



**Cintra iQ**

# Teachers' Pensions Monthly Data Collection

Implementation Guide

**Copyright © Cintra HR and Payroll Services Limited 2016**

All rights reserved. Information in this document is subject to change without notice.

**Cintra HR and Payroll Services Ltd**

Computer House

353 High Street

Gateshead

Tyne & Wear

NE8 1ET

Phone +44 (0) 191 478 7000

Fax +44 (0) 191 478 6060

# Change Management

The following table contains a list of changes that have occurred between releases. Click on a link to access the relevant information.

Version	Document section	Date changes were made
v3.3	<a href="#">Excluded Days</a>	17/02/17
v3.3	<a href="#">Identify FT, PTR or PTI Employees</a>	17/02/17
v3.3	<a href="#">Post as Add On</a>	17/02/17

# CONTENTS

## Introduction

Setting up Monthly Data Collection (MDC) .....	2
--	---

## Teaching Roles FAQ

Who is in the Return and which Posts are Classified as Teaching Roles? .....	4
To create a report for employee posts .....	4
How Do I Set Job Categories as Teaching Roles? .....	5
To set the job category .....	5
How Do I Apply a Job Category to a Job? .....	7
To apply the category to a job .....	7
How are Excluded Days Included in the MDC Return? .....	8

## Salary Data FAQ

How are Full Time, Part Time Regular or Part Time Irregular Employees Identified in Cintra iQ? .....	10
Full Time Employee .....	10
Part Time Employee Regular .....	11
Part Time Employee Irregular .....	12
How is Full Time Equivalent (FTE) Salary Determined? .....	13
How Does Cintra iQ Treat FTE Annual Salaries Held Against Teaching Posts? .....	14
Single Post .....	14
Multiple Posts .....	15

Main Post and Add On Post .....	16
How Do I Pay Casual Employees? .....	18
Where Do I Enter the DfES Number? .....	19

# CHAPTER 1

## Introduction

This document is intended for those clients who wish to set up the **Monthly Data Collection (MDC)** configuration themselves and **Cintra's Implementation, Support, Development, and Installation** teams. This document contains procedures and examples that affect new **Cintra iQ Teachers Pensions Monthly Data Collection Return** module.

This chapter explains the following:

Setting up Monthly Data Collection (MDC) .....	2
--	---

## Setting up Monthly Data Collection (MDC)

Before you can generate a **Monthly Data Collection Return**, you should ensure you set up the **Monthly Collection Data** by performing the following:

- Determine who should be included in the **Return**. All employees who hold posts that are classified as **Teaching** posts are included in the **Return**.
- Classify the posts, belonging to the **Return's** employees, as **Teaching** posts. This is done through the **Job Category Lookup** table as the employee's post belongs to a job assigned to a job category that defines whether the job category is a **Teaching Role**.

**Note:** If an existing job categorisation is too general, you may need to create a separate job category specific to **Teaching Roles**. Otherwise, you can flag each teaching category as a **Teaching Role**, then apply the correct category to each job. **e.g.** I have a **Senior Management** job category that contains both teaching and non teaching related jobs. Therefore, I want to keep **Senior Managers** for non **Teaching Roles** and create a different category for **Teaching Roles**.

- Ensure that all employees who are in **Teaching Role** job categories, have full time equivalent (**FTE**) annual salaries held against their teaching post(s). This also applies to casual employees who are paid an hourly rate.
- Set the **Teachers Pension Scheme Type** on both the **Final Salary** scheme, and the **Career Average Scheme (CARE)**. This is done through the **Scheme Details** tab in the **Pension/Benefit Schemes > Pension Scheme** form.

# CHAPTER 2

## Teaching Roles FAQ

This **FAQ** is divided into Questions and Answers about how **Teaching Roles** are treated in **Cintra iQ**.

For example purposes, a generic **Job Category** was created to illustrate the procedures.

