Clark County School District

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. Select **Manager Self Service**.

3. Select the **Budget Planning Tool** tile.

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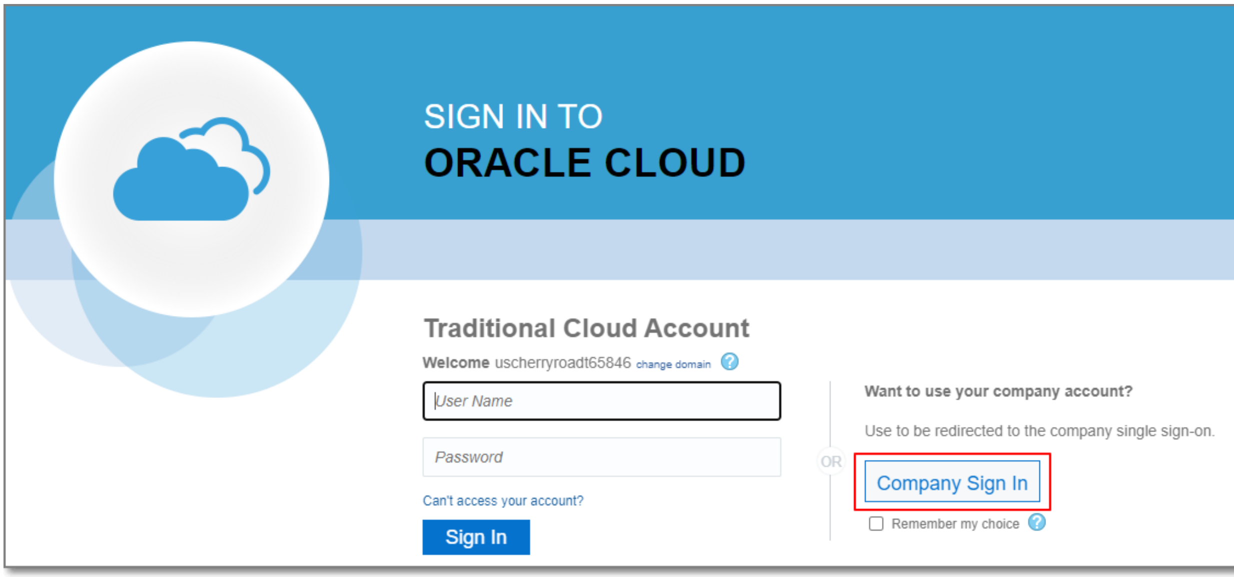
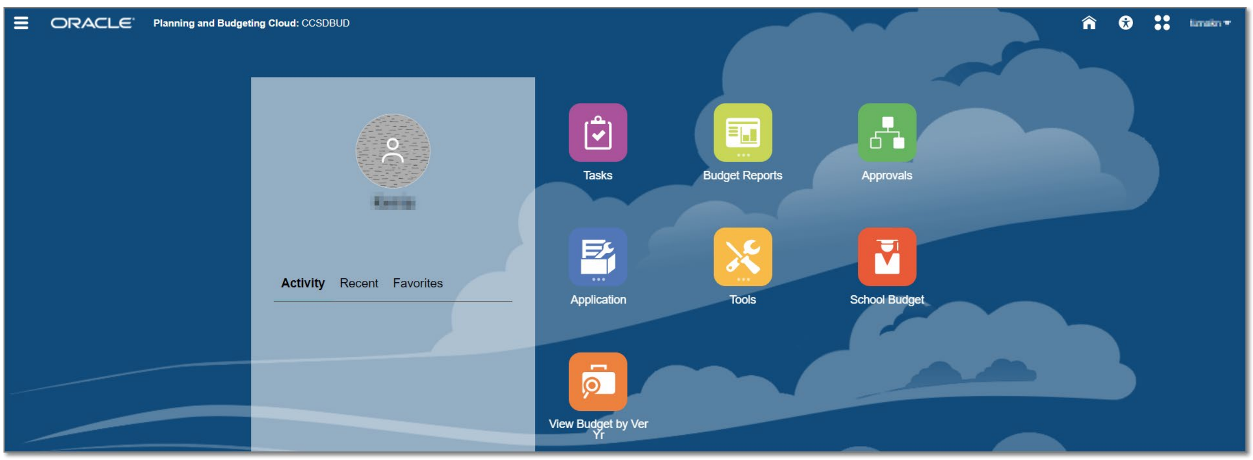
4. Click on **Company Sign In.**



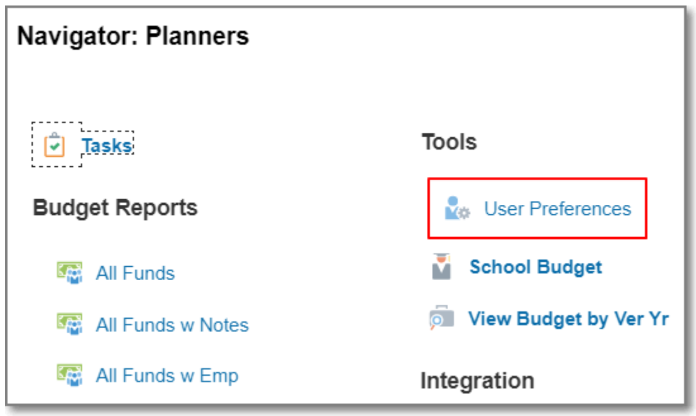
5. You will be brought to the **Budget Planning Tool homepage.**



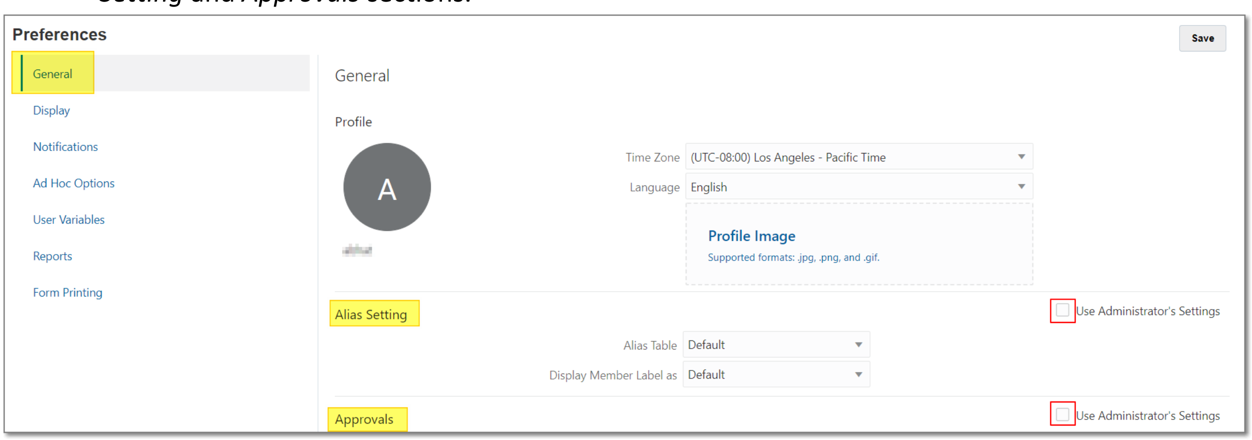
User Preferences

1. From the homepage, click the **Navigator** icon (three dashes at top left).

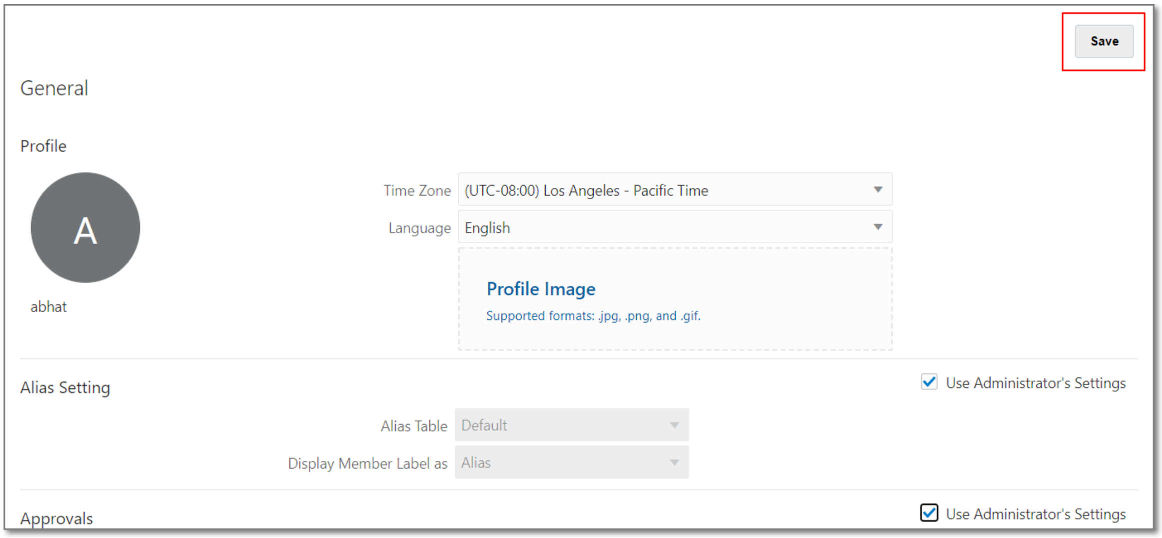
2. Under Tools, click on **User Preferences.**



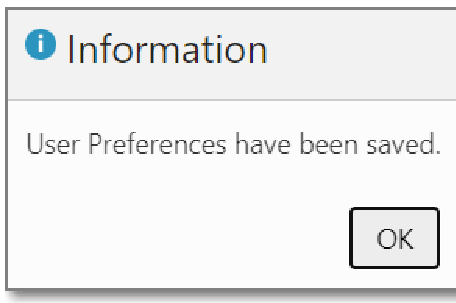
3. In the **General** Preferences, click on the **Use Administrator's Settings** checkbox in both the *Alias Setting* and *Approvals* sections.



