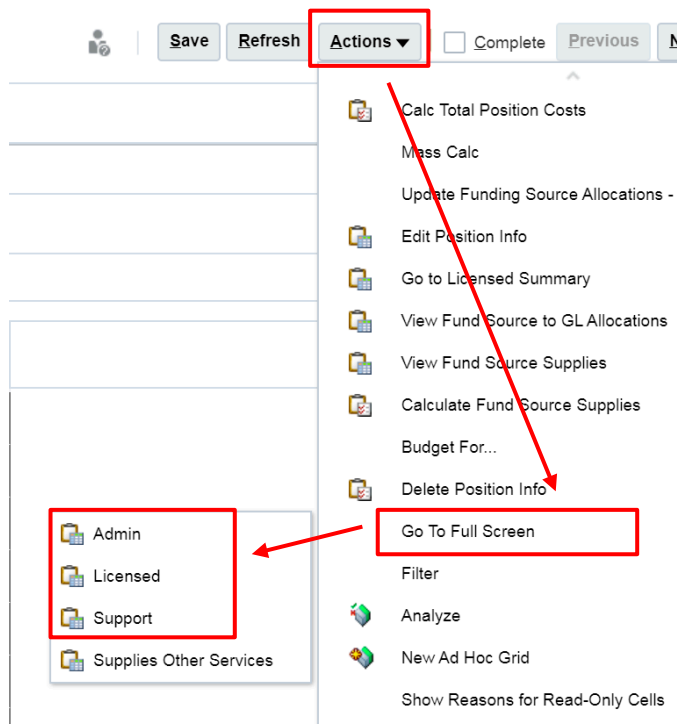


How to Clear a Transfer - Reinstating a Transfer to its Original Position

In the CCSD Budget Planning you have the functionality to transfer Licensed positions between Job Codes/Positions. A transfer can only occur when it is being originated from the employee's *original position*. If you have transferred an employee to a different position and then decide to transfer the employee to yet another position (transfer of a transfer), you must clear the first transfer to ensure the employee's original position data is retained for HR review. If you receive the error message below, you must clear the original transfer before you can move forward with another transfer of the same employee:



1. From the School Budget Form > click **Actions** > **Go To Full Screen** > select the desired tab (Admin/ **Licensed**):



2. Identify the employee's original position where you made the first transfer *from*. **TIP:** The position number in the **Assigned Position Number** column will match the position number on the original employee row. Highlight the original employee row > Right Click > Select **Edit Position Info**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget Working_SB Years FY21 Entity 0411 Hoggard, M

Transfer Position
 Calc Total Position Costs
 Mass Calc
 Update Funding Source Allocations
Edit Position Info
 Go to Licensed Summary
 View Fund Source to GL Allocations
 View Fund Source Supplies
 Calculate Fund Source Supplies
 Budget For...
 Delete Position Info
 Go To Full Screen
 View Edit Position Totals
 Edit
 Adjust
 Supporting Detail

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
SKI,CANDACE J EM_560012			8/7/19		1.0
LD S EM_304688			8/7/19		1.0
ESA L EM_10115926			9/9/19		1.0
LA P EM_10097046			8/7/19		1.0
EN,MARY T EM_317450			8/7/19		1.0
EM_548509			8/7/19		1.0
ANY K EM_10031210			8/7/19		1.0
ED EM_300132			8/7/19		1.0
IN S EM_302974			8/7/19		1.0
ER L EM_302982			8/7/19		1.0
A EM_328799	P_10014581_1		8/7/19		1.0
O EM_306606			8/7/19		1.0
LAW,KIMBERLY A EM_328799	P_10014581_1		8/7/19		0.0
Total All Positions					31.0

3. In the form scroll the top screen to the far right

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf > SB Edit Position Detail

Scenario Budget FY21 Entity 0411 Hoggard, MabelES (Magnet) (Pr) Job LRN STRT TTL1 ELE - C8114

Position P_10014581_1 LRN STRT TTL1 ELE Employee Employee 1

Item	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual Base Salary	Calculated Averz	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total Employee I
in	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Sal	Average Base Sz	Assumption	Assumption	Assumption	Assumption
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary	P_10014581_1	No	0.00

