

# School Meals Portal for Income Reports

## Work Instructions

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**Please Note:**

These Work Instructions will be available to download from the [Surrey County Council website](#) and will be updated accordingly following any feedback or changes to the School Meals Portal.

## 1. Accessing the School Meals Portal

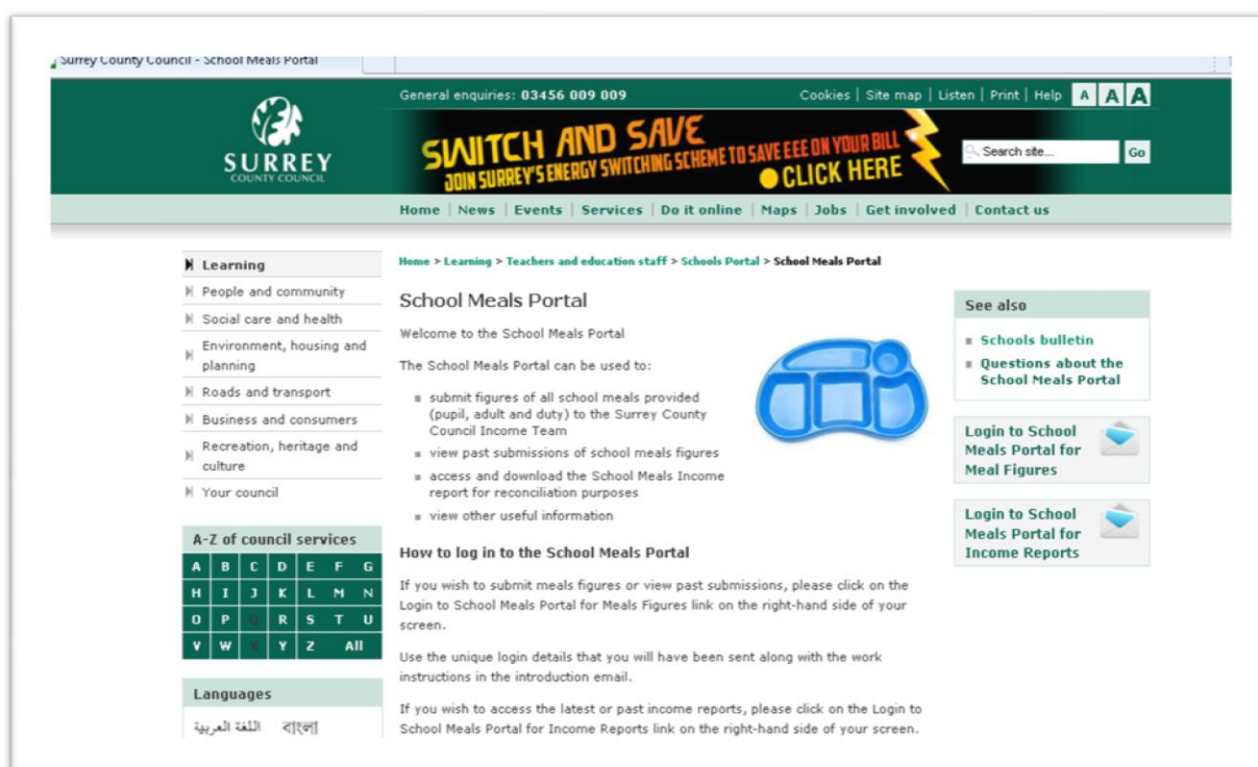
The School Meals Portal is accessed via the Surrey County Council website.

- You can go direct to the School Meals Portal Landing Page using the following link:  
<http://www.surreycc.gov.uk/learning/teachers-and-education-staff/schools-portal/school-meals-portal>

**OR**

- Go to the SCC Home Page:
  - then click on 'Learning' (on the left of the page)
  - then click on 'Teachers and Education Staff'
  - then click on 'Schools Portal'
  - then click on 'School Meals Portal'

### This is the School Meals Portal Landing Page



Surrey County Council - School Meals Portal

General enquiries: 03456 009 009

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O	P	Q	R	S	T	U
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Languages

اللغة العربية العربية

Home > Learning > Teachers and education staff > Schools Portal > School Meals Portal

### School Meals Portal

Welcome to the School Meals Portal

The School Meals Portal can be used to:

- submit figures of all school meals provided (pupil, adult and duty) to the Surrey County Council Income Team
- view past submissions of school meals figures
- access and download the School Meals Income report for reconciliation purposes
- view other useful information

**How to log in to the School Meals Portal**

If you wish to submit meals figures or view past submissions, please click on the Login to School Meals Portal for Meals Figures link on the right-hand side of your screen.

