# CCSD School Budget Planning Tool Essentials Guide

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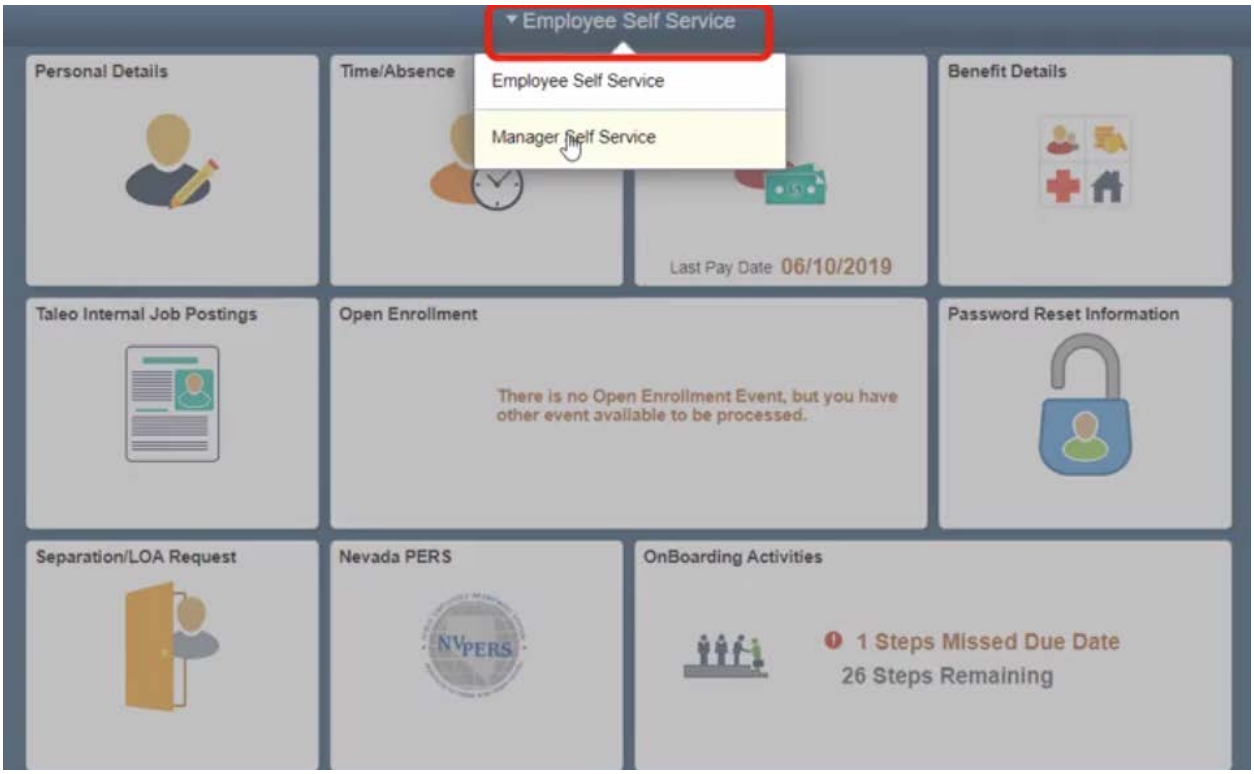
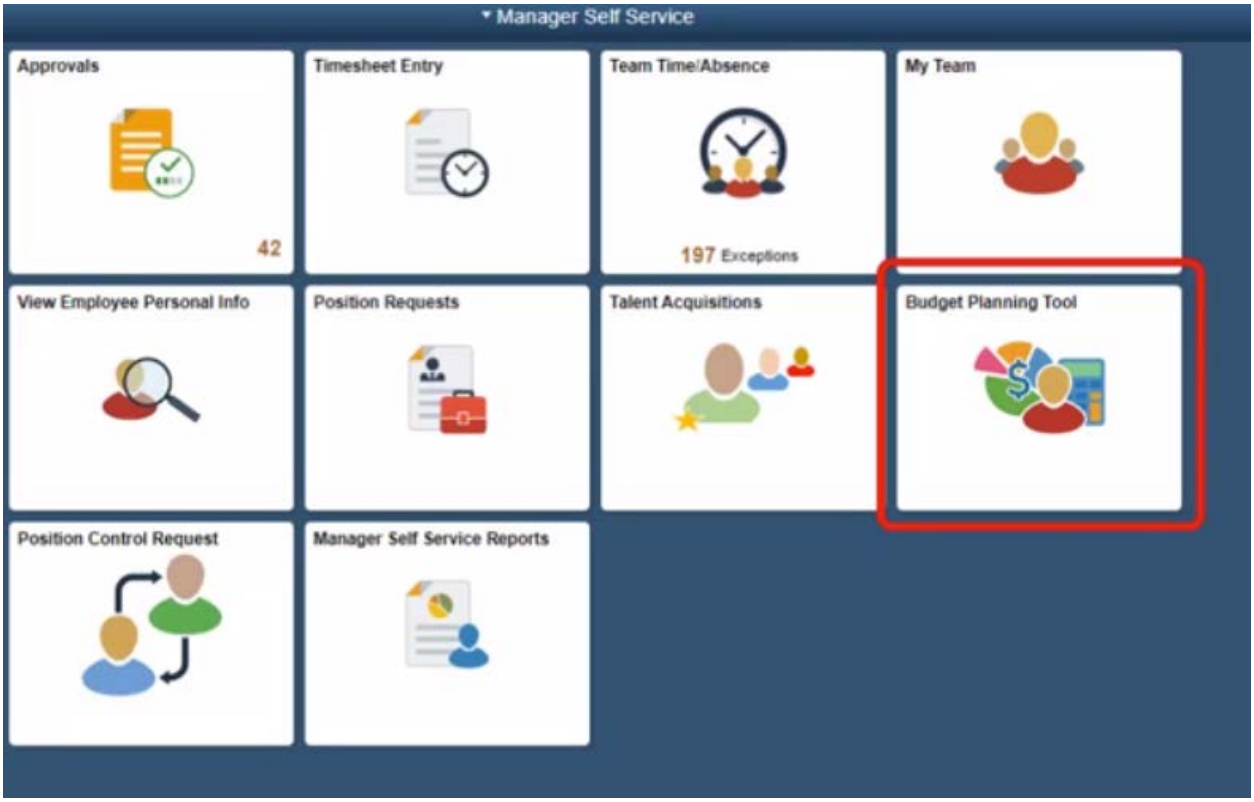
# Accessing the CCSD Budget Planning Tool through HCM PeopleSoft

1. Log into HCM PeopleSoft using your **Active Directory (AD) credentials**.

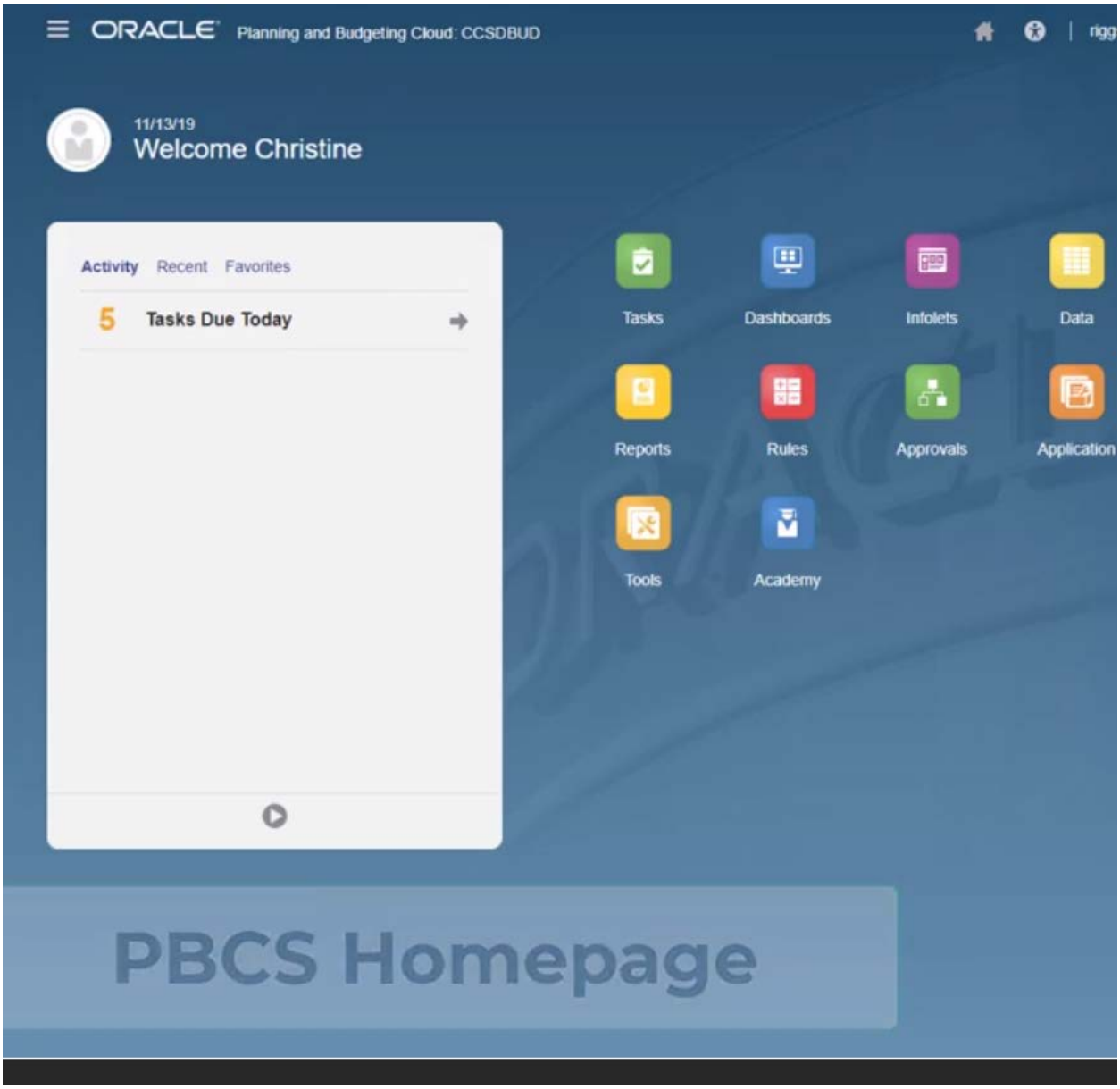
2. You will be brought to the Employee Self Service Dashboard. Using the Top Menu, switch to **Manager Self Service**.



3. From the MSS Dashboard, select the **Budget Planning Tool** tile.



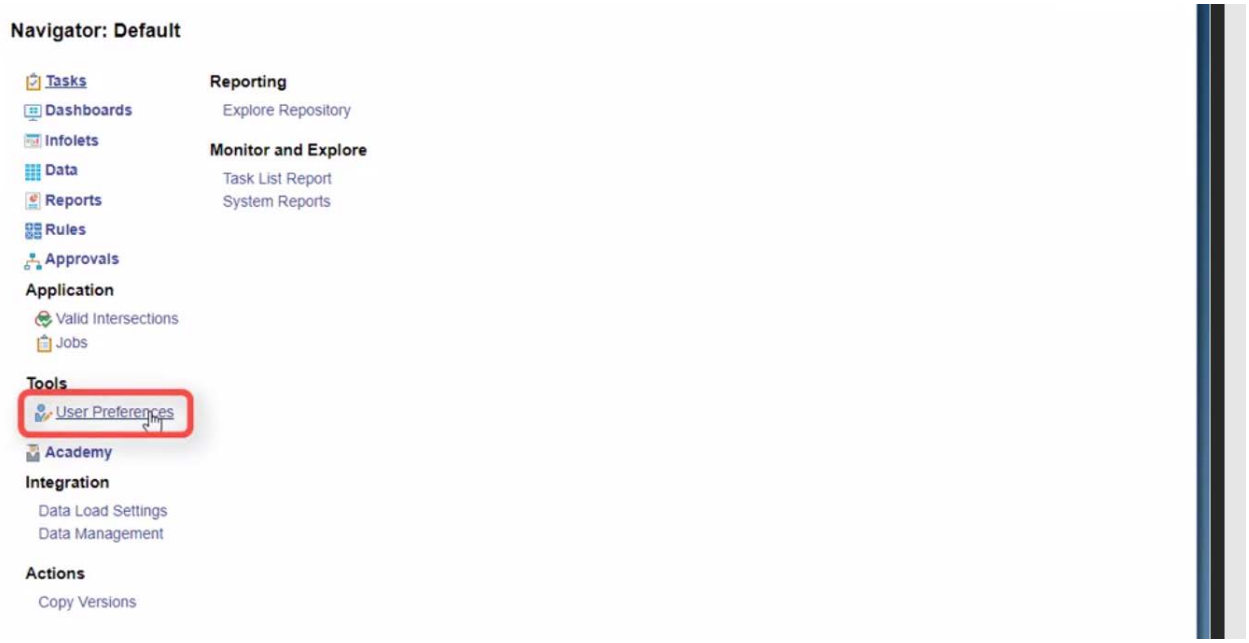
4. You will be brought to the **PBCS homepage**, where you will perform all functions and tasks associated with your location's School Budget.