Compensation Monthly Spread Detail

Version Working_SB Position P_10014581_1 Employee Employee 1

		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Basic Salary Expense-Actual Basis	Assumption	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Expense-Actual Basis	Public Emp Retirement System	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Occupational Injury Management	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	State Unemployment Ins	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Medicare	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL COMPENSATION EXPENSE-ACTUAL BASIS	TOTAL SALARY & FRINGE BENEFITS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Basic Salary Expense-Average Basis	Assumption	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Expense-Average Basis	Public Emp Retirement System	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Occupational Injury Management	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	State Unemployment Ins	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Medicare	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

4. Highlight the Assigned Position Assumption cell > right click > select Edit > Clear:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf > SB Edit Position Detail

Scenario Budget: FY21 Entity: 0411 Hoggard, MabelES (Magnet) (Pr) Job: LRN STRT TTL1 ELE - C8114

Position Information Detail

Position: P_10014581_1 LRN STRT TTL1 ELE Employee: Employee 1

ite	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual Base Salary	Calculated Aver	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positk	Multi Job	Total Employee
on	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Salz	Average Base S	Assumption	Assumption	Assumption	Assumption
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00		P_10014581_1	No	0.00

Compensation Monthly Spread Detail

Version: Working_SB Position: P_10014581_1 Employee: Employee 1

	YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Basic Salary Expense-Actual Basis	0.00	0.00						
Benefits Expense-Actual Basis	0.00	0.00						
TOTAL COMPENSATION EXPENSE-ACTUAL BASIS	0.00	0.00						
Basic Salary Expense-Average Basis	0.00	0.00						
Benefits Expense-Average Basis	0.00	0.00						
TOTAL COMPENSATION EXPENSE-AVERAGE BASIS	0.00	0.00						

Context menu options: Edit Position Info, Calculate Total Compensation Exp 0, View Fund Source to GL Allocations, Update Position Totals, Edit New Position Detail, Calc Alloc to GL String-All Positions, Add Position, Calc Total Position Costs, Edit Position Info, View Fund Src to GL Allocations, Edit, Adjust, Comments, Supporting Detail, Change History, Attachments.

- The cell will highlighted in light yellow > click **SAVE** > Return to the previous page by clicking the **SB Position Info Detail-Licensed Transf** link:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf > SB Edit Position Detail

Scenario Budget: FY21 Entity: 0411 Hoggard, MabelES (Magnet) (Pr) Job: LRN STRT TTL1 ELE - C8114

Position Information Detail

Position: P_10014581_1 LRN STRT TTL1 ELE Employee: Employee 1

ite	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual Base Salary	Calculated Aver	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positk	Multi Job	Total Employee
on	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Salz	Average Base S	Assumption	Assumption	Assumption	Assumption
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary		No	0.00

Compensation Monthly Spread Detail

Version: Working_SB Position: P_10014581_1 Employee: Employee 1

	YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Basic Salary Expense-Actual Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Expense-Actual Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL COMPENSATION EXPENSE-ACTUAL BASIS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Basic Salary Expense-Average Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Benefits Expense-Average Basis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL COMPENSATION EXPENSE-AVERAGE BASIS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

- Note the **Assigned Position Number** column has removed the transfer position number from the original employee row. Locate the position you transferred the employee *To* (**TIP**: the position number in the Assigned Position Number field will be the same position number you cleared in the prior step).