Use the unique login details that you will have been sent along with the work instructions in the introduction email.

If you wish to access the latest or past income reports, please click on the Login to School Meals Portal for Income Reports link on the right-hand side of your screen.

**See also**

- Schools bulletin
- Questions about the School Meals Portal

Login to School Meals Portal for Meal Figures

Login to School Meals Portal for Income Reports

Have a look around this page; from here you can:

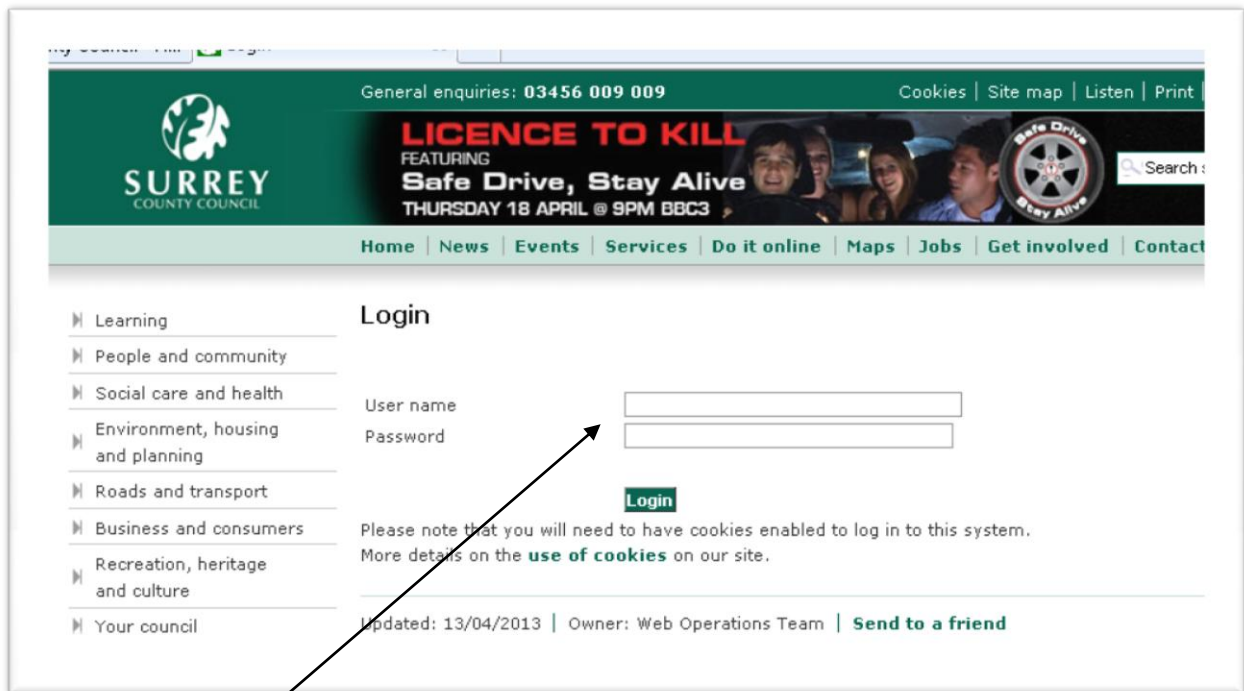
- Login to the Portal
- Access the questions and answers page
- Access these work instructions
- Find contact information for help and support

## 2. Logging into the School Meals Portal for Income Reports

- From the [School Meals Portal Landing Page](#), you should see two login links on the right. Select the link called 'Login to School Meals Portal for Income Reports':



- The Login page will load and should look like this:



- Enter the User name and Password that were sent to you in the 'Introduction to the School Meals Portal' email.

### First Time Logging In

- Please Note: The first time you login to the Portal, you will be asked to change the password set by Surrey County Council. You will see the following screen:



- Enter your new password and press Submit.

### 3. Overview of the Portal Main Page

- After logging in (or after changing your password), you will reach the Meals Figures main page. Each section on this page is explained below:

#### Information Boxes

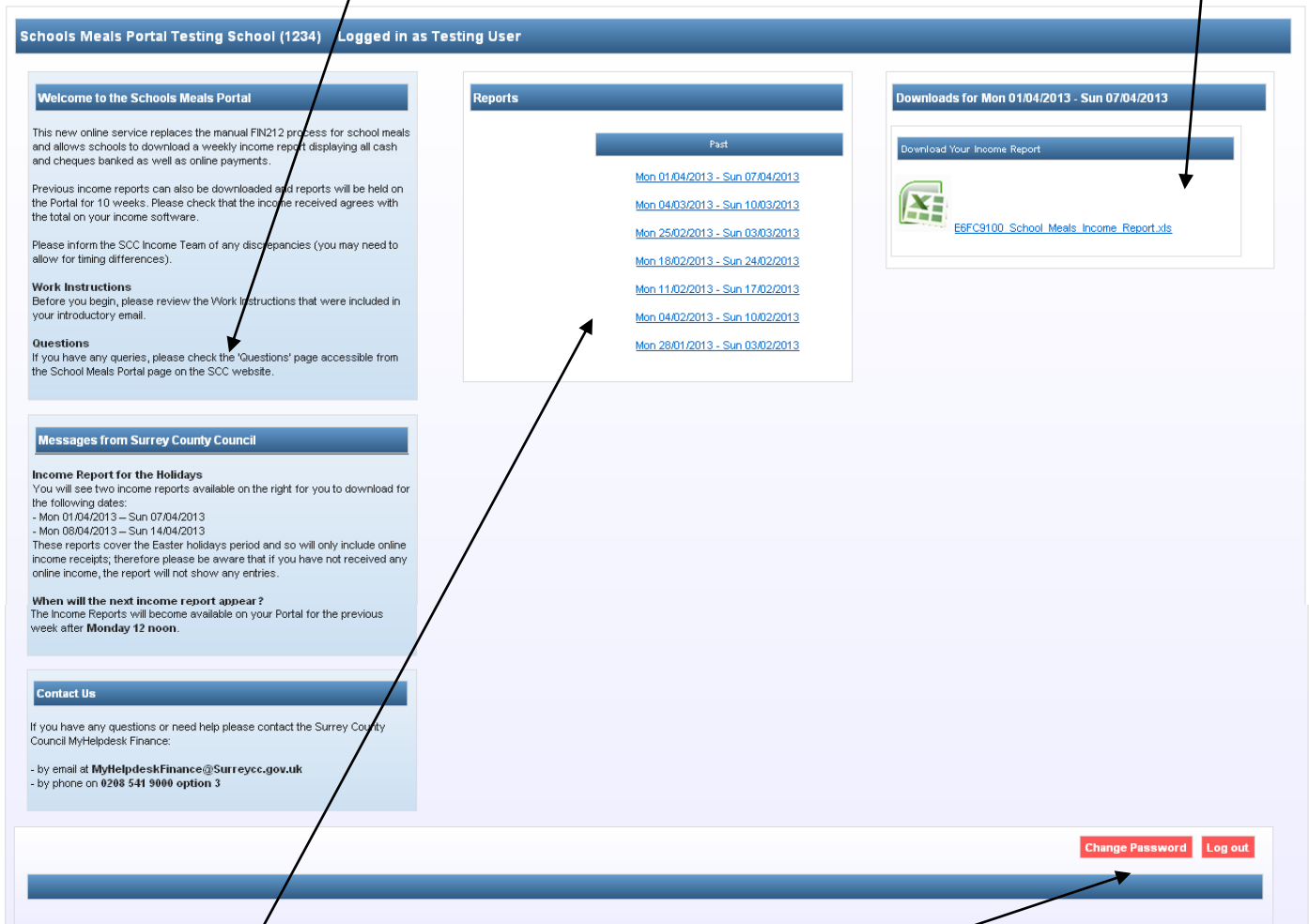
Please read through the boxes on the left of the page.

SCC will update these on a regular basis with changes and messages about the Portal.

You will always be able to find our **contact information** here as well.

#### The Download Box

This is where you download the Income Report – click on the file and open or save it.



The screenshot shows the 'Schools Meals Portal' interface. At the top, it says 'Schools Meals Portal Testing School (1234) Logged in as Testing User'. The main content area is divided into several sections:

- Welcome to the Schools Meals Portal:** Contains introductory text and 'Work Instructions'.
- Messages from Surrey County Council:** Includes an 'Income Report for the Holidays' section with dates and a 'When will the next income report appear?' section.
- Contact Us:** Provides contact information for MyHelpdesk Finance.
- Reports:** A list of weekly income reports with dates, such as 'Mon 01/04/2013 - Sun 07/04/2013'.
- Downloads for Mon 01/04/2013 - Sun 07/04/2013:** A 'Download Your Income Report' section with a file icon and the filename 'E6FC9100\_School\_Meals\_Income\_Report.xls'.
- Footer:** Contains 'Change Password' and 'Log out' buttons.

#### Selecting the Income Report to Download

All available Income Reports will be listed here. You can choose the week you want, then download the report from the Download Box.