This chapter describes the following:

Who is in the Return and which Posts are Classified as Teaching Roles? .....	4
How Do I Set Job Categories as Teaching Roles? .....	5
How Do I Apply a Job Category to a Job? .....	7
How are Excluded Days Included in the MDC Return? .....	8

## Who is in the Return and which Posts are Classified as Teaching Roles?

You can create a report containing employee posts, jobs and job category data to help you identify who should be included in the **Return** and which **Job Categories** are **Teaching Roles** and which need to be classified as **Teaching Roles**.

### To create a report for employee posts

1. Create an Employee report that contains the **Employment ID, First Name, Surname, Post Title, Job Title, Job Category Name, and Job Category Is Teaching Role** fields.
2. Run the report using the **As At** date. This generates data for those employees who are in posts today.
3. Save the report as a spreadsheet to view it in detail. The report tells you what jobs the employees are in, how the jobs are categorised and whether the job category is flagged as a **Teaching Role**.
4. Sort the report by **Job Category Name** and **Job Title**. You can now systematically go through the report to see if you need to change an employee's **Job Category** to a **Teaching Role** through the **Lookup Table** module.

**Note:** For those **Job Categories** that need to be set as a **Teaching Role**, see [How Do I Set Job Categories as Teaching Roles?](#)

**Note:** To check if any vacant posts are required, you can create a similar report for **Posts** by selecting **Post Title, Posts Reference, Current Posts, Job Title, Job Description** and **Job Category Name** fields.

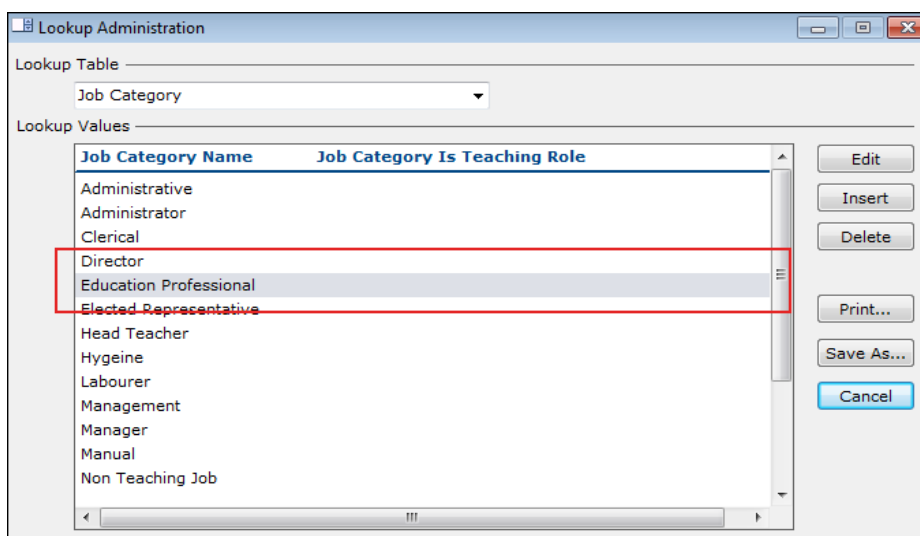
## How Do I Set Job Categories as Teaching Roles?

Once you have identified which jobs need to be for **Teaching Roles** only, you can set this in the **Job Category Lookup Table**.

**Search path:** Menu bar> Definitions> Lookups...> Lookup Administration window> Lookup Table drop down list> Job Category

### To set the job category

1. Navigate to the **Lookup Table: Job Category**. Its categories appear in the **Lookup Values** pane.
2. Highlight the desired job category.



