payment details
- Absence details
- Curriculum details for all records for all members of staff (except support staff) for whom data is supplied for Maths and Science subjects on the timetable system
- Qualification details for all teachers and teaching assistants.

The following school level data items are collected:

- Source at Census reference date
- Vacancies
- Occasional teachers
- Third party staff count

This handbook covers the information required by schools to complete the School Workforce Census 2010 Return. This return is due on 4 November 2010.

Where to Find More Information

In addition to this handbook, a preparation guide (which describes how to prepare your data for the School Workforce Census) and an Errors and Resolutions document (which provides suggestions on how to resolve any errors or warnings) are being prepared. These guides, together with any other useful information, can be found on the SupportNet website (<http://support.capitaes.co.uk>) by entering SWC10 in the **Site Search** field on the Home page and clicking the **Go** button.

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet. Copies can be obtained from SupportNet (<http://support.capitaes.co.uk>) by entering PERMLIST in the **Site Search** field on the Home page.

Carrying Out a Dry Run

Once the SIMS 2010 Summer Release has been installed, you can carry out one or more dry runs of the School Workforce Census. It is advisable to do this as early as possible, even if you know that your data has not yet been fully prepared or checked. The purpose of the dry run is to produce the Validation Errors Summary, which details the corrections that need to be made to your data.

