



SBS Budgets

How to do a staffing scenario

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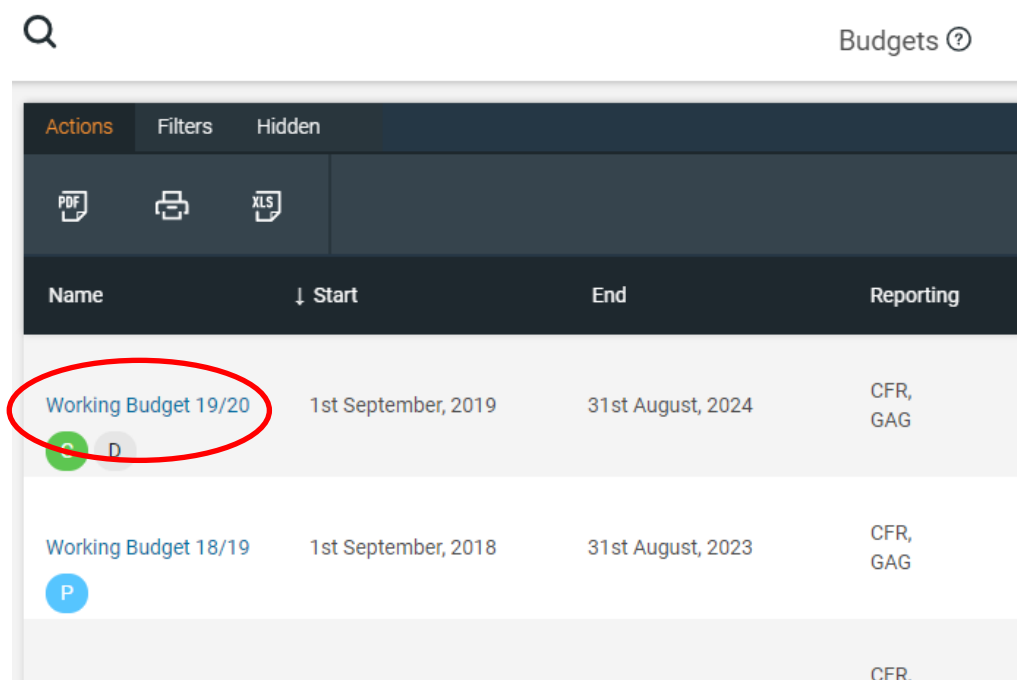
The start of any staffing scenario

1. Follow the path Settings > Budgets



The screenshot shows the SBS Budgets application interface. On the left, a dark navigation menu lists several options: 'Dashboard', 'Settings' (highlighted with a red circle), 'School Details', 'Local Authority Funding Rates', 'Budgets' (highlighted with a red circle), and 'Financial Reporting Codes'. The main content area displays the 'Leadership' profile for John Smith, including his name, email (sbsonline@schoolbusinessservices.co.uk), telephone number (0345 222 1551), and role as School Business Manager.

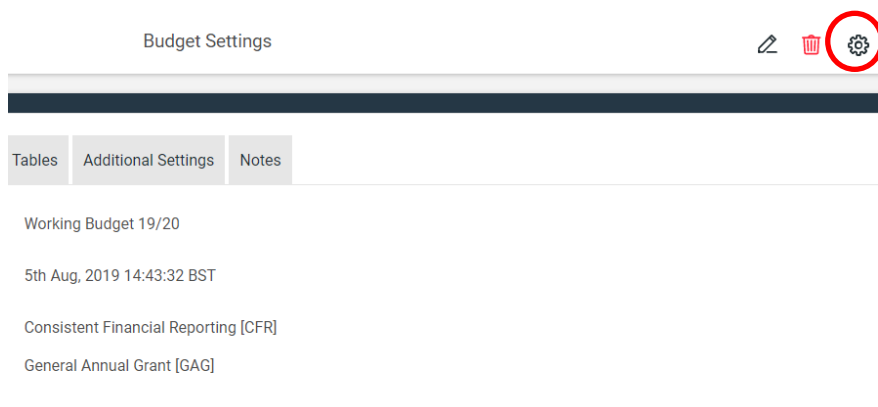
2. Select the name of your current working budget