3. Click the **Edit** button. The **Job Category** form appears.
4. Set **Job Category Is Teaching Role: Y**

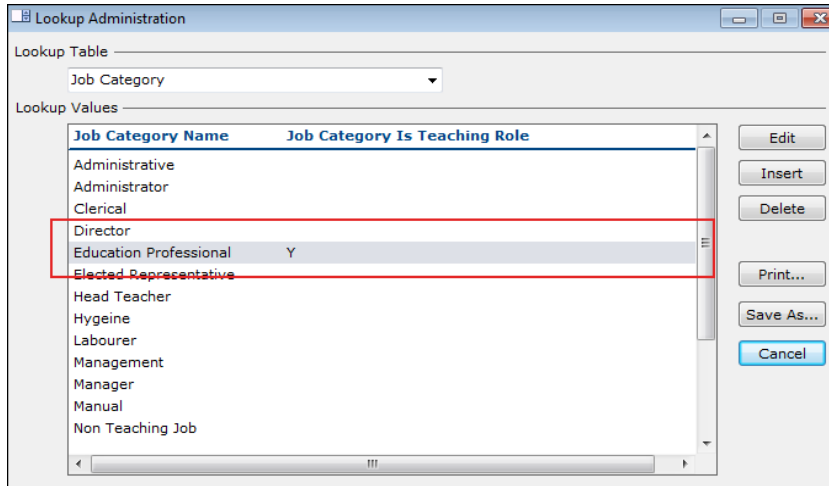
Job Category

Job Category Name: Education Professional

Job Category Is Teaching Role: Y

Cancel OK

5. Click the  button. The **Job Category** is now set as a **Teaching Role** and you are ready to apply the **Job Category** to a job.



**Note:** You can create a new category by clicking the  button.

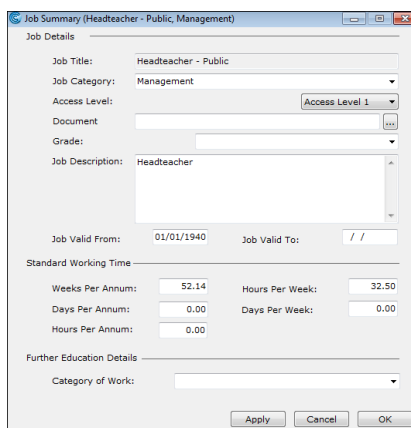
## How Do I Apply a Job Category to a Job?

Once you have set a Job **Category** as a **Teaching Role**, you can apply the category to a job.

**Search path:** Jobs> Job record> Forms> Job Summary

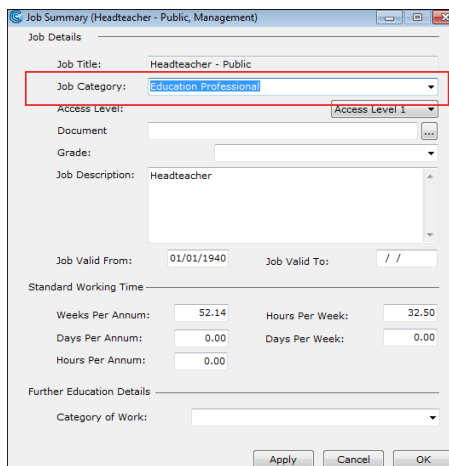
### To apply the category to a job

1. Navigate to the **Job Summary** form.



The screenshot shows the 'Job Summary (Headteacher - Public, Management)' form. The 'Job Category' dropdown is set to 'Management'. Other fields include 'Job Title: Headteacher - Public', 'Access Level: Access Level 1', 'Job Description: Headteacher', and 'Job Valid From: 01/01/1940'. The 'Standard Working Time' section shows 'Weeks Per Annum: 52.14', 'Hours Per Week: 32.50', 'Days Per Annum: 0.00', and 'Days Per Week: 0.00'. The 'Further Education Details' section has 'Category of Work' set to an empty dropdown. Buttons for 'Apply', 'Cancel', and 'OK' are at the bottom.