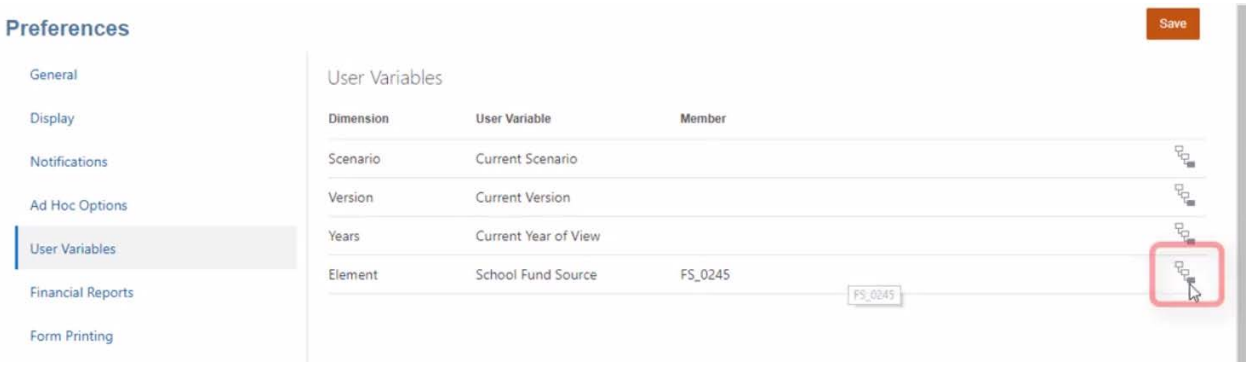
# Editing the User Preferences to the Correct Funding Source

1. From the PBCS homepage, click the **Navigator** icon in the top left corner.

2. Under Tools, click on **User Preferences**.

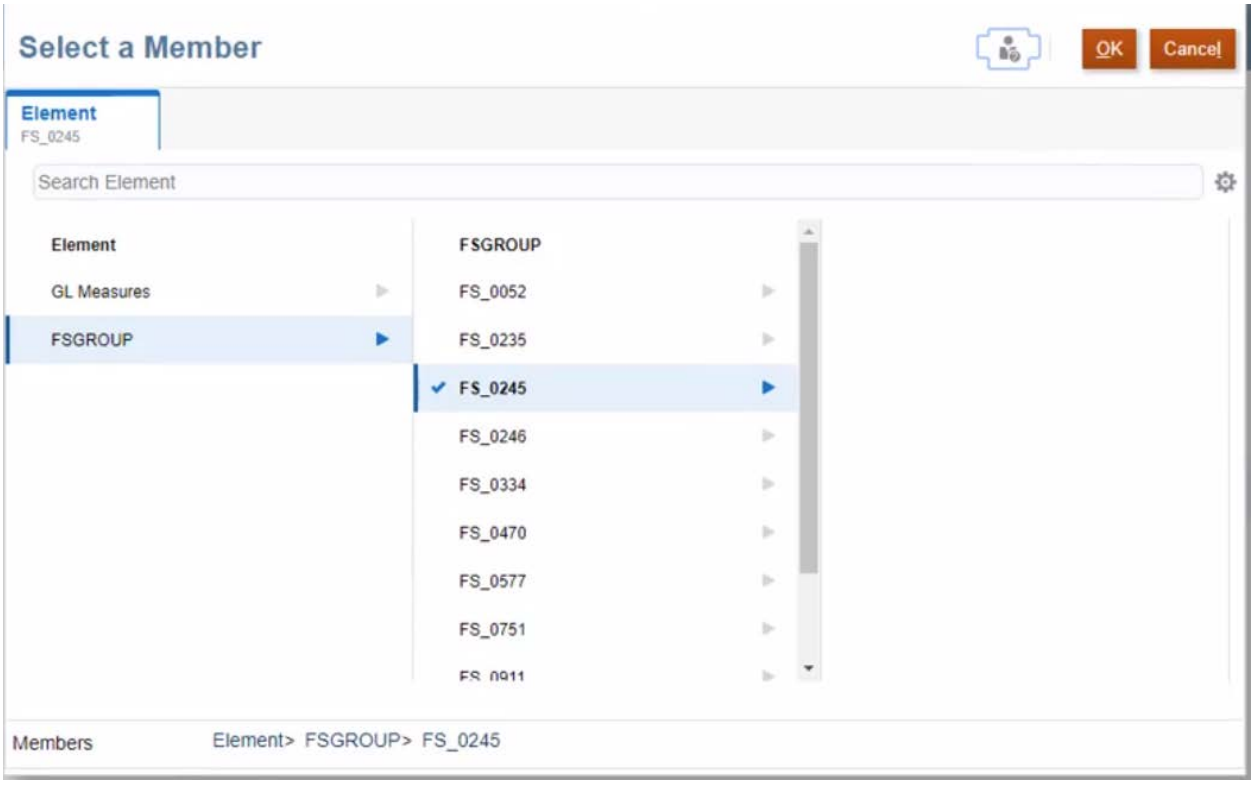



3. Go to the **Element** row, and click on the **Member Selector** icon.



4. From the Select a Member window, select your work location's **funding source**.

5. Click **OK**.




6. Click the **Save** button.

7. Click **OK** in the Information window.

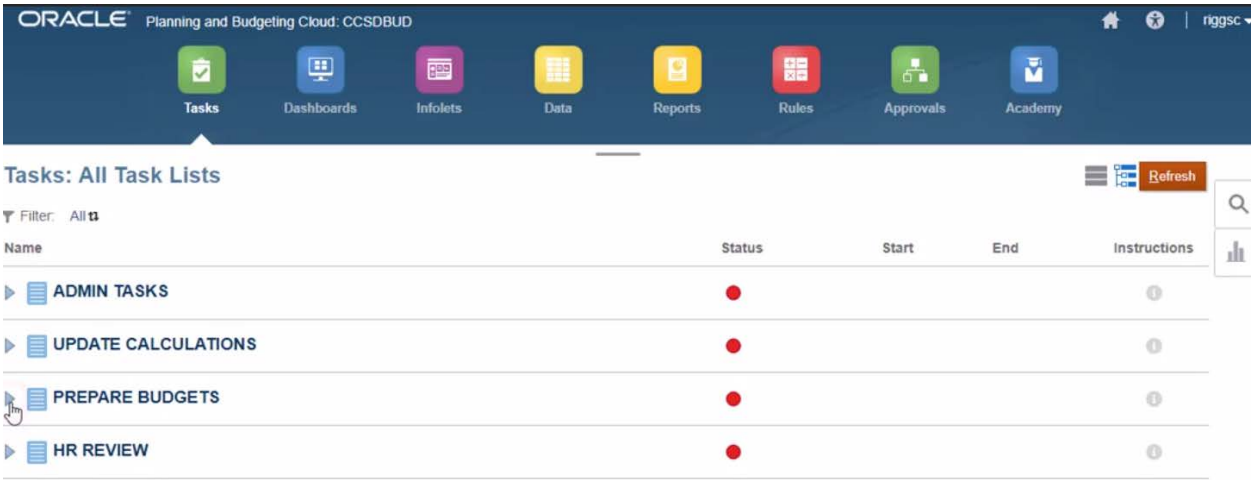
8. Click the **Home** icon to return to the PBCS homepage.

**Please note:** If you are assigned to one school or work location, you will only need to complete this process **once**. If you are assigned to multiple locations, you will need to **repeat the process** for each of your assigned locations.

# Accessing and Editing the School Budget

1. From the PBCS homepage, click on the **Tasks** icon.

2. From the Task List window, click the arrow next to **Prepare Budgets**.




3. Click on **School Budget**.

4. To ensure that you are in the correct work location, click on the **Entity** link. (This will be useful if you are assigned to **multiple locations**).

5. From the Select a Member window, select your work location. (**Please note:** If you are assigned to only one location, you must ensure that the **blue checkmark** appears next to your work location name.)

6. Click **OK**.

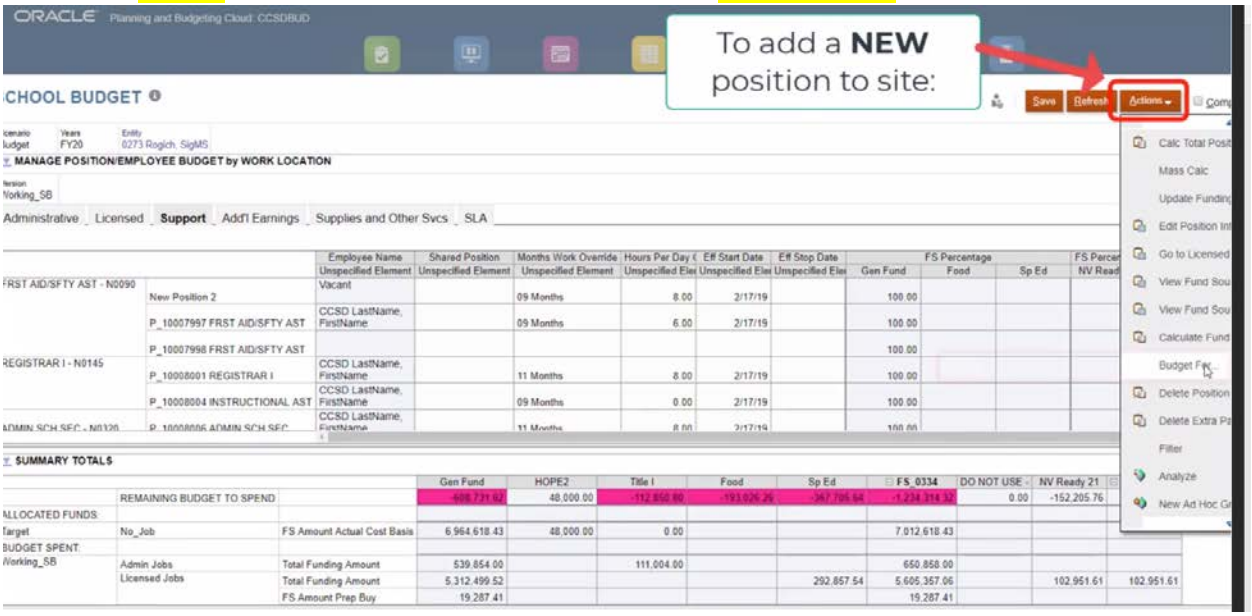
7. ***If you changed locations*** in the Entity link, click the **Go** arrow to update the grid with the current location's budget data. Once the page is finished updating, you will be able to modify information within the Budget.

# Adding a Position

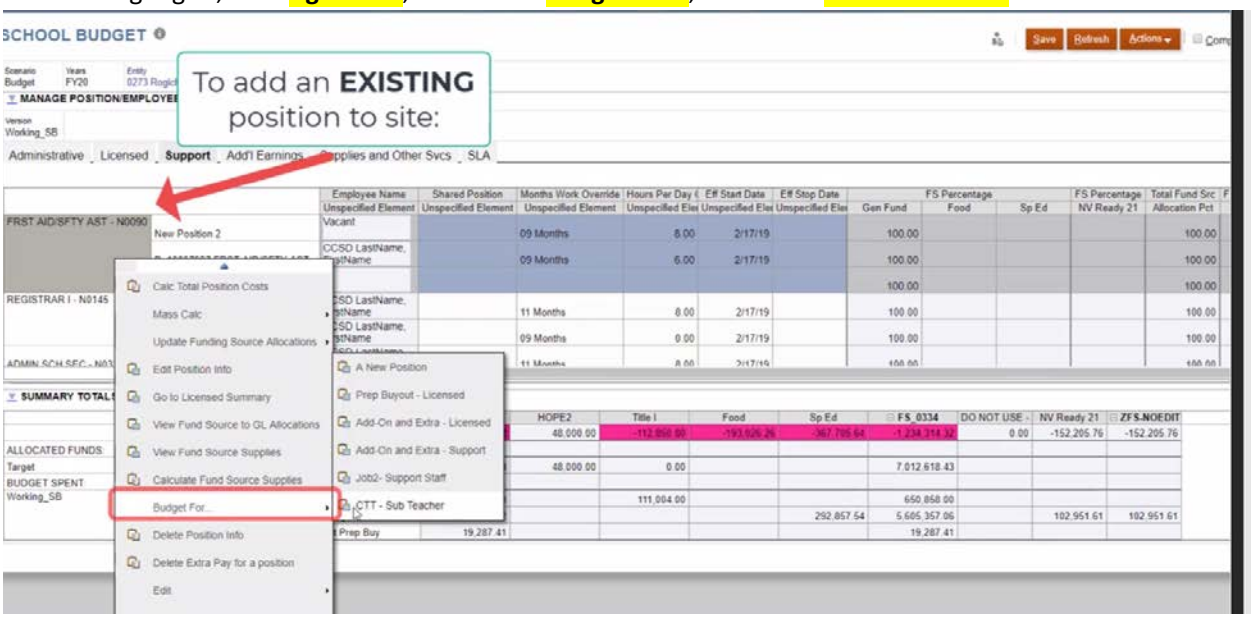
1. From the School Budget form, select the desired employee-type tab (Administrative, Licensed, or Support) for the new position.

2. To add a position, you can either:

**A)** Click the **Actions** menu, hover over **Budget for…**, and select **A New Position**; OR




**B)** If you are budgeting for a new position that ***already exists at your site***, you may locate the **Job** in the School Budget grid, then **right-click**, hover over **Budget for…**, and select **A New Position**.

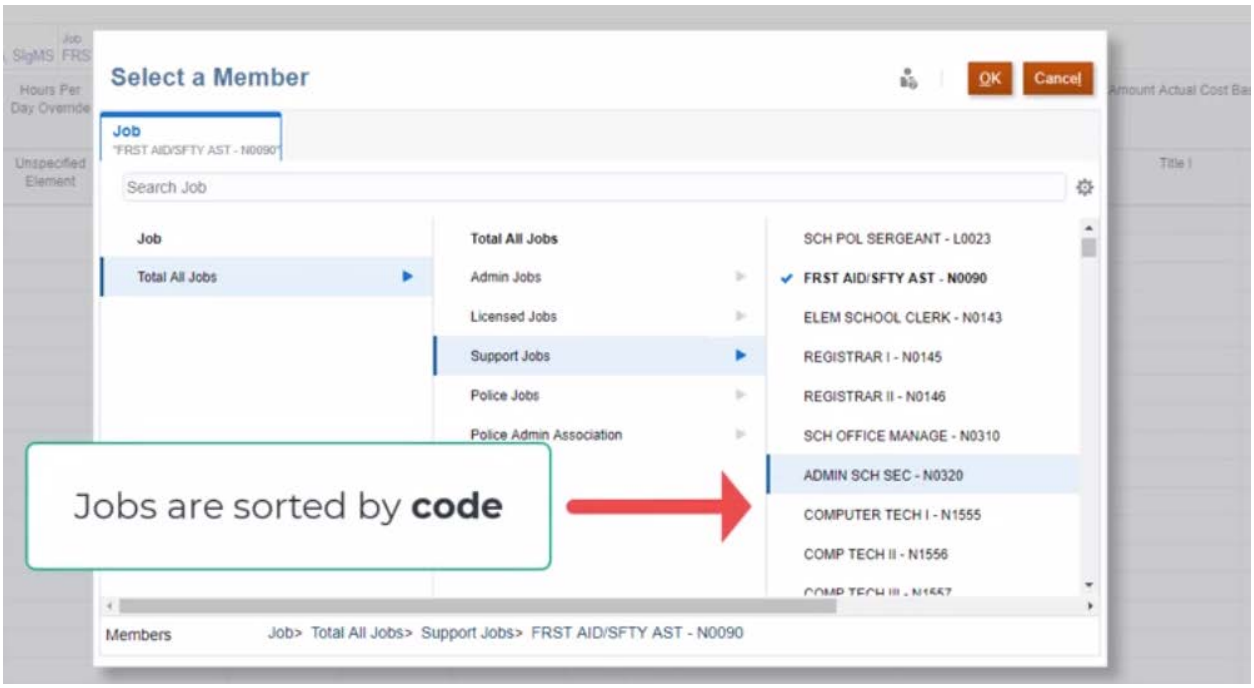


3. You will be brought to the **SB Add Position** form. If you right-clicked on a Job to add a new position that already exists, it will display in the **Job Link** at the top of the form.