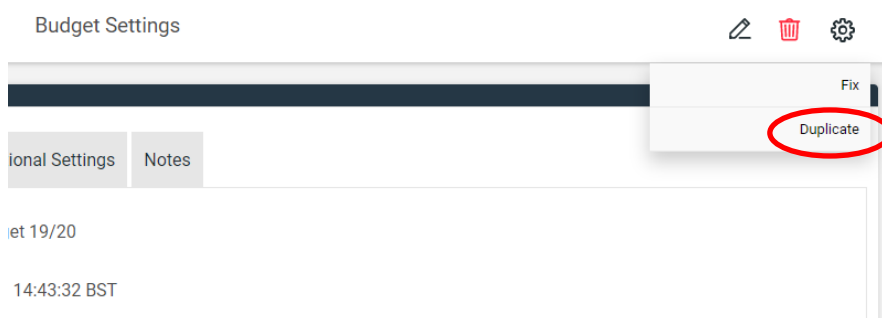
The screenshot shows the 'Budgets' section of the SBS Budgets application. At the top, there are tabs for 'Actions', 'Filters', and 'Hidden'. Below these are icons for PDF, Print, and XLS. A table lists the budgets with columns for 'Name', 'Start', 'End', and 'Reporting'. The first row, 'Working Budget 19/20', is highlighted with a red circle. Below it is 'Working Budget 18/19'. The table data is as follows:

| Name | Start | End | Reporting |
|----------------------|---------------------|-------------------|-----------|
| Working Budget 19/20 | 1st September, 2019 | 31st August, 2024 | CFR, GAG |
| Working Budget 18/19 | 1st September, 2018 | 31st August, 2023 | CFR, GAG |

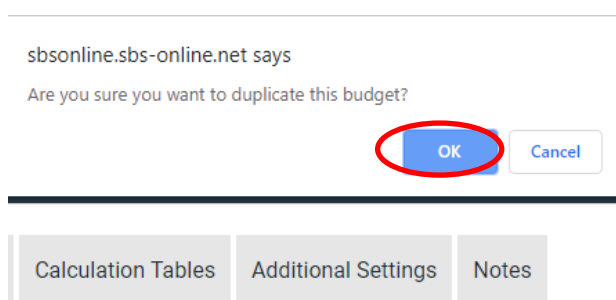
3. Select the actions cog in the top right



4. Next, select the option to duplicate your budget



5. This will prompt a confirmation message, select OK



Name: Working Budget 19/20

Created on: 5th Aug, 2019 14:43:32 BST

6. This will lead you to the edit screen of your new budget, rename the budget relevant to your scenario

Edit Budget ?

Calculation Tables
Additional Settings
Notes

Name: Working Budget 19/20 New Staff Scenario

Reporting:

- ☒ Consistent Financial Reporting [CFR]
- ☒ General Annual Grant [GAG]
- ☐ Academy Chart of Accounts [ACOA]
- ☐ Custom Reporting

7. Use the Save (the green tick) icon in the top right to confirm the changes

Edit Budget ?

☒
☐
☐

Additional Settings
Notes

Working Budget 19/20 New Staff Scenario ?

Consistent Financial Reporting [CFR] ?

General Annual Grant [GAG]

