



Business World HR Form Guide

TRANSFER WITHIN TEAM FORM

Shropshire Council

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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 how to transfer an existing Resource into another position within the school's establishment. When the form has been completed at school level it workflows to Payroll.

Please check your establishment list to check that there is a position ID number set up for the position that the Resource is transferring to. If not, please follow the process using the New Position Form.

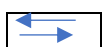
2. Navigating Business World

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. To set up A TRANSFER WITHIN TEAM into an EXISTING POSITION

Log in to Business World.

Step 1

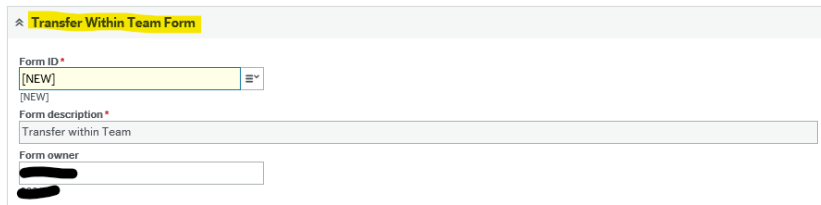
Click on Forms and then select Transfer Within Team Form:

Menu	Case Management (SC)	Absence (SC)
Your employment	OH Referral Form Incident Form	Adoption Leave Request Form Maternity Notification Form Paternity Leave Request Form Return to Work Form Shared Parental Leave Form
Forms	New Starter (SC) New Starter Form IT Request Form Induction Form Probation Form	Organisation and Position (SC) New Position Form Position Change Form Right to Recruit Form Position Grade Evaluation (Employee) Position Grade Evaluation (Manager)
Time and expenses	Contractual Changes (SC) Contractual Changes Form Flexible Working Request Form Transfer Within Team Form	Leaver (SC) Exit Questionnaire Form Leaver Checklist Form Leaver Notification Form Exit Interview
Personnel		
Procurement		
Customers and sales		
Planner		
Information pages		
Accounting		

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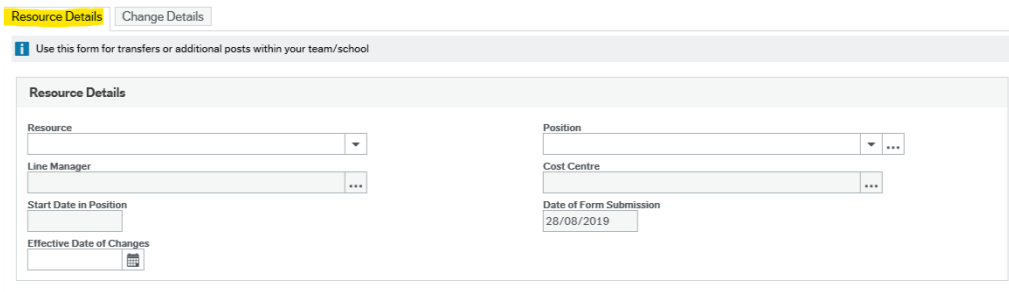
This section will auto complete with the Form owners name and Resource ID, use the TAB key to move down the 'Resource Details':