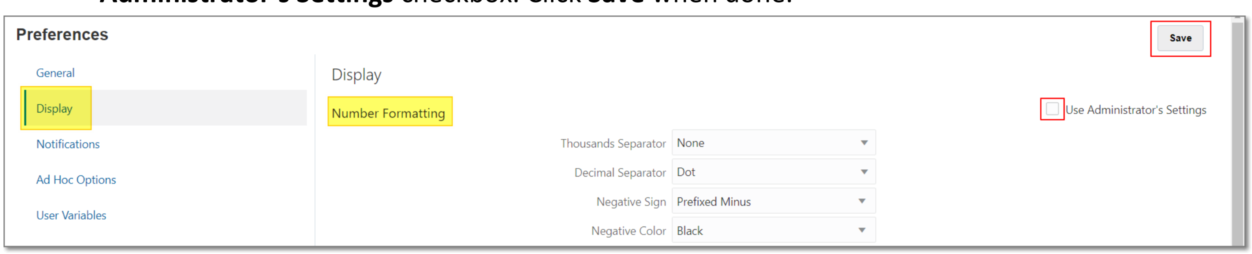
4. Click the **Save** button.



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



6. Click on the **Display** Preferences, and in the *Number Formatting* section click on the **Use Administrator's Settings** checkbox. Click **Save** when done.



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

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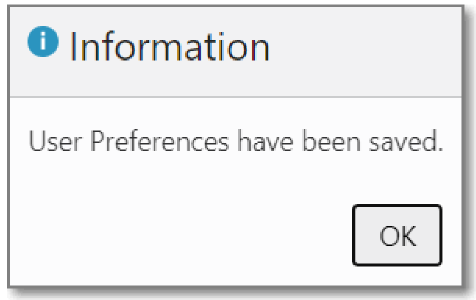
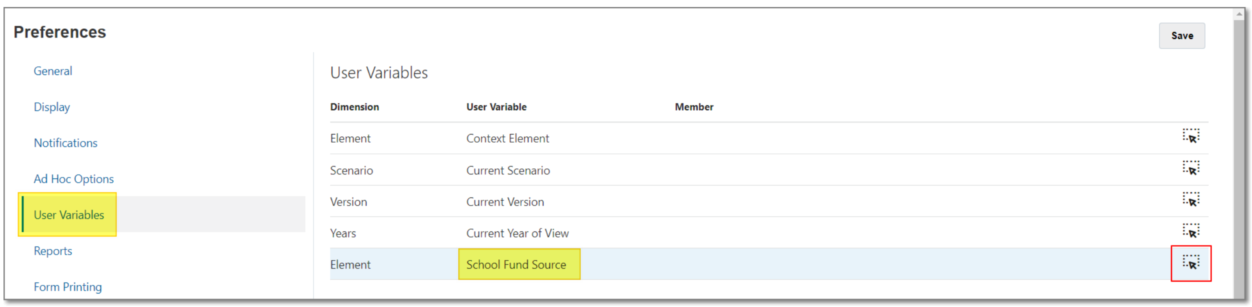
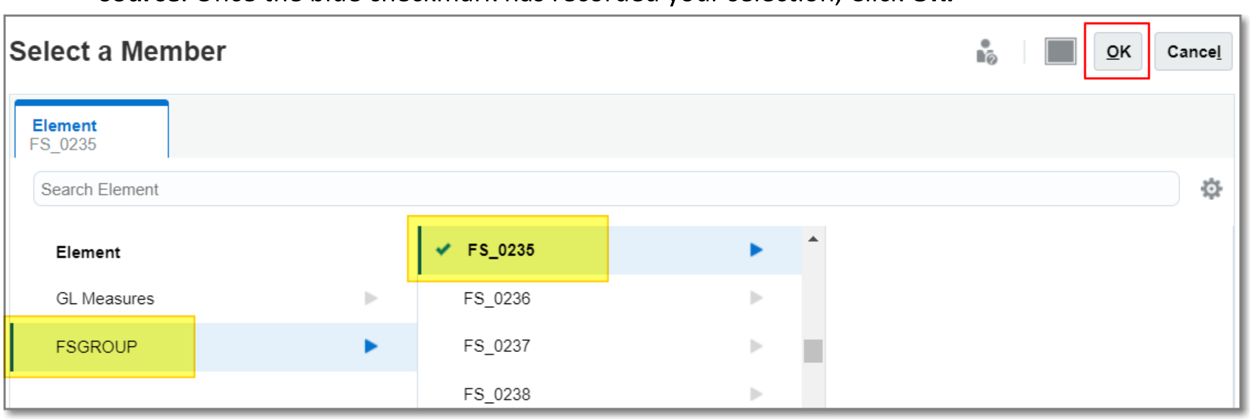


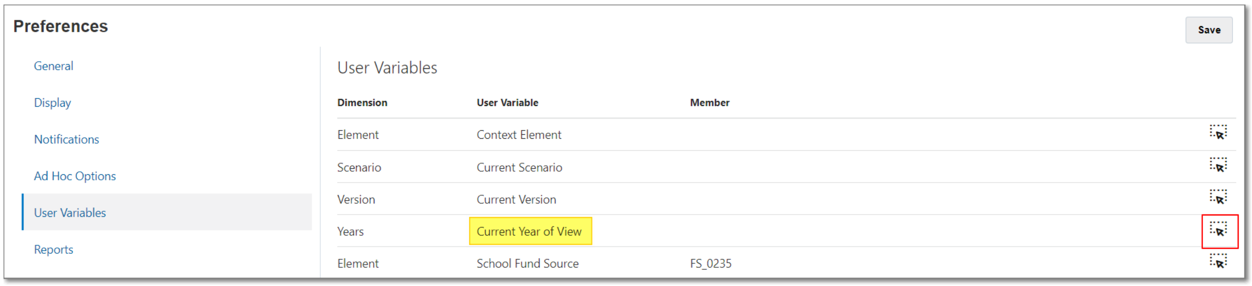
8. Click on the **User Variables** Preferences. Go to the Element *School Fund Source* row, and click on the **Member Selector** icon.



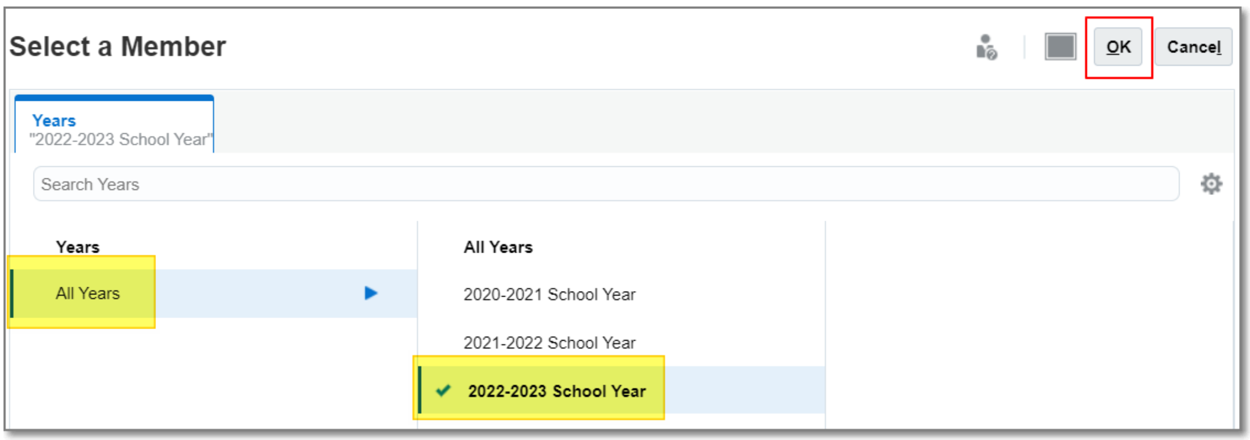
9. From the Select a Member window, click on **FSGROUP**, select your work location's **funding source**. Once the blue checkmark has recorded your selection, Click **OK.**



