Budget Planner Software Changes 2014-15

1) Manage Staff Details

A new option has been added to the Main Menu to enable users to manage the staff details held within the budget planner. This function allows user to add new staff, amend staff records and delete those staff codes that have not been used in a staffing forecast.

When importing staffing forecasts from the prior year budget planner users must ensure that the Staff Details held within Star Accounts are imported **before** importing the forecast. If users do not do this first the budget planner will remove all staff codes from the imported forecast and these will need to manually added.

2) The "**Copy Budget to Revision**" and "**Copy Budget to Future Years**" buttons have been moved in line with the columns they are associated with.

CFR	2014-15 Revision 1	2014-15 Revision 2	Forecast 2015-16	Forecast 2016-17	Notes
I01	0	0	0	0	
I01	-746,937	-746,937	-743,367	-823,343	Updated from
I01	3.570	3.570	-79.976	37.114	Updated from

(Above the table: "Copy Budget to Revision" button over the Revision 2 column and "Copy Budget to Future Years" button over the Forecast 2015-16 column.)

The "**Copy Budget to Revision**" button will only appear if the current budget is not the 'Original' budget.

3) Within the staffing sheets an assumed 1% pay increase has been included from September 2014. This means that within 2014-15 forecasts staffing costs are calculated as 5/12^{ths} of the September 2013 prices and 7/12^{ths} of September 2014 prices. Forecasts for 2015-16 and 2016-17 are calculated using the September 2014 prices only.

4) Teaching Staff Forecasts
In line with the School Teachers Pay and Condition Document 2012 (STPCD) several changes have been made to the Teaching Staff Forecast screen.

Where has the 'Teaching' category gone?
To provide a more direct link between the Budget Planner Software and the STPCD the types contained within the Budget Planner have been changed to match those in the STPCD.

Where have the Upper Pay Points gone?
Upper Pay Points are now their own 'Type' with associated spinal points and salary (UPR – Upper Pay Range).

Will I have to change the type if I import a prior year forecast?
No. When a prior year forecast is imported the budget planner will make the necessary changes based on the details found:

2013-14	2015-16
Instructors	UTR (Unqualified Teacher Range)
Teaching	MPR (Main Pay Range)
Teaching (with UPP)	UPR (Upper Pay Range)
Advanced / Excellent	LPPR (Leading Practitioner Pay Range)
Leadership	LPR (Leadership Pay Range)

If a staff member in the prior year forecast had an Upper Pay Point assigned the type will be amended to '**UPR**' and the spinal point assigned will be the Upper Pay Point that was assigned to the "**Spr"** term of the imported forecast.

Why are there now two 'Type' fields?
Two type fields exist within the 2014/15 Budget Planner to more accurately reflect progression through pay ranges, rather than adding cash adjustments which are applied to the whole year.

This is ultimately aid the Staff Monitoring process within Star Accounts.

Will I have to manually add the September 'Type' when importing a prior year forecast?
No, the 2014/15 budget planner will automatically add the September 'Type' and 'Spinal Point' based on the details found within the prior year forecast being imported. Any pay progression awarded in September will need to be manually added.

Why are my unqualified teachers being paid less?
As per Section 1, point 7(K), of the STPCD the £250 unconsolidated payments to unqualified teachers on spinal points 1 -3 have been removed.

My school has not adopted the Norfolk Advisory Payscales (NAPS), should I still use the teaching staff forecast?

Schools that have chosen not to adopt NAPS must still use the Teaching Staff Forecasts to produce a budget forecast. However, they will be required to use the closest Spinal Point to the salary paid to a staff member and enter a cash adjustment to the '**Other Payments**' field for the difference.

Please Note: This may lead to issues within the Staff Monitoring Report used within Star Accounts as 'Other Payments' are apportioned over the entire financial year, whereas the adjustment may only be applicable from the September term (i.e. the budgeted costs will not accurately reflect the actual costs).

5) Teaching and Learning Responsibility (TLR) Payments

A third fixed-term TLR range has been introduced as part of the STPCD (TLR3), for clearly time-limited school improvement projects or one-off externally driven responsibilities.

The cash value of the full year payment should be entered into each of the terms that the payments are to be made for. This value must fall between the ranges specified below:

TLR3	£505 - £2,525
TLR2	£2,561 - £6,259
TLR1	£7,397 - £12,517

6) SEN Payments

SEN payments can be awarded between £2,022 and £3,994 in the Summer Term of 2014-15 and £2,042 to £4,034 in all other terms and financial years.

7) Detailed Staff Forecast Screen

A detailed view of an individual staff forecast can be accessed by double clicking the Staff Name of any line where a Staff Code exists. This feature has been available for the past two years but it is felt this is an under utilised feature.

This screen enables records to be updated for the selected staff member in any forecast in which their staff code appears.

This is particularly useful when dealing with one member of staff in large staffing lists!

A similar screen is also available within the Support Staff Forecast screen.