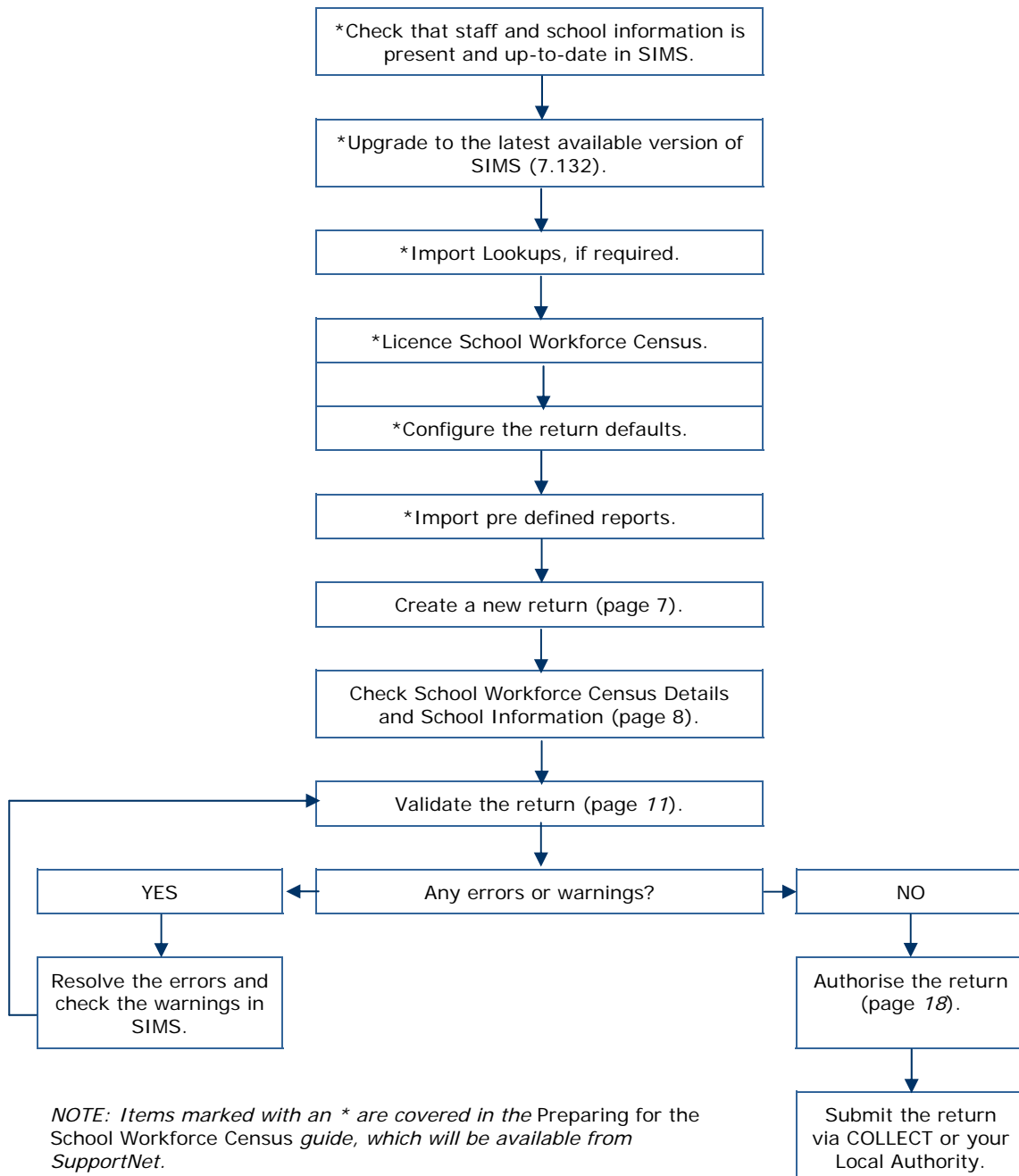
Setting Permissions

Users with Personnel Officer permissions can run and edit the School Workforce Census, providing that the licence has been applied. In addition, they are able to correct data for vacancies, staff and any curriculum information that fails validation.

Please contact your System Manager if you are unsure whether you have the required permissions.

For more information, please refer to the *System Manager* handbook.

Steps to Producing the School Workforce Census



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Configuring the School Workforce Census Defaults

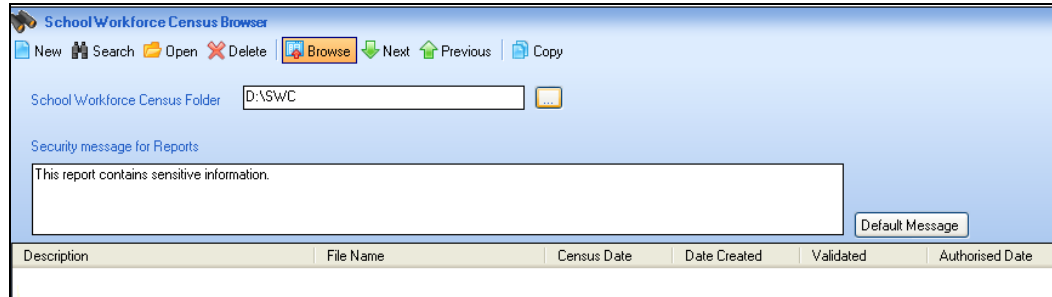
Before creating a School Workforce Census Return, the folder in which the return file is saved must be specified.



IMPORTANT NOTE: Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. census returns, imported and exported CTFs, etc.

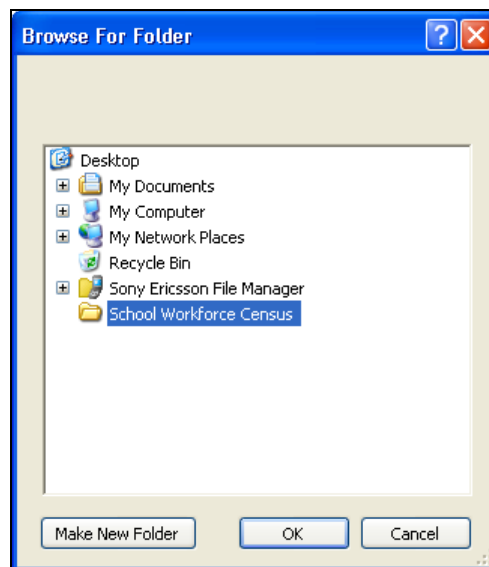
You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. The DCSF recommends ISO27001 as the standard for information security, a copy of which can be found at <http://www.itgovernance.co.uk/bs7799.aspx>. If you are in any doubt, you should consult with your IT Security Officer before proceeding.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.



2. Enter the new folder path in the **School Workforce Census Folder** field or click the adjacent **Browse** button to display the Windows® **Browse for Folder** dialog.

 *Browse button*



3. Navigate to the location of the required folder and highlight it. Alternatively, if a suitable folder does not exist, click the **Make New Folder** button and enter a suitable name.
4. Click the **OK** button to select or create a folder, to display its name in the **Schools Workforce Census Folder** field.



IMPORTANT NOTE: *If you are changing the location of the folder, ensure that authorised personnel only have access to the new folder, as it will contain sensitive data. For more information, please see the important note at the beginning of this section.*

Creating a New School Workforce Census

Before creating a new School Workforce Census return, ensure that all staff and school information is present and up-to-date in SIMS.

It is possible to create more than one return. This enables you to carry out dry runs so that you can check what data needs to be added or updated. Any unwanted returns can be deleted, providing they have not been authorised.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.
2. Click the **New** button to display the **School Workforce Census Details** page.



NOTE: The remainder of the steps to produce the School Workforce Census are carried out from the **School Workforce Census Details** page. However, you may need to visit other areas of SIMS to correct any errors generated when the return is validated.

Saving Your Work

Save your work at any time by clicking the **Save** button. The information in the School Workforce Census must be saved before the return can be validated.