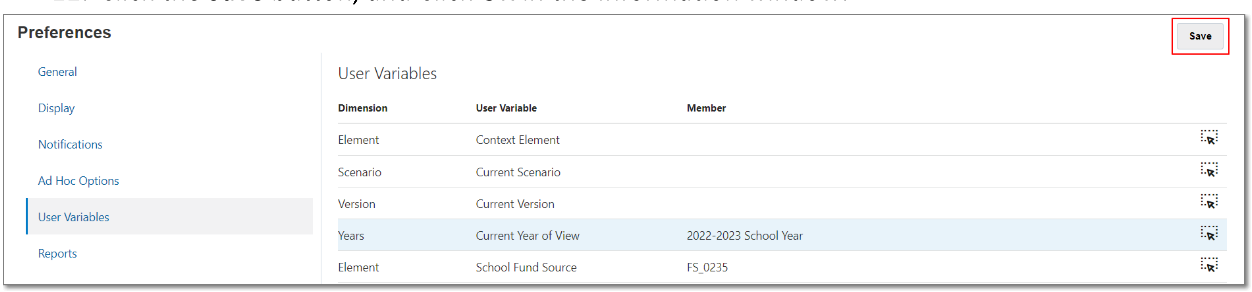
10. Go to the Dimension "Years" *Current Year of View* row, and click on the **Member Selector** icon.



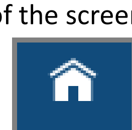
11. Click on *All Years,* and select the year for which you are planning. Once the blue checkmark has recorded your selection, Click **OK.**



12. Click the **Save** button, and Click **OK** in the Information window.



13. Click the **Home** icon in the top right of the screen to return to the homepage.

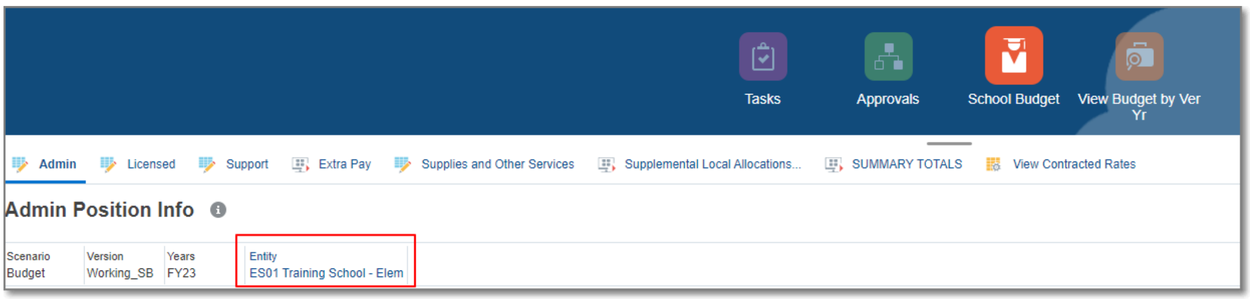


Please note: If you are assigned to one school or work location, you will only need to complete this process **once**. If your work location changes, you will need to update this User Preference with your new location. If you are assigned to multiple locations, select **Funding Source** from the **GL measures** menu item instead of your work location.

Accessing and Editing the School Budget

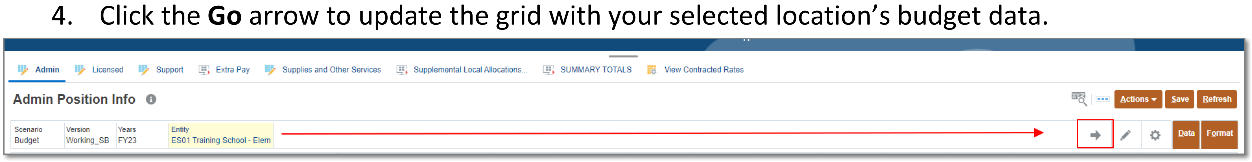
1. From the homepage, click on the **School Budget** icon.

2. Confirm you are accessing the correct work location in the **Entity** field. (This will be useful if you are assigned to **multiple locations**). To change the work location displayed, click on the **Entity** link.



3. From the Select a Member window, select your work location, and click **OK.**

4. Click the **Go** arrow to update the grid with your selected location's budget data.



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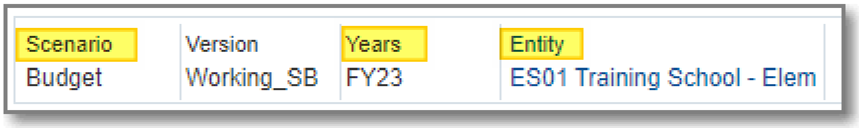
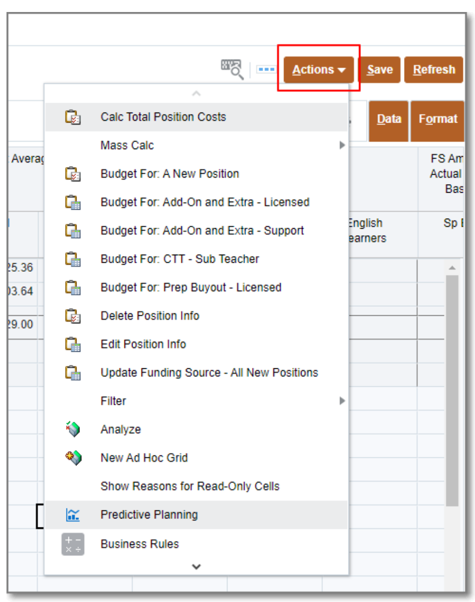
Navigating and Understanding the School Budget

1. The **Scenario** cell contains the “ledger name” for data in the grid. This makes up budget data (in combination with the Year and Entity cells).
2. The **Years** cell contains the fiscal year for the budget you are working in.
3. The **Entity** cell contains the **school or work location** you are currently budgeting for.

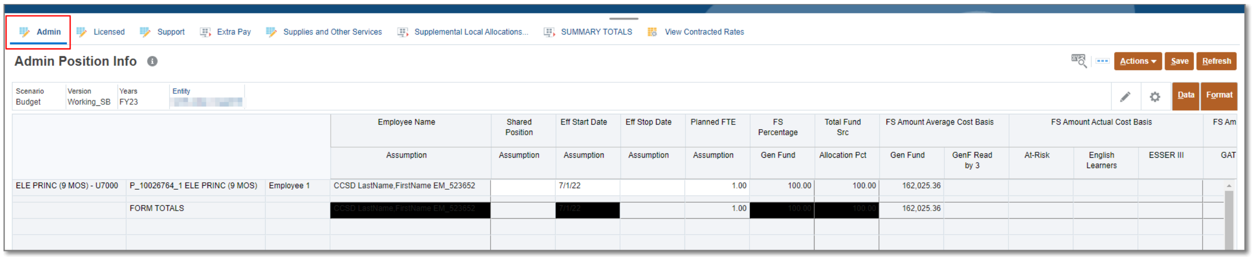


4. The **Save** button allows you to save changes made to the budget scenario. Any unsaved changes in the grid will be highlighted in yellow. In some scenarios, clicking Save will update the **Summary Totals** area.
5. The **Refresh** button replaces the currently displayed data with **saved data**. This button can be used to revert changed data (if clicked before saving) to original values.

6. The **Actions** button houses a menu of actions that can be used when modifying the budget form. Using the “Up” and “Down” arrows will allow you to scroll through available menu items. Some actions in this menu can be accessed when right-clicking on certain areas within the School Budget Form.