Transfer Within Team Form

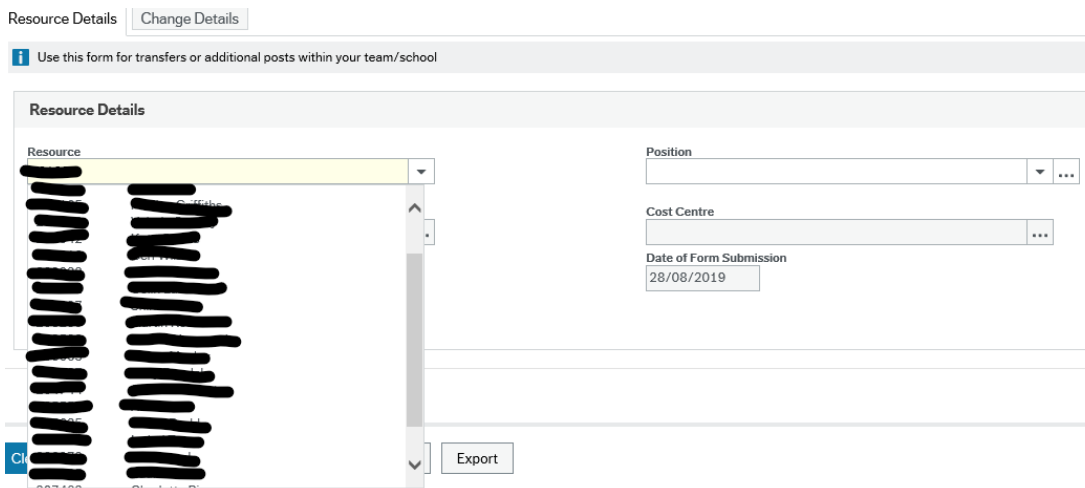


STEP 2

The Resource Details section will allow you to input the Resource name and confirm the position that they are transferring from and the effective date of change:



Click in the 'Resource' box, press SPACEBAR and select the Resource from drop down box or if you know the Resource ID type it in the box:



TAB to the next box, press SPACEBAR and select the position the Resource is transferring from and TAB.

This will populate the following boxes with Line Manager details, Cost Centre, Start Date in Position and Date of Form Submission.

Use the calendar to select the effective date of change:

STEP 3

Select the next tab 'Change Details':

Position Transfer Type – press SPACEBAR and scroll down to Transfer – select the relevant one and press TAB to move to the next box.

Transfer	When an employee moves from one position into another within the school.
Transfer - promotion	When the employee is promoted within the school.
Transfer act-up	When the employee is covering a more senior position (e.g. Deputy covering Headteacher position).
Transfer - end	DON'T use this option.

New Position – press SPACEBAR and scroll down to the position the Resource is moving to – select the relevant one and press TAB to move to the next box:

The screenshot shows the 'Transfer Within Team Form' with the following details:

- Change Details:**
 - Position Transfer Type:** Transfer
 - Contract Type:** (highlighted)
 - Pay Step:** (dropdown)
 - End Date if Fixed Term:** (calendar icon)
 - FTE:** (input field)
 - Question:** If this is a Variable Hours Contract, please state the range of hours
 - Question:** If Temporary to cover the absence of another employee, please state this employee's name here
 - Additional Information:** (input field)
- New Position:**
 - Administrator and PA to the Headteacher
 - Teaching Assistant L1
 - Teaching Assistant L2
 - Forest School Assistant
 - Teaching Assistant L3
 - Caretaker L2
 - Higher Level Teaching Assistant SEND
 - Lunchtime Supervisory Assistant
 - Lunchtime Supervisory Assistant
 - Headteacher
 - Teacher- TLR
 - Teacher- MPR
 - Primary School Casual
 - Primary School Supply
 - Primary School Supply
 - Cook

TAB to the next box Contract Type. Press SPACEBAR and select the relevant contract type - highlighted are the types to use:

☰ Transfer Within Team Form x

i Please select whether this is an additional post or a transfer. Note that if you select transf

Position Transfer Type
 ...

Contract Type
 ...

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

Clear
Print preview
Submit form
Save as draft
Export

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. Use this option when an end date is known. Also use this option for secondments.
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 this option.

Temporary	can be used. Use this option when an end date is not known.
Temporary Acting Up	DON'T use this option.
Temporary Maternity Cover	can be used. Use this option when an end date is not known.
Temporary Secondment	DON'T use this option.
Temporary Sickness Cover	can be used.
Variable Hours Contract	DON'T use this option.

Current Grade will auto populate from the New Position tab.

TAB to the Pay Step box, press SPACEBAR and select the appropriate pay point:

Fixed Term Justification – select one of the following if it is a fixed term contract. If permanent leave blank.

Enter date using the calendar for when the fixed term contract is to. **Please note that Business World is set up to cease paying the employee on the End Date entered**, therefore you must monitor and review fixed term contracts in a timely manner to ensure they are processed as a Leaver or a Contractual Changes amendment is completed:

The screenshot shows the 'Transfer Within Team Form' with the following details:

- Change Details:**
 - Position Transfer Type: Transfer
 - Contract Type: Fixed Term Contract
 - Pay Step: NJCA07
 - End Date If Fixed Term: A calendar pop-up is open, showing December 2019. The date 31 is highlighted.
- New Position:** Forest School Assistant
- Current Grade:** NJC Grade 6
- FTC Justification:** Externally funded research project
- Contracted Hours Per Week:** 0.00
- Weeks per Year:** 0.00

TAB to next box and type in how many hours the contract will be for. 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 Part-Time Teachers Calculator' on the SLG to calculate and enter the **FTE hours for a part time teacher**. This is important to ensure they are paid pro rata to a full-time teacher at your school.