2. Select the desired category from the **Job Category** drop down list.



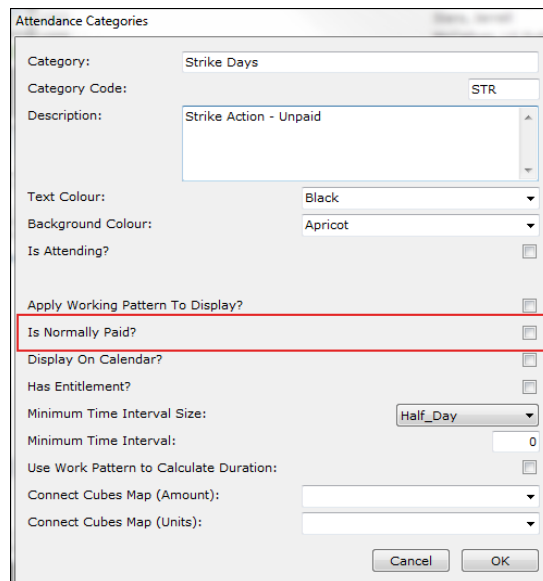
This screenshot is identical to the previous one, but the 'Job Category' dropdown menu is open, showing 'Education Professions' selected. A red box highlights the dropdown menu area.

3. Click the  button. The **Job Category** is updated.

## How are Excluded Days Included in the MDC Return?

For any **Attendance Categories** calendar entries that are flagged as not normally paid (e.g. strike days, unpaid leave etc.) in the database, the days for those absences are picked up and counted in the **Excluded Days** column in the **MDC** file.

To check if the flag is set to **N**, go to the **Attendance Categories Lookup** table and confirm that **Is Normally Paid?** is set correctly for each attendance category.



The screenshot shows a dialog box titled "Attendance Categories". It contains several fields and checkboxes. The "Category" field is set to "Strike Days", "Category Code" is "STR", and "Description" is "Strike Action - Unpaid". Other fields include "Text Colour" (Black), "Background Colour" (Apricot), "Is Attending?" (unchecked), "Apply Working Pattern To Display?" (unchecked), "Is Normally Paid?" (unchecked, highlighted with a red box), "Display On Calendar?" (unchecked), "Has Entitlement?" (unchecked), "Minimum Time Interval Size" (Half\_Day), "Minimum Time Interval" (0), "Use Work Pattern to Calculate Duration" (unchecked), "Connect Cubes Map (Amount)" (empty), and "Connect Cubes Map (Units)" (empty). "Cancel" and "OK" buttons are at the bottom.

Excluded days are also populated for employees on multiple concurrent contracts. The number of days excluded comes out of the concurrent contract calculation and is representative of the employee's **FTE** ratio.

# CHAPTER 3

## Salary Data FAQ

This **FAQ** is divided into Questions and Answers about how **Salary Data** should be set up in **Cintra iQ** for **Teachers' Pensions Monthly Data Collection**.

This chapter describes the following:

How are Full Time, Part Time Regular or Part Time Irregular Employees Identified in Cintra iQ? .....	10
How is Full Time Equivalent (FTE) Salary Determined? .....	13
How Does Cintra iQ Treat FTE Annual Salaries Held Against Teaching Posts? .....	14
How Do I Pay Casual Employees? .....	18
Where Do I Enter the DfES Number? .....	19

## How are Full Time, Part Time Regular or Part Time Irregular Employees Identified in Cintra iQ?

The system identifies if an employee is **Full Time**, **Part Time Regular** or **Part Time Irregular** by checking an employee's **Post History** for one or more posts that are **not** marked as **Additional Role** in the same date and time period as the **MDC Return**. They also must have the following criteria:

### Full Time Employee

If the post is **not** flagged as an **Additional Role** and it has a working pattern for a **Full Time Equivalent FTE** value of **1**, the system automatically identifies it as **Full Time**.

**Note:** If no working pattern is specified, then the system treats the post as having a **FTE** of **1**.

From	To	Post	Job Title	Job Category	Post Contract Type
19-Jun-2010		Academy Headteach	Headteacher - Public	Education Professional	

From	To	Work Pattern	FTE Factor	Hours Per Week	Weeks Per Year	Term Tim
15-Apr-2012		Mon-Fri	1.000000	32.50	52.1400	

**Note:** If an employee is identified as not **Full Time**, then they need to be established as **Part Time Regular** or **Part Time Irregular**.

