

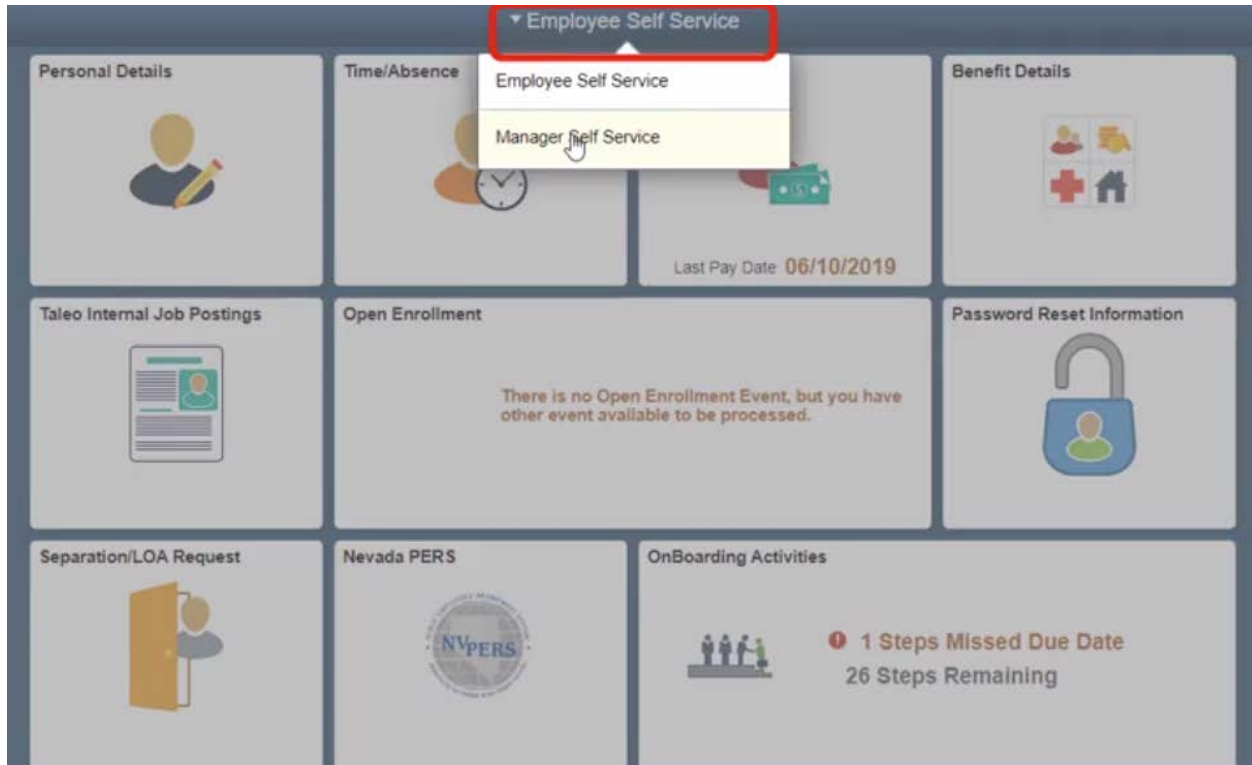
CCSD School Budget Planning Tool Essentials Guide

Table of Contents

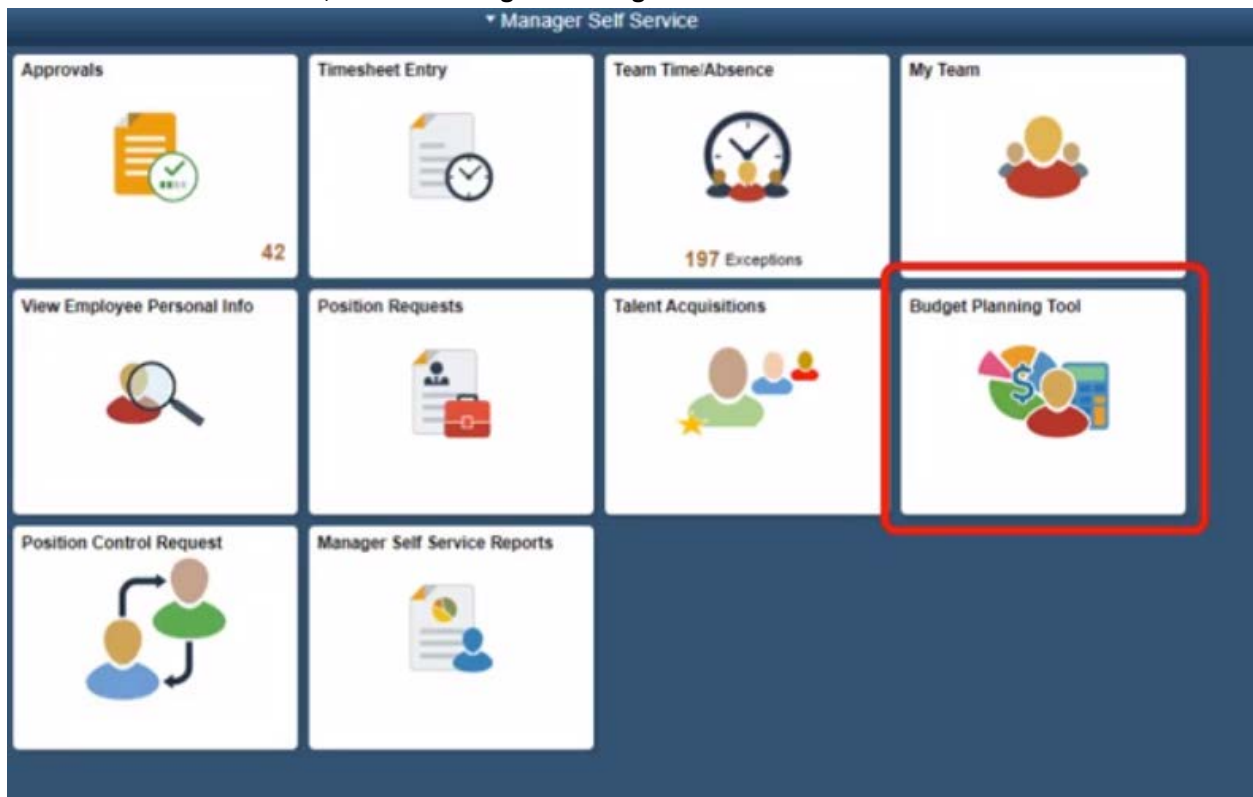
Accessing the CCSD Budget Planning Tool through HCM PeopleSoft	3
Editing the User Preferences to the Correct Funding Source	6
Accessing and Editing the School Budget	8
Adding a Position	9
Removing a Position	13
Budgeting for a Shared Position	15
Budgeting for a Prep Buy	16
Budgeting for a Job 2	19
Budgeting for a Certified Teacher Tutor (CTT)	22
Budgeting for Licensed Add-On or Extra Time	24
Budgeting for Support Add-On or Extra Time	27
Budgeting for Supplies and Other Services	29
Exporting a Tab and Budget Totals	31
Promoting (Submitting) a Budget for Review/Approval	32

