

# LEAMIS News Bulletin

Please Read Carefully

## LEAMIS

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<b>Subject/Title</b>	<b>SIMS.net Dinner Money End of Year Procedures</b>
<b>Date:</b>	June 2015
<b>Bulletin Version:</b>	1.0
<b>Relevant to:</b>	Primary Schools using SIMS.net Dinner Money
<b>Contents:</b>	<p><b>Preparation</b> It is advisable, in this academic year, to reconcile pupil and staff balances, issue refunds and collect debts (where possible), particularly for pupils or staff who are leaving the school. Balances for pupils/staff that are not leaving are automatically carried forward.</p> <p>We suggest printing off a copy of the Pupil Balances and Staff Balances reports as a record of current balances, total meal costs and transaction totals, plus any other reports that may be required.</p> <p><b>Price Changes</b> Add new pupil and staff meal charges.</p> <p><b>Add New Catering Year</b> Define a new Catering Year 2015/16.</p>
<p>If you require assistance please contact LEAMIS Servicedesk <b>0116 231 1280</b> or Email: <a href="mailto:servicedesk@leamis.org.uk">servicedesk@leamis.org.uk</a></p>	

**Document Amendments**

<b>Issue</b>	<b>Amendment Detail</b>	<b>Author</b>	<b>Approved By</b>	<b>Date</b>
V 1.0	Initial Document	Dawn Wallage	Margot Welland	June 2015

There are procedures, which need to take place **BEFORE** the start of the new Academic Year in SIMS.net Dinner Money.

**It is important that the "LEAMIS Primary Schools SIMS.net End of Year Summer 2015 bulletin" has been followed, a new academic year has been created and promotion routines have been run BEFORE undertaking these Dinner Money instructions.**

**The Dinner Money module MUST NOT be used in the new academic year until it has been completely setup – especially new meal charges. It is advisable to start these processes as early as possible and complete a Sims.net backup before commencing.**

### **Preparation**

- Ensure **ALL** Dinner registers are complete and up to date
- Where possible all refunds have been issued and all debts collected, particularly for any pupils or staff members that are leaving the school. Balances for pupils/staff that are not leaving are automatically carried forward.
- All pupil, staff and other payments/transactions have been recorded on the system
- Complete the Banking Return
- Produce the Catering return
- Print Dinner Money reports as required for future reference, e.g. Pupil Balances, Staff Balances, Kitchen Statistics for whole year etc.

### **Price changes**

When prices are increased, new meal charges have to be created to reflect these increases. Creating a new meal charge will automatically end the previous charge.

***NB – Remember to increase any Subsidised meals, Paid Adult visitor meals, Paid Student visitor meals or any other paid meal charges used on your system.***

- **Tools/Dinner Money/Pupil Meal Definitions**
- **Search** for the relevant description e.g. School Meal, highlight and click **Open**
- In the Charges section click **New**
- Enter the **Start Date** 26/08/2015 (i.e. - the first day of the new school year, when staff are in school) and new **Charge £2.15 for KS2 Pupils (LEICESTERSHIRE schools, other Local Authority Start Date and new Charge rates may be different)**
- Click **OK**
- Click **Save**

Repeat for any other Pupil Meal charge increases

- **Tools/Dinner Money/Staff Meal Definitions**
- **Search** for the relevant description e.g. Paid Staff Meal, highlight and click **Open**
- In the Charges section click **New**
- Enter the **Start Date** 26/08/2015 (i.e. - the first day of the new school year, when staff are in school) and new **Charge £2.88 (Inc. VAT) (LEICESTERSHIRE schools, other Local Authority Start Date and new Charge rates may be different)**
- Click **OK**
- Click **Save**

Repeat for any other Staff Meal charge increases.

Repeat above for **Tools/Dinner Money/Adhoc Meal Definitions** and **Tools/Dinner Money/Other Sales Definitions** if used in school.

## Adding a New Catering Year

A new Catering Year has to be setup each year, with a starting date of the first day of the school Academic Year.

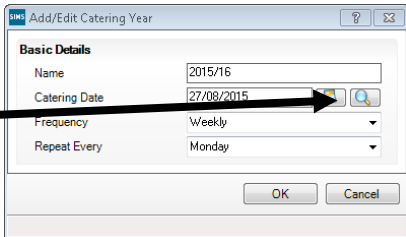
**NB SIMS.net end of year procedures must have been completed before commencing this part of the process.**

The New catering year start date will be Thursday 27th August 2015 (Leicestershire schools, other LA's may vary).

### Tools/Dinner Money/Setup

- In the Catering Returns section click **New**
- The **Add/Edit Catering Year** dialogue screen will be displayed
- In the **Name** field type **2015/16**

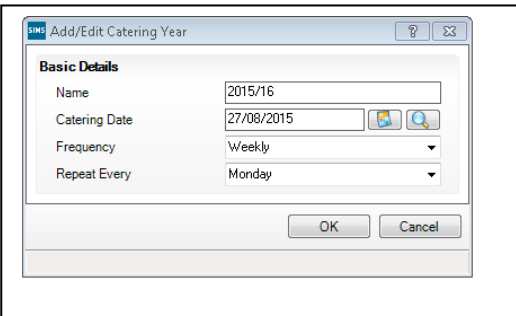
For the **Catering Date** click on the  icon



- Click on the Academic Year chooser arrow
- Choose **Academic Year 2015/16** from the drop down list, select **Start of Academic Year 2015/2016** and click **OK**

***NB** If Academic Year 2015/16 is not available from the list, the SIMS.net End of Year procedures have not been carried out. These must be completed before you can continue setting up a Dinner Money new year.*

- **Frequency** should be set to **Weekly**
- **Repeat Every** should be set to **Monday**
- Click **OK**
- Click **Save**
- Click **OK** to the change message



SIMS.net must now be closed on all machines and restarted in order for these changes to take effect.

***SIMS Dinner Money Year 2015/2016 is now set-up***