School Workforce Census

EPM Connect Guide



Document Control

Document Overview: This document outlines the step-by-step process for managing all tasks within the School Workforce Census module in EPM Connect.

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Document Approval
The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	5th December 2025
Summary of Change	Addition of Preparation for the Census section
New Version Number	v2.1
Changes to be notified to	Director of Operational Excellence

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The School Workforce Census

The School Workforce Census module allows you to simplify the process. Real-time data is imported directly from the employee portal, reducing errors and duplication. Automated alerts highlight incomplete information, while the option to download a draft version gives you confidence to review internally in line with DfE requirements.

Important

You cannot make any changes to the module until a **Census Date** and **Submission Date** has been confirmed by the DfE.

Preparation for the Census

In order to reduce the number of errors within the **School Workforce Census**, we recommend preparing in advance. There are a number of steps you can take to prevent errors:

- Regularly check Incomplete Records within the Employees module.
- Ensure there is at least one employee in the system has the Role Identifier of SEN Co-ordinator within Job Information
- Ensure there is at least one employee in the system has the Role Identifier of Head Teacher within Job Information
- When adding new employees, ensure:
  - All fields denoted with a ***** are completed.
  - The **Origin** field within **Job Information** is completed
  - All fields within **Sensitive Information** are completed. If the information for any of these fields is not available, select **Information Not Yet Obtained**
  - All fields within the **Leadership Pay** section of **Salary Information** is completed for Leadership posts

    If **Leadership** fields are left incomplete, they will only register as queries in the School Workforce Census and will not prevent you from submitting the Census.

Summary (including Metrics)

The **Summary** section of the module displays the **Census Date** and **Submission Date**

1. On the left-hand side of the EPM Connect window, select **Workforce Census**. A list of further menu options will appear.
2. Select **Summary**. The **Workforce Census Summary** page is displayed.
3. This page displays the **Census Date** and **Submission Date**.

   The **Summary** page provides confirmation of the **Census Date** and the **Submission Date**.

   If either of the dates are yet to be confirmed they will be displayed as **Not Confirmed**. This information will be added as soon as it is available.

   During the census period, select **Produce Census** to begin the process.

   Outside of this period submissions cannot be produced.

Check for Errors

This provides a Workforce Census Wizard to complete the details within the census.

1. On the left-hand side of the EPM Connect window, click **Workforce Census**. A list of further menu options will appear.
2. Select **Check for Errors**. The **Check For Errors** page is displayed.

   This will check any errors within the system within the **Employees** and **Absence Management** modules.

   Error Table

   Type: will display either error or query.

   Error: Missing or invalid information, for example Disability is missing or invalid. Errors must be fixed before you can download the Census submission.

   Query: Information that needs confirmation, for example 'Last day of absence is missing for a non-maternity absence – please confirm if absence is ongoing.'

   Queries do not need to be fixed before downloading the Census submission file, but highlight areas which may need to be checked before submission.

   Search/filter

   Click on the magnifying glass icon to search in the selected column.

   Click on a highlighted column heading to sort alphabetically or numerically.

   Click again to switch between ascending/descending order.

3. Click the pencil icon on the far right-hand side of the error or query to check the information and make the relevant changes.

   We recommend right-clicking on the pencil icon to open up the relevant record in an additional tab. This will prevent the need to re-open the School Workforce Census tab after each query is resolved.

4. Click **Save** to save the changes made.

5. Once all changes have been made, return to the page and click the **Recheck for Errors** button.

6. This will re-run all the checks against the changes you have made. Once all errors have been removed, you can **Produce the Census**.

   If errors remain, you cannot Produce the Census.

Produce Census

1. On the left-hand side of the EPM Connect window, select **Produce Census.** The **Produce Census** page is displayed.
2. This page will show the **Property Information**.

   If any of the information within the **Property Information** section is incorrect, select on **Admin** on the left-hand side of the EPM Connect Window and select **Main Settings**. If you do not have access, please speak to your EPM Team.