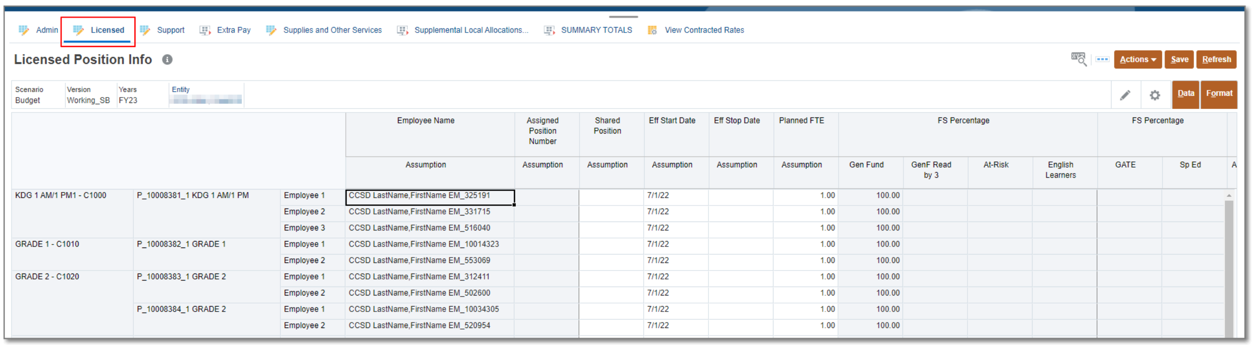


7. The **Admin tab** houses all **current** Administrative positions and employees at the site. This includes Principals, Assistant Principals, etc. At the bottom of the tab, a total of **all** Administrative positions and the amounts taken from each funding source will display.



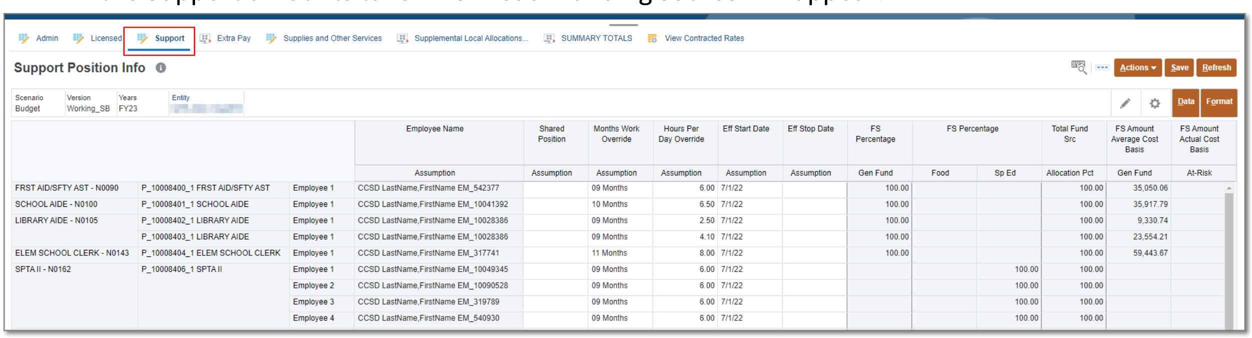
			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Average Cost Basis		FS Amount Actual Cost Basis			FS Am
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund	GenF Read by 3	At-Risk	English Learners	ESSER III	GAT
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	Employee 1	CCSD LastName,FirstName EM_523652		7/1/22		1.00	100.00	100.00	162,025.36					
	FORM TOTALS		[redacted]		[redacted]		1.00	[redacted]	[redacted]	162,025.36					

8. The **Licensed tab** houses all **current** Licensed positions and employees at the site. This includes Teachers (listed by teacher type), Counselors, etc. At the bottom of the tab, a total of all Licensed positions and the amounts taken from each funding source will display.



			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	At-Risk	English Learners	GATE	Sp Ed	A
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName,FirstName EM_325191			7/1/22		1.00	100.00						
		Employee 2	CCSD LastName,FirstName EM_331715			7/1/22		1.00	100.00						
		Employee 3	CCSD LastName,FirstName EM_516040			7/1/22		1.00	100.00						
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName,FirstName EM_10014323			7/1/22		1.00	100.00						
		Employee 2	CCSD LastName,FirstName EM_553069			7/1/22		1.00	100.00						
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName,FirstName EM_312411			7/1/22		1.00	100.00						
		Employee 2	CCSD LastName,FirstName EM_502600			7/1/22		1.00	100.00						
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName,FirstName EM_10034305			7/1/22		1.00	100.00						
		Employee 2	CCSD LastName,FirstName EM_520954			7/1/22		1.00	100.00						

9. The **Support tab** houses all **current** Support positions and employees at the site. This includes Office Managers, First Aid Safety Assistants, Registrars, etc. At the bottom of the tab, a total of the Support amounts taken from each funding source will appear.



			Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	FS Percentage	FS Percentage		Total Fund Src	FS Amount Average Cost Basis	FS Amount Actual Cost Basis
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	At-Risk
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName,FirstName EM_542377		09 Months	6.00	7/1/22		100.00			100.00	35,050.06	
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	Employee 1	CCSD LastName,FirstName EM_10041392		10 Months	6.50	7/1/22		100.00			100.00	35,917.79	
LIBRARY AIDE - N0105	P_10008402_1 LIBRARY AIDE	Employee 1	CCSD LastName,FirstName EM_10028386		09 Months	2.50	7/1/22		100.00			100.00	9,330.74	
	P_10008403_1 LIBRARY AIDE	Employee 1	CCSD LastName,FirstName EM_10028386		09 Months	4.10	7/1/22		100.00			100.00	23,554.21	
ELEM SCHOOL CLERK - N0143	P_10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName,FirstName EM_317741		11 Months	8.00	7/1/22		100.00			100.00	59,443.67	
SPTA II - N0162	P_10008406_1 SPTA II	Employee 1	CCSD LastName,FirstName EM_10049345		09 Months	6.00	7/1/22				100.00	100.00		
		Employee 2	CCSD LastName,FirstName EM_10090528		09 Months	6.00	7/1/22				100.00	100.00		
		Employee 3	CCSD LastName,FirstName EM_319789		09 Months	6.00	7/1/22				100.00	100.00		
		Employee 4	CCSD LastName,FirstName EM_540930		09 Months	6.00	7/1/22				100.00	100.00		

Please note: The total number of positions does **not** appear due to the fact that Support positions are calculated differently based on months/hours worked per position.

10. The **Extra Pay** tab is a **view-only** tab. It provides a quick way to view positions that have been budgeted for:
    - Prep Buys
    - Licensed Add-On and Extra Time
    - Support Add-On and Extra Time

    This tab includes totals at the bottom by employee type.

Admin | Licensed | Support | Extra Pay | Supplies and Other Services | Supplemental Local Allocations... | SUMMARY TOTALS | View Contracted Rates

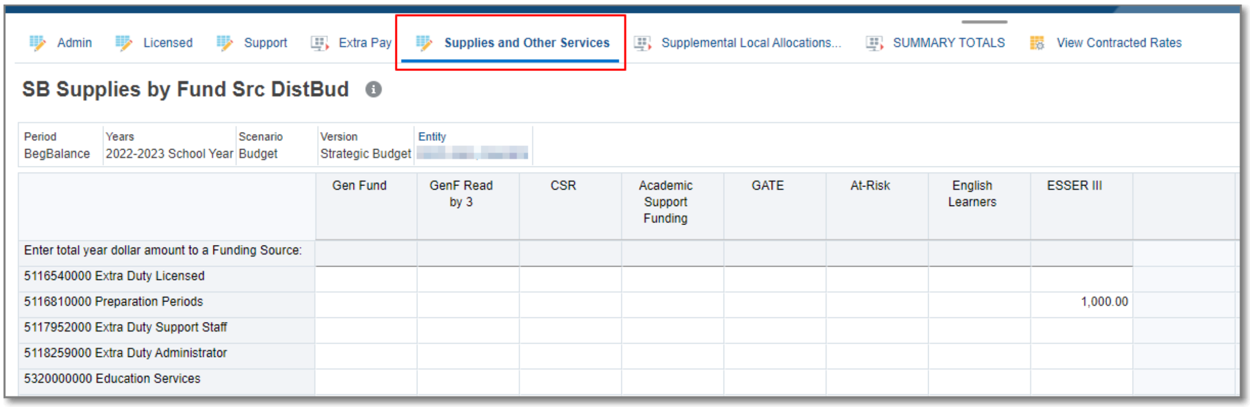
SB ExtraPay2

Scenario	Years	Version	Entity
Budget	FY23	Working_SB	[illegible]