Checking and Editing School Workforce Census Details

In the **School Workforce Census Details** panel of the **School Workforce Census Details** page, check that the details are correct.

School Workforce Census Details			
Census Date	<input type="text" value="04/11/2010"/>	School Workforce Census Description	<input type="text" value="SchoolWorkforceCensus2010"/>
Absence Start Date	<input type="text" value="01/09/2009"/>	Absence End Date	<input type="text" value="31/08/2010"/>
Continuous Contracts Start Date	<input type="text" value="01/09/2009"/>	Continuous Contracts End Date	<input type="text" value="31/08/2010"/>

The **School Workforce Census Description** displays the default name `School Workforce Census 2010`, which can be edited. This can be particularly useful when attempting to identify dry runs or copies of existing returns.

The **Census Date**, **School Workforce Census Description**, **Absence Start Date**, **Absence End Date**, **Continuous Contracts Start Date** and **Continuous Contracts End Date** default to the correct values and cannot be edited.

Checking and Editing School Information

The **School Information** panel of the **School Workforce Census Details** page displays read-only school details recorded in the **School Details** page of SIMS (via **Focus | School | School Details**). The **School Information** should always be checked.

LA Number	823	Establishment Number	4321
School Type	Comprehensive all-through 11-18		
School Phase	Secondary		
School Name	Green Abbey School		

Buttons: School Detail, Calculate All Details

1. If any details are missing or incorrect, click the **School Detail** button to display the **School Detail** dialog.

School Name: Green Abbey School

LA: 823 Central Bedfordshire

Establishment Number: 4321

Unique Reference Number: [Empty]

School Phase: Secondary

School Type: Comprehensive all-through 11-18

School Governance: Community

Intake Type: Comprehensive

Boarding Pupils:

Nursery Class:

Special Class or Unit:

Head Teacher: Mr Adrian Blacker

Curriculum Years: 7, 13

Pupil Genders: Coeducational

Gender on entry to school: Coeducational

Main Contact: Mr Adrian Blacker


Buttons: Save, Undo, Help, OK, Cancel

2. Add or amend any required information. Click the **Save** button then click the **OK** button to return to the **School Workforce Census Details** page, where the updated details are displayed.


Calculating Details

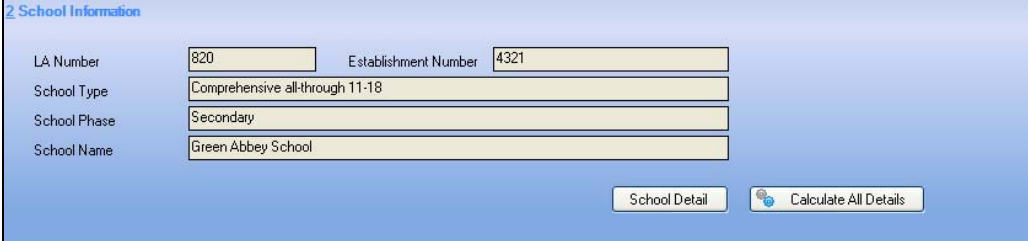
The process of calculating details extracts the required information from SIMS and displays the results in the various panels on the **School Workforce Census Details** page. This process does not update the **Vacancies on Census Day**, **Occasional Teachers on Census Day** or **Third Party Staff on Census Day** or panels.

You must calculate all details at least once to populate the return.

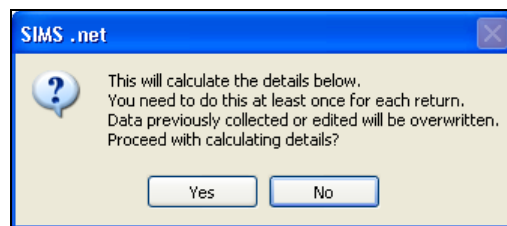
 **IMPORTANT NOTE:** If you subsequently need to calculate all details again, any manual amendments that you have made on the **School Workforce Census Details** page are overwritten and will need to be re-entered if required.

1. Secondary school users should now click the **Calculate All Details** button in the **School Information** panel.

 **NOTE:** The **Calculate All Details** button is available for Secondary schools only. All other school phases should continue to the next panel.



A dialog displays a message warning that any existing data shown in the **School Workforce Census Details** page will be overwritten.



2. Click the **Yes** button to calculate the details, noting that any manual amendments will be overwritten.

Progress is reported on the status bar at the bottom of the screen. Once complete, the panels on the **School Workforce Census Details** page are populated with the data extracted from SIMS.

3. The return can be saved at any point by clicking the **Save** button.

Checking and Editing Curriculum Details

Once the **Calculate All Details** button is clicked, the **Curriculum for Teachers and Teaching Assistants** panel is displayed.