4. To change the position that you are adding, click the **Job link**.

5. In the **Select a Member** window that appears, locate the desired position. (**NOTE:** These are sorted by job code rather than position title. You may use the **Search Job** bar to search for available positions.)

6. Once the blue checkmark appears next to the desired position, click **OK**.



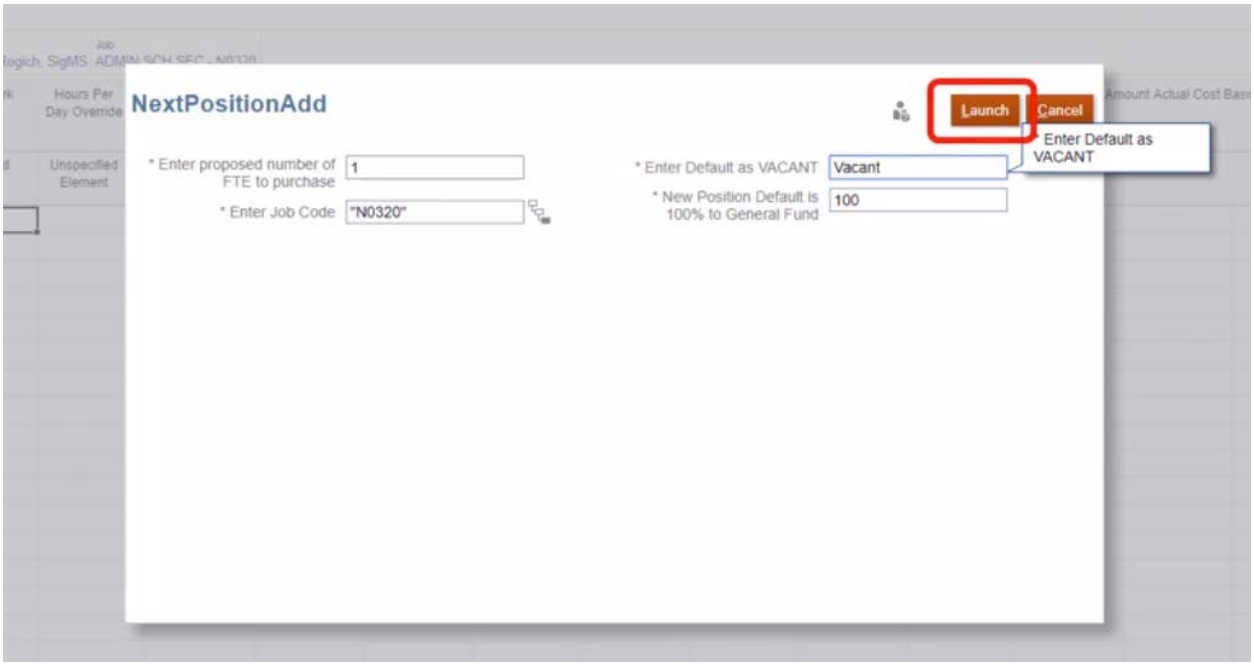

7. After changing a position, the **Job** link will show in yellow to indicate that the data in the form needs to be updated. Click the **Go** arrow to update. (This will remove the yellow highlight.)

8. Click the **Actions** menu and select **Add Position**.

9. In the **NextPositionAdd** window that appears, enter **1** in the **Proposed number of FTE to purchase** field.

10. Ensure that the **Default** field is set to **Vacant**.

11. Click the **Launch** button.




12. If you entered a **Support Professional** position, enter the appropriate job information in the **Months Work Override** and **Hours Per Day Override** cells (based on the type of employee/their schedule). If the position is Administrative or Licensed, disregard this step.

13. Click the **Save** button. (If you entered a **Support Professional** position, this will remove the yellow highlight from the two Override fields.)

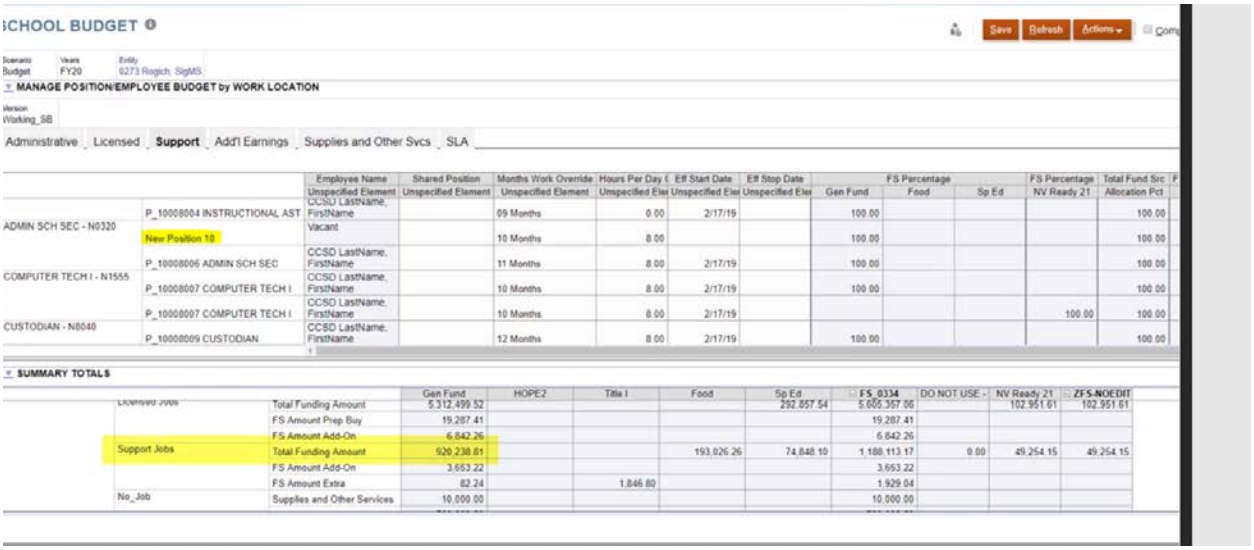
14. Right-click on the **new position number**. From the menu that appears, select **Calc Total Position Costs**.

15. If you entered a Support **Professional** employee, upon being returned to the SB Add Position form, you will see that the **Planned FTE** has auto-calculated (based upon the information entered in the Override fields).

16. To return to the School Budget form, click on the **SB Home** link.

17. To view the newly added position in the School Budget form, click on the appropriate employee-type tab (as you are automatically brought back to the Administrative tab whenever returning to the School Budget

form). Then, scroll to find the new position in the employee grid.




18. Note the dollar amount in the **Summary Totals** area (depending on the type of position you added), then click **Save**.

19. To update the **Summary Totals** area with the new position information, click **Refresh**. You will then see the updated dollar amounts based on the type of position that was added.

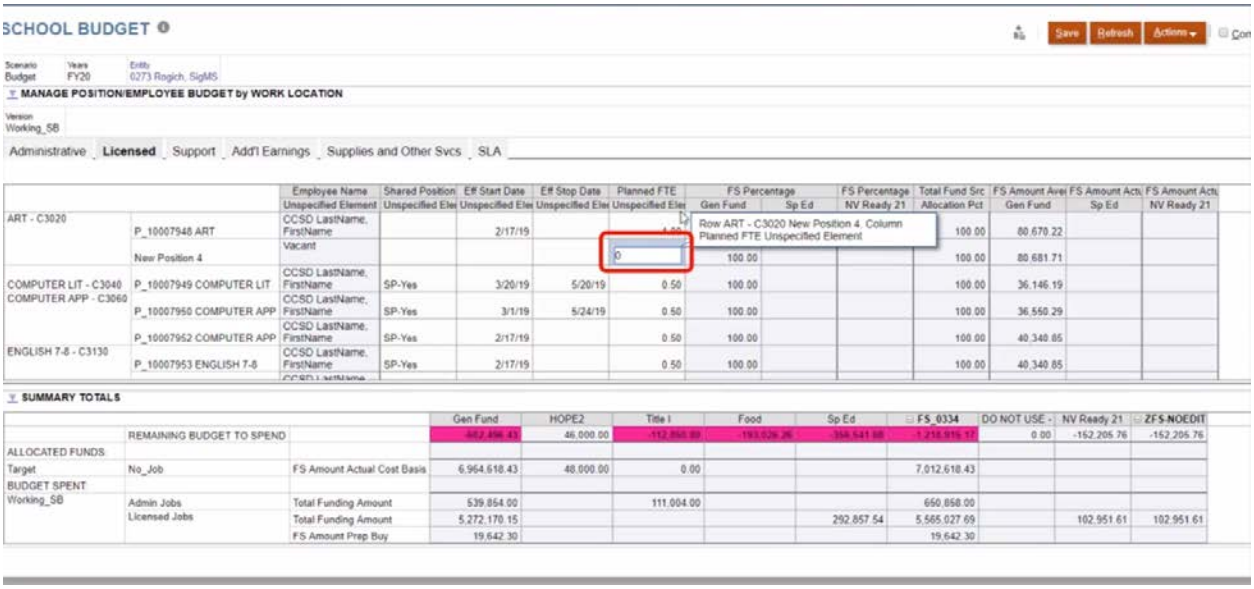
# Removing a Position

1. From the School Budget form, select the employee-type tab from which you are choosing to remove a position (Administrative, Licensed, or Support).

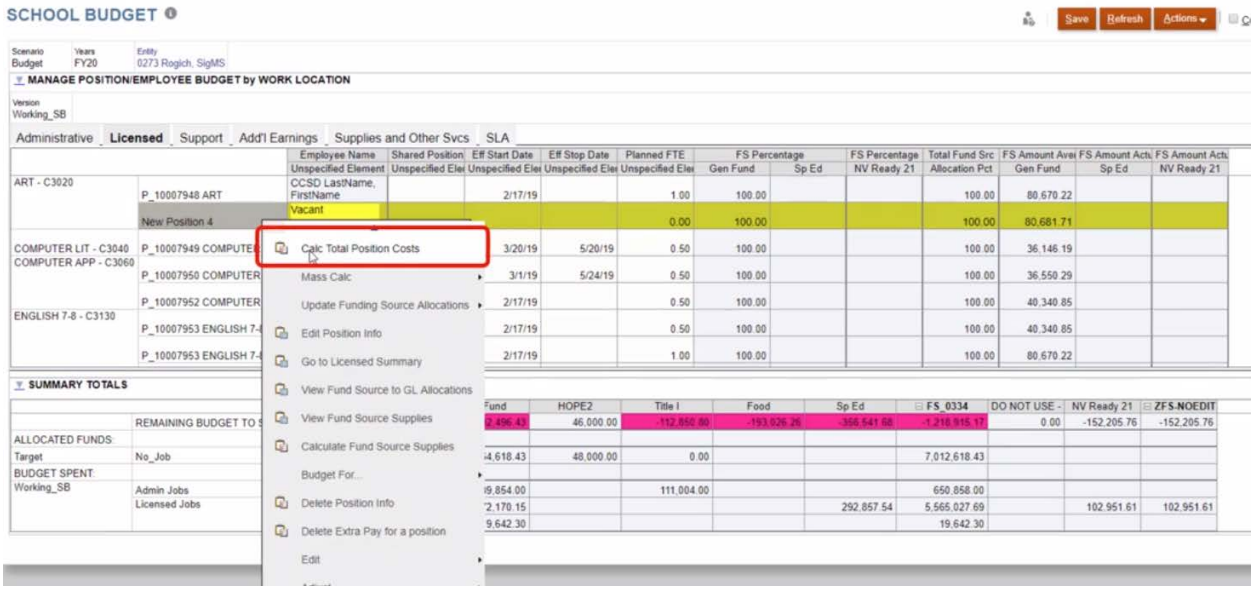
2. In the list of positions that appears, locate the position that you wish to remove.

3. If the position is **Administrative or Licensed**, change the **Planned FTE** field to 0.

4. Click **Save**.




5. Once the form has saved, the position row will highlight in yellow. **Right-click** on the position number, then select **Calc Total Position Costs**.

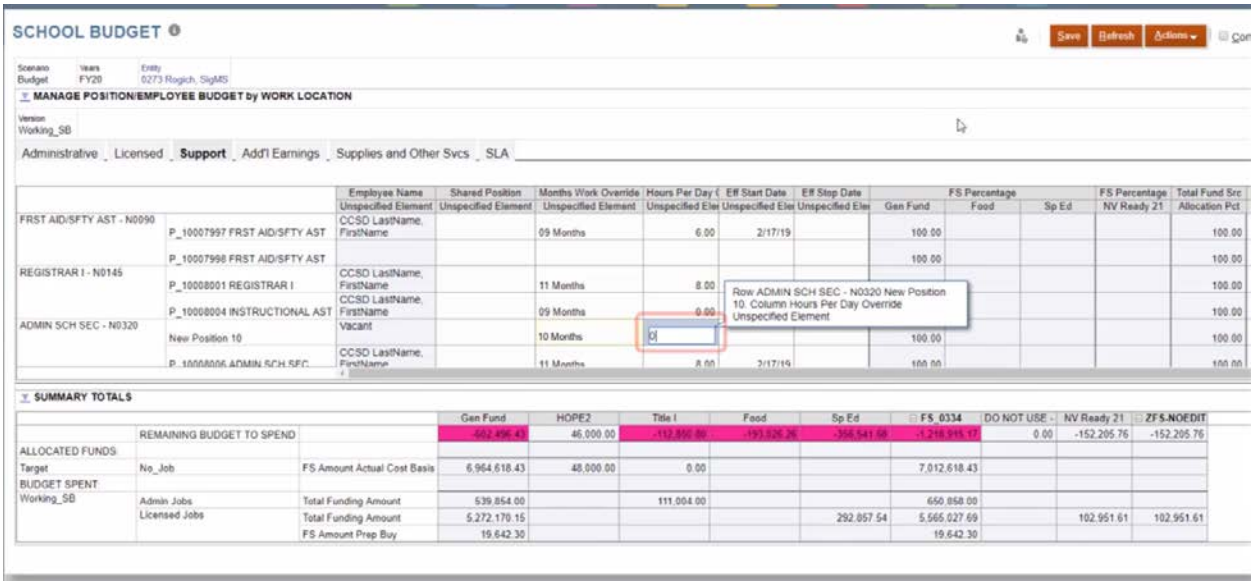


6. Note that the dollar amount coming from the original funding source (for example, the General Fund) now reflects **0.00**.