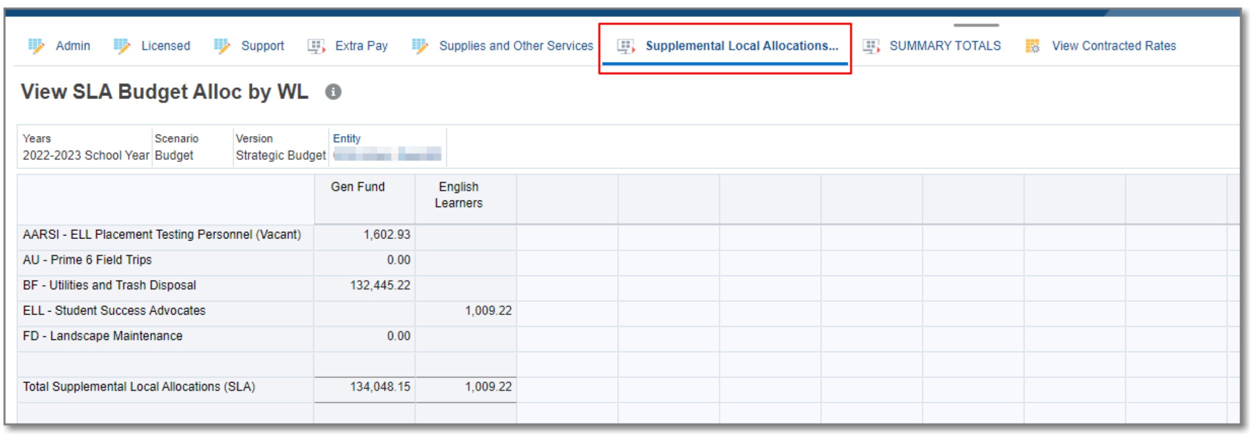
		Emp Name	FS Amount Prep Buy		FS Amount Add-On	FS Amount Extra
		Assumption	Gen Fund	At-Risk	Gen Fund	Gen Fund
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,FirstName EM_331715	7,805.40			
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,FirstName EM_516040		4,071.24		
GRADE 2 - C1020	P_10008384_1 GRADE 2	CCSD LastName,FirstName EM_10034305			2,695.81	3,261.68
	LICENSED ADDITIONAL EARNINGS TOTAL	[redacted]	7,805.40	4,071.24	2,695.81	3,261.68
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	CCSD LastName,FirstName EM_542377			1,483.75	2,299.19
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	CCSD LastName,FirstName EM_10041392			1,219.02	2,361.21
	SUPPORT ADDITIONAL EARNINGS TOTAL	[redacted]			2,702.77	4,660.40

11. The **Supplies and Other Services** tab provides a direct entry of non-position budget dollars by funding source. This includes:
    - Bulk Prep Periods
    - Employee Training
    - General Supplies
    - And more

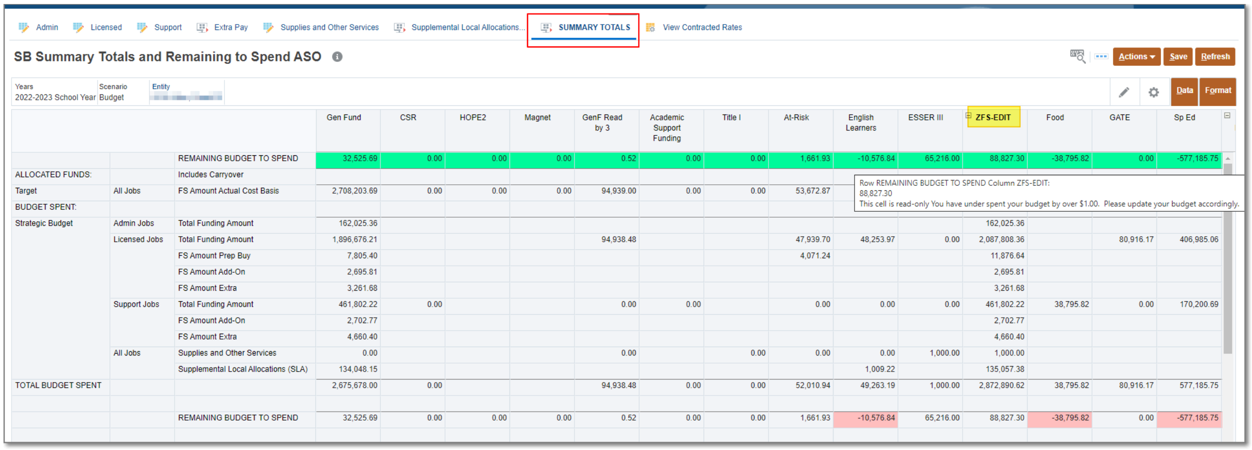
    The service type appears on the left, while the funding source displays at the top. This is a **modifiable** tab.



12. The **Supplemental Local Allocations (SLA)** tab houses SLA information. This may include:
    - ELL Placement Testing Personnel
    - Partnership Field Trips
    - Landscape Maintenance
    - And more-

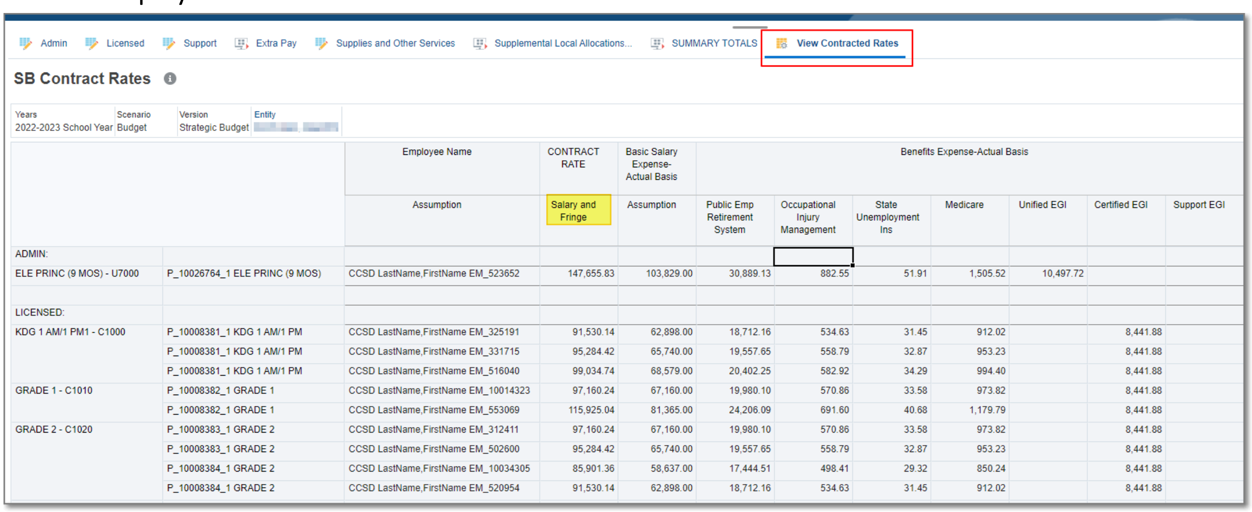


13. The **Summary Totals** tab contains a running total of each tab available in the School Budget form. This includes Administrative, Licensed, Support, Extra Pay, et cetera. It provides total dollar amounts by each tab type and from what funding source they are being taken. Any cells appearing in red delineate a **negative balance**, which **must** be reconciled before a budget scenario can be promoted for review and approval. The **Remaining Budget to Spend** row displays a message when funds have been overspent or if there is a remaining balance to spend. The funding sources to the right of **ZFS-Edit** are managed centrally and are noneditable.



			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	Academic Support Funding	Title I	At-Risk	English Learners	ESSER III	ZFS-EDIT	Food	GATE	Sp Ed
		REMAINING BUDGET TO SPEND	32,525.69	0.00	0.00	0.00	0.52	0.00	0.00	1,661.93	-10,576.84	65,216.00	88,827.30	-38,795.82	0.00	-577,185.75
ALLOCATED FUNDS:		Includes Carryover														
Target	All Jobs	FS Amount Actual Cost Basis	2,708,203.69	0.00	0.00	0.00	94,939.00	0.00	0.00	53,672.87						
BUDGET SPENT:																
Strategic Budget	Admin Jobs	Total Funding Amount	162,025.36										162,025.36			
	Licensed Jobs	Total Funding Amount	1,896,676.21				94,938.48			47,939.70	48,253.97	0.00	2,087,808.36		80,916.17	406,985.06
		FS Amount Prep Buy	7,805.40							4,071.24			11,876.64			
		FS Amount Add-On	2,695.81										2,695.81			
		FS Amount Extra	3,261.68										3,261.68			
	Support Jobs	Total Funding Amount	461,802.22	0.00			0.00	0.00		0.00	0.00	0.00	461,802.22	38,795.82	0.00	170,200.69
		FS Amount Add-On	2,702.77										2,702.77			
		FS Amount Extra	4,660.40										4,660.40			
	All Jobs	Supplies and Other Services	0.00				0.00		0.00	0.00	0.00	1,000.00	1,000.00			
		Supplemental Local Allocations (SLA)	134,048.15								1,009.22		135,057.38			
TOTAL BUDGET SPENT			2,675,678.00	0.00			94,938.48	0.00	0.00	52,010.94	49,263.19	1,000.00	2,872,890.62	38,795.82	80,916.17	577,185.75
		REMAINING BUDGET TO SPEND	32,525.69	0.00	0.00	0.00	0.52	0.00	0.00	1,661.93	-10,576.84	65,216.00	88,827.30	-38,795.82	0.00	-577,185.75