#### Logging out

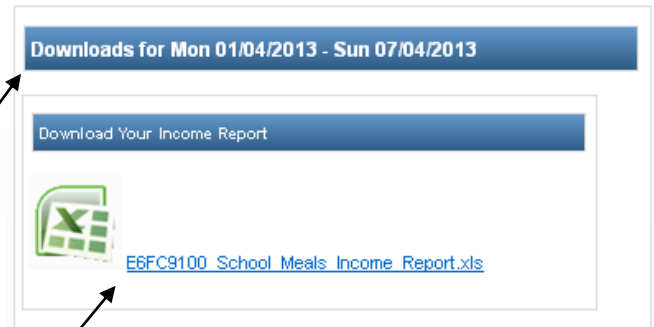
Click the Log Out button in the bottom-right to return to the SCC website.

You can also change your password at any time by selecting the Change Password option.

## 4. Downloading Income Reports

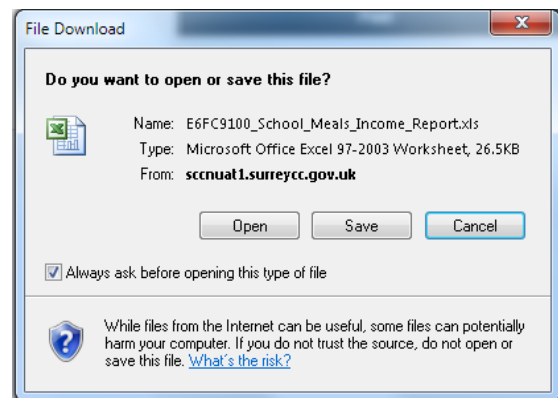
Every **Monday at 12pm** a new Income Report for your School Meals cost centre will become available on your Portal for you to download, the new report will be for the previous week (Monday to Sunday).

- Your **latest** income report will always be displayed in the download box on the right of the page.
- The date for the chosen income report is shown in the download box.



- To download the report, click on the Excel icon/file in the download box.

- A popup box may appear. You can choose to Open or Save the report



### Selecting a different Income Report

- Your Income Reports will be stored in the Portal for up to 10 weeks available for you to download.
- If you wish to download a past income report, select the appropriate week from the list of **Past Reports**. Then check the dates in the download box have updated accordingly and follow the same steps as above to Open or Save the file.



## 5. Overview of the Income Report

The Income Report will open in Excel; if you are unable to open the Income Report you should contact us using details below.

- The Income Reports will always display your school’s name, cost centre for school meals and the dates the report is for (the report should always be for a single week, Monday to Sunday).

<u>School Meals Income Report</u>						
<b>School:</b>		TESTING SCHOOL				
<b>Cost Centre:</b>		E6CC1234				
<b>Report From:</b>		Mon 01/04/2013				
<b>Report To:</b>		Sun 07/04/2013				
<u>Cash Banked and Online Payments</u>						
Cost Centre	Cost Element	Reference	Text	Debit / Credit	Posting Date	Amount (GBP)
E6CC1234	6130	1401597245	Testing School	C	05/04/2013	-389.00
E6CC1234	6130	1401597246	Testing School	C	05/04/2013	-96.00
E6CC1234	6130	1401597247	Testing School	C	05/04/2013	-126.00
E6CC1234	6130	1401597248	Testing School	C	05/04/2013	-214.00
E6CC1234	6130	1401597850	Testing School	C	05/04/2013	-58.00

- The report lists all income received by SCC during the chosen week. This includes all cash and cheques banked as well as all online payments from your cashless system provider.

### Checking the Income Reports

- You will need to check that the received sums agree with the figures on your income management system.
- If there is a discrepancy you will need to contact the SCC MyHelpdesk and provide details of:

<b>CSS collections</b>	Amount sent, amount received, collection date, seal number, slip number
<b>Items taken to the bank</b>	Amount sent, amount received, date processed and slip number
<b>Online Income</b>	Amount recorded on your system/SCC report and date processed

***Please remember there may be timing differences and these should not be reported.***

## 6. Contact us and Support

If you have any questions or need help with using the Portal, please first check the available information on the [School Meals Portal page](#) on the SCC Website. From that page, you can access the following supporting information:

- The [Questions about the School Meals Portal](#) page contains answers to likely questions and was put together using feedback from schools. Surrey County Council will continue to update this page on a regular basis.
- These **Work Instructions** will be available to download from the website and will be updated accordingly following any feedback or changes to the School Meals Portal.

If you cannot find the information you're looking for on the website, please contact the Surrey County Council MyHelpdesk:

- By email: [myhelpdeskfinance@surreycc.gov.uk](mailto:myhelpdeskfinance@surreycc.gov.uk)
- By phone: 0208 541 9000 – option 3