Accessing the CCSD Budget Planning Tool through HCM PeopleSoft

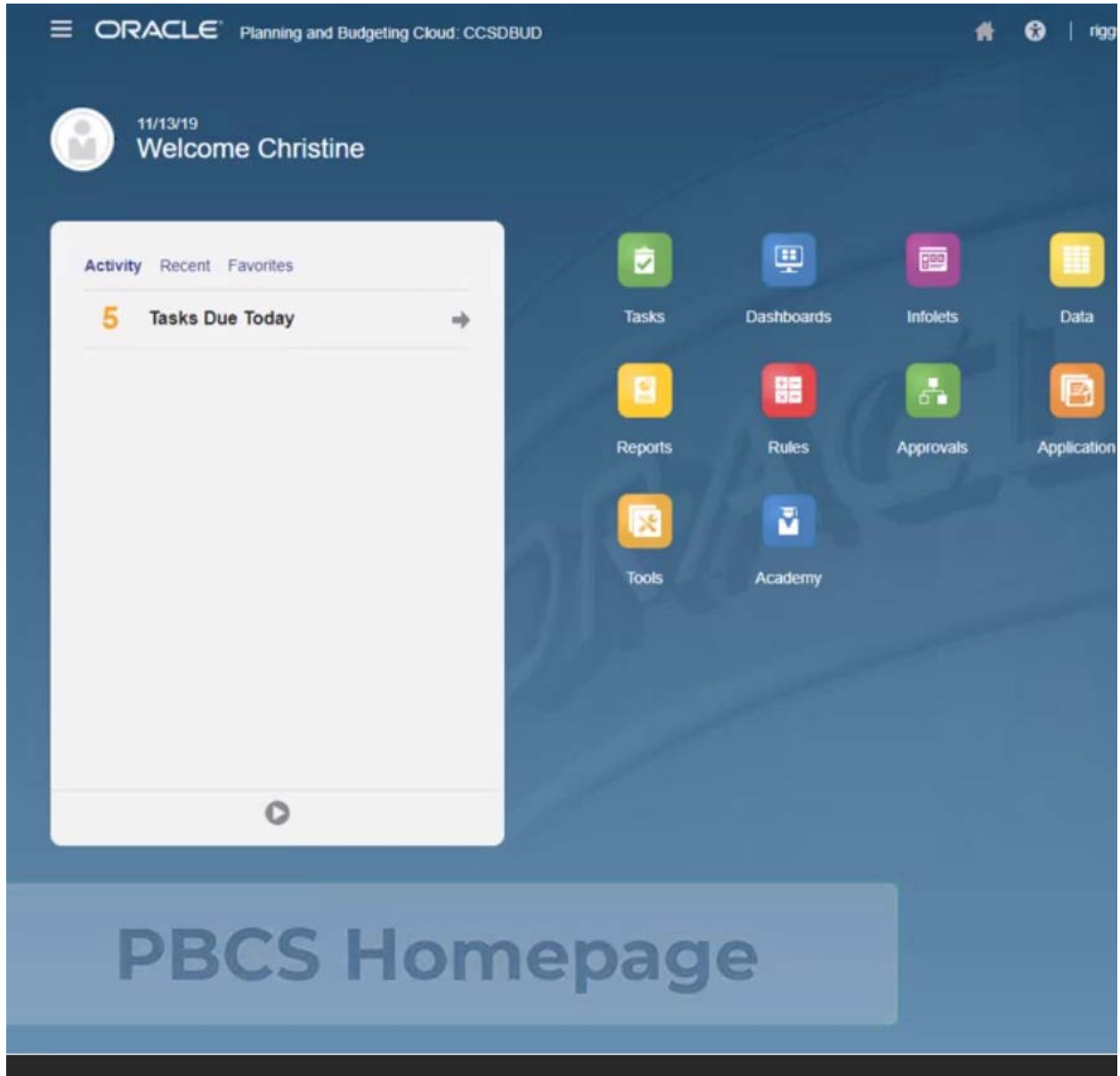
1. Log into HCM PeopleSoft using your **Active Directory (AD) credentials**.
2. You will be brought to the Employee Self Service Dashboard. Using the Top Menu, switch to **Manager Self Service**.



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.

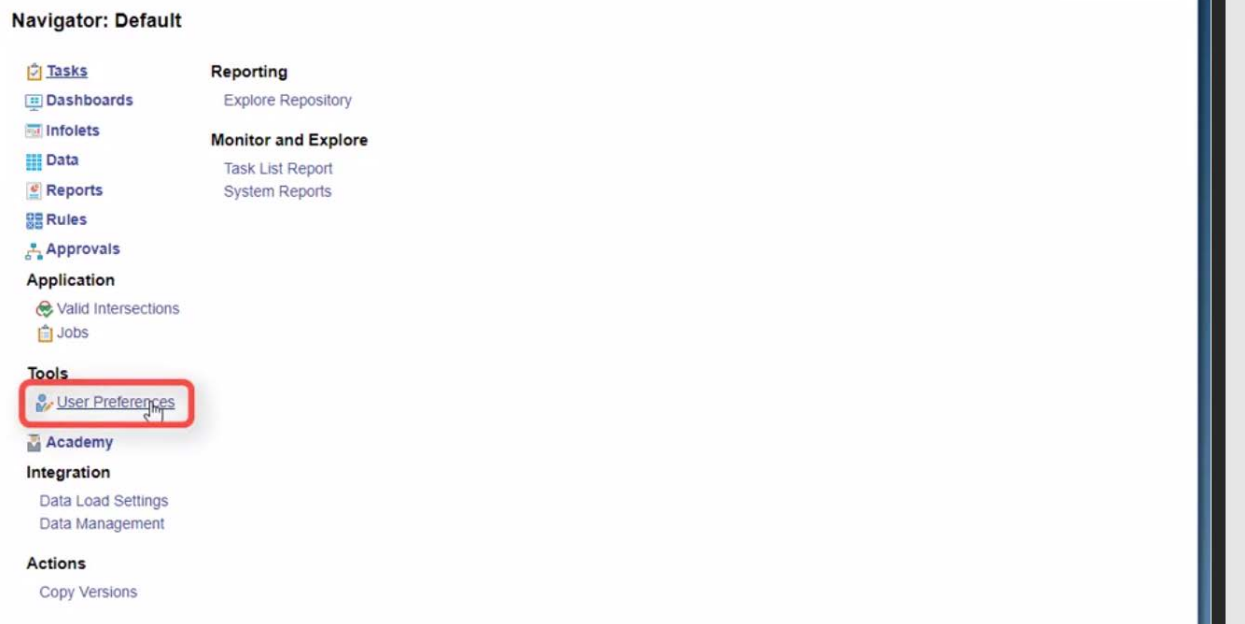


Editing the User Preferences to the Correct Funding Source

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**.

The screenshot shows the 'Select a Member' window. At the top, there is a title bar with the text 'Select a Member' and two buttons: 'OK' and 'Cancel'. Below the title bar, there is a tab labeled 'Element' with the text 'FS_0245' next to it. A search bar labeled 'Search Element' is positioned below the tab. The main area of the window contains a table with two columns: 'Element' and 'FSGROUP'. The 'Element' column has two rows: 'GL Measures' and 'FSGROUP'. The 'FSGROUP' row is selected, and a dropdown menu is open, showing a list of funding source codes: 'FS_0052', 'FS_0235', 'FS_0245' (which is checked with a blue checkmark), 'FS_0246', 'FS_0334', 'FS_0470', 'FS_0577', 'FS_0751', and 'FS_0911'. At the bottom of the window, there is a status bar that reads 'Members' and 'Element> FSGROUP> FS_0245'.

Element	FSGROUP
GL Measures	FS_0052
FSGROUP	FS_0235
	✓ FS_0245
	FS_0246
	FS_0334
	FS_0470
	FS_0577
	FS_0751
	FS_0911

6. Click the **Save** button.

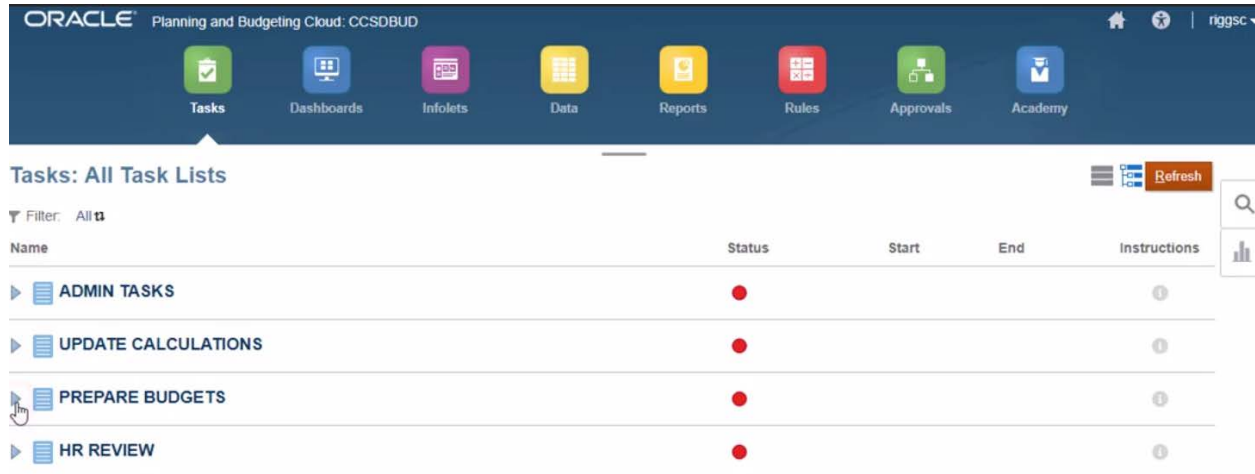
7. Click **OK** in the Information window.