14. The **View Contracted Rates** tab houses a list of *actual* salary and fringe contracted rates for each employee.



		Employee Name	CONTRACT RATE	Basic Salary Expense-Actual Basis	Benefits Expense-Actual Basis						
		Assumption	Salary and Fringe	Assumption	Public Emp Retirement System	Occupational Injury Management	State Unemployment Ins	Medicare	Unified EGI	Certified EGI	Support EGI
ADMIN:											
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,FirstName EM_523652	147,655.83	103,829.00	30,889.13	882.55	51.91	1,505.52	10,497.72		
LICENSED:											
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,FirstName EM_325191	91,530.14	62,898.00	18,712.16	534.63	31.45	912.02		8,441.88	
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,FirstName EM_331715	95,284.42	65,740.00	19,557.65	558.79	32.87	953.23		8,441.88	
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,FirstName EM_516040	99,034.74	68,579.00	20,402.25	582.92	34.29	994.40		8,441.88	
GRADE 1 - C1010	P_10008382_1 GRADE 1	CCSD LastName,FirstName EM_10014323	97,160.24	67,160.00	19,980.10	570.86	33.58	973.82		8,441.88	
	P_10008382_1 GRADE 1	CCSD LastName,FirstName EM_553069	115,925.04	81,365.00	24,206.09	691.60	40.68	1,179.79		8,441.88	
GRADE 2 - C1020	P_10008383_1 GRADE 2	CCSD LastName,FirstName EM_312411	97,160.24	67,160.00	19,980.10	570.86	33.58	973.82		8,441.88	
	P_10008383_1 GRADE 2	CCSD LastName,FirstName EM_502600	95,284.42	65,740.00	19,557.65	558.79	32.87	953.23		8,441.88	
	P_10008384_1 GRADE 2	CCSD LastName,FirstName EM_10034305	85,901.36	58,637.00	17,444.51	498.41	29.32	850.24		8,441.88	
	P_10008384_1 GRADE 2	CCSD LastName,FirstName EM_520954	91,530.14	62,898.00	18,712.16	534.63	31.45	912.02		8,441.88	

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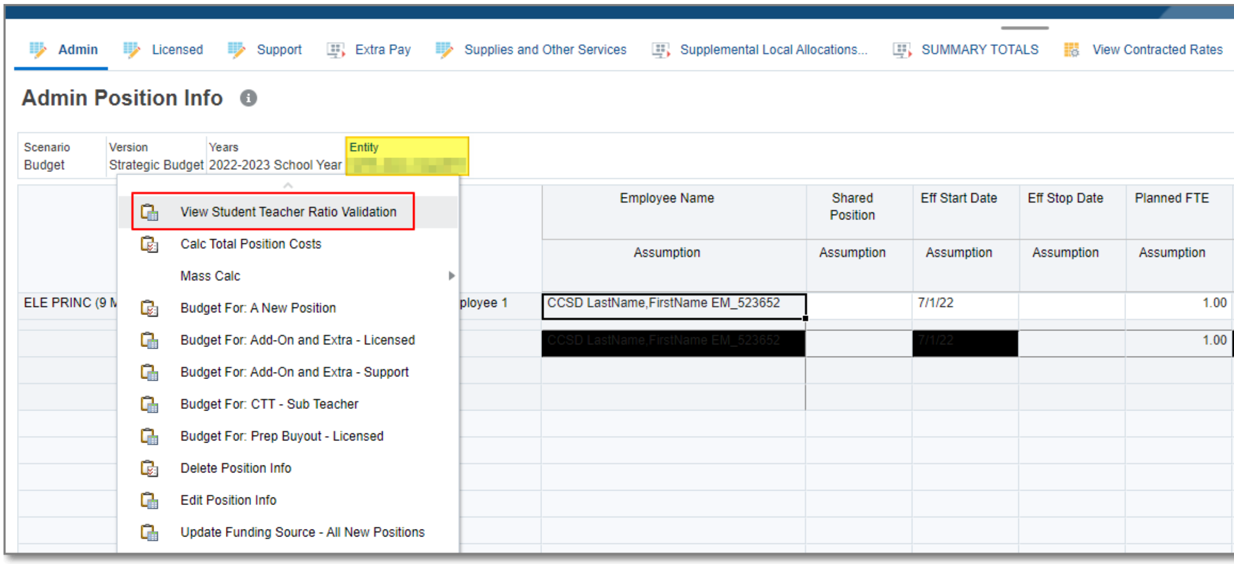
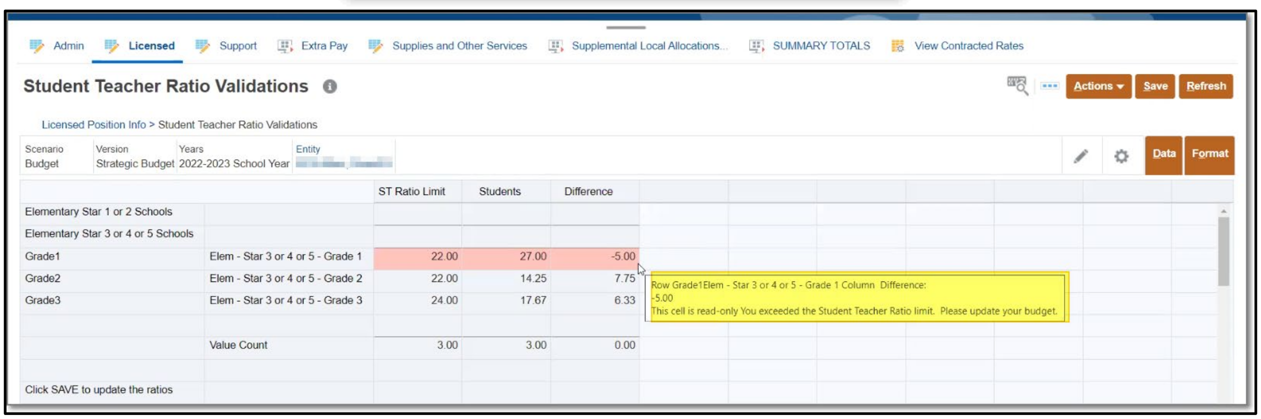
Student-Teacher Ratio Validation (Elementary schools only)

1. From the school budget right-click the Entity (school).
2. Select **View Student Teacher Ratio Validation.**

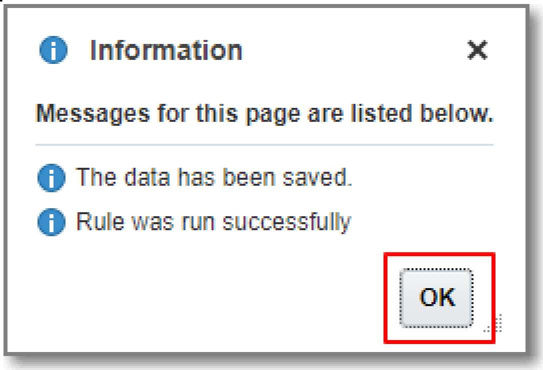


3. Click **Save** to update the ratios.



Note: Grade 1 has exceeded the student-teacher ratio threshold. Add a position in first grade and re-run the ratio validation.

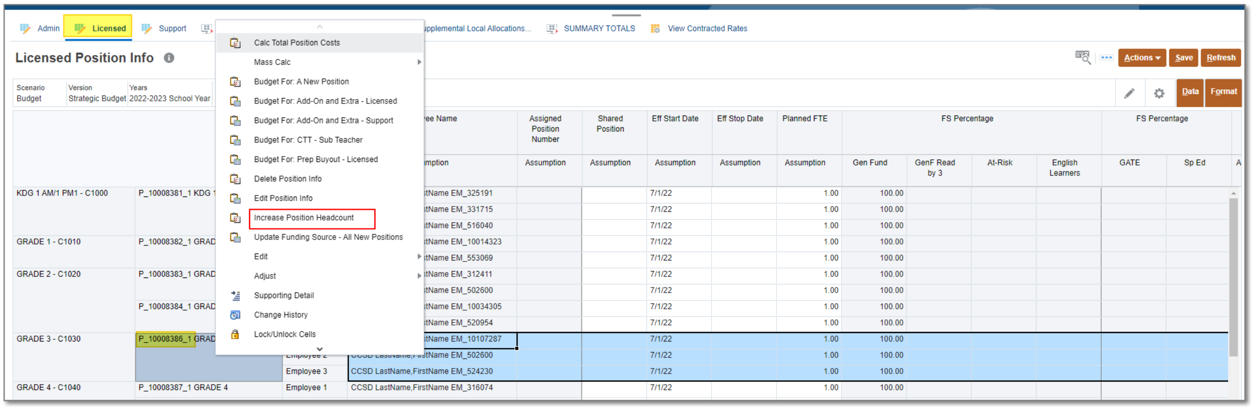
4. Click **OK** in the pop-up information window.