IMPORTANT NOTE: Once you have recorded a member of staff as a teacher or teaching assistant, you must restart SIMS in order to view their name in the **Staff Name** column. This enables their details to be added to the **Curriculum for Teachers and Teaching Assistants** panel.

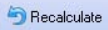


NOTES: This panel is only displayed for Secondary schools. In order to minimise rework for correcting staff details, you may choose to validate the details before editing the **Curriculum for Teachers and Teaching Assistants** panel. For more information, please see *Validating the School Workforce Census* on page 14.

The **Curriculum for Teachers and Teaching Assistants** panel will only be 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 DCSF subjects. Please refer to the *Preparing for the 2010 School Workforce Census handbook*, available from SupportNet.

Records can 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.

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

Staff Name	Staff Code	Subject Code	General Subject	Hours Taught	Year Group Taught
Chase Lynn	LC	ECC	Economics	15	Curriculum Year 13
Dumbell Steven	SD	GEN	General Studies	30	Curriculum Year 13
Miandad Sunil	SM	HIS	History	0	Curriculum Year 12
Anderson Mary	MA	CHM	Chemistry	30	Curriculum Year 11

 Recalculate
 Add
 Delete

All subjects from the timetable cycle in which census day falls are included.
 NB: Hours Taught is based on the following: (Hours Taught in cycle / Days in cycle) * 5

1. Click the **Add** button to add a new record. The next free row in the **Curriculum for Teachers and Teaching Assistants** panel becomes editable.
2. Click in the **Staff Name** column and select the member of staff from the drop-down list. The **Staff Code** is automatically populated.
3. Click in the **Subject Code** field and select the required code, e.g. ENG from the drop-down list.

NOTE: The subject codes displayed are the DCSF subject codes, not the school's timetable subject codes.

4. The **General Subject** is automatically populated, although it is possible to select a different subject, for example if more than one subject has been linked to a DCSF Subject Code.
5. Enter the number of hours taught in the **Hours Taught** column.



NOTE: Records are required on hours per National Curriculum Year group basis.

6. Click in the **Year Group Taught** column and select the required National Curriculum Year.
7. To delete any manually entered record that is no longer required, highlight the line and click the **Delete** button.



*NOTE: If a line that was entered automatically is deleted, it is replaced when the **Recalculate** or **Calculate All Details** button is clicked. Any manually added records are permanently deleted.*

Editing the Vacancies on Census Day Panel

The **Vacancies on Census Day** panel enables you to add any current job vacancies that exist in your school. This information is not stored in SIMS, so it must be added manually. Each qualified teacher post (QTS) (permanent or a contract of one or more terms) that is vacant or temporarily filled on census day must be recorded. A vacant or temporarily filled post is defined as one that fulfils any of the following criteria:

- The vacant post is not covered.
- The post is covered temporarily by other staff within the school.
- The post is covered by a teacher on a contract of less than one term.
- The post is covered by a teacher on a contract of between one and three terms (except if the incumbent is on recognised long term absence, such as maternity leave).

The following posts should be included:

- Posts the school has tried to fill but were not filled on the Census day.
- Posts where an appointment has been made but was not in post on the Census day.
- Posts for all types of qualified teachers, from classroom teachers to head teachers.

Posts that are going to become vacant after the Census day, e.g. where a teacher has resigned but is serving notice, should not be included.

4 Vacancies on Census Day

Post Number	Post	Post Name	Subject Code	General Subject	Tenure	Temporarily Filled	Advertised
1	AST	Advanced Sk...	CHM	Chemistry	Full Time	Yes	Yes
2	TCH	Classroom te...	ECO	Economics	Part Time	No	No
3				<Select>			

New
Delete

1. Click the **New** button to add a new vacancy.
The **Post Number** is read-only and increments automatically when vacancies are added to the list.
2. Select the required **Post Name** from the drop-down list. This populates the **Post** field automatically with the appropriate code.
3. Select the required **General Subject** from the drop-down list. This populates the **Subject Code** field automatically with the appropriate code.
4. Indicate the **Tenure** of the vacancy by clicking in the cell and selecting **Full Time** or **Part Time** from the drop-down list.
5. If the vacancy has been **Temporarily Filled**, click in the cell and select **Yes** from the drop-down list. If it has not been temporarily filled, select **No**.
6. If the post has been **Advertised**, click in the cell and select **Yes** from the drop-down list. If it has not been advertised, select **No**.



NOTE: The page can be saved only if all of the columns have been completed.

Vacancies can be deleted by highlighting them and clicking the **Delete** button.