7. If you are removing a **Support** position, select the **Support** tab, and locate the position you wish to remove in the employee grid.

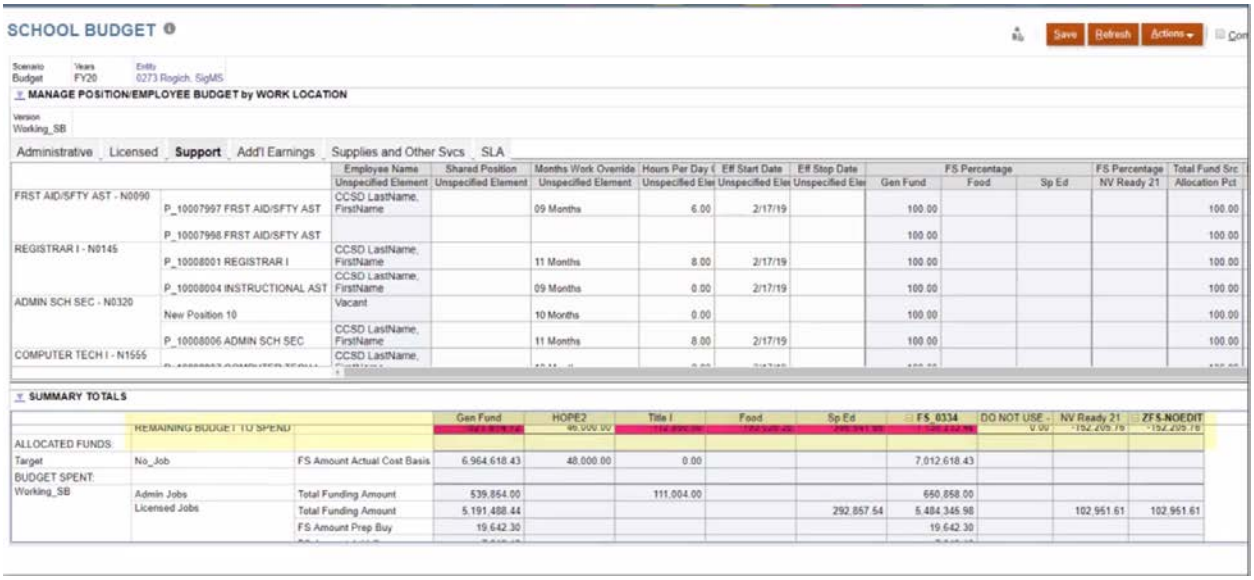
8. Change the **Hours Per Day Override** field to 0. (Please note that you do **not** need to update the **Months Work Override** field).

9. Click **Save**.




10. **Right-click** on the position number, then select **Calc Total Position Costs**.

11. After the School Budget form has appeared again, note that the **Summary Totals** area has been updated (namely the **Remaining Budget to Spend**).



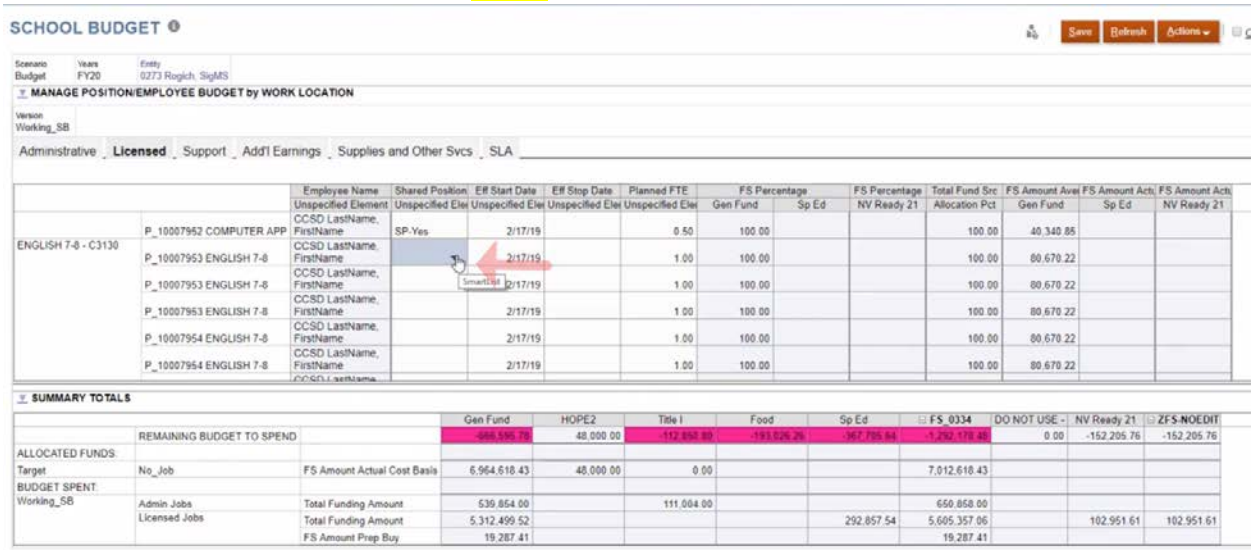
# Budgeting for a Shared Position

1. From the School Budget form, click on the desired **employee-type tab** (Administrative, Licensed, or Support).

2. Locate the desired employee name in the employee grid.

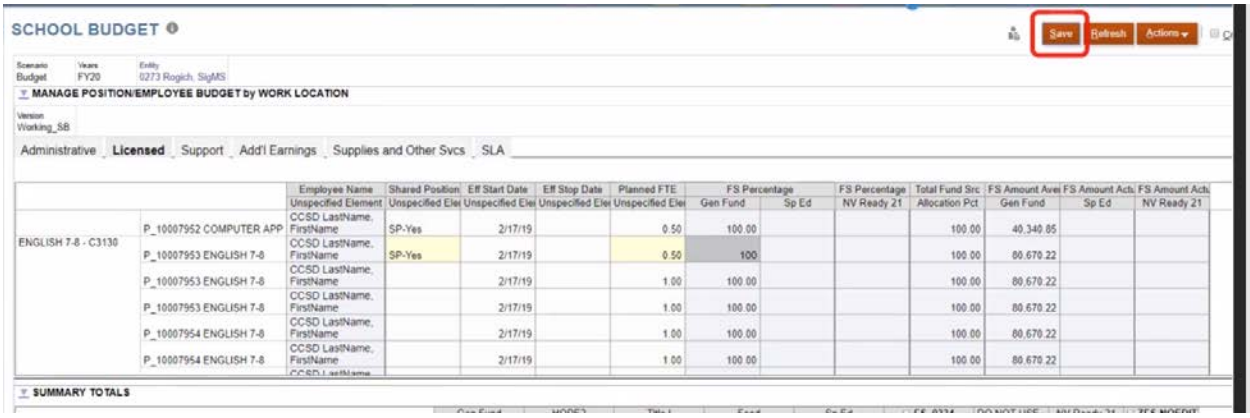
3. Click into the **Shared Position** column next to the employee's name. A dropdown arrow will appear.

4. Click the dropdown arrow, then select **SP-Yes**.




5. In the **Planned FTE** column, change the value from **1.00** to **.5**.

6. Click **Save**.

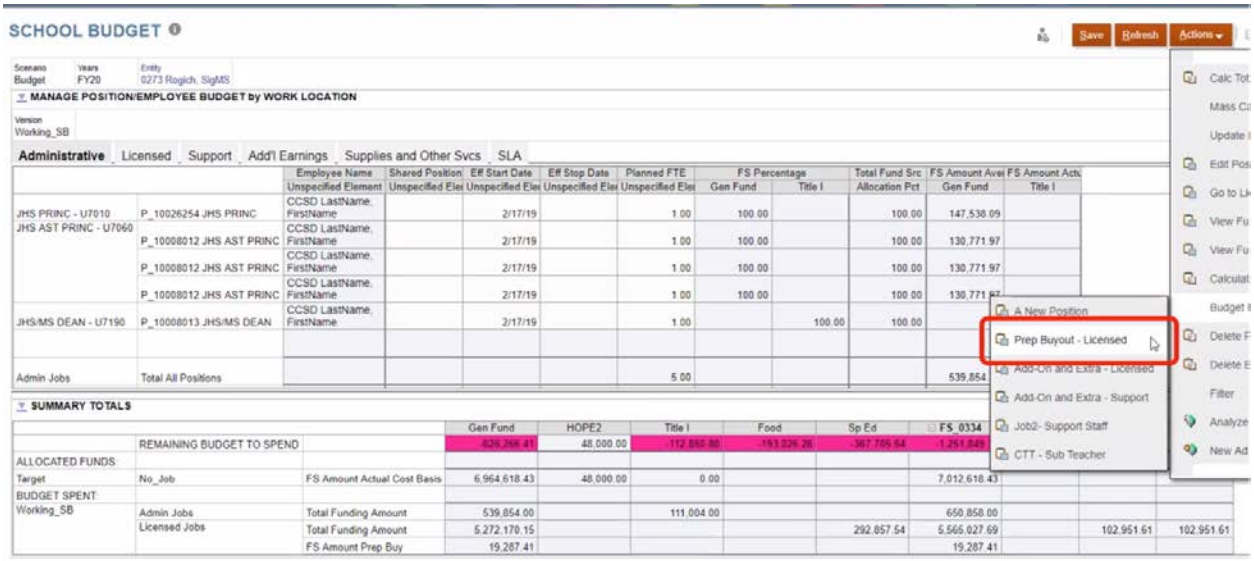



7. **Right-click** the position number and select **Calc Total Position Costs**.

# Budgeting for a Prep Buy

1. From the School Budget form, select any **employee-type tab** (Administrative, Licensed, or Support).

2. Click the **Actions** menu, hover over **Budget for…**, and select **Prep Buyout – Licensed**.




3. You will be brought to the **SB PrepBuy-Mult** form. From the list of positions available, scroll until you find the desired position, then right-click on the **position number**.

4. From the menu that appears, select **Edit Prep Buy Details**.

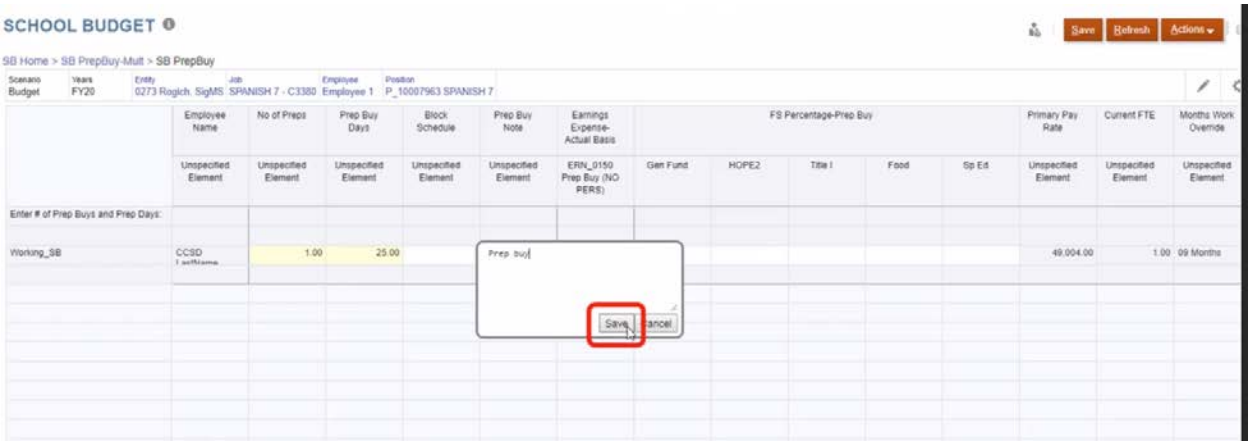
5. You will be brought to the **SB PrepBuy** form. Enter **1** in the **Number of Preps** column next to the employee name.

6. Enter the appropriate number of days in the **Prep Buy Days** column.

7. ***If your school is on a block schedule***, select **Yes** in the dropdown under **Block Schedule**. If not, you may select **No**, or leave the cell blank.

8. If desired, enter a comment in the **Prep Buy Note** column (such as a justification for the Prep Buy).

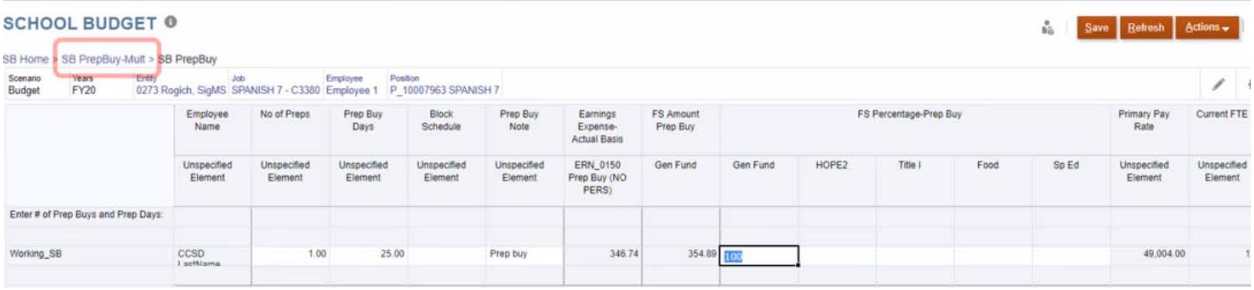
9. Click **Save** when finished.




