

HR and Payroll Service – Appendix A

Recruitment Administration

Vacancy placement: Process requests to place adverts in publications as specified by the school

School Responsibilities

Promptly furnish Capita with all information and documents as reasonably required for supply of service

Ensure that all Disclosure and Barring Service (DBS) Medical Clearances and other pre-employment checks have been satisfactorily obtained before the employee takes up the post. Capita HR Solutions (as part of Capita Business Services Limited) will not be held responsible for employees working without the appropriate clearances

HR Administration

Certification of Teachers' Annual Return

Annual salary notification

Requests for premature retirement in accordance with the relevant procedures

Resignation or termination of employment

Advice, support and provision of template letters and documents

Production of and amendments to contracts of employment

Establish and maintain HR records

Maternity, paternity and adoption leave – notification intent to return support and advice

Monthly reminders regarding fixed term contracts

New starter administration – production of contract and qualified teacher status checks

Production and maintenance of annual staff list

Renewal of fixed term contracts and temporary upgrading

Certification of all Teachers' Pensions Forms

Supply of Schools Census Data

Prohibition and List 99 Checks

Payroll Administration

Employee Lifecycle:

Absence recording, career breaks

Payroll terminations

Establish and maintain full payroll records

New starter payroll: addition to the payroll and full payroll processing

Time off without pay processing

Payments and Deductions:

Process pay increases

Arrears payments

Ad hoc payments made as part of the normal payroll cycle

Deduct student loans

Keep up to date records of annual pay awards

Manage voluntary deductions such as Union subscriptions, HSA Give As You Earn and those arising from employee benefits schemes

Process annual increments and national pay awards where applicable

National Insurance contributions and payments

Death in service payments

Process variations to normal working hours

Maternity, paternity and adoption – calculations and payments

Occupational or statutory sick deductions and payments

Overtime processing

Payment by BACS

Process all authorised variations to pay

Processing of expenses and mileage

Processing of pay increases

Redundancy payments and calculation

Salary deductions

Third party deductions (including court orders, Child Support Agency)

Timesheet processing

Salary recall for schools using LA bank accounts

Process and calculate leavers' final payments

Pensions and Reporting:

Payroll Administration

Calculate pension contributions

Local Government Pension Scheme Annual Return

LGE pension forms for all staff

Process additional voluntary pension contributions and added years

Management of auto-enrolment process

Standard payroll reporting

General Payroll Activity:

RTI activity in line with HMRC guidelines

Advice on day-to-day matters concerning pay such as Income Tax and National Insurance

Advice on pay terms and conditions for teachers and support staff

Full payroll reconciliation

Implement tax codes as notified by HMRC

Implement and manage a disaster recovery strategy

Income tax – PAYE P11D production and issue of P45 and P60

Payslip distribution to one school contact

Schools' Responsibilities for HR Administration and Payroll

Ensure that all information is fully accurate and completed before submitting to Capita

Ensure that all information is submitted in the correct designated format to Capita in advance of all HR and Payroll deadlines. All deadlines will be notified to schools on an annual basis. Capita retains the right to review these deadlines at any point and advise the schools of any changes in advance.

Disclosure and Barring Service – E-bulk

DBS checks for all employees and volunteers

School Responsibilities

Ensure that all Disclosure and Barring Service (DBS) checks are satisfactorily obtained before the employee takes up the post using the DBS Applicants and Managers guidelines

HR Advisory

Advice and support provided remotely or on site handling on HR aspects such as capability, discipline, grievance, harassment, redundancy, restructures, sickness, absence management and TUPE

Advice on ill health retirement process for teaching or support staff including liaison with your Occupational Health provider if required

Advice on adverse DBS disclosures

Advice on absence management matters

Advice on Pay and Grading as well as Terms and Conditions for teachers and support staff

Advice on pre-employment contractual matters

Advice on the preparation and presentation of cases at hearings and Employment Tribunals (excluding legal representation)

Advice on the use of equality legislation and its practical implications

Interpretation and application of national and locally agreed terms and conditions of employment

Interpretation and application of maternity, paternity and adoption leave

Advice and support in relation to probationary periods and ending fixed term contracts

Advice and support in relation to workforce restructuring and redundancy (excludes 'project' work that would be priced and contracted for separately, for example in support of conversion of school status or other significant change)

Attend meetings, hearings and appeals relating to capability, discipline, grievance, harassment, redundancy, reorganisation, restructures, sickness and attendance management and TUPE

Attend relevant meetings of the governing body to advise on redundancy and redeployment procedures

Attend formal meetings where required under the agreed procedures to support and advise managers

Coaching managers during complex cases

Consult with relevant trade unions on behalf of the governing body in accordance with statutory requirements and local agreements

Attend meetings with headteachers to assist with the management of redundancy cases as per the defined redundancy procedure as necessary

Attend meetings with employees and/or their representatives, and/or accompany managers on behalf of the school as part of the model policies and procedures in relation to grievances, competence or disciplinary issues where this will assist the process of resolution

HR Advisory

Support managers on long-term sickness absence management; liaising with Occupational Health and providing support and advice to the manager to help resolve the case

Liaison with schools' appointed legal advisers in respect of settlement agreements or employment tribunal responses and submissions or case support

Succession planning

School Responsibilities

Provide copies of policies and procedures adopted by the school to enable the HR staff to advise in accordance with these

Obtain legal advice for the provision of settlement agreements, and formal legal proceedings, for example, Employment Tribunal claims

Proactive support for the management of long term absence cases