

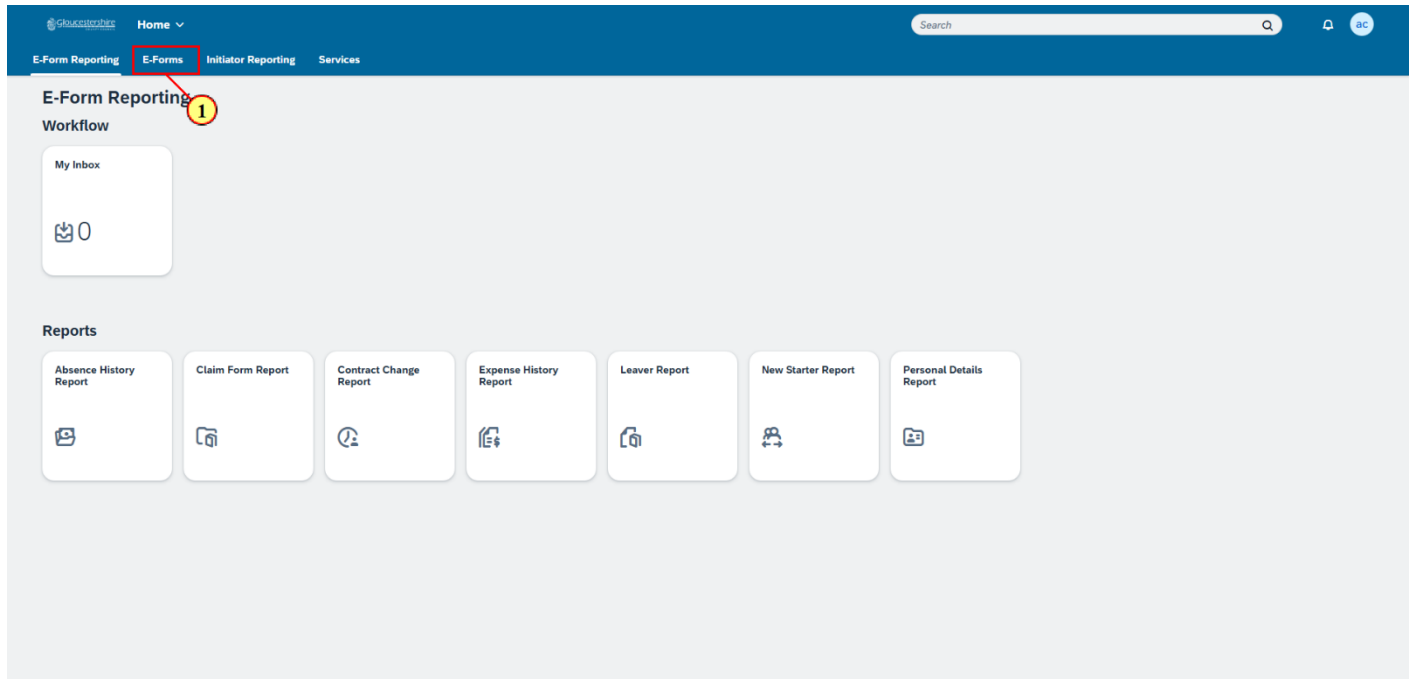


Schools OBO - New Starter Form

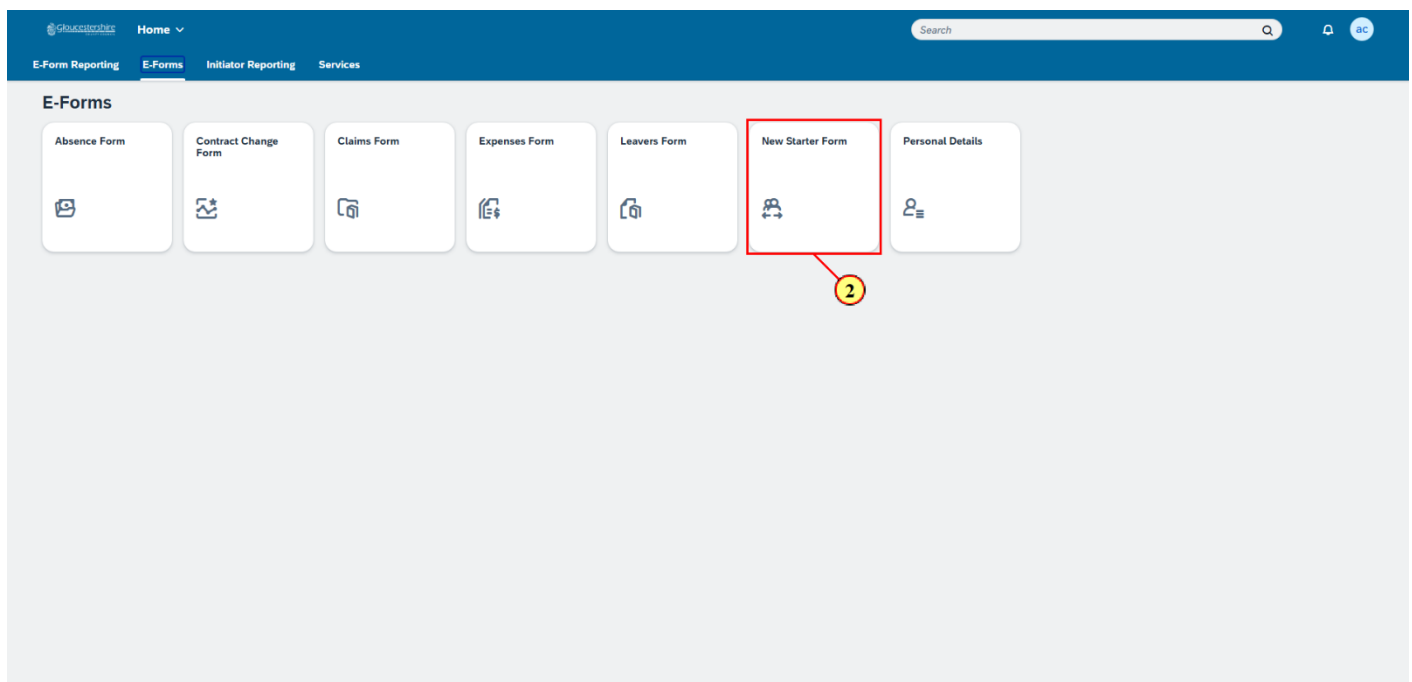
Schools On Behalf Of (OBO) - New Starter Form

In this step by step guide, you will learn how to:

- Complete the New Starter Schools E-Form.



(1) To add a **New Starter E-Form** go to the **E-Forms** page.



(2) Then click on the **New Starter Form** tile.

Schools on Behalf Of (OBO) - New Starter Form

Section A - Organisational Details

Is the New Starter Currently employed in your organisation?:* No

Where has your new employee come from:* Other local Authority Children

Previous Employer: Bristol Authority

Please select a contract type for this employee:* 04 Teacher

Position title (This position title will be shown on the employee's statement of particulars):* Test Teacher

Position Cost Centre: 932964 - Cleanwater C/E/ Primary Academy

Confirm Employee Details

Your Comments - Internal Organisation Use Only

Your Comments:

Add Comments

Section F - Notify Approver

Please tick this box if you require an email to be generated to your approver notifying this form is awaiting approval

Print Cancel Delete Save to Draft Submit

The New Starter Form will then open.

In **Section A - Organisational Details** the following fields are completed using the picklists and freetext:

- Is the New Starter Currently employed in your organisation?**
- Where has your new employee come from?**
- Previous Employer.**
- Please select a contract type for this employee.**
- Position Title (This position title will be show on the employee's statement of particulars).**

The **Position Cost Centre** is then added, if you have more than one, it will update automatically.

(3) Once all details are added click on **Confirm Employee Details**.