Weeks per year – see information below, being mindful of previous continuous service to ensure that their entitlement is correct:

School Support Staff	Less than 5 years' service	More than 5 years' service
Term time only	43.21	44
Term time + 1 week (PD Days)	44.21	45
Term time + 2 weeks	45.21	46
Term time + 3 weeks	46.21	47
Term time + 4 weeks	47.21	48
Term time + 1 PD Day	43.35	44.18
Term time + 2 PD Days	43.58	44.41
Term time + 3 PD Days	43.80	44.64
Term time + 4 PD Days	44.03	44.87
Term time + 1 week and 1 PD Day	44.48	45.34
Term time + 1 week and 2 PD Days	44.71	45.57
Term time + 1 week and 3 PD Days	44.94	45.80

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Term time + 1 week and 4 PD Days	45.16	46.03
Term time + 2 weeks and 1 PD Day	45.62	46.49
Term time + 2 weeks and 2 PD Days	45.85	46.72
Term time + 2 weeks and 3 PD Days	46.07	46.95
Term time + 2 weeks and 4 PD Days	46.30	47.19
Cleaning Assistants		
Term time + 3 weeks periodic cleaning	47	48
Cleaners in Charge		
Term Time + 4 weeks periodic Cleaning	49	
Term Time + 3 weeks periodic Cleaning + 5 years' service		49
Supervisory Assistants		
Term Time Only	43	43.57

Is this a Variable hours contract? Complete if applicable, this may be used for Teaching Assistants when covering Supervisory Assistant Roles.

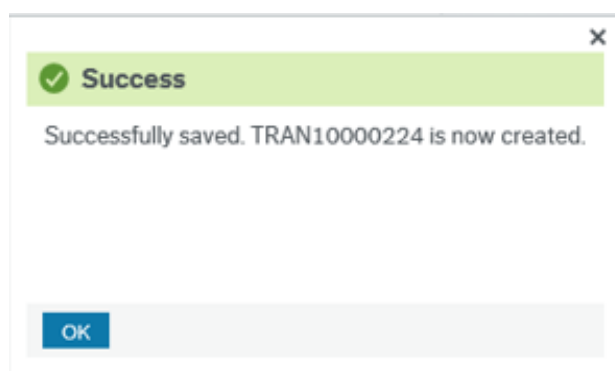
If Temporary to cover absence of another employee, please state this employee's name here – use this if they are on maternity leave or long term sickness.

Additional Information – add any additional information you feel could be relevant.

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When you are happy that the form has been fully completed, press 'Submit Form' and it will workflow 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' see screen shot below:



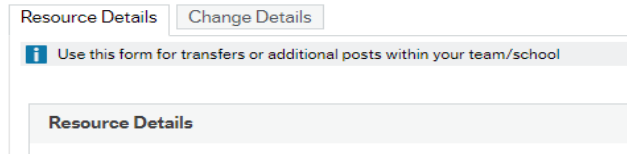
4. Headteacher Approval

If the 'Transfer Within Team 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:



Please refer to the 'Business World HR Form Guide – New Starter' section 4 for more detail regarding approving tasks. Ensure that both sections of the form are reviewed – 'Resource Details' and 'Change Details':



The image shows a screenshot of a web form. At the top, there are two tabs: 'Resource Details' (which is selected) and 'Change Details'. Below the tabs, there is a grey bar with an information icon (i) and the text 'Use this form for transfers or additional posts within your team/school'. Below this bar, there is another grey bar with the text 'Resource Details'.

5. Additional Information

- 5.1 If you need to attach any documents please refer to the 'Business World HR Form Guide - New Starter', section 3, step 8.
- 5.2 If Payroll reject a New Starter Form they will state the reasons for the rejection in the Workflow Log comment box and the form will workflow back to the school and will show as a Task to action. Please read the comments and update the form as appropriate before resubmitting.