## Part Time Employee Regular

If the post is **not** flagged as an **Additional Role**, and has a **FTE** factor of **>0** and **<1**, the system automatically identifies it as **Part Time Regular**.

Post History (1078, Holton, Melina Ann)

From	To	Post	Job Title	Job Category	Post Contract Typ
31-Mar-2002		St Marks Teacher	Hi Teacher - Public	Education Professional	

Spine Point History Working Pattern Assignments

From	To	Work Pattern	FTE Factor	Hours Per Week	Weeks Per Year	Term Tim
31-Mar-2002		Mon-Fri	0.500000	17.50	52.1400	

OK

## Part Time Employee Irregular

If the employee has not been identified as **Full Time** or **Part Time Regular**, they need to be established as **Part Time Irregular**. This means that if the post is **not** flagged as an **Additional Role**, has a **FTE** factor of **0** and has ad hoc hours, the system automatically identifies it as **Part Time Irregular**.

Post History (1001, Heffelfinger, Horacio)

From	To	Post	Job Title	Job Category	Post Contract Typ
01-Mar-1997		Qualified Teacher 1	Teacher - Public	Education Professional	

Spine Point History Working Pattern Assignments

From	To	Work Pattern	FTE Factor	Hours Per Week	Weeks Per Year	Term Tim
01-Jul-2015		1 day	0.000000			
01-Mar-1997	30-Jun-2015	Mon-Fri	1.000000	35.00	52.1400	

OK

## How is Full Time Equivalent (FTE) Salary Determined?

Each post that the employee holds is examined to see what **FTE** salary is held against it. A **FTE** salary must be held against a post even for employees who are irregularly paid on an hourly basis. In these cases, the full time salary should be held but with an **FTE** ratio of zero so that no salary is actually paid.

## How Does Cintra iQ Treat FTE Annual Salaries Held Against Teaching Posts?

### Single Post

Within a **Post History** record, all standard pensionable payments within the record are treated as belonging to the same contract and are summed to form the annual **FTE** salary.

All Standing Allowances and Rates	
Display From: 01/07/2014 To 31/07/2014	
<b>Academy Headteacher (Academy Headteacher)</b>	
<ul style="list-style-type: none"> <li> <input type="checkbox"/> SEN Co-ordinator (Postholder Specific Allowance)           <ul style="list-style-type: none"> <li><input type="checkbox"/> 01/07/2014 onwards</li> </ul> </li> <li> <input type="checkbox"/> Teachers Leadership Pay Scale (Spinal Salary from Post)           <ul style="list-style-type: none"> <li><input type="checkbox"/> 01/04/2014 onwards</li> </ul> </li> </ul>	<p>416.67 per Month</p> <p>3,488.00 per Month</p>
<p>Annual 5,000.00</p> <p>Monthly 416.67</p> <p>Annual Salary 41,856.00</p> <p>Monthly Salary 3,488.00</p>	

**Example:** Philippa has one post that has a normal spine point salary of £41,856.00 per year. She has also been given an additional responsibility payment under that post of £5,000.00 a year. Therefore, the two payments, held under the same post, are summed to form an annual salary of £46,856.00.

## Multiple Posts

If the employee holds more than one post concurrently, these posts are treated as concurrent contracts. The **FTE** annual salary for each post is taken into a concurrent contract calculation, which gives a weighted average of the two **FTE** annual salaries, depending on the amount of money earned under each of those posts.

**Note:** By default, any concurrent employee posts in **Post History** are treated as two concurrent contracts. But you can also have multiple payments within each posts.