SCHOOL BUDGET

Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0411 Hoggard, MabelES (Magnet) (Pr	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
MUSIC, ELEM - C1250	P_10014572_1	MUSIC, ELEM	Employee 1	KRUSE-MAKOWSKI,CANDACE J EM_560012			8/7/19		1.0
PHYSICAL ED - C1260	P_10014573_1	PHYSICAL ED	Employee 1	KEARNEY,GERALD S EM_304688			8/7/19		1.0
ECSE AUTISM-KIDS - C6031	P_10014574_1	ECSE AUTISM-KIDS	Employee 1	SIMPSON,THERESA L EM_10115926			9/9/19		1.0
GEN RR ELEM - C6050	P_10014575_1	GEN RR ELEM	Employee 1	PEREZ,RENIELLA P EM_10097046			8/7/19		1.0
GATE ELEM - C6130	P_10014576_1	GATE ELEM	Employee 1	STANLEY-LARSEN,MARY T EM_317450			8/7/19		1.0
COUNSELOR/ELE - C6000	P_10014577_1	COUNSELOR/ELE	Employee 1	ROSS,OLGA S EM_548509			8/7/19		1.0
LIBRARY ELE - C8040	P_10014578_1	LIBRARY ELE	Employee 1	VANYO-HO,TIFFANY K EM_10031210			8/7/19		1.0
LEARN STRAT, ELEM - C8111	P_10014579_1	LEARN STRAT, ELEM	Employee 1	PEFFER,BONNIE D EM_300132			8/7/19		1.0
			Employee 2	MAGLICCO,ROBIN S EM_302974			8/7/19		1.0
			Employee 3	MAHER,JENNIFER L EM_302992			8/7/19		1.0
			Employee 4	LAW,KIMBERLY A EM_328799	P_10014581_1		8/7/19		1.0
RBG3 LEARNING STR - C8112	P_10014580_1	RBG3 LEARNING STR	Employee 1	HARKIN,KERRY O EM_306606			8/7/19		1.0
LRN STRT TTL1 ELE - C8114	P_10014581_1	LRN STRT TTL1 ELE	Employee 1	LAW,KIMBERLY A EM_328799			8/7/19		0.0
Licensed Jobs	Total All Positions	Total All Employees							31.0

Original Position Number Transferred From

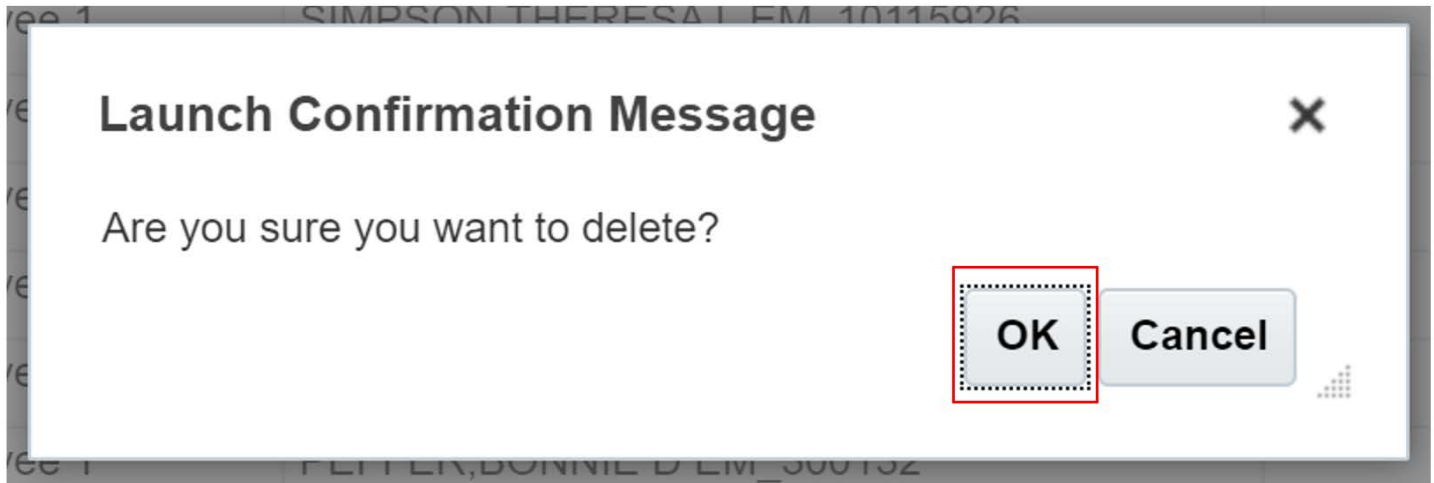
7. Highlight the employee's transferred to position row > right click > Delete Position Info