Checking and Editing Occasional Teachers Information

The **Occasional Teachers on Census Day** panel displays fields for you to enter the number of occasional teachers in the following categories:

- Number of Occasional Teachers With QTS
- Number of Occasional Teachers Without QTS
- Number of Occasional Teachers Where QTS Not Known.

5 Occasional Teachers on Census Day

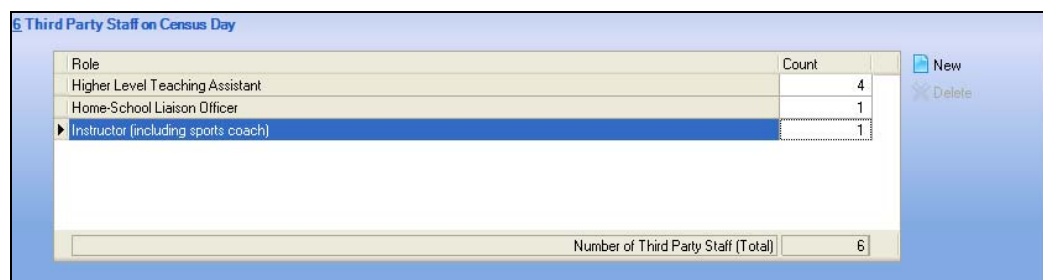
Category Description	Count
▶ Number of Occasional Teachers With QTS	0
Number of Occasional Teachers Without QTS	0
Number of Occasional Teachers Where QTS Not Known	0
Number of Occasional Teachers (Total)	
	0

The **Number of Occasional Teachers (Total)** cannot be edited.

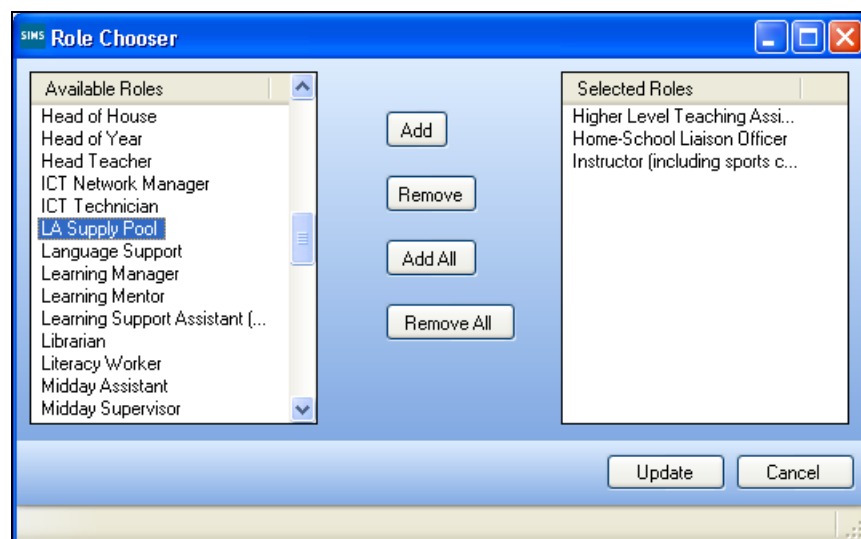
Recording the Third Party Staff Count

Schools are required to provide a total figure of how many occasional support staff or third party staff they employ. These staff are likely to be employed through a third party firm, for example food services staff working for a catering company or occasional staff who work for an agency.

The **Third Party Staff on Census Day** panel enables you to record information relating to any positions in your school that are filled by third party staff.



1. Click the **New** button to display the **Role Chooser** dialog.



2. Highlight the relevant position(s) in the **Available Roles** column and click the **Add** button to move them into the **Selected Roles** column.

Alternatively, click the **Add All** button to move all the **Available Roles** into the **Selected Roles** column. Click the **Remove All** button to clear the **Selected Roles** column and make your selections again.

3. Click the **Update** button when you have selected all the required roles. The **Roles** are displayed in the **Third Party Staff on Census Day** panel.
4. Enter the number of these positions that are filled by third party staff in the **Count** column.

The **Number of Third Party Staff (Total)** figure updates automatically as the **Count** column is completed.