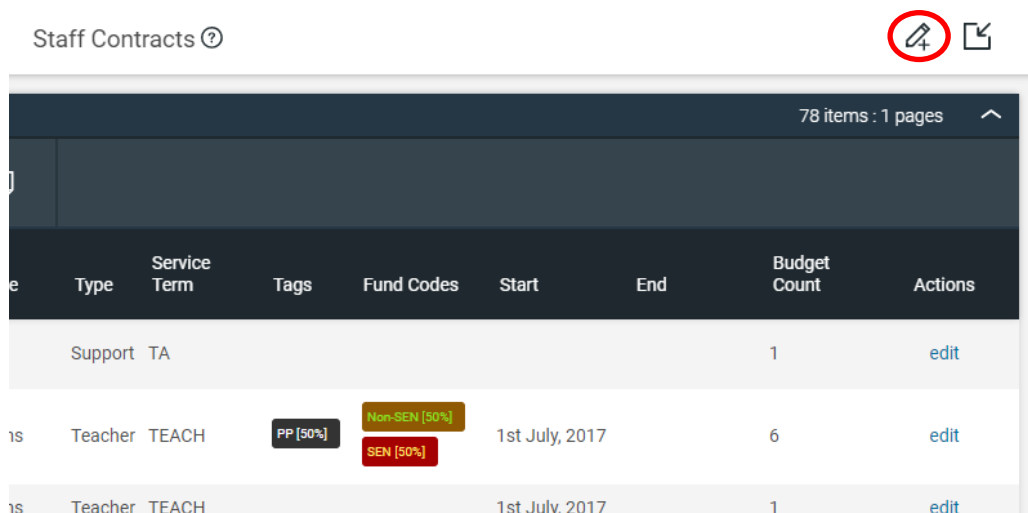
Academy Chart of Accounts [ACOA]

Creating a Staff Contract scenario

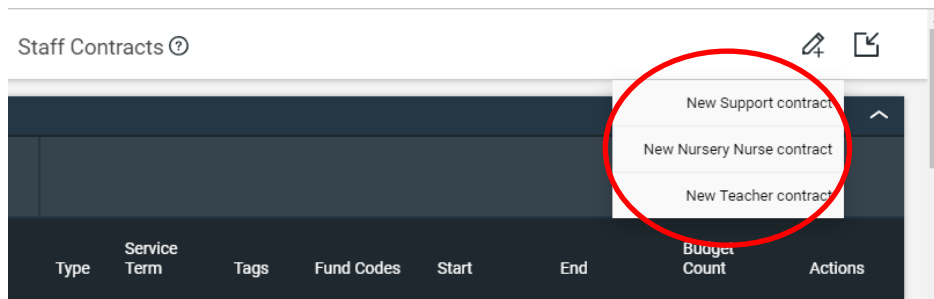
1. Follow the path Staffing > Staff Contracts



2. Select the create icon (the pen with a plus) to create the contract for the scenario



3. Select the contract type relevant to your scenario





This will lead to the creating contract screen

New Staff Contract ?


Budgets Notes


Contract can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making


Staff member: 

 or create new staff member...

Contract name:

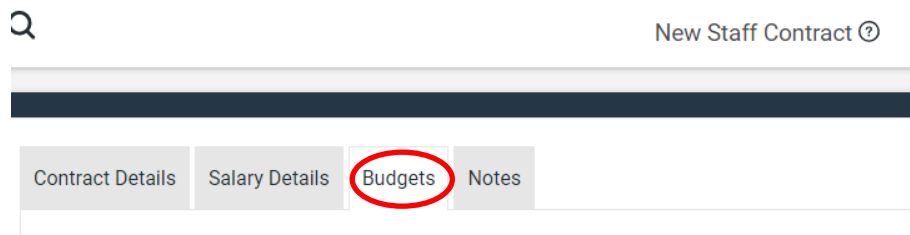
Contract type: 

Service term: 