Post	Allowance Type	Annual Salary	FTE	Monthly Payment
AE Teacher (AE Teacher)	Annual Salary (Postholder Specific Allowance)	37,650.00	0.615385	1,930.77 per Month
	01/07/2014 onwards	37,650.00 (23,169.25 with FTE of 0.615385)		Monthly 3,137.50 (1,930.77 with FTE of 0.615385)
St Marks Teacher Biology (St Marks Teacher Biology)	Annual Salary (Postholder Specific Allowance)	30,000.00	0.384615	961.54 per Month
	01/07/2014 onwards	30,000.00 (11,538.45 with FTE of 0.384615)		Monthly 2,500.00 (961.54 with FTE of 0.384615)
SEN Co-ordinator (Postholder Specific Allowance)	Annual Salary (Postholder Specific Allowance)	5,000.00	0.384615	160.26 per Month
	01/07/2014 onwards	5,000.00 (1,923.08 with FTE of 0.384615)		Monthly 416.67 (160.26 with FTE of 0.384615)

**Example:** Cecilia has two posts: She works 20 hours per week as an AE teacher and has a **FTE** salary of £37,650. She also works 12.5 hrs per week as a Biology teacher and has a **FTE** salary of £35,000 therefore, her income is determined by the weighted average derived by the concurrent contract calculation, which for this example is £36,631.00.

## Main Post and Add On Post

If the employee has one main post, and is given an additional post for other responsibilities, the additional post can be treated as an **Add On** to the main post. The annual salary for each post is summed to form the employee's **FTE** annual salary.

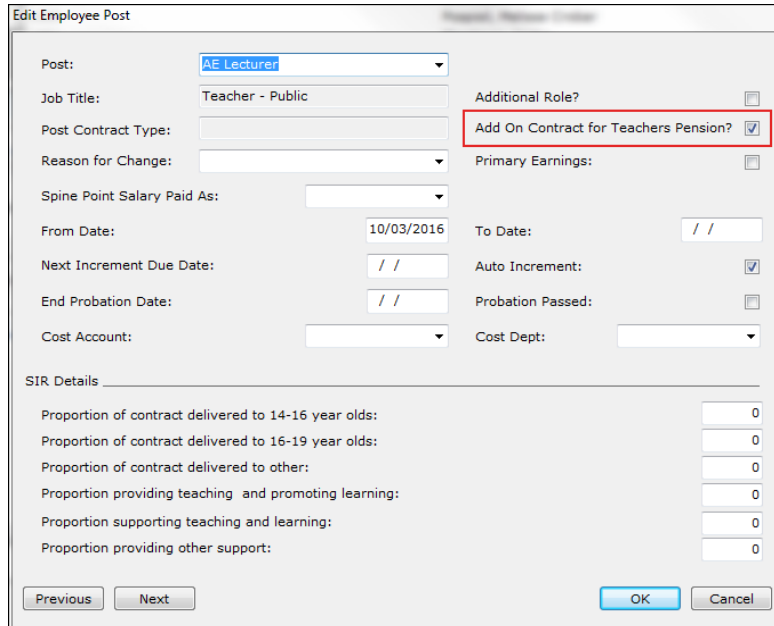
**Note:** The **Add On** option can only be used in cases where the employee holds a single main post. (See this example.) If the employee holds concurrent multiple posts, then all payments for those contracts have to be held within the post. For more information, see [Mutiple Posts](#).

All Standing Allowances and Rates		Set Up Individual Allowances and Rates
Display From: 01/07/2014 To 31/07/2014		
<b>Education HR Teachers Admin (Education HR Teachers Administrator)</b>		
<input type="checkbox"/> Invigilator Lower (Employee In Post Specific Rate)		
<input type="checkbox"/> 01/03/2013 onwards		7.1400 per Unit
<input type="checkbox"/> Invigilator Lower Holiday (Employee In Post Specific Rate)		
<input type="checkbox"/> 01/03/2013 onwards		0.8600 per Unit
<input type="checkbox"/> Overtime 1.5 APTC (Employee In Post Specific Rate)		
<input type="checkbox"/> 01/04/2014 - 09/03/2016		18.6086 per Unit
<input type="checkbox"/> Salary NJC Spine (Spinal Salary from Post)		
<input type="checkbox"/> 01/04/2014 - 29/02/2016		1,617.08 per Month
		Annual Salary 19,405.00
		Monthly Salary 1,617.08
<b>SEN Co-ordinator 1 (SEN Co-ordinator 1)</b>		
<input type="checkbox"/> SEN Co-ordinator (Postholder Specific Allowance)		
<input type="checkbox"/> 01/07/2014 onwards		416.67 per Month
		Annual 5,000.00
		Monthly 416.67

