

Downloading and saving the monthly Service Returns from the Schools Payroll Portal

Purpose

Use this procedure to download your monthly service returns and save them to a local drive.

What you need

- Log in details for the Schools Payroll Portal

Helpful hints

- For more detailed instructions and a simulation exercise, please see the eLearning at http://www1.surreycc.gov.uk/lpool/schools_portal/index.htm

Procedure

1. Start at the Schools Payroll Portal page on the Surrey County Council website, this can be located by clicking through the following Links from the SCC homepage: Learning > Teachers and education staff > Schools Portal > Schools Payroll Portal, or using the Search option here:



To make it easier to locate in the future we advise Saving this as a favourite.

2. In the “See also” box, to the side of the Schools Payroll Portal homepage, there are links to extra help.

If you have any queries or issues using the Portal or the Schools Returns, this should be your first point of call to see if you can find the answer.

These are currently include, but are not limited to:

- Work instructions for the Schools Portal – download these work instructions, and those accompanying the other parts of the eLearning course
- Bursars’ toolkit - resources that have been made available for Bursars

See also

- [Schools bulletin](#)
- [Questions about the Schools Payroll Portal](#)
- [Work instructions for the Schools Payroll Portal](#)
- [Payroll deadlines 2013](#)
- [Bursar's toolkit](#)
- [policy for the Schools Payroll Portal deadlines](#)

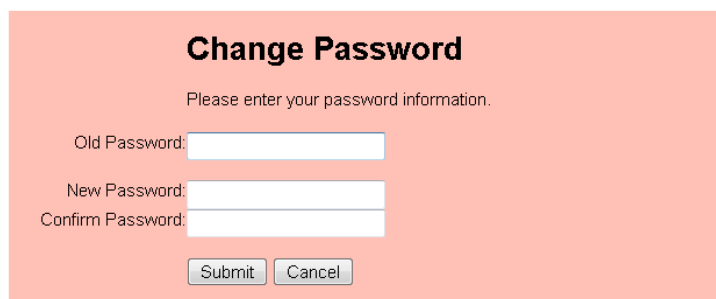
The pages found here contain a variety of useful information, and the contents are constantly reviewed and updated, so it is a good idea to check the contents regularly.

Click on “Login to Schools Payroll Portal”.

3. Enter your user name and password when prompted, and click “Login”.

This is usually your name, or some variation on your name. If you have forgotten it, the Helpdesk will be able to assist you.

If this is the first time you have logged on, or if your password has been reset, you will be asked to change your password, as shown below.



Change Password

Please enter your password information.

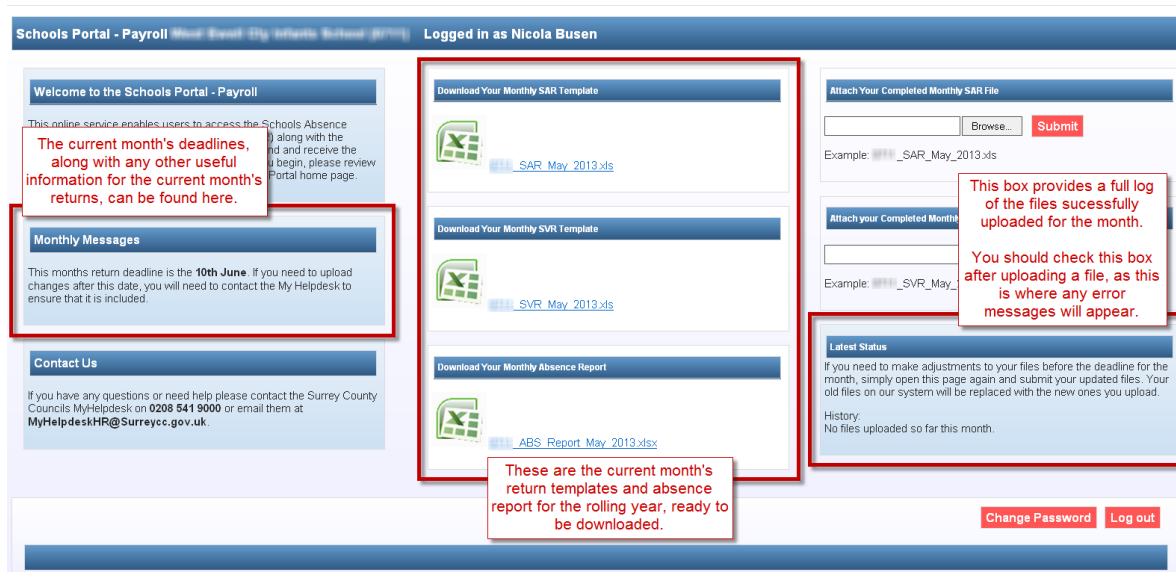
Old Password:

New Password:

Confirm Password:

4. You will now see the Schools Payroll Portal page for your school, as shown in the top banner, along with the name of the user logged in.

This screen will also provide other useful information, such as the current month’s deadline and the status of file submissions for your school, i.e. a log of successful uploads.



Schools Portal - Payroll Home Event City Infants School (8774) Logged in as Nicola Busen

Welcome to the Schools Portal - Payroll

This online service enables users to access the Schools Absence and SVR system, along with the ability to upload and receive the current month's returns. To begin, please review the Schools Absence Portal home page.


Monthly Messages

This month's return deadline is the **10th June**. If you need to upload changes after this date, you will need to contact the My Helpdesk to ensure that it is included.


Contact Us

If you have any questions or need help please contact the Surrey County Council's MyHelpdesk on 0208 841 9000 or email them at MyHelpdeskHR@Surreycc.gov.uk.