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0411 Hoggard, MabelES (Magnet) (Pr	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
ART, ELEM - C1100	P_10014571_1	ART, ELEM	Employee 1	WATSON,DAVID M EM_300132			8/7/19		1.0
MUSIC, ELEM - C1250	P_10014572_1	MUSIC, ELEM	Employee 1	KRUSE-MAKOWSKI,CANDACE J EM_560012			8/7/19		1.0
PHYSICAL ED - C1260	P_10014573_1	PHYSICAL ED	Employee 1	KEARNEY,GERALD S EM_304688			8/7/19		1.0
ECSE AUTISM-KIDS - C6031	P_10014574_1	ECSE AUTISM-KIDS	Employee 1	SIMPSON,THERESA L EM_10115926			9/9/19		1.0
GEN RR ELEM - C6050	P_10014575_1	GEN RR ELEM	Employee 1	PEREZ,RENIELLA P EM_10097046			8/7/19		1.0
GATE ELEM - C6130	P_10014576_1	GATE ELEM	Employee 1	STANLEY-LARSEN,MARY T EM_317450			8/7/19		1.0
COUNSELOR/ELE - C8000	P_10014577_1	COUNSELOR/ELE	Employee 1	ROSS,OLGA S EM_548509			8/7/19		1.0
LIBRARY ELE - C8040	P_10014578_1	LIBRARY ELE	Employee 1	VANYO-HO,TIFFANY K EM_10031210			8/7/19		1.0
LEARN STRAT, ELEM - C8111	P_10014579_1	LEARN STRAT, ELEM	Employee 1	PEFFER,BONNIE D EM_300132			8/7/19		1.0
			Employee 2	MAGLICCO,ROBIN S EM_302974			8/7/19		1.0
			Employee 3	MAHER,JENNIFER L EM_302992			8/7/19		1.0
			Employee 4	LAW,KIMBERLY A EM_328799	P_10014581_1		8/7/19		1.0
RBG3 LEARNING STR - C8112	P_10014580_1	RBG3 LEARNING STR	Employee 1	HARKIN,KERRY O EM_306606			8/7/19		1.0
LRN STRT TTL1 ELE - C8114	P_10014581_1	LRN STRT TTL1 ELE	Employee 1	LAW,KIMBERLY A EM_328799			8/7/19		0.0
Licensed Jobs	Total All Positions	Total All Employees							31.0

8. Click OK in the confirmation message:



- Review and confirm the employee information to delete (**TIP:** the Position field below will NOT be the employee's original position number). Click **Launch**:



- You will be returned to the **SB Position Info Detail-Licensed Transf** page. Now that we have cleared and removed the employee's transfer data, the employee is listed under their original position row and you can originate a transfer for the employee.

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget: Working_SB FY21 Entity: 0411 Hoggard, MabelES (Magnet) (P)

Buttons: Save, Refresh, Actions, Complete, Download, Next, Close

Scenario Budget	Version Working_SB	Years FY21	Entity	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	Gen Fund
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
GRADE 5 - C1050	P_10014570_1 GRADE 5			Employee 2	BOYD,CHRISTOPHER EM_10087561		8/7/19	1.00	100.0
				Employee 3	HO,CHRISTOPHER A EM_552412		8/7/19	1.00	100.0
				Employee 1	CZECH,TRACY L EM_10680250		8/7/19	1.00	100.0
ART, ELEM - C1100	P_10014571_1 ART, ELEM			Employee 2	KRIZ,MELANIE J EM_10112936		7/31/19	1.00	100.0
				Employee 3	LAKE,CHERI R EM_302941		8/7/19	1.00	100.0
				Employee 1	WATERS,LANCE D EM_551751		8/7/19	1.00	100.0
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM			Employee 1	KRUSE,MAKOWSKI,CANDACE J EM_560012		8/7/19	1.00	100.0
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED			Employee 1	KEARNEY,GERALD S EM_304688		8/7/19	1.00	100.0
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS			Employee 1	SIMPSON,THERESA L EM_10115926		9/9/19	1.00	
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM			Employee 1	PEREZ,RENIELLA P EM_10097046		8/7/19	1.00	
GATE ELEM - C6130	P_10014576_1 GATE ELEM			Employee 1	STANLEY-LARSEN,MARY T EM_317450		8/7/19	1.00	
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE			Employee 1	ROSS,OLGA S EM_546809		8/7/19	1.00	100.0
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE			Employee 1	VANYO-HO, TIFFANY K EM_10031210		8/7/19	1.00	100.0
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM			Employee 1	PEFFER,BONNIE D EM_300132		8/7/19	1.00	100.0
				Employee 2	MAGLICCO,ROBIN S EM_302974		8/7/19	1.00	100.0
				Employee 3	MAHER,JENNIFER L EM_302562		8/7/19	1.00	100.0
RBG3 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR			Employee 1	HARKIN,KERRY O EM_306606		8/7/19	1.00	
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE			Employee 1	LAW,KIMBERLY A EM_328799		8/7/19	0.00	7.0
Licensed Jobs	Total All Positions			Total All Employees				31.00	