**Example:** Azelea has one main teaching post which pays an annual salary of £19, 405.00. She also has an additional responsibility as Special Education Needs (SEN) Co-ordinator which pays an annual salary of £5,000. Instead of being treated as concurrent contracts with a weighted average, the annual salaries from both posts are summed to form an annual FTE annual salary of £24,405.00.

## Post as Add On

To define the employee's post as an add on, ensure that the **Add On Contract for Teachers Pensions?** check box is checked.



The screenshot shows the 'Edit Employee Post' form with the following fields and values:

- Post: AE Lecturer
- Job Title: Teacher - Public
- Post Contract Type: (empty)
- Reason for Change: (empty)
- Spine Point Salary Paid As: (empty)
- From Date: 10/03/2016
- To Date: / /
- Next Increment Due Date: / /
- Auto Increment:
- End Probation Date: / /
- Probation Passed:
- Cost Account: (empty)
- Cost Dept: (empty)
- Additional Role?:
- Add On Contract for Teachers Pension?:**
- Primary Earnings:

**SIR Details**

Proportion of contract delivered to 14-16 year olds:	0
Proportion of contract delivered to 16-19 year olds:	0
Proportion of contract delivered to other:	0
Proportion providing teaching and promoting learning:	0
Proportion supporting teaching and learning:	0
Proportion providing other support:	0

Buttons: Previous, Next, OK, Cancel

**Note:** The **Add On Contract for Teachers Pensions?** check box was introduced in v33. If it is not available on the **Post History** form, contact your **Cintra Implementation** team as the form needs to be customised.

## How Do I Pay Casual Employees?

When you allocate variable pay to a post in a given period , or pay hours for casual paid employees, you can enter data by either of the following methods:

- **Payroll Period Input.**
- **Batch Import:** Ensure **Post Reference** is mapped to the appropriate heading in the **Batch** file if you are importing data. This is so that you know which post has the allocated pay.

## Where Do I Enter the DfES Number?

Ensure you enter the **Teachers' Pension Member Reference Number (DfES/GTC teaching reference)** for each employee as it is essential for generating a valid **MDC** return. The reference number must consist of seven digits. All teachers should have a number, but if it is unknown and exists, visit the **Teachers' Pensions Employer Portal** for more information. Otherwise enter **0000000**.

**Search path:** Personnel record > Forms > Teaching Details > SIR Details window > Dfes Number field > right-click > Information > Field Information

The screenshot shows the 'SIR Details' form for 'Pandemonium, Philippa, Pandemonium'. The 'DfES Number' field is highlighted with a red box and contains the value '9085466'. A 'Field Information' dialog box is open over this field, showing the following details:

- Table: People
- Field: GTC Teacher Reference
- Type: Alphanumeric
- Size: 9 characters

The form also includes other fields such as 'Date Started Teaching (SIR Field 32): 01/09/2005', 'Qualified Teaching Status (SIR Field 22): 1 Qualified Teacher Status (QT)', and 'Area of Learning of Highest Qualification (SIR Field 23): 04 Engineering and manufactu'. At the bottom, there is a table for 'Teaching or FE Qualifications' and 'Teachers Pension Details'.

Date Obtained	Grade	Subject	Teaching and FE Category
27-Nov-2015		English	04 PGCE