Section A - Organisational Details

Is the New Starter Currently employed in your organisation?:* No

Where has your new employee come from:* Other local Authority Children

Previous Employer: Bristol Authority

Please select a contract type for this employee:* 04 Teacher

Position title (This position title will be shown on the employee's statement of particulars):* Test Teacher

Position Cost Centre: 932964 - Cleanwater C/E/ Primary Academy

Confirmation

You will not be able to change your selection. Are you sure you'd like to go ahead?

OK Cancel

Your Comments - Internal Organisation Use Only

Your Comments:

Add Comments

Section F - Notify Approver

Please tick this box if you require an email to be generated to your approver notifying this form is awaiting approval

Print Cancel Delete Save to Draft Submit


(4) A confirmation window will appear warning the selection can no longer be changed if you go ahead.

Section B - New Employee Details

Title: Ms
 Forename: Test
 Middle Name:
 Surname: Example
 Please select Continues Service Start Date: 17.02.2025
 Street and House No.: 1 Test street
 2nd Address line:
 City: Gloucester
 County:
 Postcode: GL1 5TG
 Home Telephone number:
 Mobile Telephone Number:
 Email Address: testing1@testing2.com

Date of Birth: 09.02.1992
 Nationality: United Kingdom
 Disability:
 DBS Issue Number:
 National Insurance Number:
 Ethnicity: Mixed or Multiple ethnic gro...
 Gender: Female
 Clearance Date: Please Enter Date

Buttons: Print, Cancel, Delete, Save to Draft, Submit

 In **Section B - New Employee Details** information about the employee is added. The first section is used to add **Name, Service Start Date, Address** and **contact details**.
Note: The added email address will become the login for accessing their payslip on Successfactors.

Section B - New Employee Details

Email Address: testing1@testing2.com

Date of Birth: 09.02.1992
 Nationality: United Kingdom
 Disability:
 DBS Issue Number: 1234567
 Teacher Registration Number: 7654321
 Bank Sort Code: 010907
 Bank Account number: 22334453


National Insurance Number: NS 23 23 23 D
 Ethnicity: Mixed or Multiple ethnic gro...
 Gender: Female
 Clearance Date: 03.02.2025
 Issue Date: 13.02.2023
 Bank Name:
 Building Society Ref No:

Add First Emergency Contact Details

First Emergency Address

Street and House No.:
 2nd Address line:
 City:
 County:
 Postcode:
 First Name:

Buttons: Print, Cancel, Delete, Save to Draft, Submit




Further down the page more details about the employee are added:

Date of Birth, Nationality, NI Number, Gender, Disability (if relevant), **DBS & Teacher Registration numbers** (if the new staff member is a teacher) & **bank details**.

Important: If providing a DBS number the **Clearance Date** must always be added.


Note: If information is added in an incorrect format (in this example the **Bank Sort Code**) the field will highlight in red and will need to be corrected before the form can be submitted.



To **Add First Emergency Contact Details** click on the related tickbox and the relevant fields will then appear and can then be completed.




In **Section C - Contract Details**, the **Type of Contract, Start Date, Grade & Starting Scale Point** are added.



The **FTE field is then completed with Decimals for Teachers and Hours for non-teaching staff**.

Important: If No is selected in the field **Is this a claim only position?** a new button will appear: **Work Schedules**.

This is a new button that must ALWAYS be completed to ensure that the details update correctly in the new system. The next few steps will explain how these fields work.




The **FTE (teachers in decimal)** field is used to record what proportion of full time hours the teacher will work.


The relevant figure is added as a decimal, for example a full time post is added as **1**, a a part time post at 2 days per week is added as **0.40** etc.

(5) For this example we will assume the worker is full time, type **1** in the **FTE (Teachers in Decimal)** field.

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 The next step is to add the **Work Schedule** for the worker. This is a new process that must be completed to ensure that the correct working hours are recorded in the system.

(6) Click on the **Work Schedules** link.

 The **Create Work Schedules** window will appear, this is used to set up the work schedule for the staff member.