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

To add a **NEW** position to site:

Oracle Planning and Budgeting Cloud: CCSD08UD

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entry: 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	Hours Per Day	EF Start Date	EF Stop Date	FS Percentage	Gen Fund	Food	Sp Ed	FS Percent	FS Percent
FRST AID/SFTY AST - N0090	Vacant	09 Months	8.00	2/17/19		100.00					
New Position 2											
P_10007997 FRST AID/SFTY AST	CCSD LastName, FirstName	09 Months	6.00	2/17/19		100.00					
P_10007998 FRST AID/SFTY AST	CCSD LastName, FirstName					100.00					
REGISTRAR I - N0145		11 Months	8.00	2/17/19		100.00					
P_10008001 REGISTRAR I	CCSD LastName, FirstName					100.00					
P_10008004 INSTRUCTIONAL AST	CCSD LastName, FirstName	09 Months	0.00	2/17/19		100.00					
P_10008006 ADMIN SCH SEC	CCSD LastName, FirstName	11 Months	8.00	2/17/19		100.00					

SUMMARY TOTALS

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE	NV Ready 21
488,731.62	48,000.00	-112,850.00	-193,026.26	-367,795.64	-1,234,714.32	0.00	-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	5,312,499.52		292,857.54	5,605,357.06
		FS Amount Prep Buy	19,287.41			19,287.41

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**.

To add an **EXISTING** position to site:

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entry: 0273 Rogich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET

Version: Working_SB

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

Employee Name	Shared Position	Months Work	Hours Per Day	EF Start Date	EF Stop Date	FS Percentage	Gen Fund	Food	Sp Ed	FS Percentage	Total Fund Sec
FRST AID/SFTY AST - N0090	Vacant	09 Months	8.00	2/17/19		100.00					100.00
New Position 2											
P_10007997 FRST AID/SFTY AST	CCSD LastName, FirstName	09 Months	6.00	2/17/19		100.00					100.00
P_10007998 FRST AID/SFTY AST	CCSD LastName, FirstName					100.00					100.00
REGISTRAR I - N0145		11 Months	8.00	2/17/19		100.00					100.00
P_10008001 REGISTRAR I	CCSD LastName, FirstName					100.00					100.00
P_10008004 INSTRUCTIONAL AST	CCSD LastName, FirstName	09 Months	0.00	2/17/19		100.00					100.00
P_10008006 ADMIN SCH SEC	CCSD LastName, FirstName	11 Months	8.00	2/17/19		100.00					100.00

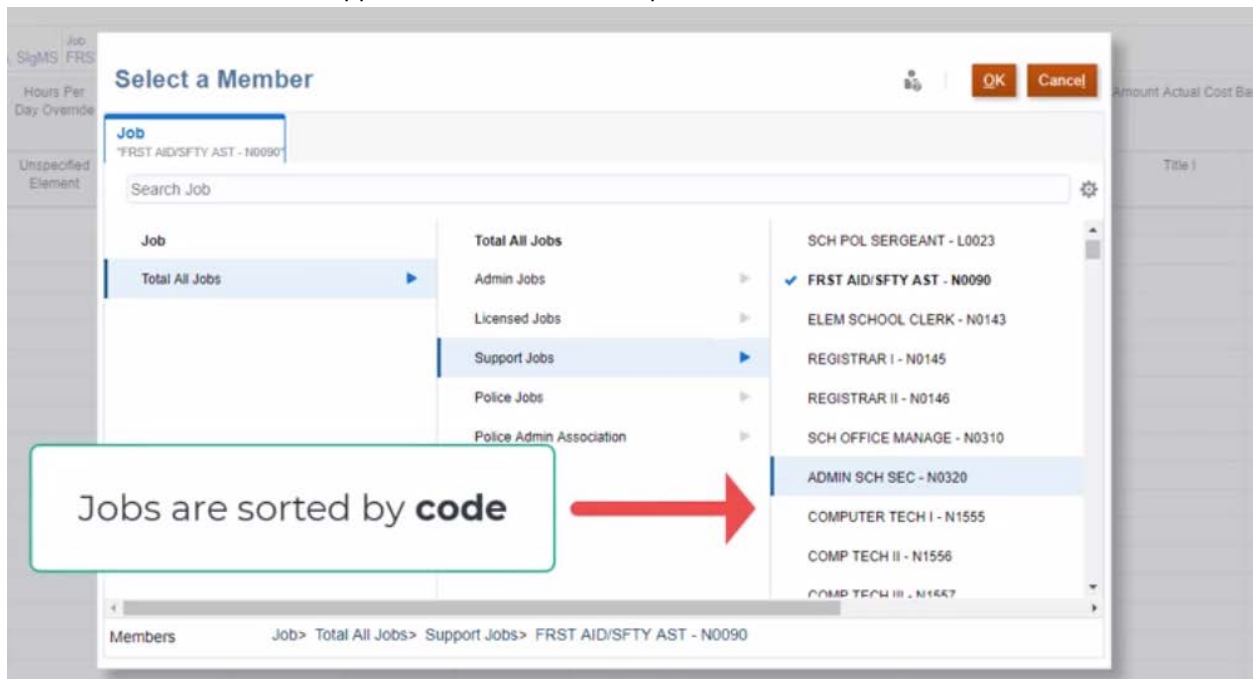
SUMMARY TOTALS

HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE	NV Ready 21	FFS NOEDIT
48,000.00	-112,850.00	-193,026.26	-367,795.64	-1,234,714.32	0.00	-152,205.76	-152,205.76

ALLOCATED FUNDS

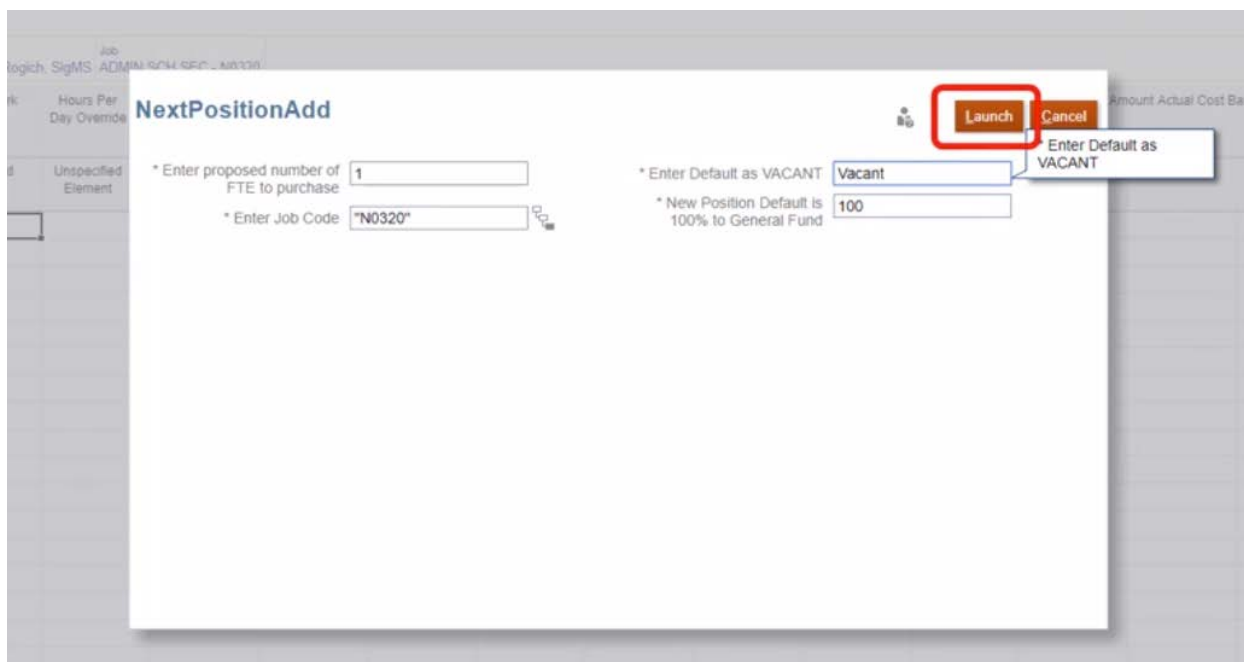
Target	No. Job	FS Amount Actual Cost Basis	6,964,618.43	48,000.00	0.00	7,012,618.43
BUDGET SPENT						
Working_SB						
Admin Jobs		Total Funding Amount	539,854.00	111,004.00		650,858.00
Licensed Jobs		Total Funding Amount	5,312,499.52		292,857.54	5,605,357.06
		FS Amount Prep Buy	19,287.41			19,287.41

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.