Validating the School Workforce Census

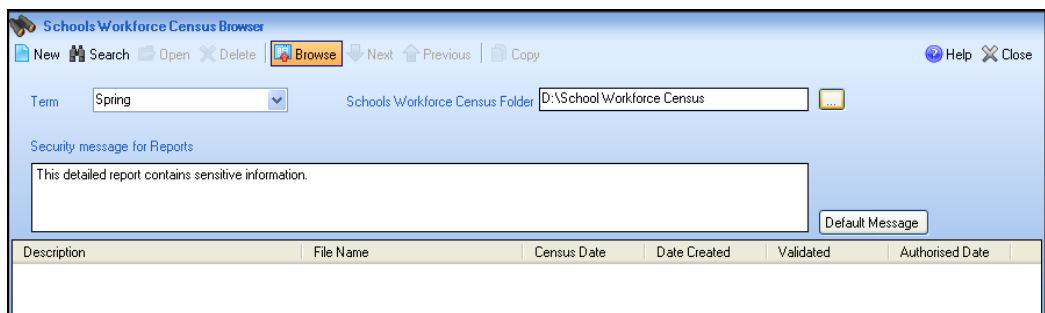
A School Workforce Census return must be validated and authorised before it can be sent to your Local Authority.

Validating the return creates an unauthorised School Workforce Census return file, which is then run through a set of DCSF rules. Once the validation is complete, a list of errors and warnings is displayed.

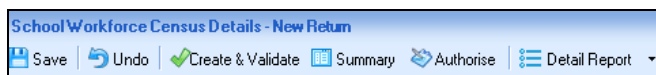
An error is caused by either missing or inaccurate data, whilst a warning highlights data that is unusual or not as expected, e.g. a member of staff's age falling outside the expected range.

Once the return has been validated, detailed reports can be produced that can be used as an aid to resolving any issues. Please see *Producing Detail Reports* on page 16 for more information.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.



2. Search for then double-click the required return to open it.
3. Click the **Create & Validate** button to begin the validation process, which may take some time depending on the number of staff.



Resolving School Workforce Census Failures and Queries

After creating and validating the School Workforce Census file, a list of any failures and queries is displayed in the **Validation Errors Summary** panel at the bottom of the **School Workforce Census Details** page.

Type	Error Number	Error Message	Individual Data Item	Solution
F	4220	Ethnicity is invalid	Teacher Number: 9290003 NI Number: NB121235B N	# Go to Focus Person Staff and correct Ethnicity
F	4220	Ethnicity is invalid	Teacher Number: 9773452 NI Number: NB945544D N	# Go to Focus Person Staff and correct Ethnicity
F	4220	Ethnicity is invalid	Teacher Number: 9443009 NI Number: NB124455C N	# Go to Focus Person Staff and correct Ethnicity
F	4160	Member of workforce with missing NI Number	Teacher Number: NI Number: Name: Lester, Sabina.	# Go to Focus Person Staff and provide NI Numb
F	4100	Qualified Teacher with Teacher Number missing	Teacher Number: NI Number: Name: Lester, Sabina.	# Go to Focus Person Staff and add Teacher Nu

The errors summary displays the following information:

Column	Description
Type	Indicates whether the error is a failure (indicated by an F) which must be corrected, or a warning/query (indicated by a Q).
Error Number	Displays the error number.
Error Message	Displays the text of the error message.
Individual Data Item	Displays the specific record containing the error.
Solution	Suggests how the error can be corrected.

- To view a particular error number, select the error number from the drop-down list at the top of the panel. The panel displays records relating to the selected error number.
- Use the scroll bars to view all the errors/warnings.
- Click any row to navigate to the appropriate record (where applicable). This launches the specific area in SIMS where the record can be amended/corrected.
- Change the order of the summary by clicking the appropriate column heading. The width of the columns can be changed by dragging the dividing line between the column headings until the required size is achieved.
- The summary can be printed by clicking the **Report** button. A high number of errors generates a high number of printed pages.

The errors listed are displayed until they are corrected and the validation routine is run again.

In addition to the Validation Errors Summary, a document has been produced, which contains a list of the errors/queries that can be generated. This document also includes explanations and information on how to resolve the error or if the error can be ignored. In addition, the document helps to identify the order in which errors should be corrected.

The *School Workforce Census Errors and Resolutions* document is available on SupportNet. Enter SWC10 in the **Site Search** field on the **Home** page and click the **Go** button to find the latest version.

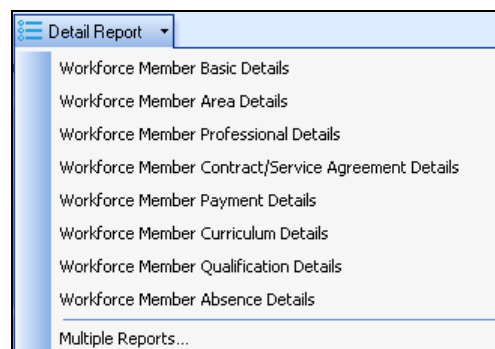
Producing Detail Reports

Detail Reports can be used to check the data that is used to generate the School Workforce Census return. They can be produced as soon as the return has been validated.