Section C - Contract Details

Type of Contract* Permanent Start Date* 24.02.2025
 Grade* 964UQT Starting Scale Point*
 Is this a claim only position?* No
 FTE (teachers in decimal)* 1.0000 FTE (teachers as %) 100.00% Work Schedules
 Is there a Probationary Period* No

Create Work Schedules

Start Date: 24 February 2025 Hours Per Week: 0.0

Schedule Day	Day	Hours Worked (decimal)
1	Monday	0.00

Buttons: Preview Schedule, Save & Close, Cancel

Section F - Notify Approver

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Print Cancel Delete Save to Draft Submit

The first working day for the schedule will appear automatically based on the Start Date added earlier in the Contract Details section (the Work Schedule will begin the actual day the Contract starts rather than always starting on a Monday).

The hours worked for that day can then be added.

Important: This needs to be added in decimal format e.g. 7.4.

Note: A full time teacher has working hours per day of 6.5

A full time support person has working hours per day of 7.4

(7) For this example type 7.30 in the **Hours Worked (decimal)** field.

Section C - Contract Details

Type of Contract* Permanent Start Date* 24.02.2025
 Grade* 964UQT Starting Scale Point*
 Is this a claim only position?* No
 FTE (teachers in decimal)* 1.0000 FTE (teachers as %) 100.00% Work Schedules
 Is there a Probationary Period* No

Create Work Schedules

Start Date: 24 February 2025 Hours Per Week: 0.0


Schedule Day	Day	Hours Worked (decimal)
1	Monday	7.30

Buttons: Preview Schedule, Save & Close, Cancel

Section F - Notify Approver

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Print Cancel Delete Save to Draft Submit