The screenshot shows a web application window titled "NextPositionAdd". It contains several input fields and buttons. The "Launch" button is highlighted with a red rectangle. A tooltip is visible over the "Launch" button, showing the text "Enter Default as VACANT". The form includes the following fields:

- * Enter proposed number of FTE to purchase: 1
- * Enter Job Code: *N0320*
- * Enter Default as VACANT: Vacant
- * New Position Default is 100% to General Fund: 100

Buttons: Launch, Cancel.

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.

iSCHOOL BUDGET Save Refresh Actions Com

Scenario: Budget Year: FY20 Entity: 0273 Rough Sign MS

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	EF Start Date	EF Stop Date	Gen Fund	Food	Sp Ed	FS Percentage	FS Percentage	Total Fund Src
	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element						Allocation Pct
ADMIN SCH SEC - N0320	P_10000004 INSTRUCTIONAL AST	CCSU LastName, FirstName	09 Months	0.00	2/17/19		100.00					100.00
	New Position 18	Vacant	10 Months	8.00			100.00					100.00
COMPUTER TECH I - N1555	P_10000006 ADMIN SCH SEC	CCSD LastName, FirstName	11 Months	8.00	2/17/19		100.00					100.00
	P_10000007 COMPUTER TECH I	CCSD LastName, FirstName	10 Months	8.00	2/17/19		100.00					100.00
CUSTODIAN - N0040	P_10000007 COMPUTER TECH I	CCSD LastName, FirstName	10 Months	8.00	2/17/19						100.00	100.00
	P_10000009 CUSTODIAN	CCSD LastName, FirstName	12 Months	8.00	2/17/19		100.00					100.00

SUMMARY TOTALS

	Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE	NV Ready 21	ZFS NOEDIT
Licensed roles	Total Funding Amount	5,312,499.52			292,857.54	5,005,357.05		102,951.01	102,951.01
	FS Amount Prep Buy	19,287.41				19,287.41			
	FS Amount Add-On	6,842.26				6,842.26			
Support Jobs	Total Funding Amount	620,238.61		193,026.26	74,848.10	1,188,113.17	0.00	49,254.15	49,254.15
	FS Amount Add-On	3,653.22				3,653.22			
	FS Amount Extra	82.24	1,846.80			1,929.04			
No_Job	Supplies and Other Services	10,000.00				10,000.00			

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**.

SCHOOL BUDGET

Scenario: Budget, Year: 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

ART - C3020	P_10007948 ART	Employee Name Unspecified Element CCSD LastName, FirstName Vacant	Shared Position Unspecified Elei	EF Start Date Unspecified Elei	EF Stop Date Unspecified Elei	Planned FTE Unspecified Elei	FS Percentage		FS Percentage NV Ready 21	Total Fund Src Allocation Pct	FS Amount Avei Gen Fund	FS Amount Acti Sp Ed	FS Amount Acti NV Ready 21
							Gen Fund	Sp Ed					
		New Position 4		2/17/19		0.50	100.00		100.00	80,670.22			
COMPUTER LIT - C3040	P_10007949 COMPUTER LIT	CCSD LastName, FirstName	SP-Yes	3/20/19	5/20/19	0.50	100.00		100.00	36,146.19			
COMPUTER APP - C3060	P_10007950 COMPUTER APP	CCSD LastName, FirstName	SP-Yes	3/1/19	5/24/19	0.50	100.00		100.00	36,550.29			
ENGLISH 7-8 - C3130	P_10007952 COMPUTER APP	CCSD LastName, FirstName	SP-Yes	2/17/19		0.50	100.00		100.00	40,340.85			
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19		0.50	100.00		100.00	40,340.85			

SUMMARY TOTALS

REMAINING BUDGET TO SPEND		Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
ALLOCATED FUNDS:		467,896.43	46,000.00	112,850.00	193,026.26	386,541.88	1,218,916.17	0.00	-152,205.76	-152,205.76
Target	No_Job	6,964,618.43	46,000.00	0.00			7,012,618.43			
BUDGET SPENT										
Working_SB	Admin Jobs	Total Funding Amount	539,854.00	111,004.00		660,858.00				
	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				

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**.

SCHOOL BUDGET

Scenario: Budget, Year: 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

ART - C3020	P_10007948 ART	Employee Name Unspecified Element CCSD LastName, FirstName Vacant	Shared Position Unspecified Elei	EF Start Date Unspecified Elei	EF Stop Date Unspecified Elei	Planned FTE Unspecified Elei	FS Percentage		FS Percentage NV Ready 21	Total Fund Src Allocation Pct	FS Amount Avei Gen Fund	FS Amount Acti Sp Ed	FS Amount Acti NV Ready 21
							Gen Fund	Sp Ed					
		New Position 4		2/17/19		1.00	100.00		100.00	80,670.22			
						0.00	100.00		100.00	80,681.71			
COMPUTER LIT - C3040	P_10007949 COMPUTER	CCSD LastName, FirstName	SP-Yes	3/20/19	5/20/19	0.50	100.00		100.00	36,146.19			
COMPUTER APP - C3060	P_10007950 COMPUTER	CCSD LastName, FirstName	SP-Yes	3/1/19	5/24/19	0.50	100.00		100.00	36,550.29			
ENGLISH 7-8 - C3130	P_10007952 COMPUTER	CCSD LastName, FirstName	SP-Yes	2/17/19		0.50	100.00		100.00	40,340.85			
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19		0.50	100.00		100.00	40,340.85			
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19		1.00	100.00		100.00	80,670.22			

SUMMARY TOTALS

REMAINING BUDGET TO SPEND		Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
ALLOCATED FUNDS:		2,496.43	46,000.00	112,850.00	193,026.26	386,541.88	1,218,916.17	0.00	-152,205.76	-152,205.76
Target	No_Job	4,618.43	46,000.00	0.00			7,012,618.43			
BUDGET SPENT										
Working_SB	Admin Jobs	Total Funding Amount	9,854.00	111,004.00		660,858.00				
	Licensed Jobs	Total Funding Amount	2,170.15		292,857.54	5,565,027.69		102,951.61	102,951.61	
		FS Amount Prep Buy	9,642.30			19,642.30				

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**.

SCHOOL BUDGET

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	EF Start Date	EF Stop Date	Gen Fund	FS Percentage	Sp Ed	FS Percentage	Total Fund Src
Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element
FRST AID/SFTY AST - N0090	P_10007997 FRST AID/SFTY AST	09 Months	6.00	2/17/19		100.00				100.00
REGISTRAR I - N0145	P_10007998 FRST AID/SFTY AST	11 Months	8.00			100.00				100.00
	P_10008001 REGISTRAR I	09 Months	0.00							100.00
ADMIN SCH SEC - N0320	P_10008004 INSTRUCTIONAL AST	10 Months	0.00			100.00				100.00
	New Position 10	11 Months	8.00	2/17/19		100.00				100.00
	P_10008006 ADMIN SCH SEC									100.00

SUMMARY TOTALS

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE	NV Ready 21	ZFS-NOEDIT
652,496.43	46,000.00	112,897.88	193,826.26	358,541.98	1,218,915.17	0.00	152,205.76	152,205.76
6,964,618.43	48,000.00	0.00			7,012,618.43			
539,854.00		111,004.00		660,858.00				
5,272,170.15			292,857.54	5,565,027.69		102,951.61	102,951.61	
19,642.30				19,642.30				

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**).