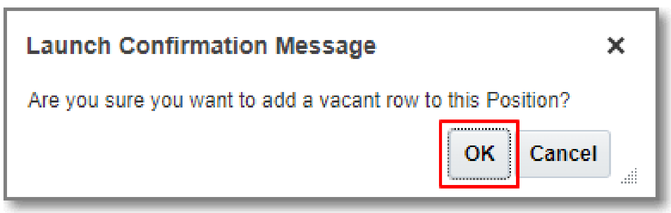
Increasing the Headcount of an Existing Position

Use this function to increase the headcount of an existing position, and use the same funding source allocation and position attributes (full-time, part-time, number of months, hours, etc.) of the existing position.

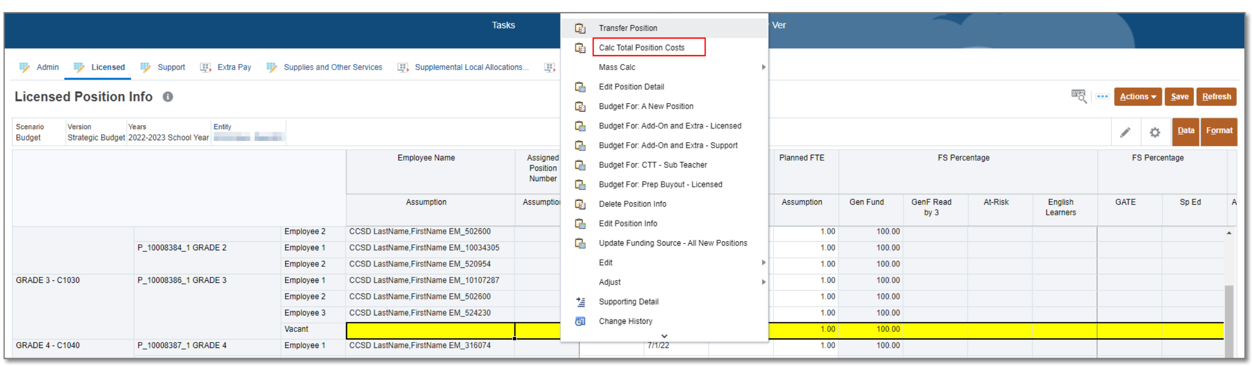
1. From the Admin, **Licensed,** or Support tab
2. Right-click from the position cell and select **Increase Position Headcount**.



3. Click **OK** when prompted to proceed.



4. When done, scroll to the position, and a new vacant position row will be created and highlighted in yellow. Right-click the yellow vacant position.
5. Select **Calc Total Position Costs**.



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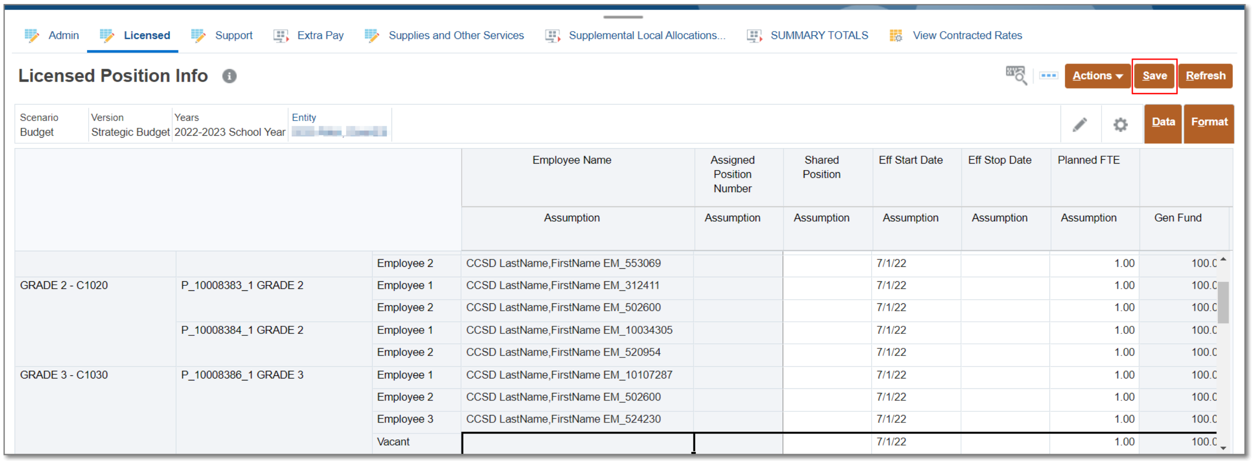
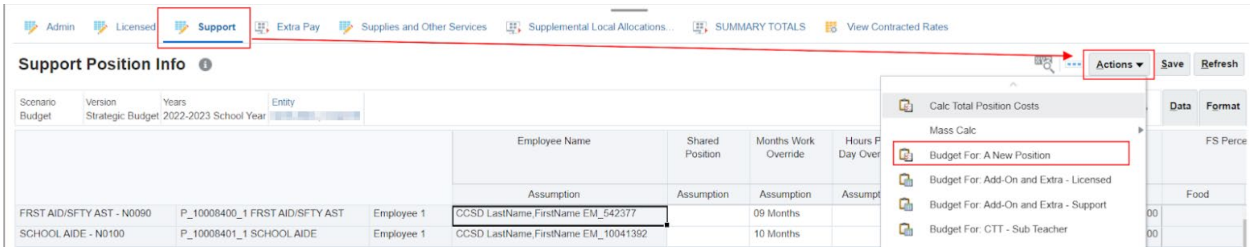
6. Click **Save** to aggregate this new amount in the **Summary Totals.**



*Double-click here to return to the Table of Contents

Adding and Adjusting Positions

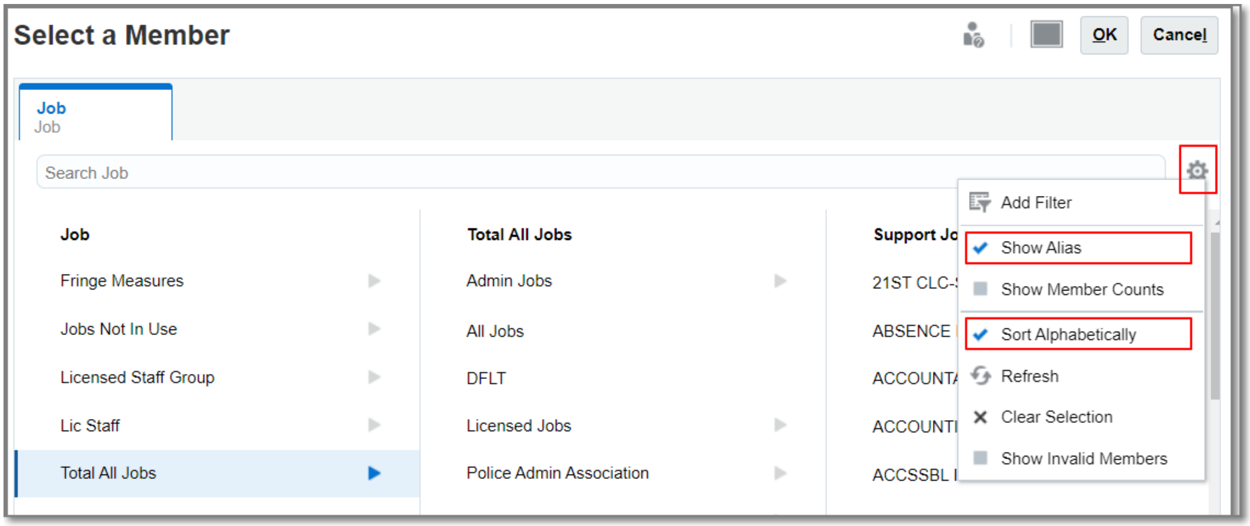
1. From the Admin, Licensed or **Support** tab click the **Actions** menu.
2. Click **Budget For: A New Position**.