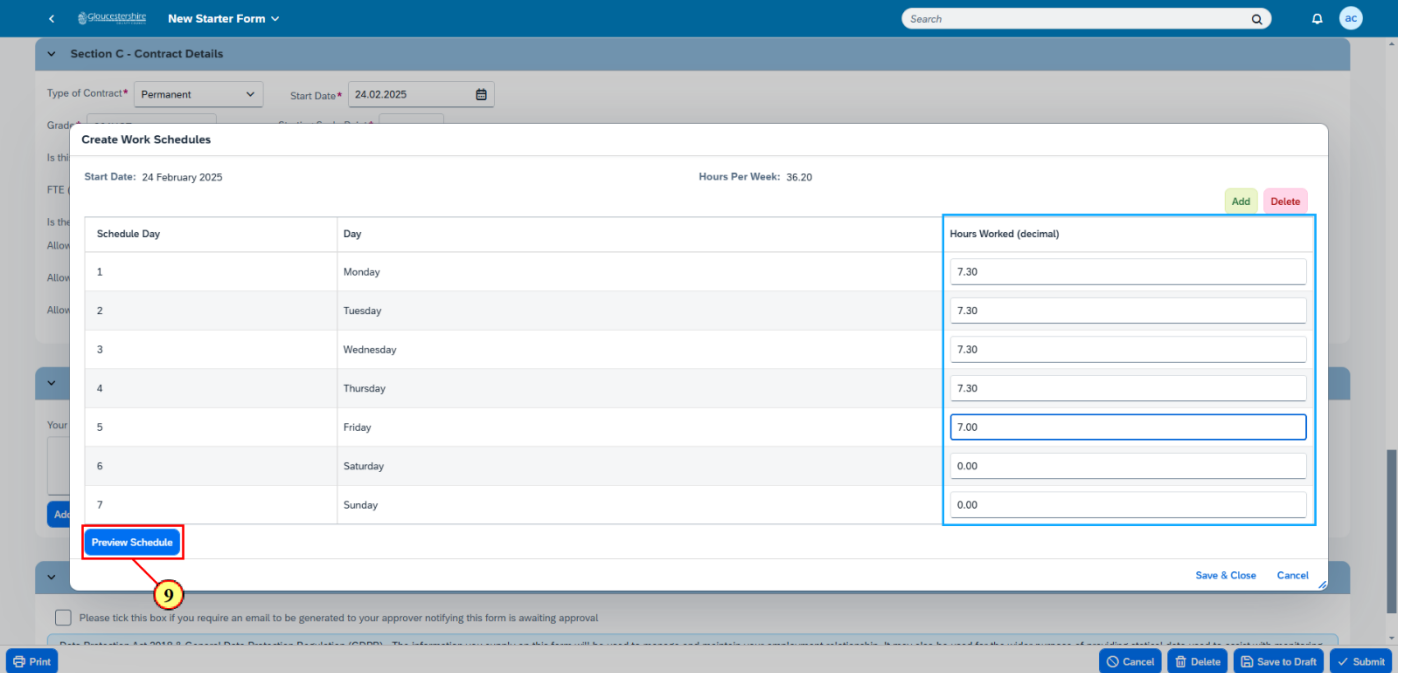


The remaining days for the week then need to be added.

Important: All 7 days for the week are added, non-working days have **0.00** added to the **Hours Worked (decimal)** field.

Note: If a staff member works a pattern such as a 9 day fortnight all 14 days for the period need to be added. If the worker's pattern starts mid-week 7 days still needs to be added.


(8) Click on the **Add** button to add each day.



The screenshot shows the 'Create Work Schedules' form. At the top, it displays 'Start Date: 24 February 2025' and 'Hours Per Week: 36.20'. Below this is a table with the following data:

Schedule Day	Day	Hours Worked (decimal)
1	Monday	7.30
2	Tuesday	7.30
3	Wednesday	7.30
4	Thursday	7.30
5	Friday	7.00
6	Saturday	0.00
7	Sunday	0.00

At the bottom left of the form, a red box highlights the 'Preview Schedule' button, with a yellow circle containing the number 9 next to it. Other buttons like 'Add', 'Delete', 'Save & Close', and 'Cancel' are also visible.