SCHOOL BUDGET

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	EF Start Date	EF Stop Date	Gen Fund	FS Percentage	Sp Ed	FS Percentage	Total Fund Src
Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element
FRST AID/SFTY AST - N0090	P_10007997 FRST AID/SFTY AST	09 Months	6.00	2/17/19		100.00				100.00
REGISTRAR I - N0145	P_10007998 FRST AID/SFTY AST	11 Months	8.00	2/17/19		100.00				100.00
	P_10008001 REGISTRAR I	09 Months	0.00	2/17/19		100.00				100.00
ADMIN SCH SEC - N0320	P_10008004 INSTRUCTIONAL AST	10 Months	0.00			100.00				100.00
	New Position 10	11 Months	8.00	2/17/19		100.00				100.00
COMPUTER TECH I - N1555	P_10008006 ADMIN SCH SEC									100.00

SUMMARY TOTALS

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE	NV Ready 21	ZFS-NOEDIT
652,496.43	46,000.00	112,897.88	193,826.26	358,541.98	1,218,915.17	0.00	152,205.76	152,205.76
6,964,618.43	48,000.00	0.00			7,012,618.43			
539,854.00		111,004.00		660,858.00				
5,191,408.44			292,857.54	5,484,345.98		102,951.61	102,951.61	
19,642.30				19,642.30				

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**.

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entity: 6273 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 Unspecified Element	Shared Position Unspecified Ele	EF Start Date Unspecified Ele	EF Stop Date Unspecified Ele	Planned FTE Unspecified Ele	FS Percentage		FS Percentage NV Ready 21	Total Fund Src Allocation Pct	FS Amount Ave		FS Amount Act		FS Amount Act
						Gen Fund	Sp Ed			Gen Fund	Sp Ed	NV Ready 21		
ENGLISH 7-8 - C3130	P_10007952 COMPUTER APP	CCSD LastName, FirstName	SP-Yes	2/17/19	0.50	100.00			100.00	40,340.85				
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007954 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007954 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					

SUMMARY TOTALS

		Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
REMAINING BUDGET TO SPEND		666,385.76	48,000.00	112,858.89	-193,626.26	367,795.84	-5,262,178.46	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	639,854.00	111,004.00		660,858.00				
	Licensed Jobs	Total Funding Amount	5,312,499.52			292,857.54	5,605,357.06		102,951.61	102,951.61
		FS Amount Prep Buy	19,287.41				19,287.41			

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

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entity: 6273 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 Unspecified Element	Shared Position Unspecified Ele	EF Start Date Unspecified Ele	EF Stop Date Unspecified Ele	Planned FTE Unspecified Ele	FS Percentage		FS Percentage NV Ready 21	Total Fund Src Allocation Pct	FS Amount Ave		FS Amount Act		FS Amount Act
						Gen Fund	Sp Ed			Gen Fund	Sp Ed	NV Ready 21		
ENGLISH 7-8 - C3130	P_10007952 COMPUTER APP	CCSD LastName, FirstName	SP-Yes	2/17/19	0.50	100.00			100.00	40,340.85				
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	0.50	100.00		100.00	80,670.22					
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007953 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007954 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					
	P_10007954 ENGLISH 7-8	CCSD LastName, FirstName	SP-Yes	2/17/19	1.00	100.00		100.00	80,670.22					

SUMMARY TOTALS

		Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
REMAINING BUDGET TO SPEND		666,385.76	48,000.00	112,858.89	-193,626.26	367,795.84	-5,262,178.46	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	639,854.00	111,004.00		660,858.00				
	Licensed Jobs	Total Funding Amount	5,312,499.52			292,857.54	5,605,357.06		102,951.61	102,951.61
		FS Amount Prep Buy	19,287.41				19,287.41			

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**.

The screenshot shows the 'SCHOOL BUDGET' form. The 'Actions' menu is open, and 'Prep Buyout - Licensed' is highlighted. The form displays a table of budget items with columns for Employee Name, Shared Position, EF Start Date, EF Stop Date, Planned FTE, FS Percentage, Total Fund Src, FS Amount Ave, and FS Amount Act. The 'Summary Totals' section shows the remaining budget to spend and allocated funds.

Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Ave	FS Amount Act
JHS PRINC - U7010	P_10026254 JHS PRINC							
JHS AST PRINC - U7060	P_10008012 JHS AST PRINC							
JHS/MS DEAN - U7190	P_10008013 JHS/MS DEAN							
Admin Jobs	Total All Positions			5.00			539,854	

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0134
626,268.41	48,000.00	112,893.80	163,526.26	367,795.44	1,251,844

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.

SCHOOL BUDGET

SB Home > SB PrepBuy-Mult > SB PrepBuy

Scenario Budget: FY20, Entity: 0273 Rogich, SigMS: SPANISH 7 - C3380, Employee: Employee 1, Position: P_10007963 SPANISH 7

	Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense-Actual Basis	FS Percentage-Prep Buy					Primary Pay Rate	Current FTE	Months Work Override
							Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element			
Enter # of Prep Buys and Prep Days:														
Working_SB	CCSD Last Name	1.00	25.00		Prep buy	ERN_0150 Prep Buy (NO PERS)	Gen Fund					49,004.00	1.00	09 Months

Prep buy

Save Cancel

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.

SCHOOL BUDGET

SB Home > SB PrepBuy-Mult > SB PrepBuy

Scenario Budget: FY20, Entity: 0273 Rogich, SigMS: SPANISH 7 - C3380, Employee: Employee 1, Position: P_10007963 SPANISH 7

	Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense-Actual Basis	FS Amount Prep Buy	FS Percentage-Prep Buy					Primary Pay Rate	Current FTE
								Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element		
Enter # of Prep Buys and Prep Days:														
Working_SB	CCSD Last Name	1.00	25.00		Prep buy	346.74	354.89	100					49,004.00	1

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
FY20
Entity 0273 Roglich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version:
Working_SB

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

		Emp Name Unspecified Element	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra	
			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			-426,621.30	48,000.00	-112,880.80	-193,026.26	-367,705.64	-1,252,204.06	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**.

ORACLE Planning and Budgeting Cloud: CDSDBUD

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entry: 0273 Rogich, Slight

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	EF Start Date	EF Stop Date	Gen Fund	FS Percentage	Food	Sp Ed	FS Percentage	Total Fund Src	FS Av
FRST AID/SFTY AST - N0090	P_10007997 FRST AID/SFTY AST	09 Months	6.00	2/17/19		100.00					100.00	
REGISTRAR I - N0145	P_10007998 FRST AID	11 Months	8.00	2/17/19		100.00					100.00	
ADMIN SCH SEC - N0320	P_10008001 REGISTR	09 Months	0.00	2/17/19		100.00					100.00	
COMPUTER TECH I - N1555	P_10008004 INSTRUC	10 Months	8.00	2/17/19		100.00					100.00	
	P_10008006 ADMIN S	11 Months	8.00	2/17/19		100.00					100.00	

SUMMARY TOTALS

ALLOCATED FUNDS: Target No_Job, BUDGET SPENT: Working_SB, Admin Jobs, Licensed Jobs

REMAINING BUDGET TO SP

HOPE2, Title I, Food, Sp Ed, FS 0334, DO NOT USE, NV Ready 21, ZFS NOEDIT

Job2 - Support Staff

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**.

SCHOOL BUDGET

Scenario: Budget, Years: FY20

SB Manage Position by Job and Position - SB Position Search-Support Only

Employee	Months Work	Hrs Per Day	Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Current FTE	EF Start Date	EF Stop Date	Months Work Override	Hours Per Day Override	Planned FTE
FRST AID/SFTY AST - N0122	09 Months	6.00	Hourly	Biweekly	13.88	15.25	0.56	2/17/19		09 Months	6.00	0.55
OFFICE SPEC II - N0122	09 Months	6.00	Hourly	Biweekly	13.88	17.22		2/17/19		09 Months	2.00	0.55

Copy this Job to Job2

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

9. Click **OK**.

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

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.

20

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).