The following reports are currently available:

- Workforce Member Basic Details
- Workforce Member Area Details
- Workforce Member Professional Details
- Workforce Member Contract/Service Agreement Details
- Workforce Member Payment Details
- Workforce Member Curriculum Details
- Workforce Member Qualification Details
- Workforce Member Absence Details.

From the **School Workforce Census Details** panel, select the required report from the **Detail Report** drop-down menu.



The required report is displayed in your Internet browser, as shown in the following graphic.

School Workforce Census - 2010 (Workforce Member Staff Basic Details)								
Security Message : This report contains sensitive information.								
Report Criteria: Members of staff included in the SWC return								
<ul style="list-style-type: none"> • staff in regular service on census day • staff with regular service in the collection period 1/9/2009 – 31/8/2010 								
Total number of staff = 86								
Filename: 8234321_SW3_823LL10_001.UNA				Report Created Date: 19-04-2010 13:25:57				
Surname	Forename	Middle Name(s)	NI Number	Former Surname	Gender	DOB	Ethnicity	Disability
Abell	Anita	-	BC172692B	-	F	11-02-1963	White, British	Information not yet obtained
Anderson	Mary	Elizabeth	YY223344A	-	F	11-03-1966	White, British	Information not yet obtained
Andrews	Selina	-	WE340235A	Andrews	F	13-12-1955	White, British	Information not yet obtained
Asher	Dawn	-	MW365527B	-	F	12-02-1968	White, British	Information not yet obtained
Atkinson	John	Henry	WL300044D	-	M	01-08-1969	UNK	Information not yet obtained
Batchley	Andrea	-	NJ652736A	-	F	21-03-1965	White, British	Information not yet obtained
Blackler	Adrian	-	ZN248685D	-	M	24-02-1944	UNK	Information not yet obtained
Brown	James	-	PN802417A	-	M	09-11-1957	White, British	Information not yet obtained
Brown	Paul	Simon	YZ464646A	-	M	28-08-1970	White, British	Information not yet obtained
Burrows	Katie	-	HG095368A	-	F	19-08-1973	White, British	Information not yet obtained
Burton	Fiona	-	YZ919705A	-	F	21-01-1968	White, British	Information not yet obtained
Buxton	Abigail	-	MW337654B	-	F	17-03-1965	White, British	Information not yet obtained
Chase	Lynn	-	TS240238A	-	F	28-05-1963	White, British	Information not yet obtained
Coombes	Jane	-	MW273351B	-	F	06-02-1950	White, British	Information not yet obtained
Darby	Jane	-	YZ474747A	-	F	16-11-1960	White, British	Information not yet obtained
Davidson	Richard	-	YZ484848A	-	M	23-05-1958	White, British	Information not yet obtained
Davies	Geraint	-	PG819193A	-	M	11-07-1964	White, British	Information not yet obtained
Daylow	Donna	-	MW365293B	-	F	11-06-1965	White, British	Information not yet obtained
Dumbell	Steven	-	YZ494949A	-	M	24-05-1953	White, British	Information not yet obtained
Edwards	Joan	-	ZN820322D	-	F	10-09-1962	White, British	Information not yet obtained
Estaphan	Julia	-	PR323707D	-	F	30-03-1960	Black or Black British, Caribbean	Information not yet obtained

Copying a Detail Report to a Spreadsheet

Copying the detail report to a spreadsheet application enables you to make use of additional functionality, such as column sorting, etc.

Drag the mouse across the area of the report you wish to copy, right-click and select **Export to Microsoft Excel** from the drop-down list.

Printing a Detail Report

1. Either select **File | Print** or click the **Print** button to display the **Print** dialog.



Print button

2. The paper selection, number of copies and print quality can be edited before clicking the **Print** button.

Closing the Detail Report

Click the **Close** button at the top-right hand corner of the page to close the report and return to the **School Workforce Census Details** page.



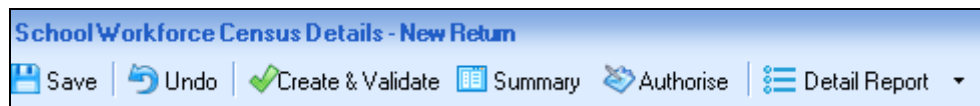
Close button

Authorising the School Workforce Census

A School Workforce Census must be authorised before it can be sent to your LA. Before authorising the return, you should ensure that all the information displayed on the **School Workforce Census Details** page is correct and does not require further editing.