10. Because a Prep Buy **cannot** be split-funded, you must enter **100** under the desired funding source (for example, the Gen Fund). You will receive an error if you try to split-fund the Prep Buy.

11. Click **Save**. When the form is updated, noted that the **Earnings Expense-Actual Basis** and the **FS Amount Prep Buy** columns have auto-calculated.

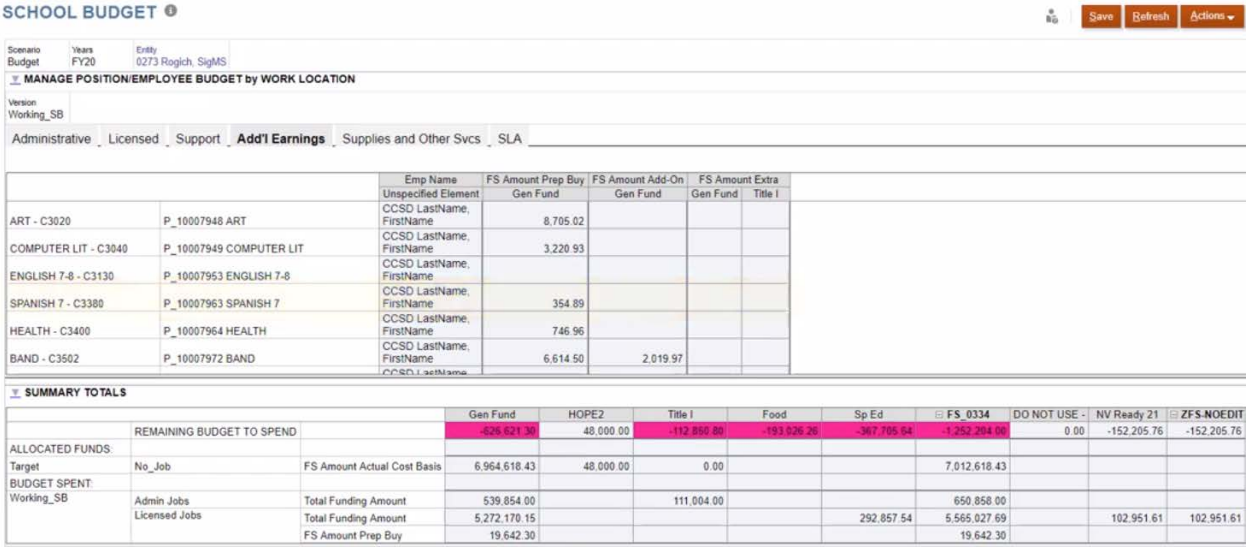
12. Return to the previous form by clicking the **SB PrepBuy-Mult** link. You will be able to view the newly entered Prep Buy information in the employee grid.




13. Click **Save**. This will automatically update the **Summary Totals** on the School Budget form.

14. The Prep Buy information will now be available in the **Additional Earnings** tab of the School Budget form. To view, click the **SB Home** link.

15. Click the **Additional Earnings** tab. You will now be able to view the position and its Prep Buy information.



SCHOOL BUDGET

Save | Refresh | Actions

Scenario: Budget | Years: FY20 | Entity: 0273 Rogich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative | Licensed | Support | **Add'l Earnings** | Supplies and Other Svcs | SLA

| | | Emp Name | FS Amount Prep Buy | FS Amount Add-On | FS Amount Extra | |
|---|---|---|---|---|---|---|
| | | Unspecified Element | Gen Fund | Gen Fund | Gen Fund | Title I |
| ART - C3020 | P_10007948 ART | CCSD LastName, FirstName | 8,705.02 | | | |
| COMPUTER LIT - C3040 | P_10007949 COMPUTER LIT | CCSD LastName, FirstName | 3,220.93 | | | |
| ENGLISH 7-8 - C3130 | P_10007953 ENGLISH 7-8 | CCSD LastName, FirstName | | | | |
| SPANISH 7 - C3380 | P_10007963 SPANISH 7 | CCSD LastName, FirstName | 354.89 | | | |
| HEALTH - C3400 | P_10007964 HEALTH | CCSD LastName, FirstName | 746.96 | | | |
| BAND - C3502 | P_10007972 BAND | CCSD LastName, FirstName | 6,614.50 | 2,019.97 | | |

SUMMARY TOTALS

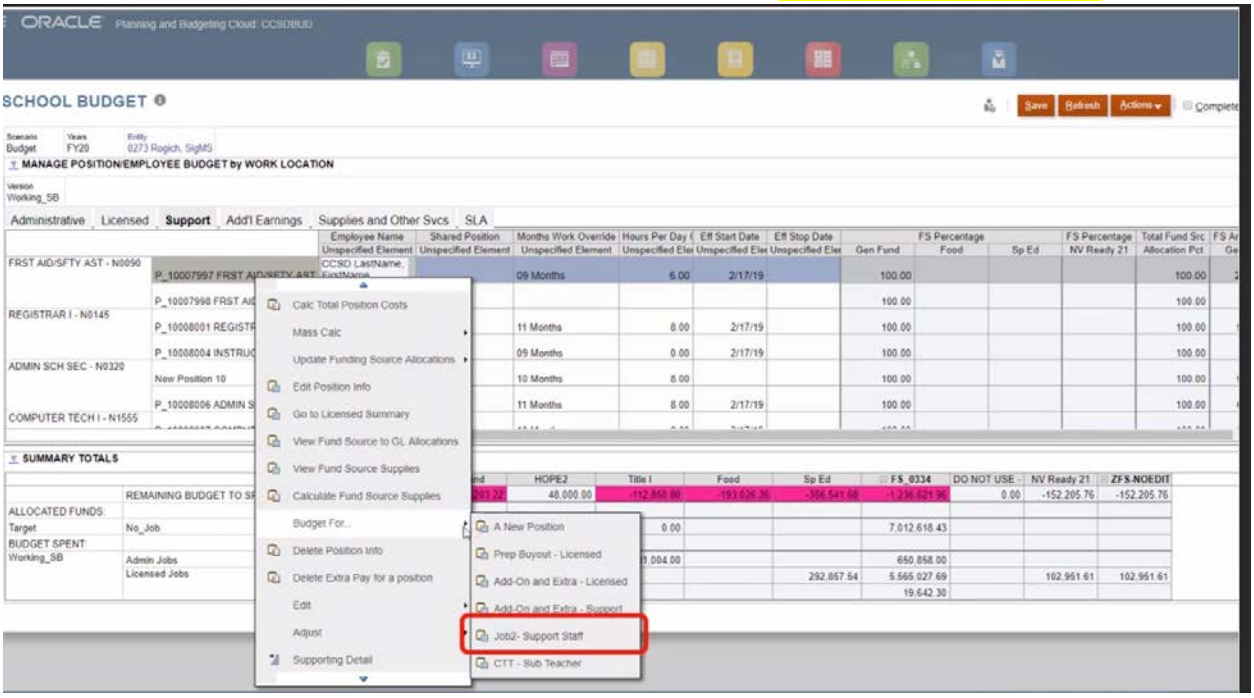
| | | | Gen Fund | HOPE2 | Title I | Food | Sp Ed | FS_0334 | DO NOT USE - | NV Ready 21 | ZFS-NOEDIT |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | REMAINING BUDGET TO SPEND | | -626,621.30 | 48,000.00 | -112,850.80 | -193,026.26 | -367,705.64 | -1,252,204.00 | 0.00 | -152,205.76 | -152,205.76 |
| ALLOCATED FUNDS: | | | | | | | | | | | |
| Target | No_Job | FS Amount Actual Cost Basis | 6,964,618.43 | 48,000.00 | 0.00 | | | 7,012,618.43 | | | |
| BUDGET SPENT: | | | | | | | | | | | |
| Working_SB | Admin Jobs | Total Funding Amount | 539,854.00 | | 111,004.00 | | | 650,858.00 | | | |
| | Licensed Jobs | Total Funding Amount | 5,272,170.15 | | | | 292,857.54 | 5,565,027.69 | | 102,951.61 | 102,951.61 |
| | | FS Amount Prep Buy | 19,642.30 | | | | | 19,642.30 | | | |

# Budgeting for a Job 2

1. From the School Budget form, select the **Support** tab.

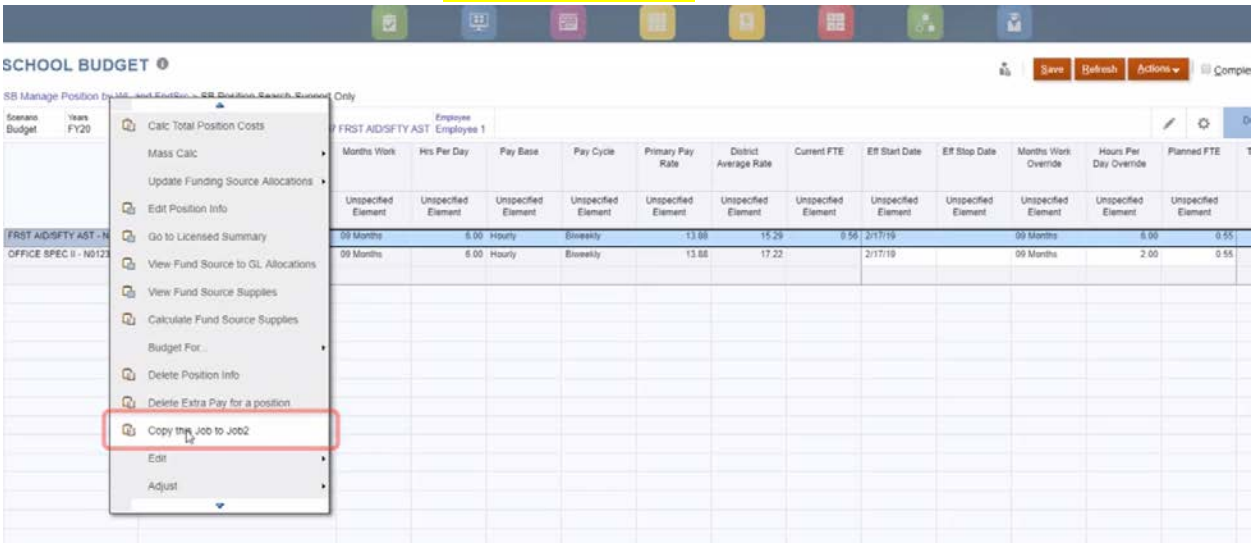
2. Find the desired employee from the Support employee grid and **right-click** on their position number.

3. From the menu that appears, hover over **Budget for…**, and select **Job2 – Support Professional**.




4. You will be brought to the **SB Position Search-Support Only** form. From the available employees, locate your selection, and select the row by **right-clicking** on the Job.

5. From the menu that appears, select **Copy this Job to Job2**.

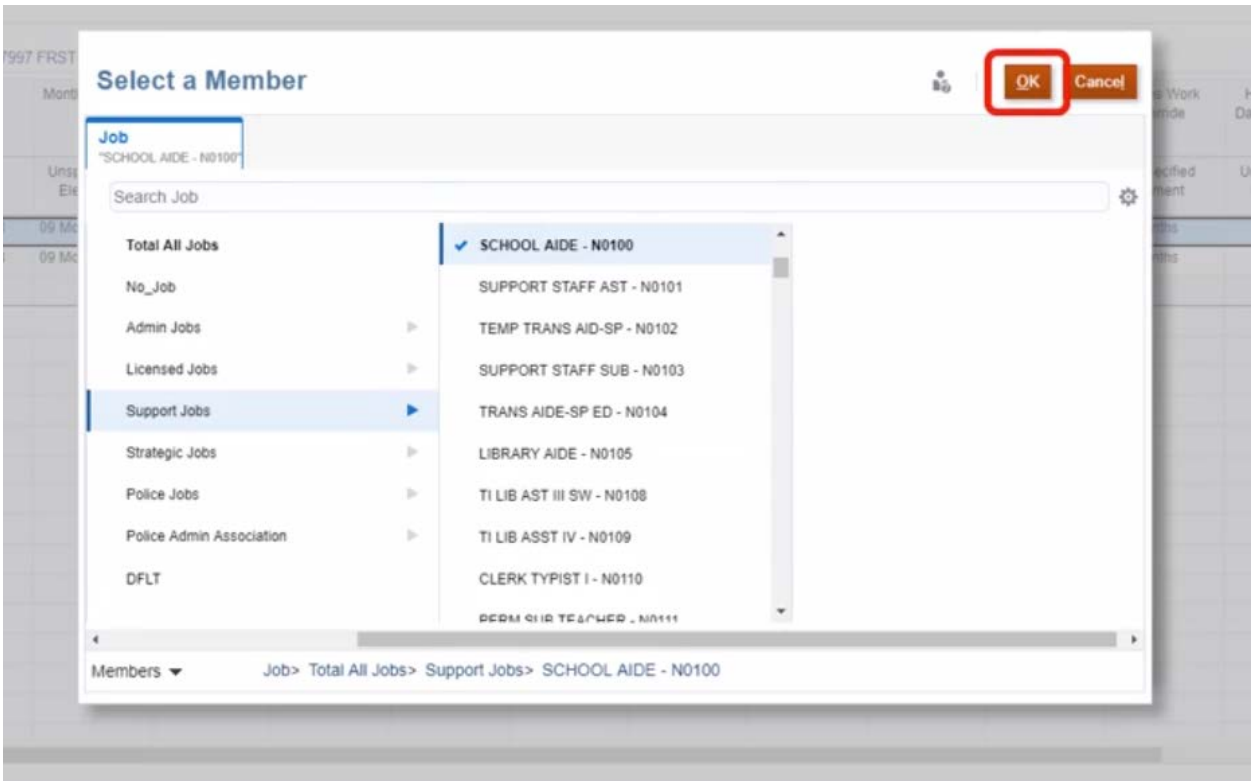


6. Click **OK** in the Launch Confirmation message.

7. You will be brought to the **Copy Job1 to Job2** window. Click the **Member Selector** icon next to the **Please enter JOB2** field.