SCHOOL BUDGET

Scenario: Budget, Years: FY20, Entity: 0273 Region: 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	Gen Fund	Food	Sp Ed	FS Percentage	FS Percentage	Total Fund	FS Au
Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element
P_10000009 CUSTODIAN	CCSD LastName, FirstName	12 Months	8.00	2/17/19		100.00					100.00	
P_10000009 CUSTODIAN	CCSD LastName, FirstName	12 Months	8.00	2/17/19		100.00					100.00	
P_10000011 HD CUST II	CCSD LastName, FirstName	12 Months	8.00	2/17/19		100.00					100.00	
P_10007997 FRST AID/SFTY AST	CCSD LastName, FirstName	09 Months	6.00	2/17/19		100.00					100.00	
P_10007997 FRST AID/SFTY AST	CCSD LastName, FirstName	09 Months	2.00	2/17/19		100.00					100.00	
P_10007999 OFFICE SPEC II	CCSD LastName, FirstName	11 Months	8.00	2/17/19		100.00					100.00	

SUMMARY TOTALS

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 9334	DO NOT USE	NV Ready 21	ZFS-NOREDE
622,293.30	48,000.00	112,885.86	193,526.26	194,941.66	1,236,521.36	8.00	-152,205.76	-152,205.76
6,964,618.43	48,000.00	0.00			7,012,618.43			
539,854.00		111,004.00			650,858.00			
5,272,170.15				292,857.54	5,565,027.69		162,951.61	162,951.61
19,642.30					19,642.30			

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**.

The screenshot shows the Oracle Planning and Budgeting Cloud interface. The 'SCHOOL BUDGET' form is displayed with the 'Administrative' tab selected. The 'Actions' menu is open, and the 'Budget for...' option is highlighted, with 'CTT – Sub Teacher' selected from the dropdown menu.

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Ave	FS Amount Ach
JHS PRINC - U7010				1.00	100.00	100.00	147,538.09	
JHS AST PRINC - U7060				1.00	100.00	100.00	130,771.97	
JHSIMS DEAN - U7190				1.00	100.00	100.00	130,771.97	
Admin Jobs				5.00			539,854.00	

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.)

The screenshot shows the 'SBT CTT' form. The 'CTT Budget Hours' field is set to 7.00, 'CTT Quantity' is 1.00, and 'Gen Fund' is 100.

CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate	Total Comp Exp	Gen Fund	HOPE2	Title I	Food	Sp Ed	Total Fund Src
7.00	1.00	Hourly	Biweekly	20.00	0.00	100					

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 Rough, SigMS

MANAGE POSITIONEMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative

Licensed

Support

Add'l Earnings

Supplies and Other Svcs

SLA

		Employee Name Unspecified Element	Shared Position Unspecified Element	Months Work Override Unspecified Element	Hours Per Day Unspecified Element	Eff Start Date Unspecified Element	Eff Stop Date Unspecified Element	Gen Fund	FS Percentage Food	Sp Ed	FS Percentage NV Ready 21	Total Fund Src Allocation Pct	FS Ar 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	Ne_Position			12 Months	0.03			100.00				100.00	
Support Jobs	Total All Positions												9

SUMMARY TOTALS

			Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
ALLOCATED FUNDS:	REMAINING BUDGET TO SPEND		546,129.80	48,000.00	112,898.00	191,026.26	358,541.88	1,280,548.24	0.00	152,205.76	152,205.76
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, Title, or Support).
2. Click on the **Actions** menu, hover over **Budget for...**, and select **Add-On and Extra – Licensed**.

SCHOOL BUDGET

Scenario: Budget, Year: FY20, Entry: 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	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Ave	FS Amount Act	
Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Gen Fund	Title I	Allocation Pct	Gen Fund	Title I
JHS PRINC - U7918	P_10026254 JHS PRINC	CCSD LastName, FirstName	2/17/19	1.00	100.00	100.00	147,538.09		
JHS AST PRINC - U7060	P_10000012 JHS AST PRINC	CCSD LastName, FirstName	2/17/19	1.00	100.00	100.00	130,771.97		
	P_10000012 JHS AST PRINC	CCSD LastName, FirstName	2/17/19	1.00	100.00	100.00	130,771.97		
	P_10000012 JHS AST PRINC	CCSD LastName, FirstName	2/17/19	1.00	100.00	100.00	130,771.97		
JHSMS DEAN - U7190	P_10000013 JHSMS DEAN	CCSD LastName, FirstName	2/17/19	1.00	100.00	100.00			
Admin Jobs	Total All Positions			5.00			539,854.00		

SUMMARY TOTALS

	Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	
REMAINING BUDGET TO SPEND	649,129.00	48,000.00	112,658.00	191,026.36	344,541.88	1,300,348.00	
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	6,272,170.15		292,857.54	5,565,027.69	102,951.61
		FS Amount Prep Buy	19,642.30			19,642.30	

Actions: Calc Total Position, Mass Calc, Update Funding So, Edit Position Info, Go to Licensed Sur, View Fund Source, View Fund Source, Calculate Fund So, Budget For..., Delete Position Info, Delete Extra Pay to, Filter, Analyze, New Ad Hoc Grid

Right-click menu: A New Position, Prep Buyout - Licensed, **Add-On and Extra - Licensed**, Add-On and Extra - Support, Job2 - Support Staff, CTT - Sub Teacher

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.

SCHOOL BUDGET

SB Home > SB LicAddOn-Mult > SB LicAddOnExtra-FS

Scenario: Budget, Year: FY20, Entry: 0273 Rogich, SigMS, Job: COMPUTER LIT - C3040, Employee: P_10007948 COMPUTER LIT

Manage Licensed Add-On (PERS)

Employee Name	Add-On Days	Add-On Minutes	Days of Add-On	Add-On Note	Earnings Expen	Gen Fund	HOPE2	FS Percentage-Add-On	Primary Pay Rat	Current FTE	Months Work		
Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Element	ERN_0202 Add			Title I	Food	Sp Ed	Unspecified Elar	Unspecified Elar	Unspecified Elar
Enter Add-On # Days, Minutes and Funding													
Working_SB	CCSD LastName,										61,161.00	1.00	09 Months

Manage Licensed Extra (NO PERS)

Employee Name	Extra Days	Extra Minutes	Days of Extra M	Extra Note	Earnings Expen	Gen Fund	HOPE2	FS Percentage-Extra	Primary Pay Rat	Current FTE	Months Work		
Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Element	ERN_0151 Extr			Title I	Food	Sp Ed	Unspecified Elar	Unspecified Elar	Unspecified Elar
Enter Extra # Days, Minutes and Funding													
Working_SB	CCSD LastName,										61,161.00	1.00	09 Months

Callouts: Add-On Time, Extra Time

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**.

SCHOOL BUDGET

SB Home > SB LicAddOn-Mult > SB LicAddOnExtra-FS

Saving data...

Scenario: FY20 Entry: 0273 Rogich, SigMS COMPUTER LIT - C3640 Employee: Employee 1 Position: P_10097949 COMPUTER LIT

Manage Licensed Add-On (PERS)

	Employee Name Unspecified Elar	Add-On Days Unspecified Elar	Add-On Minutes Unspecified Elar	Days of Add-On Unspecified Elar	Add-On Note Unspecified Element	Earnings Expen ERN_0202 Add	FS Percentage-Add-On				Primary Pay Rat Unspecified Elar	Current FTE Unspecified Elar	Months W Unspecified Elar
							Gen Fund	HOPE2	Title I	Food			
Enter Add-On # Days, Minutes and Funding													
Working_SB	CCSD LastName	5.00	15.00	1.00	Add-on days		100				61,161.00	1.00	09 Months

Manage Licensed Extra (NO PERS)

	Employee Name Unspecified Elar	Extra Days Unspecified Elar	Extra Minutes Unspecified Elar	Days of Extra M Unspecified Elar	Extra Note Unspecified Element	Earnings Expen ERN_0151 Extr	FS Percentage-Extra				Primary Pay Rat Unspecified Elar	Current FTE Unspecified Elar	Months Work Unspecified Elar
							Gen Fund	HOPE2	Title I	Food			
Enter Extra # Days, Minutes and Funding													
Working_SB	CCSD LastName	2.00	15.00	1.00	Extra days		100				61,161.00	1.00	09 Months

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 position now reflects the information you entered in the Add-On and/or Extra fields.