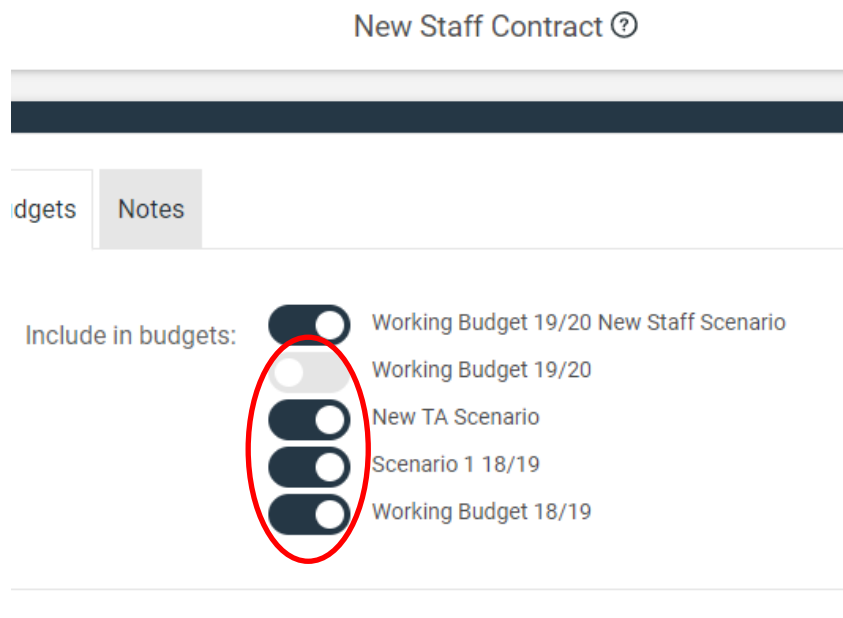
Maximum salary scale: 

We recommend leaving the staff member blank, and naming the contract relevant to the scenario but then create the contract as normal

- Once all the relevant information for the contract has been complete, proceed to the 'Budgets' tab within the contract



- Contracts are automatically selected into all budgets, use the toggle to unselect the budget this contract should not be included in



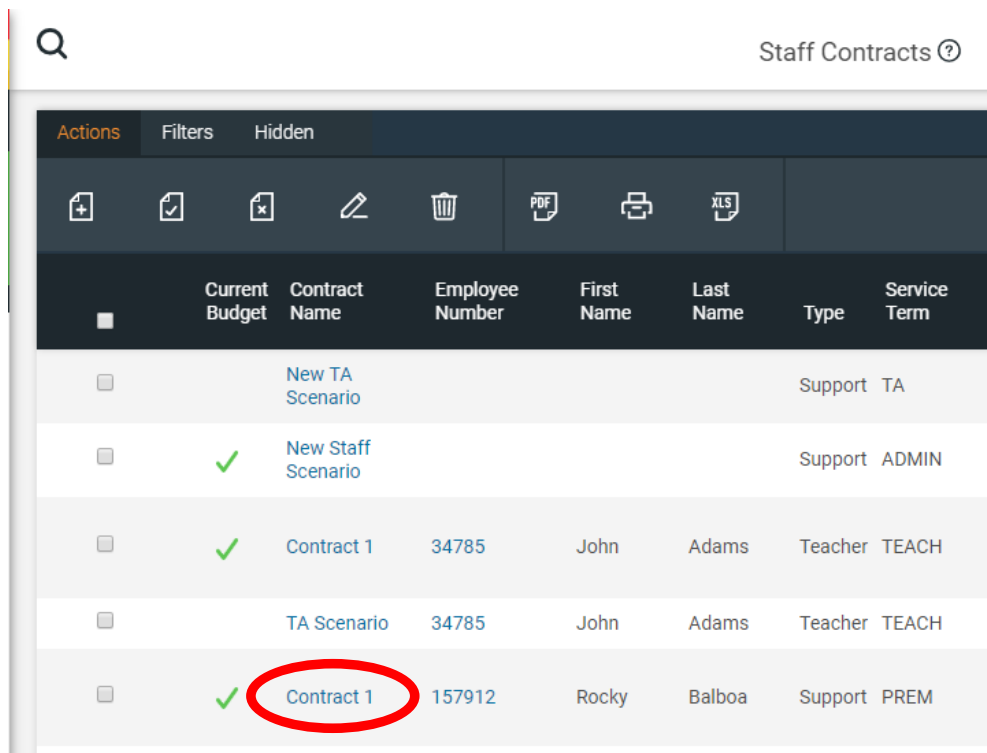
Ending Staff Contract scenario

1. Follow the path Staffing > Staff Contracts



The screenshot shows the SBS Budgets interface. On the left sidebar, the 'Staffing' menu item is highlighted with a red circle, and the 'Staff Contracts' sub-item is also highlighted with a red circle. The main content area displays the 'Leadership' section for the 'Head Teacher', John Smith, with contact details: Email: sbsonline@schoolbusinessservices.co.uk, Tel: 0345 222 1551, and School Business Manager.




