**GETTING STARTED - 2023-24(26) (3 year) Scenario**

Schools should check that they have set up a new scenario to work on this year – See setting up guidance. This is a quick guide on how to get started on updating staffing information.

**SETTINGS**

* LA funding rates – Are not editable and are updated by SBS only once figures are confirmed
* Budgets – list of scenarios - Select your current budget to work on e.g., 2023-24 Budget
* Update Core Settings by clicking on Edit on the right-hand side of the Budget and select tab:
* Core Settings
  + To change name of the Budget
  + Budget dates Start: 01/04/2023, End: 31/03/2026
  + Check Outturn: toggle is turned OFF
* Select next tab - Staff Contract Settings
* Outer London, check service terms hours and weeks per year
  + Support - Region: Out; Hours: 36 hrs; Weeks: 52.143; Increment: Apr
  + Teachers – Region: Out; Hours: 27.5 hrs; Weeks: 52.143 (Infants may need to change teachers to 25 hours); Increment: Sep
* Select next tab - Calculation Tables
  + Teachers Salary Scales: A new table is available for 2022-23 which includes the September 2022 Pay Award in line with recommendations in the STRB’s 32nd Report 2022
    - Scroll down to the '**Teacher scale tables**' section:
      * Click the blue ‘**Add teacher scale table**’ button on the right of the screen
      * Set 01-09-2022 as the effective date on the new row which appears
      * Select the correct September 2022(A, B or C) option from the drop-down menu (inflated by 5% for most scales)
      * Again, select another line - Set 01-09-2023 as the effective date on the new row which appears
      * Select the correct September 2023(A, B or C) option from the drop-down menu (inflated by 3% - 5% - SBS have also loaded September 2023’s predicted salary rates, we recommend that schools load these too)
* Support staff Salary Scales: Support Staff Salary Apr 2022 tables available (increased by £2,229)
  + Scroll down to the **'Support staff salary tables'** section:
    - Click the blue **'Add Support staff salary tables'** button on the right of the screen
    - Add a line for 01-04-2022
    - Select Support Scales – 2022 from the drop-down menu
    - Please note, Support Staff salary rates have only been loaded for this year only
* Salaries for Custom scales:
  + - Please speak to your Link Officers
  + National Insurance: NI Rate reduced from 15.05% to 13.8% on 6th November 2022
    - Scroll down to NI Tables section:
      * Click on **‘Add NI table’**
      * Select 06-11-2022
      * Choose ‘Nov 2022’ table
  + Maternity Pay
    - Select Maternity 2022-23 (Teachers Zero/Support SMP)
  + Funding Predictor Table – **(TAKE CARE, PLEASE DO NOT TOUCH)** until further notice. Currently, leave whatever year appears, e.g., 2018-2019, 2021-22, etc. However, this year may need changes according to the new 2023-24 Budgets

**Select ‘Green tick’ at the top right-hand menu to Save each action!**

**SETTINGS cont.**

* Cost centres - update if new cost centre created in 2022-23 – E.g., CC304 DFC Energy Efficiency, CC 604 National Tutoring Programme, CC602 School-led tutoring, CC 603 Recovery Premium, or if revision required in 2023-24
* Contract types – simply teacher and support
* Staffing Service Terms – **Check these and the codes are current**, particularly that the codes are mapped correctly (may need to add for pupil premium, PE & Sports, Breakfast/ASC cost centres) – To Edit > use pencil edit at top of page
* Staffing > Salary Scales > Schools to check their current staff rates are correct. There should be different Teachers’ salary rates for both September 2022 & 2023. Guidance note for Custom Scales are also available

**Getting started on STAFFING**

Staff Members:

* Staff should already be in SBS from last year’s scenario/budget - required to update joiners and leavers in the new year. Start with your teachers who have left and started in September 2022. Then move on to updating Support staff.
* This section is a “header” for all staff which will need to be updated when adding a new member of staff and can go straight to contracts by clicking on employment number
* Staff member record cannot be deleted, only removed from the list by using Archive after clicking on edit
* Leavers should have a ‘Leave Date’ entered and Archive if need to be removed

Staff Contracts:

* Shows if staff member is included in current budget
* Detail of contracts can be found by:
* Edit TABs: (Can ‘multiple’ edit for key changes on several staff in one go)
* Click on one contract and ‘Pencil Edit’ icon on top right-hand
* Contract details – Choose dropdown for service term, maximum point of scale, maternity etc
* Salary details – scale points, hours etc. For ‘Auto-increment salary details’ click on Pencil Plus icon
* Budgets – to select which budgets this employee will be included in (can see in all budget scenario). Tick on staff listing shows if they are included or not.
* Notes
* A Leaver’s contract can be re-assigned to another name if the same contract
* Support Staff Scale Points – Check correct scale points are added to salary scale as at, April 2023
  + Reminder MAY BE ONE INCREMENT POINT HIGHER THAN CURRENT ESTABLISHMENT LISTS
* Example: Colman may be currently on a point 18 but will be on 19 from April 2023 and will need to be Auto Incremented to top of scale i.e., 22 in April 2024
* Support scale points 11, 16, 17, 20 and 21 are not used by LBH
* Click into Contract (not editable)
  + Salary Forecast future year amounts
  + Click into Year to see monthly breakdown
  + Salary Details future years points, hours etc
  + Budgets, in which included
  + Code mapping
  + Click on pencil in top right to edit contract details

**Inflation and Superannuation**

* Relates to staff only
* Need to do for both support and teacher
* Any salary inflation will now need to be updated/removed
  + Go to Staffing
  + Inflation & Superannuation
    - Set inflation rate for pre and 01-09-2022 to zero for teachers & support staff by clicking the blue rate link and change as required/delete. This will ensure the increases are not double counted. (Note: repeat this for all non-fixed budgets if using different scenarios)

|  |  |  |  |
| --- | --- | --- | --- |
| Sep 22 | Sep 23 | Sep 24 | Sep 25 |
| 23.68% | 23.68% | 23.68% | 23.68% |

* Teachers’ Superannuation

|  |  |  |  |
| --- | --- | --- | --- |
| Sep 22 | Sep 23 | Sep 24 | Sep 25 |
| 0% | 0% | 2% | 2% |

* Teachers’ Salaries

|  |  |  |  |
| --- | --- | --- | --- |
| Apr 22 | Apr 23 | Apr 24 | Apr 25 |
| 24.10% | 24.10% | 24.10% | 24.10% |

* Support Staff Superannuation

|  |  |  |  |
| --- | --- | --- | --- |
| Apr 22 | Apr 23 | Apr 24 | Apr 25 |
| 0% | 4% | 1.50% | 2% |

* Support Staff Salaries

**Maternity Pay**

* Shows rates as maternity pay progresses. 2022-23 Rate currently at £156.66 (to be confirmed once new rates have been published)
* Improvement as take account of SMP refund

**National Insurance**

* Simply shows the current rates

**Allowances**

* This is where allowances are set up – these now inflate year on year by SFT – check current and correct to what is being paid at school

**Staff by Year Report**

* Show layout, very flexible, good to hide the columns, filters work well and lots of staff information here. **Sub-total feature using ‘Actions’ icon on top left menu can be used to group according to which column is chosen**
* Schools need to review superannuation to ensure accuracy. Some schools may choose to opt in all staff to the Pension scheme as a precautionary measure as staff can opt in at any time
* Check all staff are coded correctly
* TAGS can be used to monitor budgets, especially ringfenced
* Go through Icons at the top – filter, submit to excel, compared with the MIS school reports

**SBS ASSIST MODULE:**

New application within the SBS Software, this year.

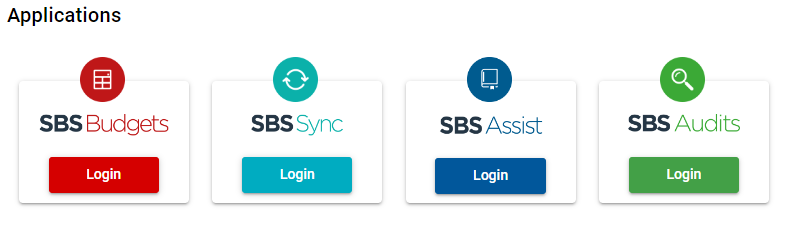
Welcome to the SBS Assist module, this area contains a multitude of videos and documents to assist in gaining, refreshing, and referencing knowledge regarding SBS Budgets and the other modules available from the SBS Online portal. To the left, you will see each menu item, broken down into segments to match that of the modules. By using the search box above, you will be able to locate any guide and/or video to help you along the way. By typing key words, for example.

How to … How to add a new staff member

What does/is …

This area will be periodically reviewed and updated by the SBS Online Support team, with the intent to provide user friendly media to assist with all any questions that may occur.

See how to connect to SBS Assist.



If you have any questions or wish to discuss any of the systems further, please contact the support desk from the details below:

Email Address: sbsonline@schoolbusinessservices.co.uk

Telephone number: 0345 222 1551 Option 8

Schools Finance Team

February 2023