3. Scroll down to **Workforce Census Modules** and select the modules you would like to include in the Workforce Census Report and unselect any modules you do not wish to include.

   If you click the **Occasional Teacher Information** field, you will be asked to populate this information manually. If this box is not ticked, you will be taken to the **Check for Errors** tab for another check.

4. Click **Next.** The page refreshes.

5. Complete the text boxes within the **Occasional Teachers on Workforce Census Day** to indicate the **Number of Occasional Teachers With QTS/Without QTS/Where QTS Not Known**.
6. To add **Agency/Third Party Support Staff on Workforce Census** Day select from the drop-down lists next to each **Role** and add a number within the **Number of Staff** text box.
7. To add a new role, click the red **+ Add Role** button. A new window is displayed.

8. Select a role from the **Role** drop down list and add a number within the **Number of Staff** text box.
9. To add a new vacancy, click the red **+ Add Vacancy** button. A new window is displayed.



10. Select a role from the **Post** and **Tenure** from the drop down list.
11. Check the boxes to indicate whether the role has been **Temporarily Filled** and/or **Advertised**.
12. To run an error check, click the **Run Error Check** button.

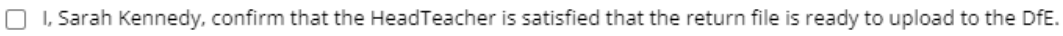


If there are any outstanding errors, you will not be able to continue.

13. Click **Continue**. A new page is displayed.



14. Click **Download Draft** to download a draft version to check.
15. Once you are satisfied with the draft, tick the confirmation box.



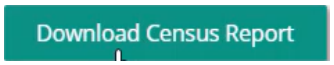
16. In the **Additional Text to be displayed on the authorisation report** field, enter any additional text.
17. Click **Confirm.** The census has been uploaded to the DfE.



18. Click **Download Additional Information**. The file will appear within your downloads.



19. Click **Download Census Report**. The file will appear within your downloads.



20. On the left-hand side of the EPM Connect window, click the **Submission** history to ensure the census has been submitted.

Submission History and downloading historical submissions

This will show all previous reports.

1. On the left-hand side of the EPM Connect window, click **Workforce Census**. A list of further menu options will appear.
2. Click **Submission History**. The **Submission History** page is displayed.
3. Click on the icons on the right hand side of the report listed.
4. The relevant report will download and appear in your download folder within your main computer files.
5. Go to your files, click **Downloads** and open the report.

Remove employees from the School Workforce Census

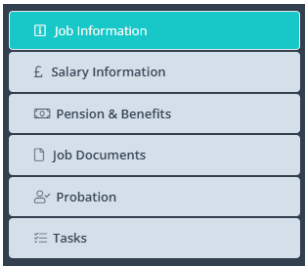
All employees stored within the system are added to the School Workforce Census by default, unless the **Casual Staff** box has been ticked. However, if you wish for a member of staff, for example a Trustee to not appear in the Workforce Census. This can be done by unticking the box within their record.

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options will appear.
2. Click **Details**. A list of further menu options will appear.
3. Click **All Employees**. The **Employees page** is displayed.
4. Choose an employee from the employees listed.

Column headings in a bold blue text with a magnifying glass icon can be filtered or sorted alphabetically, chronologically, or numerically depending on the content of the column. To sort the column, click on the column heading. Click a second time to reverse the sorting.

To search in a column, click on the magnifying glass in the header of the column you want to search. From the for dop-down list, select the rule for your search then add the criteria in the text box below.

5. Click on the **Forename** of the employee you wish to remove from the School Workforce Census.
6. Select the **Job Information** tab near left hand side. The **Job Information** page is displayed.



7. Click the **Edit Details** button at the bottom far right of the page.



8. Select an effective date (the date from which you wish the person to be removed from the Census).
9. Click **Apply**.



10. Scroll down to the bottom the **Job Information** section to **Include In The School Workforce Census** and untick the box.
11. Click **Save**.