2. Select the name of the contract you are wanted to end in a scenario



The screenshot shows the 'Staff Contracts' table in the SBS Budgets interface. The table has columns: Actions, Filters, Hidden, Current Budget, Contract Name, Employee Number, First Name, Last Name, Type, and Service Term. The 'Contract 1' entry is highlighted with a red circle.




| Actions | Filters | Hidden | Current Budget | Contract Name | Employee Number | First Name | Last Name | Type | Service Term |
|--------------------------|---------|--------|----------------|--------------------|-----------------|------------|-----------|---------|--------------|
| <input type="checkbox"/> | | | | New TA Scenario | | | | Support | TA |
| <input type="checkbox"/> | ✓ | | | New Staff Scenario | | | | Support | ADMIN |
| <input type="checkbox"/> | ✓ | | | Contract 1 | 34785 | John | Adams | Teacher | TEACH |
| <input type="checkbox"/> | | | | TA Scenario | 34785 | John | Adams | Teacher | TEACH |
| <input type="checkbox"/> | ✓ | | | Contract 1 | 157912 | Rocky | Balboa | Support | PREM |

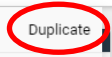
3. Select the actions cog

View Contract ?   

| | |
|------------------------------------|--|
| Name: Rocky Balboa | Type: Support |
| Contract: Contract 1 | Contract start: 19th Sep, 2014 |
| Role: PREM - Premises Staff | Continuous service date: 19th Sep, 2014 |
| | Position: Premises Assistant |

4. Next, select the option to duplicate the contract

View Contract ?   



Duplicate
Salary statement

| | |
|------------------------------------|--|
| Name: Rocky Balboa | Type: Support |
| Contract: Contract 1 | Contract start: 19th Sep, 2014 |
| Role: PREM - Premises Staff | Continuous service date: 19th Sep, 2014 |
| | Position: Premises Assistant |

Budgets
Code Mapping

This will then take you to the edit view of the new, duplicate contract.

5. We recommend renaming the contract something relevant to the scenario

Edit Contract ?

make any changes you require to the new contract and press 'Save changes'.

ts Notes

It can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making changes.

Staff member: Balboa, Rocky - 157912 ?

or create new staff member...

Contract name: Contract End Scenario ?

Contract type: Support

6. Scroll down and select in the field for end date, then use the calendar to select the date you wish the contract to end in your scenario

Edit Contract ?

Contract type: ?

Service term: ?

Maximum salary scale: ?

Tags: ?


Fund Codes: ?

Start: 2019-09-29

End: 2019-09-30

Maternity leave start date: ?

7. Next, go to the budgets tab within the contract


Edit Contract ?

Contract Details
Salary Details
Budgets
Notes

8. The contract will automatically only be ticked into your current budget, adjust the toggles if needed.

Edit Contract ?

Budgets
Notes

Include in budgets:

☒ Working Budget 19/20 New Staff Scenario




☐ Working Budget 19/20

☐ New TA Scenario

☐ Scenario 1 18/19

☐ Working Budget 18/19

9. Save the contract

Edit Contract ?




Working Budget 19/20 New Staff Scenario ?
Working Budget 19/20
New TA Scenario
Scenario 1 18/19
Working Budget 18/19

10. Follow the path Staffing > Staff Contracts



SBS

Working Budget 19/20

D C

Dashboard

Settings

Staffing

Staff Members

Staff Contracts

Staff by Year Report

Leadership



SBS

Head Teacher



Name: John Smith

Email: sbsonline@schoolbusinessservices.co.uk

Tel: 0345 222 1551

School Business Manager


11. Edit the original staff contract

Staff Contracts ?  