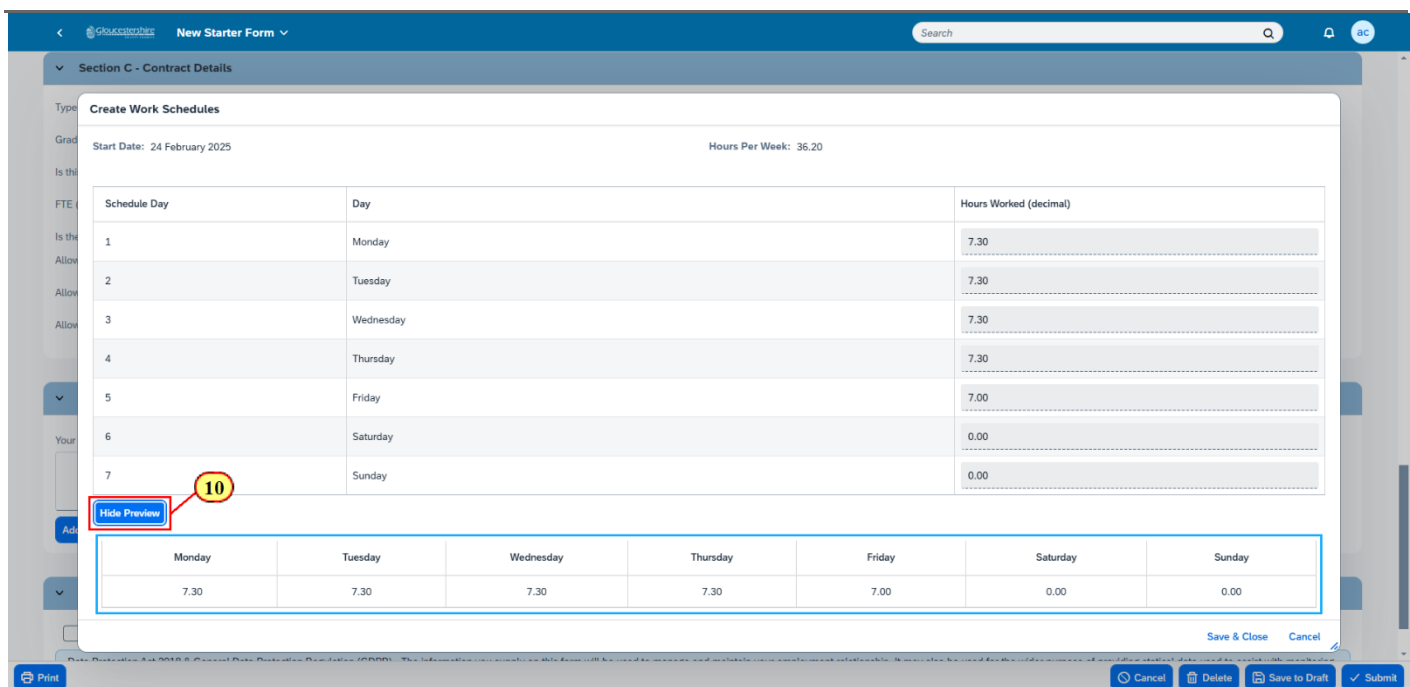


Once each day has been added for the week the corresponding working hours are added in decimal format e.g. 7.30.

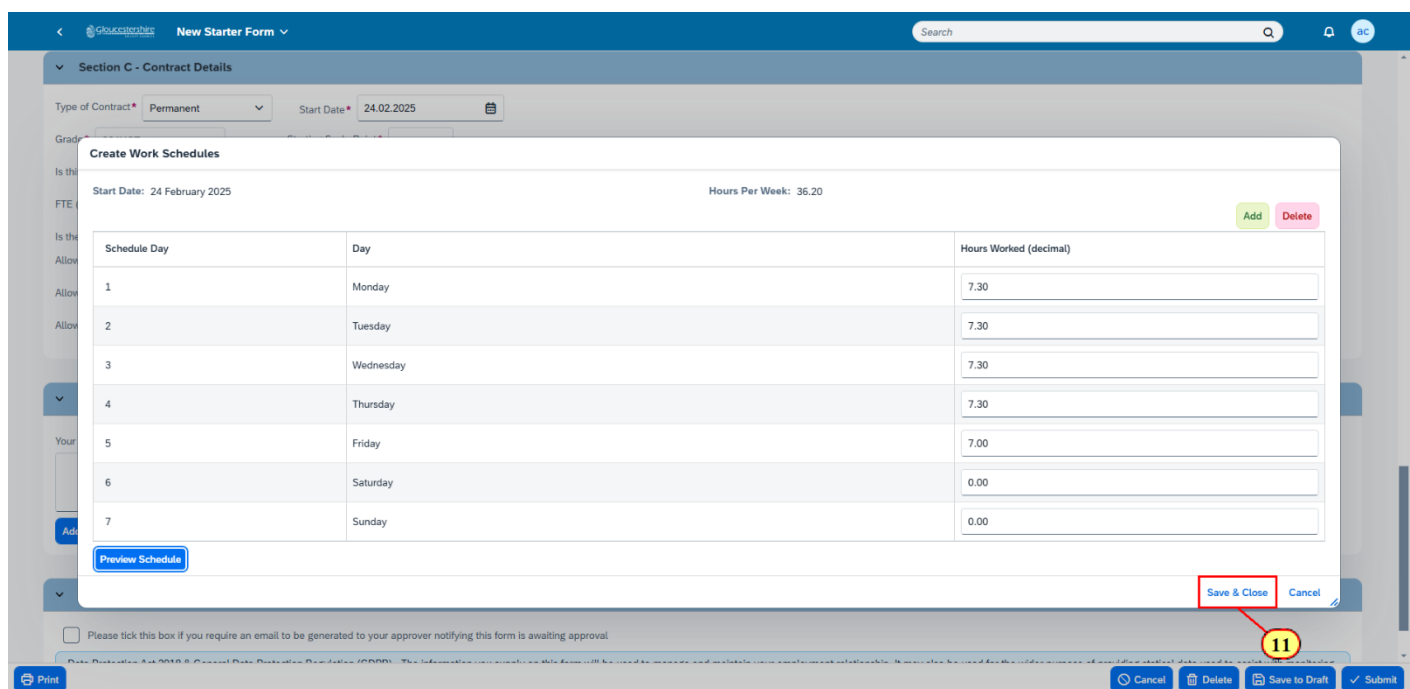
As mentioned all 7 days are added and 0.00 is added for non-working days.