SCHOOL BUDGET

SB Home > SB LicAddOn-Mult

Scenario: Budget, Version: FY20, Years: Working_SB, Entity: 0273 Rogich, SigMS

Employee Name	Add-On Days	Add-On Minutes	Days of Add-On Minutes	Add-On Note	Extra Days	Extra Minutes	Days of Extra Minutes	Extra Note	Daily Rate Of Pay	Per Minute Rate of Pay	Cal Loc On
Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Unspecified Element	Un E
ART - C3020	P_10007948 ART	CCSD LastName, Firstname EM_321784									
	New Position 4	Vicent									
COMPUTER UT - C3040	P_10007949 COMPUTER UT	CCSD LastName, Firstname EM_542094	5.00	15.00	1.00	Add-on days	2.00	15.00	1.00	Extra days	100.20
COMPUTER APP - C3060	P_10007950 COMPUTER APP	CCSD LastName, Firstname EM_543560									
	P_10007952 COMPUTER APP	CCSD LastName, Firstname EM_303897									
ENGLISH 7-8 - C3130	P_10007953 ENGLISH 7-8	CCSD LastName, Firstname EM_10013761									
	P_10007953 ENGLISH 7-8	CCSD LastName, Firstname EM_10048482									
	P_10007953 ENGLISH 7-8	CCSD LastName, Firstname EM_10100358									
	P_10007954 ENGLISH 7-8	CCSD LastName, Firstname EM_311544									
	P_10007954 ENGLISH 7-8	CCSD LastName, Firstname EM_552628									

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.

SCHOOL BUDGET

SB Home > SB LicAddOn-Mult > SB Position Comp Detail-AddExt

Scenario: Budget, Version: FY20, Years: Working_SB, Entity: 0273 Rogich, SigMS, Job: COMPUTER UT - C3040, Position: P_10007949

VIEW LICENSED ADD-ON WITH FRINGE BENEFITS

	Year/Total	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Earnings Expense-Actual Basis	ERN_0202 Add-On (PERS)	742.30	69.73	69.73	69.73	69.73	69.73	69.73	69.73	69.73	69.73	44.99
Benefits Expense-Add-On	Public Emp Retirement System	217.12	20.40	20.40	20.40	20.40	20.40	20.40	20.40	20.40	20.40	13.16
	Occupational Injury Management	6.31	0.59	0.59	0.59	0.59	0.59	0.59	0.59	0.59	0.59	0.38
	State Unemployment Ins	0.37	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02
	Medicare	10.76	1.01	1.01	1.01	1.01	1.01	1.01	1.01	1.01	1.01	0.65
	TOTAL ADD-ON & FRINGE BENEFITS	976.87	91.77	91.77	91.77	91.77	91.77	91.77	91.77	91.77	91.77	69.20

VIEW LICENSED EXTRA WITH FRINGE BENEFITS

	Year/Total	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS)	300.00	28.18	28.18	28.18	28.18	28.18	28.18	28.18	28.18	28.18	18.18
Benefits Expense-Extra	Occupational Injury Management	2.65	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.24	0.15
	State Unemployment Ins	0.15	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01	0.01
	Medicare	4.35	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.41	0.26
	TOTAL EXTRA & FRINGE BENEFITS	307.05	28.84	28.84	28.84	28.84	28.84	28.84	28.84	28.84	28.84	18.61

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**.

The screenshot shows the 'SCHOOL BUDGET' interface. The 'Administrative' tab is selected. The 'Actions' menu is open, and 'Add-On and Extra - Support' is highlighted. The main table lists positions with columns for Employee Name, Shared Position, EF Start Date, EF Stop Date, Planned FTE, FS Percentage, Total Fund Src, FS Amount Act, and FS Amount Act. The 'SUMMARY TOTALS' section shows various budget figures.

Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Act	FS Amount Act
JHS PRINC - U7010	P_10026254 JHS PRINC	2/17/19		1.00	100.00	100.00	147,538.09	
JHS AST PRINC - U7060	P_10008012 JHS AST PRINC	2/17/19		1.00	100.00	100.00	130,771.97	
	P_10008012 JHS AST PRINC	2/17/19		1.00	100.00	100.00	130,771.97	
	P_10008012 JHS AST PRINC	2/17/19		1.00	100.00	100.00	130,771.97	
JHS/MS DEAN - U7190	P_10008013 JHS/MS DEAN	2/17/19		1.00	100.00	100.00	130,771.97	
Admin Jobs	Total All Positions			5.00			539,854.00	

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 0334
REMAINING BUDGET TO SPEND	48,000.00	112,858.86	193,626.30	355,641.86	3,261,832.00
ALLOCATED FUNDS:					
Target	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
	FS Amount Prep Buy	19,642.30			19,642.30

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**.

SCHOOL BUDGET

SB Home > SB SupAddOn-Mult > SB SupAddOnExtra-FS

Scenario: Budget PY20 Entity: 0273 Rogich, SigMS SPTA II - N0162 Employee: Employee 1 Position: P_10008003 SPTA II

Manage Support Add-On (PERs)

Employee Name	Max Workdays	Max Hours	Days of Add-On	Add-On Hours	Add-On Note	Earnings Expen	Gen Fund	HOPE2	FS Percentage-Add-On	Title I	Food	Sp Ed	Primary Pay Rat	Current FTE
Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Element	ERN_0202 Add							Unspecified Elar	Unspecified
Enter Add-On # Days, Hours and Funding														
Working_SB	CCSD LastName		1.00	2.00	Add-on hours		100						17.72	0

Manage Support Extra (NO PERs)

Employee Name	Max Days-Extra	Max Hours	Days of Extra H	Extra Hours	Extra Note	Earnings Expen	Gen Fund	HOPE2	FS Percentage-Extra	Title I	Food	Sp Ed	Primary Pay Rat	Current FTE
Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Elar	Unspecified Element	ERN_0151 Exr							Unspecified Elar	Unspecified El
Enter Extra # Days, Hours and Funding														
Working_SB	CCSD LastName		1.00	2.00	Extra hours		100						17.72	0.54

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 position 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.

SCHOOL BUDGET

Scenario: Budget, Year: FY20, Entry: 02/23 Rogich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_58

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

Employee Name	Unspecified Element	Unspecified Elm	Unspecified Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Ave	FS Amount Ach
Gen Fund	Title I	Allocation Pct	Gen Fund	Title I					
JHS PRINC - U7019	P_10026254 JHS PRINC	CCSO LastName, FirstName	2/17/19		1.00	100.00	100.00	147,530.09	
JHS AST PRINC - U7060	P_10008012 JHS AST PRINC	CCSO LastName, FirstName	2/17/19		1.00	100.00	100.00	130,771.97	
	P_10008012 JHS AST PRINC	CCSO LastName, FirstName	2/17/19		1.00	100.00	100.00	130,771.97	
	P_10008012 JHS AST PRINC	CCSO LastName, FirstName	2/17/19		1.00	100.00	100.00	130,771.97	
JHS/MS DEAN - U7190	P_10008013 JHS/MS DEAN	CCSO LastName, FirstName	2/17/19		1.00	100.00	100.00	111,094.00	
Admin Jobs	Total All Positions				5.00			539,854.00	111,094.00

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.

SCHOOL BUDGET

Scenario: Budget, Year: FY20, Entry: 02/23 Rogich, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_58

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

Legend

Enter total year dollar amount to a Funding Source

	Gen Fund	HOPE2	Title I	Food	Sp Ed
5116540000 Extra Duty Licensed	10,000.00				
5116810000 Preparation Periods	5,000.00				
5117952000 Extra Duty Support Staff	5,000.00				
5118250000 Extra Duty Administrator					
5320000000 Education Services	2,000.00				
5330000000 Employee Training					
5340000000 Other Professional Services					
5343000000 Legal Services					
5344000000 Architectural Services - Profit					
5350000000 Technical Services					
5411000000 Water					

SUMMARY TOTALS

	Gen Fund	HOPE2	Title I	Food	Sp Ed	FS 8334	DO NOT USE	NV Ready 21	ZFS-NOEDIT
Support Jobs									
Total Funding Amount	937,611.27			193,026.26	63,604.14	1,194,321.67	0.00	49,254.15	49,254.15
FS Amount Add-On	3,699.96					3,699.96			
FS Amount Extra	118.51		1,846.80			1,965.31			
Supplies and Other Services	20,000.00	3,000.00				23,000.00			
Service Level Agreement	760,892.59					760,892.59			
TOTAL BUDGET SPENT	7,562,114.86	3,000.00	112,859.80	193,026.26	356,541.68	8,227,533.60	0.00	152,205.76	152,205.76

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.