Hidden 80 items : 1 pages

| Contract Name | Employee Number | First Name | Last Name | Type | Service Term | Tags | Fund Codes | Start | End | Budget Count | Actions |
|-----------------------|-----------------|------------|-----------|---------|--------------|------|------------|----------------------|----------------------|--------------|----------------------|
| TA Scenario | 34785 | John | Adams | Teacher | TEACH | | | 1st July, 2017 | | 1 | edit |
| Contract 1 | 157912 | Rocky | Balboa | Support | PREM | | | 19th September, 2014 | | 7 | edit |
| Contract End Scenario | 157912 | Rocky | Balboa | Support | PREM | | | 19th September, 2014 | 30th September, 2019 | 1 | edit |

12. Select the Budgets tab

 Edit Contract ?

Contract Details


Salary Details

Budgets

Notes

Note: A contract can exist across multiple budgets. Ensure you review

Staff member: Balboa, Rocky - 157912

 or create new staff

Contract name: Contract 1

13. Remove the contract from the Scenario Budget using the toggle




Edit Contract ?

Budgets Notes

Include in budgets:

- ☒ Working Budget 19/20 New Staff Scenario
- ☐ Working Budget 19/20
- ☐ New TA Scenario
- ☐ Working Budget 16/17
- ☐ Scenario 1 18/19
- ☐ Conversion Budget 17/18
- ☐ Working Budget 18/19

14. Use the save icon to save the contract (the green tick)

Edit Contract ?   

Working Budget 19/20 New Staff Scenario ?

- ☒ Working Budget 19/20
- ☐ New TA Scenario
- ☐ Working Budget 16/17
- ☐ Scenario 1 18/19
- ☐ Conversion Budget 17/18
- ☐ Working Budget 18/19

Changing Contract Details

1. Follow the path Staffing > Staff Contracts



The screenshot shows the SBS Budgets interface. On the left sidebar, the 'Staffing' menu item is highlighted with a red circle, and the 'Staff Contracts' sub-item is also highlighted with a red circle. The main content area displays the 'Leadership' section for the 'Head Teacher', John Smith, with contact details: Email: sbsonline@schoolbusinessservices.co.uk, Tel: 0345 222 1551, and School Business Manager.

2. Select the name of the contract you wish to create a comparison for

Staff Contracts ?

ActionsFiltersHidden

</

3. Select the actions cog in the top right




View Contract ?   

Teacher: Amelia Clark **Type:** Support

Contract: Contract 1 **Maximum salary scale:** 39

Role: ADMIN - Administration Staff

4. Choose the option to duplicate the contract

View Contract ?   

Duplicate

Salary statement

Teacher: Amelia Clark **Type:** Support

Contract: Contract 1 **Maximum salary scale:** 39

Role: ADMIN - Administration Staff

This will automatically take you to the new duplicate contract screen.

5. Rename the contract relevant to the scenario

Edit Contract ?

make any changes you require to the new contract and press 'Save changes'.

ts

Notes

It can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making changes.

Staff member: Clark, Amelia - 10785 ▼
✎ or create new staff member...

Contract name: Contract 1 (duplicate)

Contract type: Support ▼

6. Click on the Salary Details tab

Q
Edit Contract ?

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: Clark, Amelia - 10785 ▼
✎ or create new staff member...

Contract name: New Staff Scenario

Contract type: Support ▼

7. Add a salary detail

Edit Contract ? ✓ ✗ 🗑️

✎ Add salary detail ✎ Auto-increment salary details

| Other payment | Super | Paid hours ? | Paid weeks ? | Notes |
|--|-------------------------------------|--------------|--------------|---------------|
| <div> <div>▼</div> <div>0</div> </div> | <input checked="" type="checkbox"/> | 20 | 39 | <div>🗑️</div> |

8. Make the contractual changes required to the new salary detail and select the date on the new line for when this should take place

Edit Contract ?

Contract Details
Salary Details
Budgets
Notes

✎ Add salary detail ✎ At

| Start date | Salary scale | Salary adjustment | Allowances | Other payment | Super | Paid hours ? | Paid weeks ? |
|------------|--------------|-------------------|------------------|---------------|-------------------------------------|--------------|--------------|
| 2017-09-01 | 15 ▼ | 0 | Add Allowances ▼ | 0 | <input checked="" type="checkbox"/> | 20 | 39 |
| 2018-09-01 | 15 ▼ | 0 | Add Allowances ▼ | 0 | <input checked="" type="checkbox"/> | 20 | 39 |

9. Select the Budgets tab

Edit Contract ?