8. From the Select a Member window that appears, locate and select the desired Job 2 from the list of available jobs.

9. Click **OK**.



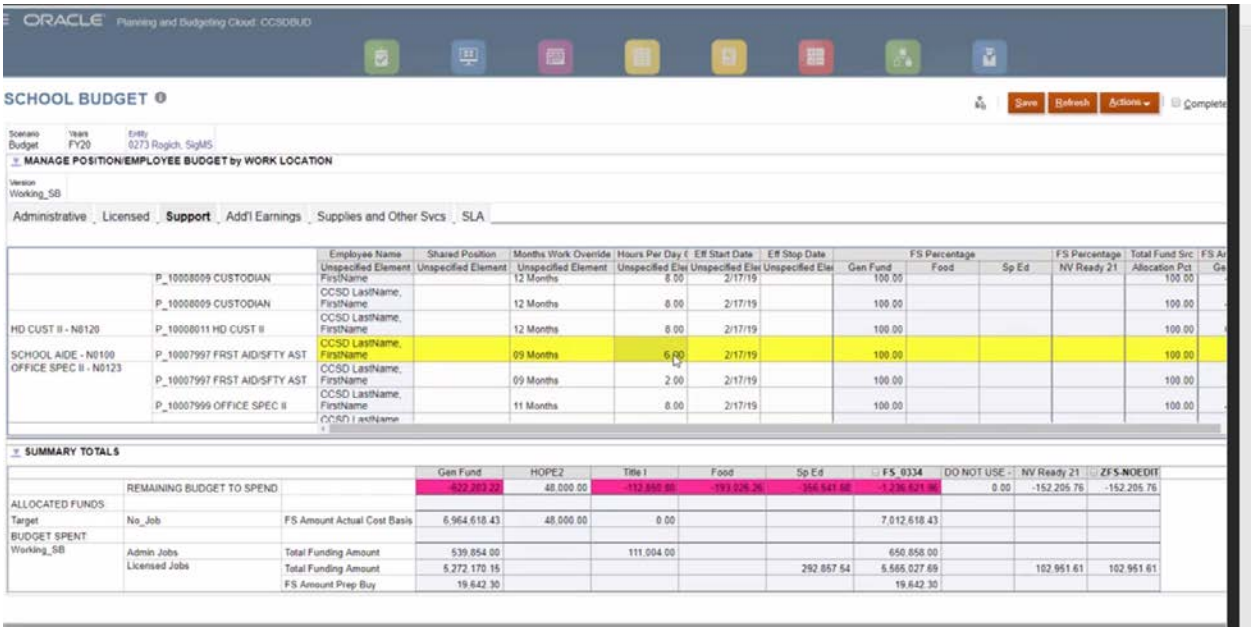

10. The **Please enter JOB2** field will now show the new position code. Click **Launch**.

11. Click **OK** in the Information window.

12. You will now be able to verify that the Job 2 displays correctly. Return to the School Budget form by clicking the **SB Home** link.

13. Once you are returned to the School Budget form, select the **Support** tab to view the newly added Job 2.

14. The new Job 2 will appear highlighted in **yellow** (as it has not yet been saved).




15. For the new job, modify the hours worked in the **Hours Per Day Override** field.

16. After adjusting one or both jobs, click **Save**.

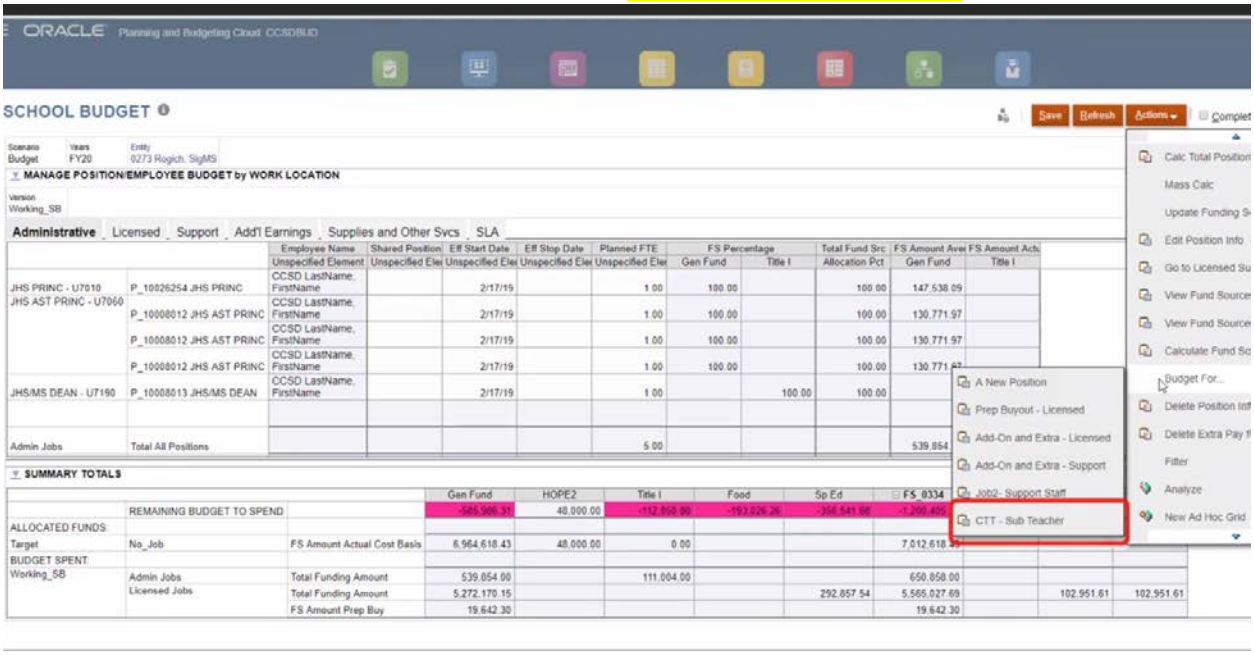
17. Click on the **Actions** menu, hover over **Mass Calc**, and select **Calc Support Positions**. (Please note: If you are making changes to several Support positions, you can use Mass Calc after making *all* desired changes.)

18. Upon being returned to the School Budget form, neither Job will be highlighted. Saving also automatically updates the Support totals in the **Summary Totals** area.

# Budgeting for a Certified Teacher Tutor (CTT)

1. From the School Budget form, select any **employee-type** tab (Administrative, Licensed, or Support).

2. Click on the **Actions** menu, hover over **Budget for…**, and select **CTT – Sub Teacher**.




3. You will be brought to the **SBT CTT** form. Enter the appropriate number of hours in the **CTT Budget Hours** field.

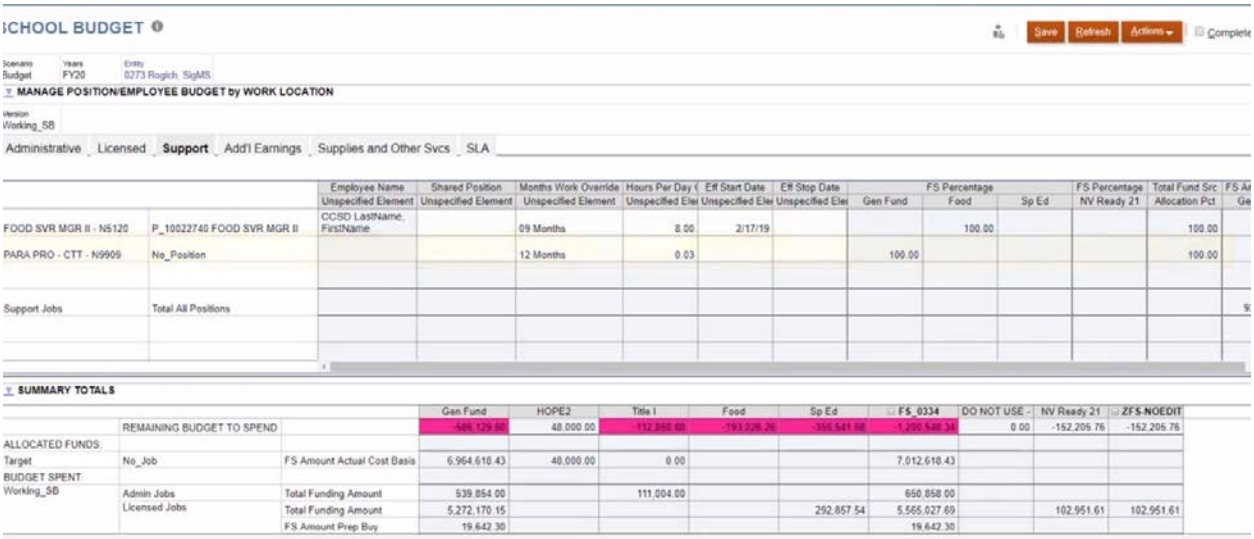
4. Enter **1** in the **CTT Quantity** field.

5. Enter **100** in the appropriate funding source (for example, the General Fund). (**Remember:** A CTT **cannot** be split-funded.)

6. Click **Save**.

7. Return to the School Budget form by clicking on the **SB Home** link.

8. To view the newly added CTT, select the **Support** tab and scroll to the bottom of the Support employee grid.



SCHOOL BUDGET

Save | Refresh | Actions | Complete

Scenario: Budget | Years: FY20 | Entity: 0273 Rogich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative | Licensed | **Support** | Add'l Earnings | Supplies and Other Svcs | SLA

| | | Employee Name | Shared Position | Months Work Override | Hours Per Day ( | Eff Start Date | Eff Stop Date | FS Percentage | | | FS Percentage | Total Fund Src | FS Ar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Unspecified Element | Unspecified Element | Unspecified Element | Unspecified Ele | Unspecified Ele | Unspecified Ele | Gen Fund | Food | Sp Ed | NV Ready 21 | Allocation Pct | Ge |
| FOOD SVR MGR II - N5120 | P_10022740 FOOD SVR MGR II | CCSD LastName, FirstName | | 09 Months | 8.00 | 2/17/19 | | | 100.00 | | | 100.00 | |
| PARA PRO - CTT - N9909 | No_Position | | | 12 Months | 0.03 | | | 100.00 | | | | 100.00 | |
| Support Jobs | Total All Positions | | | | | | | | | | | | |

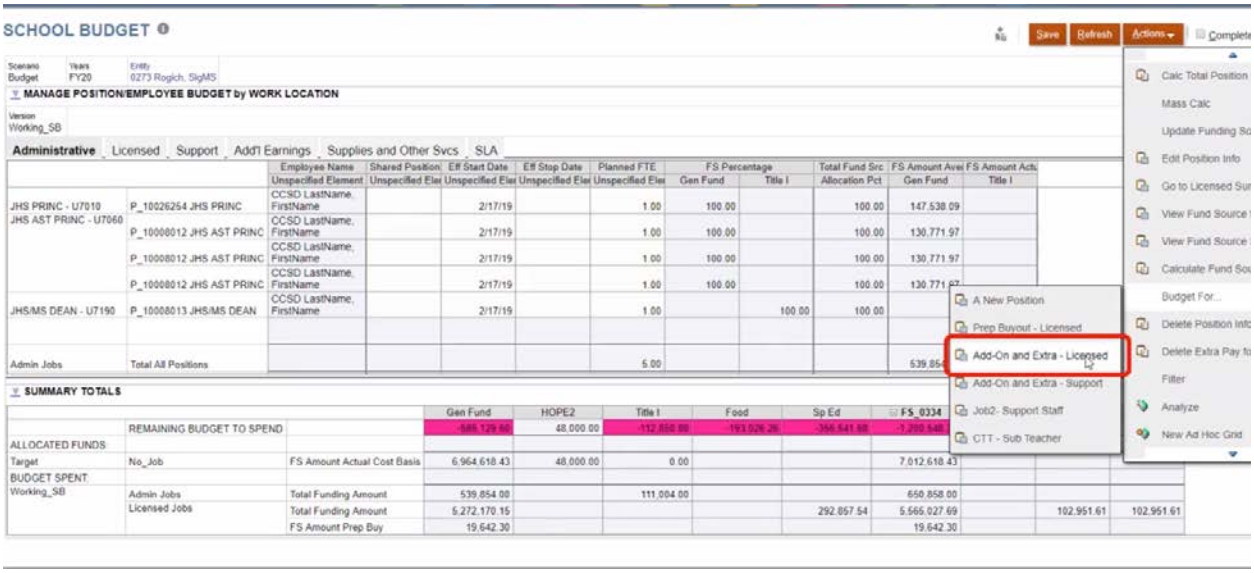
SUMMARY TOTALS

| | | | Gen Fund | HOPE2 | Title I | Food | Sp Ed | FS_0334 | DO NOT USE - | NV Ready 21 | ZFS-NOEDIT |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | REMAINING BUDGET TO SPEND | | -589,129.60 | 48,000.00 | -112,866.60 | -193,526.26 | -355,541.68 | -1,200,548.34 | 0.00 | -152,205.76 | -152,205.76 |
| ALLOCATED FUNDS: | | | | | | | | | | | |
| Target | No_Job | FS Amount Actual Cost Basis | 6,964,618.43 | 48,000.00 | 0.00 | | | 7,012,618.43 | | | |
| BUDGET SPENT: | | | | | | | | | | | |
| Working_SB | Admin Jobs | Total Funding Amount | 539,854.00 | | 111,004.00 | | | 650,858.00 | | | |
| | Licensed Jobs | Total Funding Amount | 5,272,170.15 | | | | 292,857.54 | 5,565,027.69 | | 102,951.61 | 102,951.61 |
| | | FS Amount Prep Buy | 19,642.30 | | | | | 19,642.30 | | | |

# Budgeting for Licensed Add-On or Extra Time

1. From the School Budget form, select any **employee-type** tab (Administrative, Licensed, or Support).

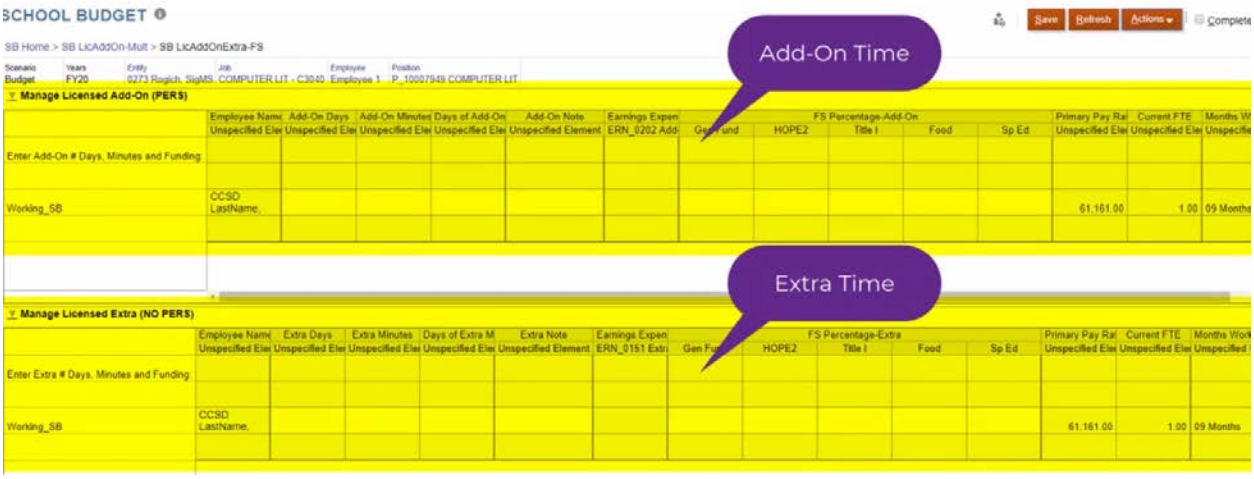
2. Click on the **Actions** menu, hover over **Budget for…**, and select **Add-On and Extra – Licensed**.