SCHOOL BUDGET

Scenario: Budget, Year: FY20, Edit: 0273 Regular, SigMS

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Review: Working_SB

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

Enter total year dollar amount to a Funding Source

	Gen Fund	HOPE2	Title I	Food	Sp Ed
5116540000 Extra Duty Licensed	10,000.00				
5116810000 Preparation Periods	5,000.00				
5117962000 Extra Duty Support Staff					
5118259000 Extra Duty Administrator					
5320000000 Education Services		2,000.00			
5330000000 Employee Training					
5340000000 Other Professional Services					
5343000000 Legal Services					
5344000000 Architectural Services - Profit					
5350000000 Technical Services	5,000.00				
5411000000 Water	5,000.00				

SUMMARY TOTALS

		Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	DO NOT USE -	NV Ready 21	ZFS-NOEDIT
Support Jobs	Total Funding Amount	937,611.27			193,026.26	63,684.14	1,184,321.67	0.00	49,254.15	49,254.15
	FS Amount Add-On	3,699.86					3,699.86			
	FS Amount Extra	118.51		1,848.80			1,968.31			
No_Job	Supplies and Other Services	25,000.00	2,000.00				27,000.00			
	Service Level Agreement	760,892.89					760,892.89			
TOTAL BUDGET SPENT		7,567,114.86	2,000.00	112,850.80	193,026.26	356,541.68	6,231,533.60	0.00	152,205.76	152,205.76

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**.

The screenshot shows the 'SCHOOL BUDGET' form. The 'Actions' menu is open, and 'Spreadsheet Export' is highlighted with a red box. The form displays a table of budget items with columns for Employee Name, Shared Position, Months Work Overlap, Hours Per Day, EF Start Date, EF Stop Date, Gen Fund, FS Percentage, Sp Ed, and NV Ready. Below the table is a 'SUMMARY TOTALS' section with a table showing various funding amounts and totals.

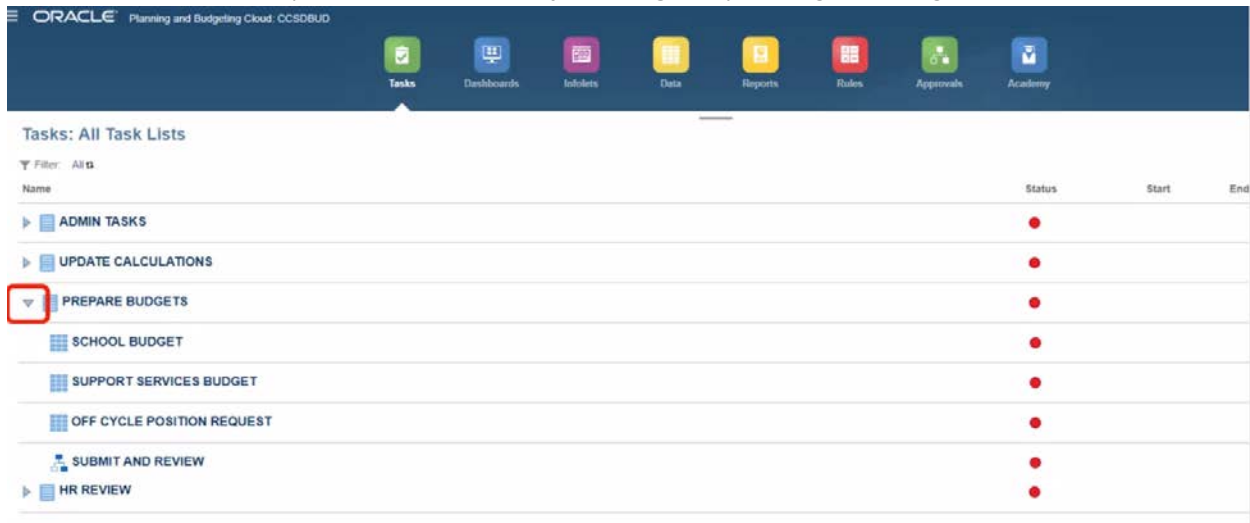
Employee Name	Shared Position	Months Work Overlap	Hours Per Day	EF Start Date	EF Stop Date	Gen Fund	FS Percentage	Sp Ed	NV Ready
FRST AID/SFTY AST - N0990	P_10007997 FRST AID/SFTY AST	09 Months	6.00	2/17/19		100.00			
REGISTRAR I - N0145	P_10007998 FRST AID/SFTY AST	11 Months	8.00	2/17/19		100.00			
ADMIN SCH SEC - N0320	P_10008001 REGISTRAR I	09 Months	8.00	2/17/19		100.00			
	P_10008004 INSTRUCTIONAL AST	10 Months	8.00	2/17/19		100.00			
	New Position 10	11 Months	8.00	2/17/19		100.00			
	P_10008006 ADMIN SCH SEC								

Gen Fund	HOPE2	Title I	Food	Sp Ed	FS_0334	DO NOT USE - LOCAL PLAN	NY Ready 21	ZFS-NOEDT
937,611.27			193,026.20	63,684.14	1,194,321.67	0.00	49,254.15	49,254.15
3,699.86					3,699.86			
110.51		1,846.80			1,957.31			
25,000.00	2,000.00				27,000.00			
760,892.59					760,892.59			
7,567,114.80	2,000.00	112,890.80	193,026.20	356,541.68	8,231,533.60	0.00	152,205.76	152,205.76
REMAINING BUDGET TO SPEND						0.00	-152,205.76	-152,205.76

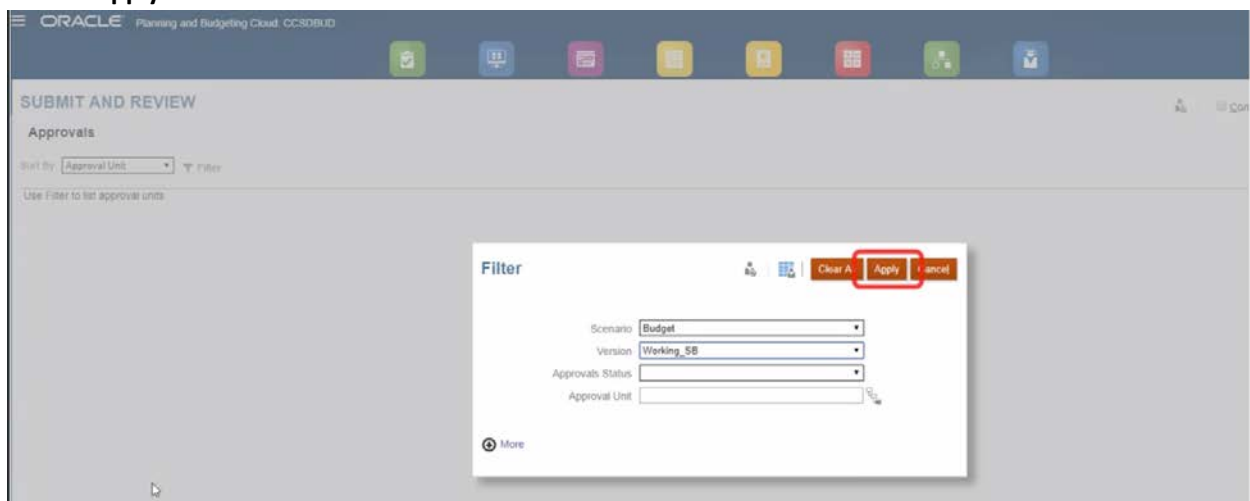
3. In the **Spreadsheet Export** window, click **Export**.
4. If you are in **Google Chrome**, the spreadsheet will appear in the downloads tray at the bottom of the screen. Select it by single-clicking on the downloaded file.
5. If you are in **Mozilla Firefox**, a dialog box should appear, indicating 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**.

The screenshot shows a web application interface for managing work locations. The main panel is titled "Change Status: WL_0273". It features an "Action" dropdown menu currently set to "Sign Off", an "Annotation" text input field, and a "Change Status" button. To the right of the form are "Refresh" and "Done" buttons, with "Done" highlighted by a red rectangle. Below the form, there is an "Add Annotation" section displaying a list of recent actions:

Action	User	Status	Timestamp
Promote by riggs	riggs	Under Review	8/30/19 3:45 PM
Start by dsalas	dsalas	1st Pass	8/29/19 11:29 AM
Originate by dsalas	dsalas	Under Review	8/29/19 11:29 AM

The left sidebar, titled "SUBMIT AND REVIEW", shows a list of work locations under the "Approvals" section. The list includes:

- Total Work Location
- WL_0273
- WL_0463
- WL_0464
- WL_0551

Each entry in the list shows the location name, the user (e.g., "SG, EBT"), and the status ("Under Review").

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.