Salary Details **Budgets** Notes

[Add](#)

| Salary scale | Salary adjustment | Allowances | Other payment | Super | Paid hours ? |
|--------------|-------------------|----------------|---------------|-------------------------------------|--------------|
| 15 | 0 | Add Allowances | 0 | <input checked="" type="checkbox"/> | 20 |
| 17 | 0 | Add Allowances | 0 | <input type="checkbox"/> | 25 |

10. The contract will automatically only be included in is the current budget, use the toggles if this needs amending to be the scenario budget.




Edit Contract ?

Budgets **Notes**

Include in budgets:

- ☒ Working Budget 19/20 New Staff Scenario
- ☐ Working Budget 19/20
- ☐ New TA Scenario
- ☐ Scenario 1 18/19
- ☐ Working Budget 18/19

11. Save the contract using the save icon (the green tick)

Edit Contract ?   



☒ Working Budget 19/20 New Staff Scenario ?
☐ Working Budget 19/20
☐ New TA Scenario
☐ Scenario 1 18/19
☐ Working Budget 18/19

12. Follow the path Staffing > Staff Contracts



The screenshot shows the SBS Budgets interface. On the left, the 'Staffing' menu item is highlighted with a red circle, and 'Staff Contracts' is also highlighted with a red circle. The main content area shows the 'Leadership' section with the SBS logo and contact information for the Head Teacher (John Smith) and School Business Manager.

13. Edit the original Staff Contract

Staff Contracts ?  

rs Hidden 81 items : 1 pages

| Current Budget | Contract Name | Employee Number | First Name | Last Name | Type | Service Term | Tags | Fund Codes | Start | End | Budget Count | Actions |
|----------------|--------------------|-----------------|------------|-----------|---------|--------------|------|------------|--------------------|-------------------|--------------|-----------------------------|
| | Contract 1 | 560521 | Clancy | Brown | Teacher | TEACH | | | 1st January, 2002 | 31st August, 2018 | 3 | edit |
| ✓ | Contract 1 | 10785 | Amelia | Clark | Support | ADMIN | | | | | 7 | edit |
| ✓ | New Staff Scenario | 10785 | Amelia | Clark | Support | ADMIN | | | | | 1 | edit |
| ✓ | Contract 1 | 157907 | Sean | Connery | Support | MIDDAY | | | 3rd February, 2018 | | 7 | edit |

14. Select the Budgets tab

Q Edit Contract ?

Contract Details


Salary Details

Budgets

Notes

Note: A contract can exist across multiple budgets. Ensure you rev

Staff member: Clark, Amelia - 10785

 or create new staff

Contract name: Contract 1

Contract type: Support

15. Select the toggle to remove the contract from the scenario




Edit Contract ?

Budgets Notes

Include in budgets:

- ☒ Working Budget 19/20 New Staff Scenario
- ☐ Working Budget 19/20
- ☐ New TA Scenario
- ☐ Working Budget 16/17
- ☐ Scenario 1 18/19
- ☐ Conversion Budget 17/18
- ☐ Working Budget 18/19

