

Update Position Funding Source – Vacant Positions Only

The new requirement restricts updating funding source allocation of current positions/employees. Instead, a new Position will be created with the desired funding source allocation. An Update of Funding Source Allocations can ONLY be to “New Positions”.

Requirement Summary:

- Existing Position Funding Should NOT be updated (no update to PeopleSoft Department Budget Table)
- From the School Budget form select a position from Admin, Licensed or Support tab, select the vacant “New Position” > right click > Select **Update Funding Source Allocations** > select the employee type (i.e. **Admin New Positions, Licensed New Positions, or Support New Positions.**)

SCHOOL BUDGET

Scenario Budget	Years	Entity											
	FY21	0911 Mccaw, GordonES (Magnet)											
MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION													
Version Working_SB													
Administrative <u>Licensed</u> Support Add'l Earnings Supplies and Other Svcs SLA													
Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage								
					Gen Fund	CSR	Magnet	GenF Read by 3	Title I				
KDG 1 AM/1 PM1 - C1000	P_10020561_1 KDG 1 AM/1 PM	SEQUEIRA,NEO SCARY D	8/7/19	1.00	93.83	6.17							
	P_10020561_1 KDG 1 AM/1 PM	GOMEZ,BRIAN NE	1/2/20	1.00	100.00								
	P_10020561_1 KDG 1 AM/1 PM	KOFFORD,LACY EM_304271	8/7/19	1.00	100.00								
	P_10020561_1 KDG 1 AM/1 PM		8/7/19	1.00	93.83	6.17							
	New Position 5	Vacant		1.00									100.00
ARL-ELEM, KDG - C1005	P_10020562_1 ARL-ELI		8/7/19	1.00	100.00								
GRADE 1 - C1010	P_10020563_1 GRADE		8/7/19	1.00	100.00								

- Highlight the vacant position to change funding source allocation > right click > select **Edit Funding Source:**

SCHOOL BUDGET

Scenario Budget	Version Working_SB	Years FY21	Entity 0911 Mccaw, GordonES (Magnet)										
Employee	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	Total Comp Exp	FS Percentage		Total Fund Src	FS Amount Average Cost Basis	FS Amount Actual Cost Basis			
	Assumption	Assumption	Assumption	Assumption		Gen Fund	Title I	Allocation Pct	Gen Fund	Title I			
KDG 1 AM/1 PM1 - C1000				1.00	88,205.51		100.00	100.00		88,205.51			
GRADE 2 - C1020				1.00	88,205.51	100.00		100.00	88,205.51				
ART. SEC - C2020				1.00	88,205.51	100.00		100.00	88,205.51				
Licensed Jobs				3.00	264,616.53				176,411.02	88,205.51			

3. Delete the value from the unwanted funding source and enter your desired funding source in the appropriate fund source column (Funding sources must total 100%). You will notice the cells you have edited are yellow> click **Save**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Lic2 > SB Edit Position FSAilloc

Scenario Budget	Years	Entity	Job	Position	Employee	FS Percentage				Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Budget Start Date	Budget Stop Date	Planned FTE				
	FY21	0911 Mccaw, GordonES (Magnet)	KDG 1 AM/1 PM1 - C1000	New Position 5	Vacant	Assumption	Gen Fund	Magnet	Title I	CSR	GenF Read by 3	Sp Ed	Early Childhood	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	
Strategic Budget	Vacant							100.00												

Save Refresh Actions

4. You can navigate back to your School Budget form by clicking the SB Home hyperlink:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Lic2 > SB Edit Position FSAilloc

Scenario Budget	Years	Entity	Job	Position	Employee	FS Percentage				Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Budget Start Date	Budget Stop Date					
	FY21	0911 Mccaw, GordonES (Magnet)	KDG 1 AM/1 PM1 - C1000	New Position 5	Vacant	Assumption	Gen Fund	Magnet	Title I	CSR	GenF Read by 3	Sp Ed	Early Childhood	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	
Strategic Budget	Vacant							100.00												