Once a return has been authorised, it is no longer possible to edit any of the information on the **School Workforce Census Details** page. If you authorise a return and subsequently need to make amendments, you should either make a copy of the return and work on the copy, or create a new return.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.
2. Click the **Search** button.
3. Highlight a return that has been validated but not authorised and click the **Authorise** button at the top of the **Schools Workforce Census Details** page.



The file extension changes from .UNA to .XML.

Submitting the Return to the Local Authority

Once the School Workforce Census Return has been completed and authorised, it can then be submitted via COLLECT or your LA.

The authorised School Workforce Census return file is located in the folder previously specified in the **School Workforce Census** browser, e.g. S:\SWCENSUS.



NOTE: An authorised file cannot be edited. If you need to make changes to an authorised file, you must make a copy of the original file and work on the copy.

Copying a School Workforce Census

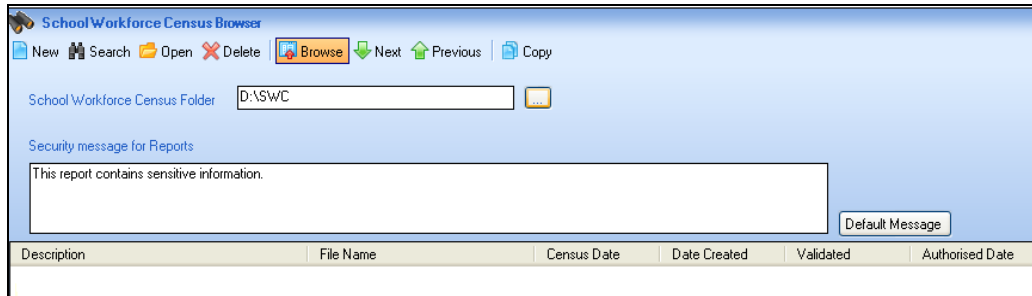
An existing School Workforce Census can be copied and saved as a new return whenever required. This enables a 'snapshot' of a return to be taken at any time and provides a backup of any manual changes that have been made to the return, for example, after recalculating details.

This functionality can also be used to make a copy of an authorised return to work on, e.g. if the LA requires the return to be resubmitted. Make the necessary corrections to the data and then create, validate and authorise the copied return.

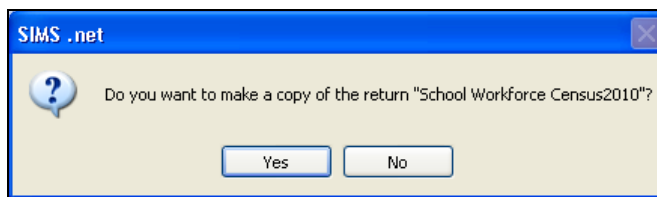


NOTE: It is not possible to copy a School Workforce Census if a return is already open in the **School Workforce Census Details** page.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.



2. Click the **Search** button.
3. Highlight the required file and click the **Copy** button to display the following message:



4. Click the **Yes** button to confirm the action.

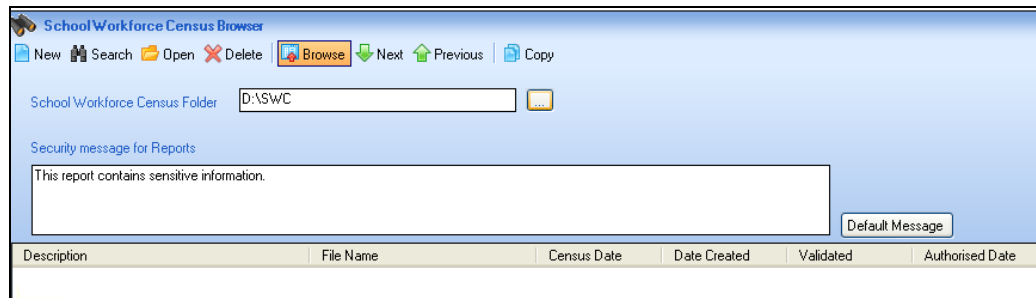
A copy is made and displayed in the **School Workforce Census** browser as Copy of <name of selected file>.

The **Description** of the copied file can be changed in the **School Workforce Census Details** panel on the **School Workforce Census Details** page.

Deleting a School Workforce Census

During the process of producing a School Workforce Census Return, a number of copies of the return may have been made, for example to save progress. Once a return has been authorised, it is advisable to delete any files that are no longer required, to keep the number of files listed in the **School Workforce Census** browser to a minimum.

1. Select **Routines | Statutory Returns | School Workforce Census** to display the **School Workforce Census** browser.



2. Highlight the required census and click the **Delete** button to display the following message:



3. Click the **Yes** button to delete the selected return.



NOTE: *School Workforce Census files that have already been authorised cannot be deleted.*

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