16. Use the save icon (the green tick) to save the contract

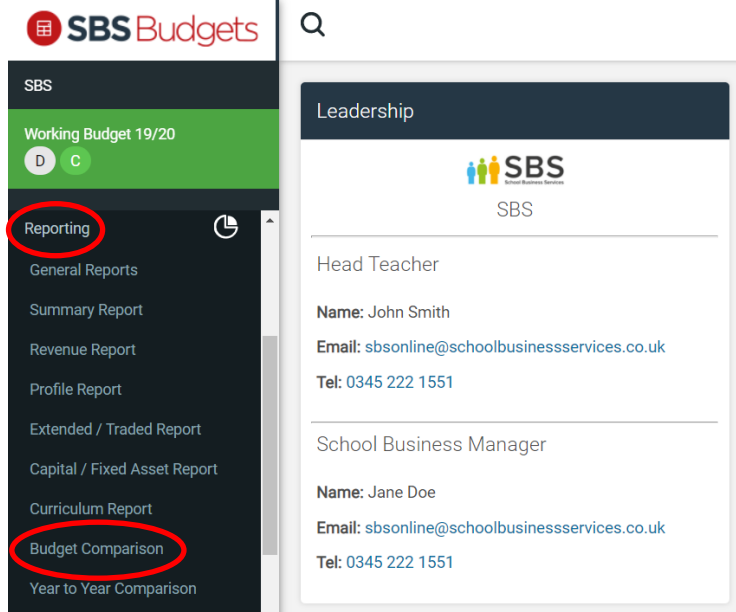
Edit Contract ?   

Working Budget 19/20 New Staff Scenario ?

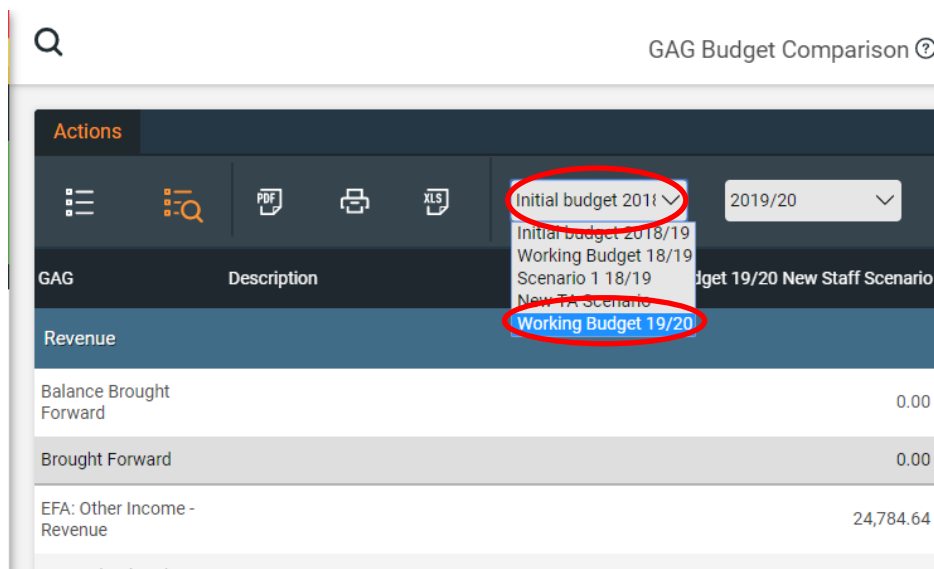
- ☒ Working Budget 19/20
- ☐ New TA Scenario
- ☐ Working Budget 16/17
- ☐ Scenario 1 18/19
- ☐ Conversion Budget 17/18
- ☐ Working Budget 18/19

Comparing the difference of your scenario

1. Follow the path Reporting > Budget Comparison



2. You will automatically be comparing your current budget to another budget, to change the comparison budget, use the first drop down at the top of your report under actions



3. The report will regenerate, and you can compare the difference the staffing changes make

Q GAG Budget Comparison ©

| GAG | Description | 2019/20 - Working Budget 19/20 New Staff Scenario | 2019/20 - Working Budget 19/20 | Variance | % Var. |
|---|-------------|---|--------------------------------|------------|---------|
| Staff Costs: Supply/Agency Teaching Staff | | 11,676.25 | 11,676.25 | 0.00 | |
| Staff Costs: Education Support | | 237,350.85 | 237,350.85 | 0.00 | |
| Staff Costs: Premises Staff | | 74,510.31 | 95,501.64 | -20,991.33 | -21.98% |
| Staff Costs: Admin and Clerical Staff | | 114,898.67 | 94,675.53 | 20,223.13 | 21.36% |
| Staff Costs: Catering Staff | | 11,728.48 | 11,728.48 | 0.00 | |