Download Your Monthly SAR Template

 [SAR_May_2013.xls](#)

Download Your Monthly SVR Template

 [SVR_May_2013.xls](#)

Download Your Monthly Absence Report

 [ABS_Report_May_2013.xlsx](#)

Attach Your Completed Monthly SAR File

Example: `####_SAR_May_2013.xls`

Attach your Completed Monthly SVR File

Example: `####_SVR_May_2013.xls`

Latest Status

If you need to make adjustments to your files before the deadline for the month, simply open this page again and submit your updated files. Your old files on our system will be replaced with the new ones you upload.

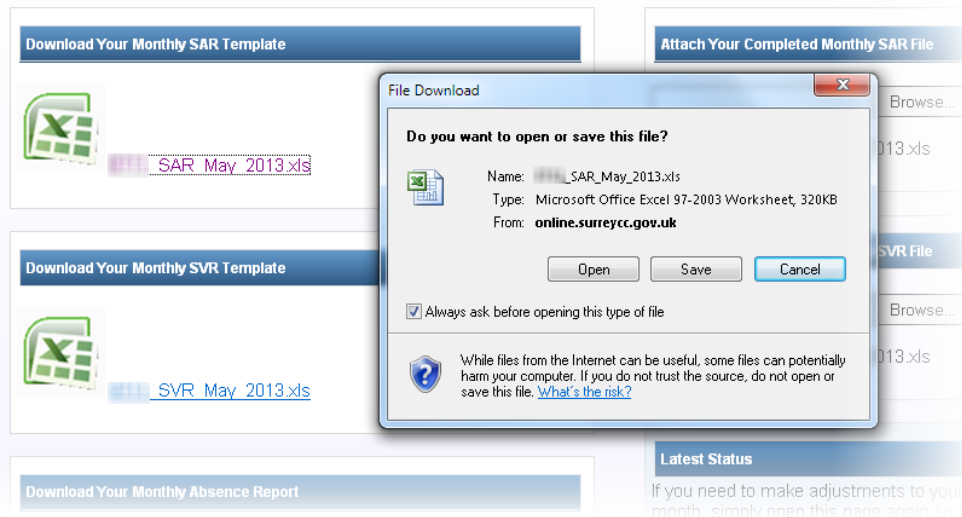
History:
No files uploaded so far this month.

Callouts:

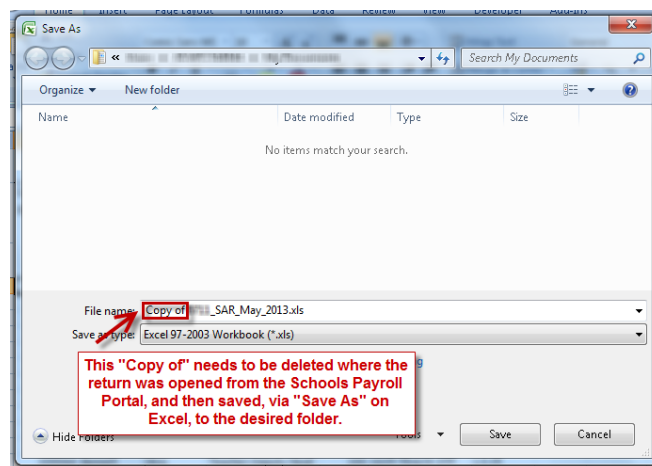
- The current month's deadlines, along with any other useful information for the current month's returns, can be found here.
- These are the current month's return templates and absence report for the rolling year, ready to be downloaded.
- This box provides a full log of the files successfully uploaded for the month. You should check this box after uploading a file, as this is where any error messages will appear.

If you manage more than one location’s returns, you will encounter an additional screen prior to this, and will need to select which Schools Service Returns you wish to download

6. Download your returns by clicking on the files under the “Download Your Monthly...” headings.



You can either “Open” (remember to remove the “Copy of” from the file name if you then save the files from here) or “Save” the files to the desired folder on your local drive.



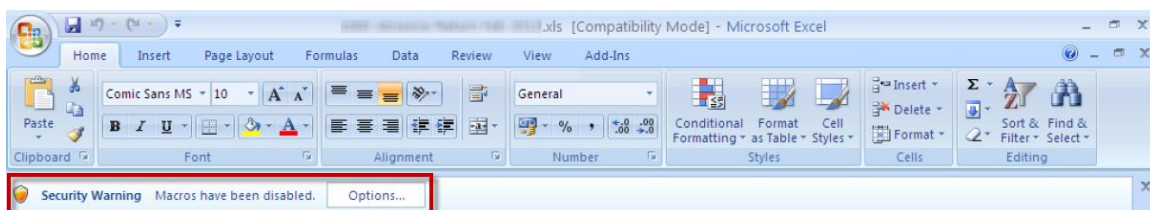
Your spreadsheets will then already have the correct file name to be accepted when you come to upload them back into the School Payroll Portal.

7. For the special features of this spreadsheet to work it is very important to enable Macros.

Depending on your security settings, upon opening the spreadsheets in whichever version of Microsoft Excel you have, you may receive one of two possible messages in relation to this:

- In Excel 2007 or later versions, the option to enable macros is in a bar at the top of the screen.

Click the “Options” button, then select the “Enable this content” option, and click “Okay”.



- In older versions of Excel, a pop-up message box will appear asking what you want to do with macros.

Click the “Enable Macros” button.

8. You can now log out of the portal (you may need to scroll down to find the “Log out” button).

You will be returned to the Schools Payroll Portal Login page.

You can go back and complete your returns, and download your absence report, at any time prior to the deadline.

Result

You have now downloaded your monthly service returns and saved them to a local drive.