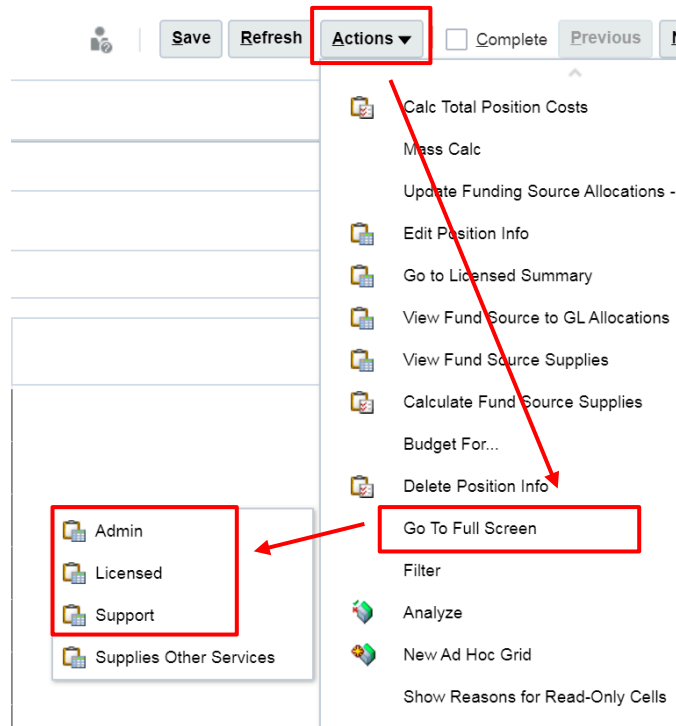


Transfer to Existing Position

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



2. Review the licensed page to identify the employee you want to transfer as well as identify the existing position to transfer that employee to:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0340 Frns, Charles & PhyllisES	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Per
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	Gen OATE	
KDG 1 AM/1 PM1 - C1000	P_10012220_1 KDG 1 AM/1 PM	Employee 1	NORTH, ANDREA J EM_336705			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
GRADE 1 - C1010	P_10012221_1 GRADE 1	Employee 1	ROHALY, STEPHANIE EM_10036333			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	7.72	92.28			
						8/7/19		1.00	100.00				
GRADE 2 - C1020	P_10012222_1 GRADE 2	Employee 1	BRAZEL, STEPHANIE L EM_10009878			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
GRADE 2 - C1020	P_10012224_1 GRADE 2	Employee 1	CASTILLO, JULIANNE F EM_338179			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
GRADE 3 - C1030	P_10012225_1 GRADE 3	Employee 1	PRICE, VANESSA L EM_10059979			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
GRADE 4 - C1040	P_10012227_1 GRADE 4	Employee 1	SCHAEFFER, LORIE EM_10028856			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
GRADE 5 - C1050	P_10012228_1 GRADE 5	Employee 1	NICHOLS, BRIANNA L EM_10061116			8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				
						8/7/19		1.00	100.00				

Transfer From General Funded Position 10012223

Transfer To CSR Funded Position 10012224

3. Highlight the employee row > Right Click > Select **Transfer Position**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0340 Frias, Charles & PhyllisES									
				Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
				Transfer Position	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	
KDG 1 AM/1 PM1 - C1000	P_10012220_1 KDG 1 AM/1 PM	Employee 1	Mass Calc			8/7/19		1.00	100.00			
		Employee 2	Update Funding Source Allocations			8/7/19		1.00	100.00			
		Employee 3	Edit Position Info			8/7/19		1.00	100.00			
		Employee 4	Go to Licensed Summary			8/7/19		1.00	100.00			
GRADE 1 - C1010	New Position 3	Vacant	View Fund Source to GL Allocations					0.00	100.00			
		Employee 1	View Fund Source Supplies			8/7/19		1.00	100.00			
	P_10012222_1 GRADE 1	Employee 2	Calculate Fund Source Supplies			8/7/19		1.00	100.00			
		Employee 1	Budget For...			8/7/19		1.00	7.72	92.28		
GRADE 2 - C1020	P_10012223_1 GRADE 2	Employee 2	Delete Position Info			8/7/19		1.00	100.00	100.00		
		Employee 2	Go To Full Screen			8/7/19		1.00	100.00			
		Employee 3	Edit Position Detail			8/7/19		1.00	100.00			
		Employee 4	Edit			8/7/19		1.00		100.00		
GRADE 3 - C1030	P_10012225_1 GRADE 3	Employee 1	Adjust			8/7/19		1.00		100.00		
		Employee 2	Supporting Detail			8/7/19		1.00	100.00			
		Employee 1				8/7/19		1.00	100.00			
		Employee 2				8/7/19		1.00	100.00			

- A confirmation message appears to remind the User to make a note of the target **job/position/employee**. Click **OK** when ready to proceed.