3. You will be brought to the **SB Licensed AddOn-Mult** form. From the grid of available positions, **right-click** on the desired position number.

4. From the menu that appears, select **Edit Fund Source Details**.

5. You will be brought to the **SB Licensed AddOnExtra-FS** form. You may enter information in the **Add-On** area (at the top), in the **Extra** area (at the bottom), or both if appropriate.



6. If you are entering **add-on time** as *days*, enter the appropriate number of days in the **Add-On Days** field.

7. If you are entering **add-on time** as *minutes*, enter the appropriate number of minutes in the **Add-On Minutes** field.

8. If you have entered Add-On Minutes, enter the number of days (to which the minutes will be applied) in the **Days of Add-On Minutes** field.

9. If desired, enter a comment in the **Add-On Note** field (such as a justification for the add-on time).

10. Enter **100** in the desired funding source (for example, the General Fund). (**Remember:** You **cannot** split-fund add-on or extra time for a Licensed employee.)

11. If you are entering **extra time** as *days*, enter the appropriate number of days in the **Extra Days** field.

12. If you are entering **extra time** as *minutes*, enter the appropriate number of minutes in the **Extra Minutes** field.

13. If you have entered Extra Minutes, enter the number of days (to which the minutes will be applied) in the **Days of Extra Minutes** field.

14. If desired, enter a comment in the **Extra Note** field (such as a justification for the extra time).

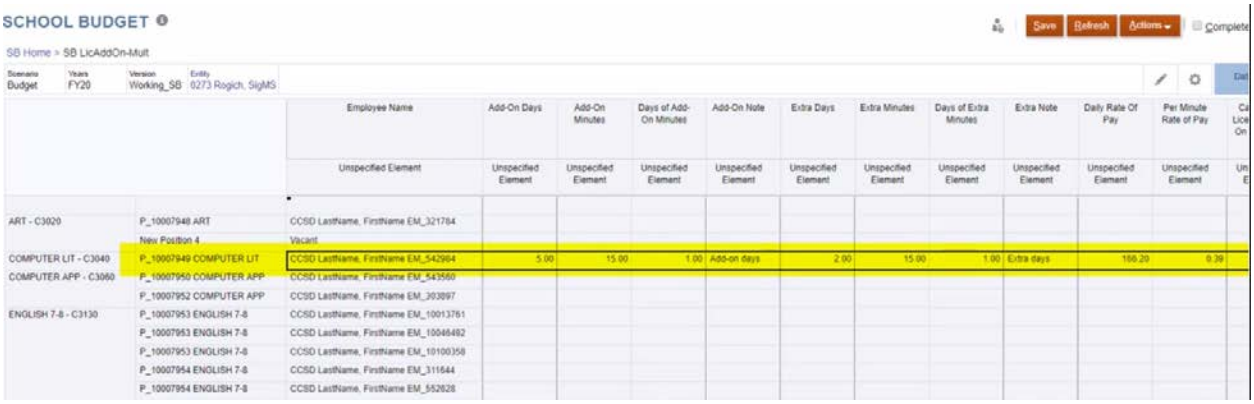
15. Enter **100** in the desired funding source.

16. Click **Save**.

17. Upon being returned to the SB Licensed AddOnExtra-FS form, note that the **FS Amount Add-On** and/or **FS Amount Extra** have auto-calculated.

18. Return to the previous form by clicking the **SB Licensed AddOn-Mult** link.

19. On the SB Licensed AddOn-Mult form, note that the positon now reflects the information you entered in the Add-On and/or Extra fields.




20. To view the fringe benefits for the newly entered time, **right-click** on the position number and select **View Add-On Extra with Fringe**.

21. As with the SB Licensed AddOnExtra-FS form, the fringe benefits information shows in the **Add-On** area (at the top), in the **Extra** area (at the bottom) or both if appropriate.

22. When finished viewing, return to the previous form by clicking on the **SB Licensed AddOn-Mult** link.

23. Scroll to the bottom of the grid to view the updated Add-On and/or Extra totals.

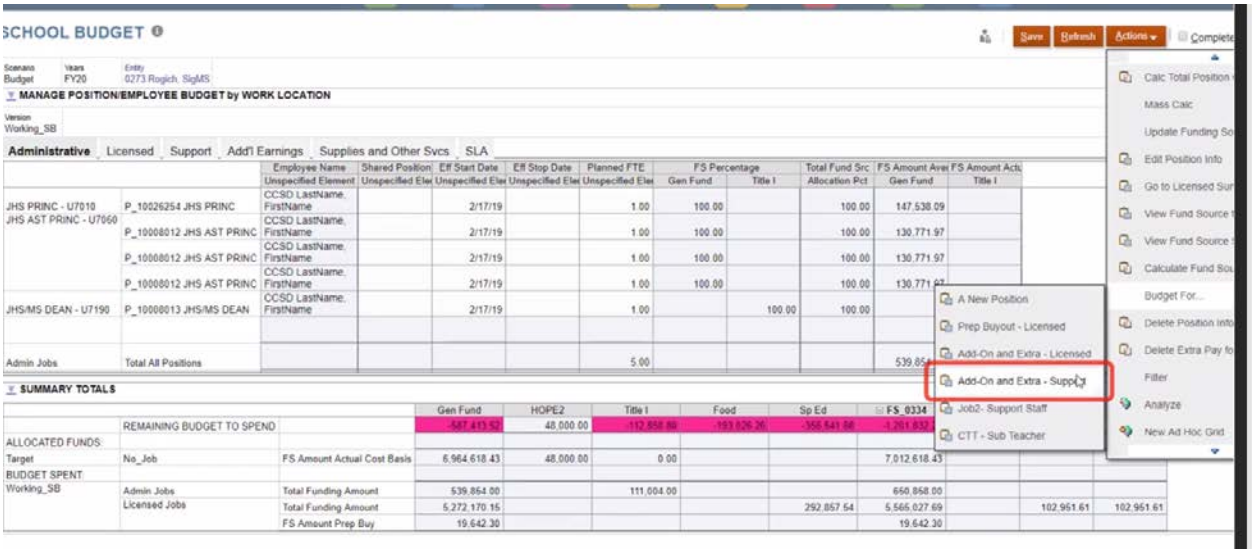
24. Click **Save**.

25. Return to the School Budget form by clicking on the **SB Home** link. You may now view the updated Licensed Add-On and/or Extra totals in the **Summary Totals** area.

# Budgeting for Support Add-On or Extra Time

1. From the School Budget form, select any **employee-type** tab (Administrative, Licensed, or Support).

2. Click on the **Actions** menu, hover over **Budget for…**, and select **Add-On and Extra – Support**.




3. You will be brought to the **SB Support AddOn-Mult** form. From the grid of available positions, **right-click** on the desired position number.

4. From the menu that appears, select **Edit Fund Source Details**.

5. You will be brought to the **SB Support AddOnExtra-FS** form. You may enter information in the **Add-On** area (at the top), in the **Extra** area (at the bottom), or both if appropriate.

6. If you are entering **add-on time**, enter the appropriate number of days in the **Days of Add-On Hours** field.

7. Once you have entered the number of days, enter the number of hours (which will apply to the days) in the **Add-On Hours** field.

8. If desired, enter a comment in the **Add-On Note** field (such as a justification for the add-on time).

9. Enter **100** in the desired funding source (for example, the General Fund). (**Remember:** You **cannot** split-fund add-on or extra time for a Support employee.)

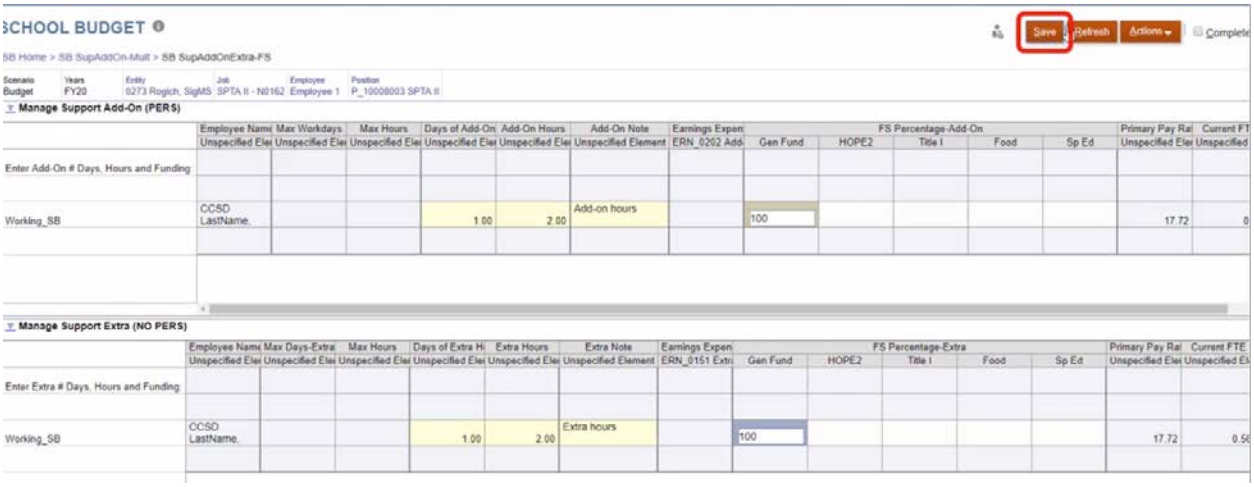
10. If you are entering **extra time**, enter the appropriate number of days in the **Days of Extra Hours** field.

11. Once you have entered the days, enter the number of hours (which will apply to the days) in the **Extra Hours** field.

12. If desired, enter a comment in the **Extra Note** field (such as a justification for the extra time).

13. Enter **100** in the desired funding source.

14. Click **Save**.




15. Upon being returned to the SB Support AddOnExtra-FS form, note that the **FS Amount Add-On** and/or **FS Amount Extra** columns have auto-calculated.

16. Return to the previous form by clicking the **SB Support AddOn-Mult** link.

17. On the SB Support AddOn-Mult form, note that the positon now reflects the information you entered in the Add-On and/or Extra fields.

18. To view the fringe benefits for the newly entered time, **right-click** on the position number and select **View Add-On Extra With Fringe**.

19. As with the SB Support AddOnExtra-FS form, the fringe benefits information shows in the **Add-On** area (at the top), in the **Extra** area (at the bottom) or both if appropriate.

20. When finished viewing, return to the previous form by clicking on the **SB Support AddOn-Mult** link.

21. Scroll to the bottom of the grid to view the updated Add-On and/or Extra totals.

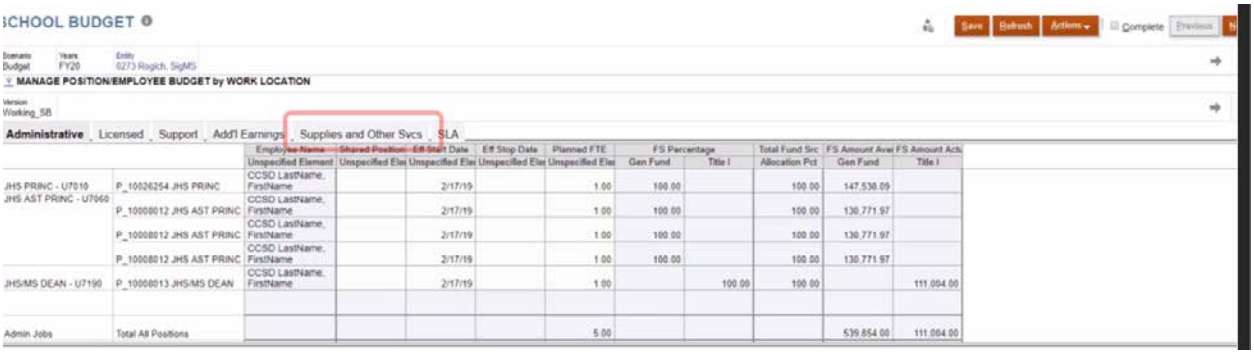
22. Click **Save**.