Note: The **Hours Per Week** at the top of the screen must match the details added to the **FTE** field on the previous screen.


(9) Click on **Preview Schedule** to see a preview of the schedule that has been set up.



(10) The schedule will appear at the bottom of the screen. Click on **Hide Preview** to close it again.



(11) Once the Work Schedule is added click on the **Save & Close** button.

 Once the Work Schedule is added an **Allowance** can also be added for the worker if relevant e.g. for First Aid or SEN Allowances.

(12) Click on the **Allowance** picklist arrow to open the picklist.

(13) Then for this example choose **1135 First Aid (TN)** from the list.

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Section C - Contract Details

Type of Contract* Permanent Start Date* 24.02.2025

Grade* 964UQT Starting Scale Point*

Is this a claim only position?* No

FTE (teachers in decimal)* 1.0000 FTE (teachers as %) 100.00% Work Schedules

Is there a Probationary Period* No

Allowance 1135 - First Aid (TN) Amount Number/Unit 1

Allowance Amount Number/Unit

Allowance Amount Number/Unit

Your Comments - Internal Organisation Use Only


Your Comments:

Add Comments

Section F - Notify Approver

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Print Cancel Delete Save to Draft Submit

 The **Number/Unit** of the allowance is added in the related field.

Clicking into the field will produce a prompt advising to add the details as monthly and to pro-rata the amount if the employee is part time e.g. if the employee works 4 full time days per week add **0.8**.

(14) For this example type **1** in the **Number/Unit** field.

Section C - Contract Details

Type of Contract* Permanent Start Date* 24.02.2025

Grade* 964UQT Starting Scale Point*

Is this a claim only position?* No

FTE (teachers in decimal)* 1.0000 FTE (teachers as %) 100.00% Work Schedules

Is there a Probationary Period* No

Allowance 1135 - First Aid (TN) Amount Number/Unit 1

Allowance Amount Number/Unit

Allowance Amount Number/Unit

Your Comments - Internal Organisation Use Only

Your Comments:

Add Comments

Section F - Notify Approver

Please tick this box if you require an email to be generated to your approver notifying this form is awaiting approval

Print Cancel Delete Save to Draft Submit

The screenshot shows the 'New Starter Form' interface. At the top, there is a search bar and a user profile icon. The main content area is divided into sections. Section C - Contract Details includes fields for 'Is this a claim only position?' (set to 'No'), 'FTE (teachers in decimal)' (1.0000), 'FTE (teachers as %)' (100.00%), and 'Work Schedules'. Below this, there are three rows for 'Allowance' with dropdown menus, 'Amount' fields, and 'Number/Unit' fields (one set to '1'). Section F - Notify Approver contains a checkbox labeled '15' which is currently unchecked. A text box below it contains a disclaimer about data protection. At the bottom right, there are buttons for 'Cancel', 'Delete', 'Save to Draft', and 'Submit'.

(15) If notification for the approver is required tick the box in **Section F - Notify Approver** section.

This screenshot is identical to the previous one, but with the 'Submit' button at the bottom right highlighted with a red border and a yellow circle containing the number '16'. The checkbox in Section F - Notify Approver is now checked, and the number '16' is also circled in yellow.

(16) Once all details have been updated click the **Submit** button.

The New Starter form has now been submitted, it will now be with the Approver for sign off.