Launch Confirmation Message

Please confirm you have Job, Position and Employee# to make the transfer To and From. In the To Employee# field type the next number in line i.e. the position you are transferring to has employee 1 and 2, enter employee 3. TIP: Use Snipping Tool if needed

OK

Cancel

- Edit the Transfer Position prompts as needed. The *FROM* position information is on the left and pre-filled with the employee row you selected to transfer (from where the User originates the right-click action). The *TO* position information is on the right and needs to be updated with the identified **job/position/employee** in the step 3, then click Launch to complete the transfer process:

Transfer Position

* Select FROM Employee

Employee 1

* Select FROM Job Code

C1020

* Select FROM Position

P_10012223_1

* Select TO Employee

Employee 3

* Select TO Position

P_10012224_1

* Select TO JOB

C1020

Tip: Update the **TO** Employee with the next Employee # from the target row (i.e. if the target row has *Vacant* or *Employee 1*, then update the **TO Employee** field with “Employee 2”.

6. When the process is done, the budget form will highlight the updated position rows in yellow. Note that the FROM position FTE is zero, the TO position created a row with the next Employee number in line (Employee 3):

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario BudgetVersion Working_SBFY21Entity0340 Frias, Charles & PhyllisES

Data

Ad hoc

Format

			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			FS Percentage		Total Fund Src
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	Gen GATE	Sp Ed	Allocation P
KDG 1 AM/1 PM1 - C1000	P_10012220_1 KDG 1 AM/1 PM	Employee 1	NORTH, ANDREA J EM_336705			8/7/19		1.00	100.00					
		Employee 2	RASH, JENNY L EM_519962			8/7/19		1.00	100.00					
		Employee 3	AUCH, AMY L EM_532012			8/7/19		1.00	100.00					
		Employee 4	ORR, STEPHANIE MARIE EM_538202			8/7/19		1.00	100.00					
	New Position 3	Vacant	Vacant					0.00	100.00					
GRADE 1 - C1010	P_10012221_1 GRADE 1	Employee 1	ROHALY, STEPHANIE EM_10036333			8/7/19		1.00	100.00					
		Employee 2	KATHAN, KRISTINA LOUISE EM_505190			8/7/19		1.00	100.00					
		Employee 1	DAVIS, SABRINA MARIE EM_10010701			8/7/19		1.00	7.72	92.28				
		Employee 2	DE LOS SANTOS, JENNIFER D EM_553285			8/7/19		1.00		100.00				
GRADE 2 - C1020	P_10012223_1 GRADE 2	Employee 1	BRAZEL, STEPHANIE L EM_10009878	P_10012223_1		8/7/19		0.00	100.00					
		Employee 2	BYARS, MELISSA S EM_311660			8/7/19		1.00	100.00					
		Employee 3	MARCHANT, MICHAEL W EM_323123			8/7/19		1.00	100.00					
		Employee 4	DEER, ANGELA M EM_333587			8/7/19		1.00	100.00					
	P_10012224_1 GRADE 2	Employee 1	CASTILLO, JULIANNE P EM_336179			8/7/19		1.00		100.00				
		Employee 2	KECK, CAMARIE M EM_512814			8/7/19		1.00		100.00				
		Employee 3	BRAZEL, STEPHANIE L EM_10009878	P_10012223_1		8/7/19		1.00		100.00				

Note: the Assigned Position Number fields will display the source position # for both the source and target rows. The target position will have the same funding of the target Job/Position with Employee 1.

7. Calculate each row: **right-click** the highlighted row > **select Calc Total Position Costs** (or to mass calculate: **Actions > Mass Calc > Calc Licensed Positions**):

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0340 Frias, Charles & PhyllisES					
<div><div>Employee Name</div><div><div>Transfer Position</div><div>Calc Total Position Costs</div><div>Mass Calc</div><div>Update Funding Source Allocations</div><div>Edit Position Info</div><div>Go to Licensed Summary</div><div>View Fund Source to GL Allocations</div><div>View Fund Source Supplies</div><div>Calculate Fund Source Supplies</div><div>Budget For...</div><div>Delete Position Info</div></div></div>								
Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	
KDG 1 AM/1 PM1 - C1000	P_10012220_1 KDG 1 AM/1 PM	Employee 1		8/7/19	1.00	100.00		
		Employee 2		8/7/19	1.00	100.00		
		Employee 3		8/7/19	1.00	100.00		
		Employee 4		8/7/19	1.00	100.00		
GRADE 1 - C1010	P_10012221_1 GRADE 1	New Position 3	Vacant		0.00	100.00		
		Employee 1		8/7/19	1.00	100.00		
		Employee 2		8/7/19	1.00	100.00		
		P_10012222_1 GRADE 1	Employee 1		8/7/19	1.00	7.72	92.28
GRADE 2 - C1020	P_10012223_1 GRADE 2	Employee 2		8/7/19	1.00		100.00	
		Employee 1		8/7/19	1.00		100.00	
		Employee 2		8/7/19	1.00		100.00	
		Employee 1		8/7/19	1.00		100.00	

8. When done the updated rows will no longer display in yellow highlight. Review the resulting *calculated* cost to ensure the process calculated the desired results:

SCHOOL BUDGET

SB Home - SB Position Info Detail-Licensed Transf

Scenario Budget

Version Working_SB

Years FY21

Entity 0340 Fris. Charles & Phyllis ES

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