23. Return to the School Budget form by clicking on the **SB Home** link.

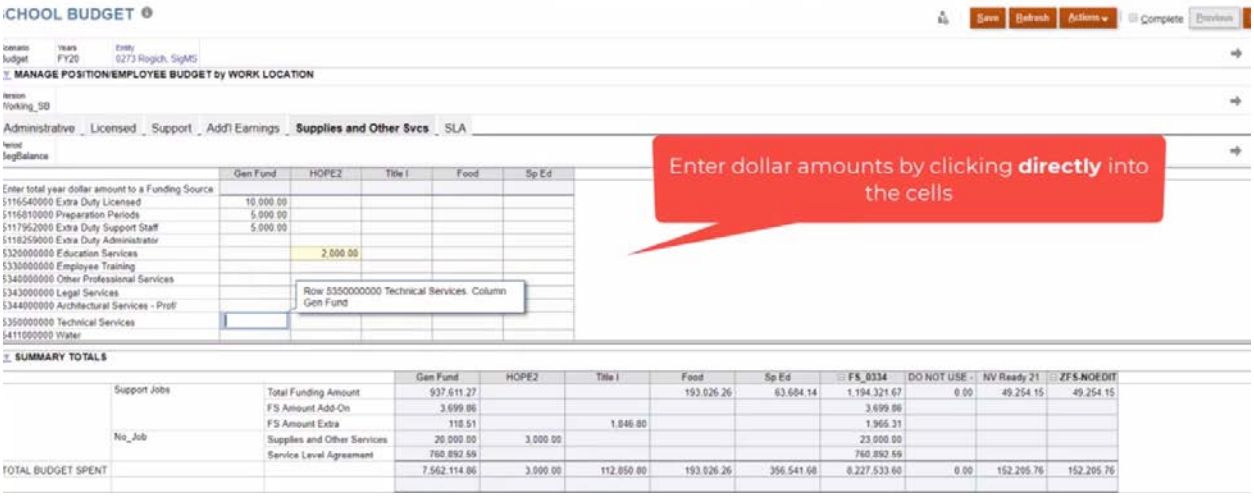
24. You may now view the updated Support Add-On and/or Extra totals in the **Summary Totals** area.

# Budgeting for Supplies and Other Services

1. From the School Budget form, select the **Supplies and Other Services** tab.




2. From this screen, you may now enter or edit dollar amounts in the appropriate fund sources available to your school, such as the General Fund.

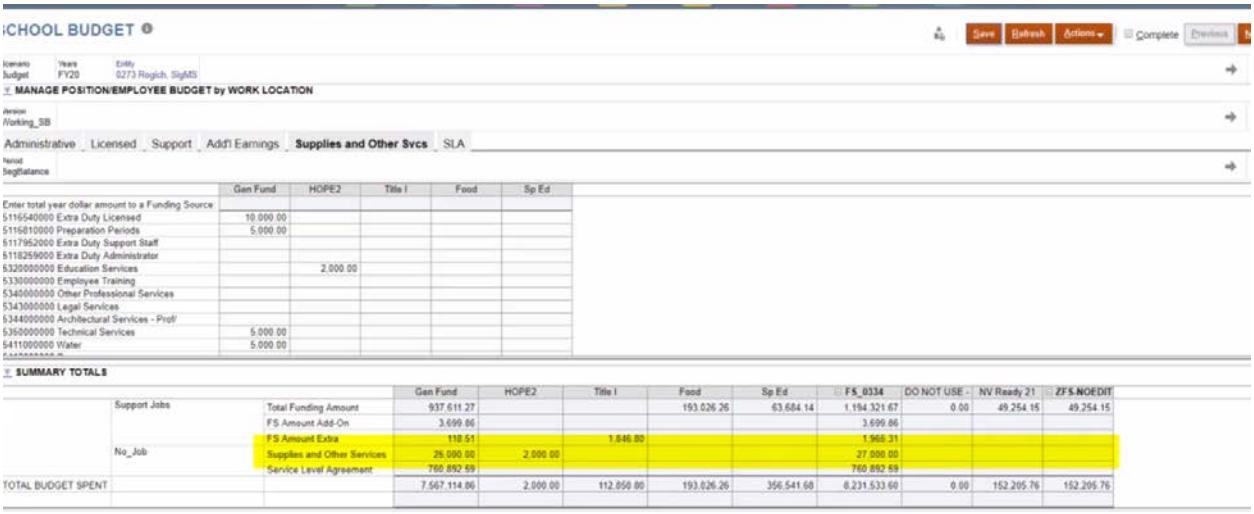



3. Click **Save** when you are finished updating.

4. Click on the **Actions** menu, then select **Calculate Fund Source Supplies**.

5. Click **Save**.

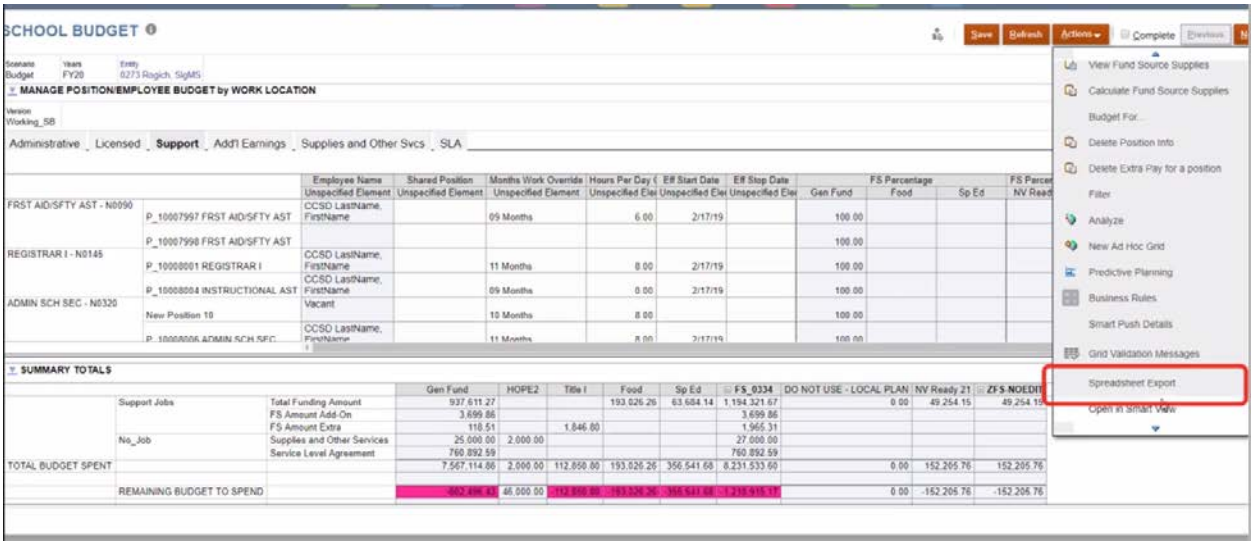
6. You may now view the updated Supplies and Other Services totals in the **Summary Totals** area.



# Exporting a Tab and Budget Totals

1. From the School Budget form, select the tab that you wish to export.

2. Click on the **Actions** menu, then select **Spreadsheet Export**.




3. In the **Spreadsheet Export** window, click **Export**.

4. If you are in **Google Chrome**, the spreadsheet will appear in the downloads tray at the bottom of the screen. Select it by single-clicking on the downloaded file.

5. If you are in **Mozilla Firefox**, a dialog box should appear, indicating that the file will open in Microsoft Excel. Click **OK**.

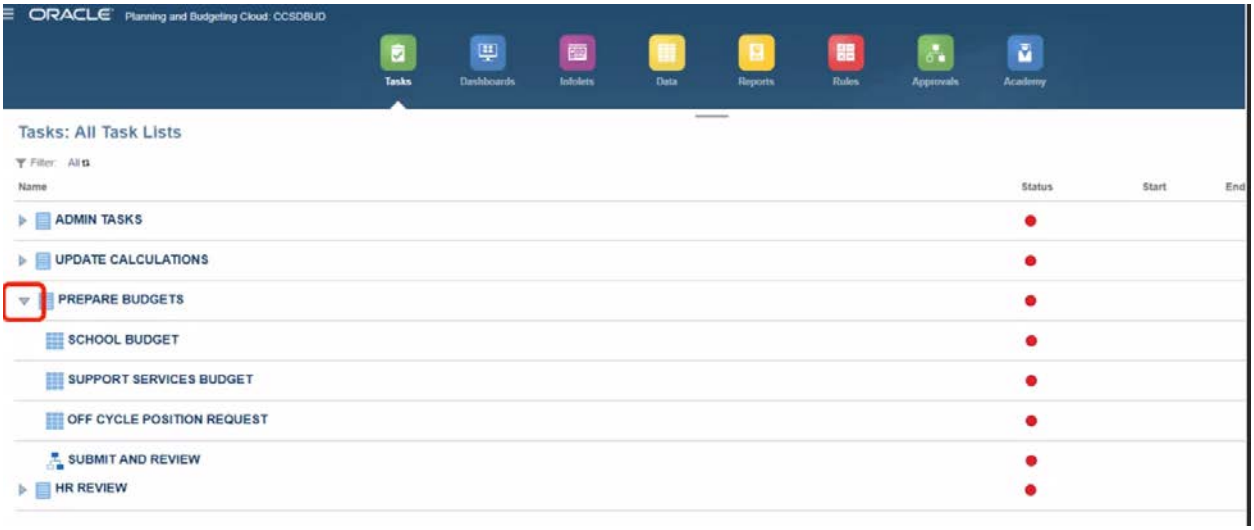
6. Once the Excel file opens, you will be able to view all information contained within the exported tab, including the Totals information.

# Promoting (Submitting) a Budget for Review/Approval

1. Go to the homepage (if you are not already there) by clicking on the **Home** icon.

2. Click on the **Tasks** icon.

3. From the Tasks List, expand the menu for **Prepare Budgets** by clicking the triangle on the left.

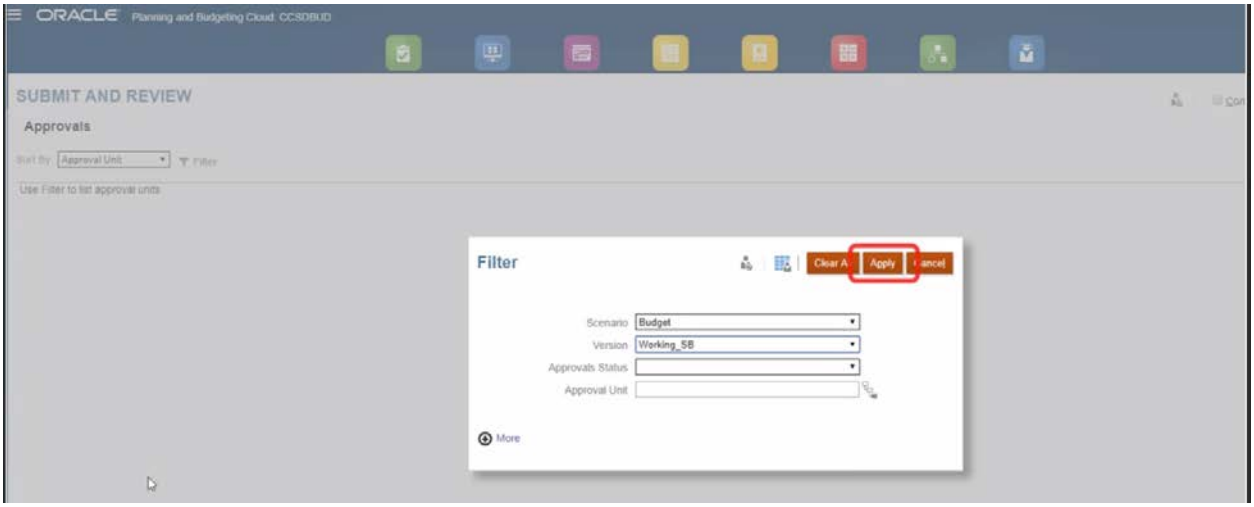



4. Click the option **Submit and Review**.

5. In the Filter window that appears, select **Budget** as the Scenario.

6. Select **Working_SB** as the Version.

7. Click **Apply**.




8. In the Submit and Review form that appears, click the **Planning Unit** for your location.

9. Add an **Annotation** (or note) for the next reviewer and/or approver to view if desired.

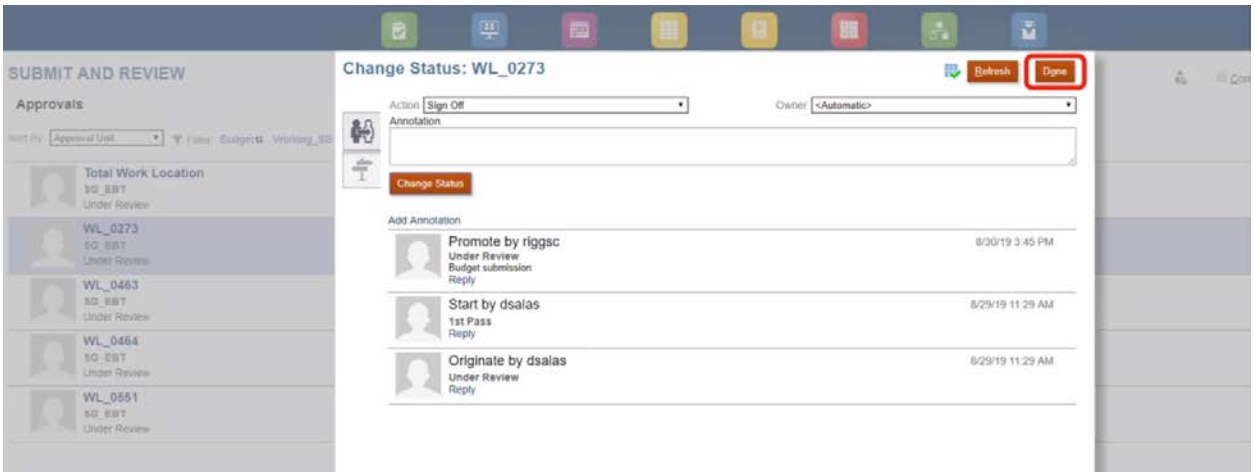
10. Ensure that the Action dropdown is set to **Promote**.

11. Click **Change Status**.

12. After the page updates, note that a "**Promote by**" row appears with your user ID, as well as the date and timestamp. The status will also show as **Under Review**.

13. If desired, you may click on **Add Annotation** to add any additional notes.

14. Click **Done**.




15. Note that the Submit and Review form now shows the submitted work location with the **Reviewer** as the new owner.

16. When finished, click **Close** to return to the Tasks List.

17. Now that your location budget has been submitted, the School Budget form will **no longer allow any changes to be made**. You can verify this by going to **Prepare Budgets** and then selecting **School Budget**.

18. Once in the School Budget form, note that you cannot add, remove, or modify any information within any of the tabs or grids in the form.