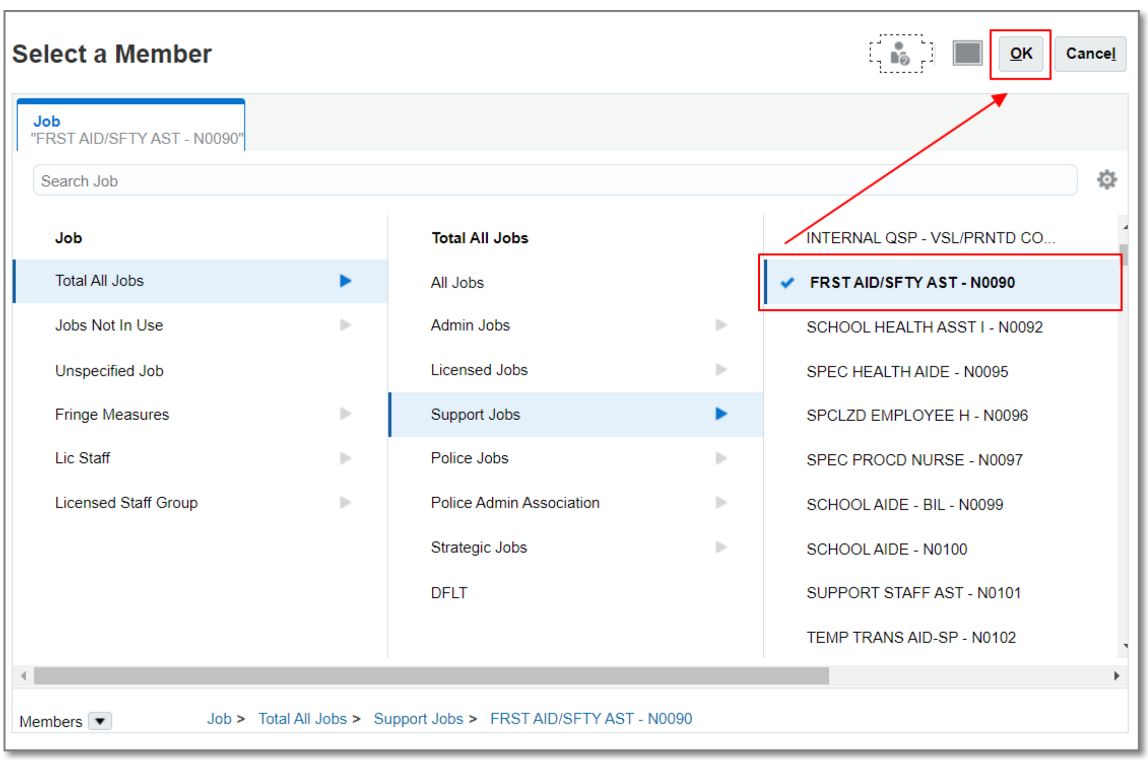
3. Review the job code. To change the Job, type it into the job code field or click the **Member Selector** to search.

   a. In the **Select a Member** window, locate the desired Job. Use the **Search Job** bar to search for available jobs.

i. To sort the jobs alphabetically click the **settings** gear icon.
ii. Select the ***Sort Alphabetically*** option.
iii. To display the job code *descriptions* select the ***Show Alias*** setting.



b. Click on the desired **job code** until the blue checkmark appears next to the selected job.
c. Click **OK.**



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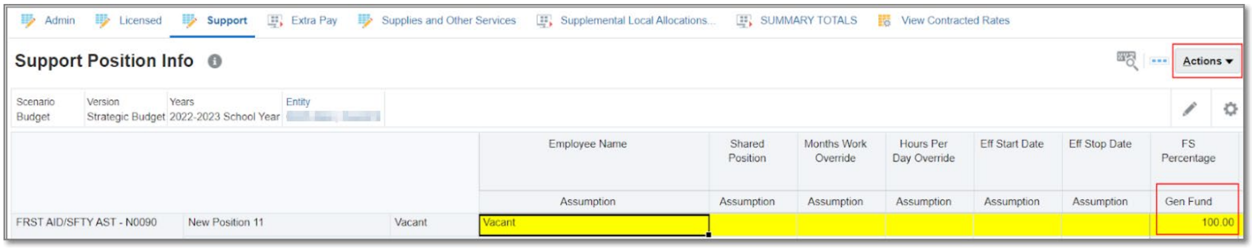
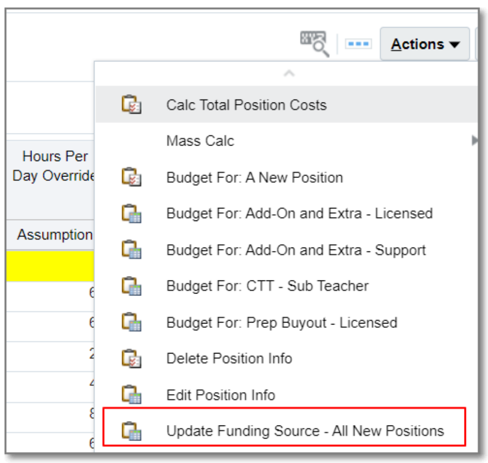
4. In the *Add New Position by Job Code* window click **Launch.**

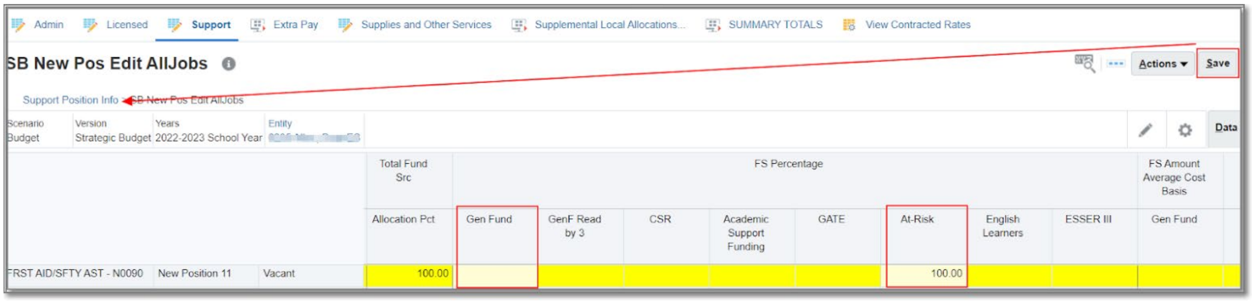
a. The funding source defaults to the General Fund. To change the funding source click the **Actions** menu.



b. Select **Update Funding Source - All New Positions.**

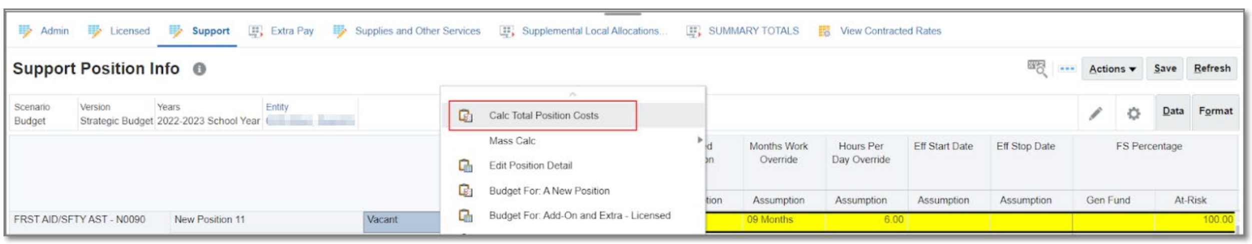


c. **Delete** the funding source allocation percent from the Gen Fund, and update the funding source to the desired fund by typing the percentage into the appropriate funding source.
d. Click **Save.**
e. Click on the **Support Position Info** hyperlink to return to the position grid.

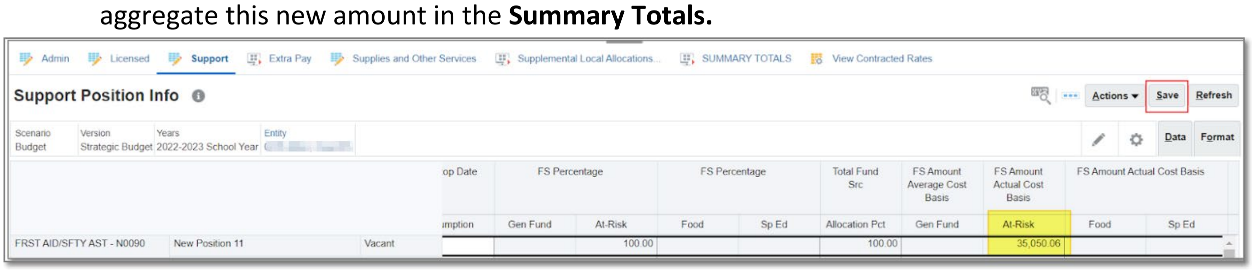


5. Select the **number of months** and **hours** for *Support* positions.
6. Click **Save.**

7. Right-click on the yellow new position row.
8. Select **Calc Total Position Costs**.



9. Confirm the dollar amount calculated in the funding source column desired, and click **Save** to aggregate this new amount in the **Summary Totals.**



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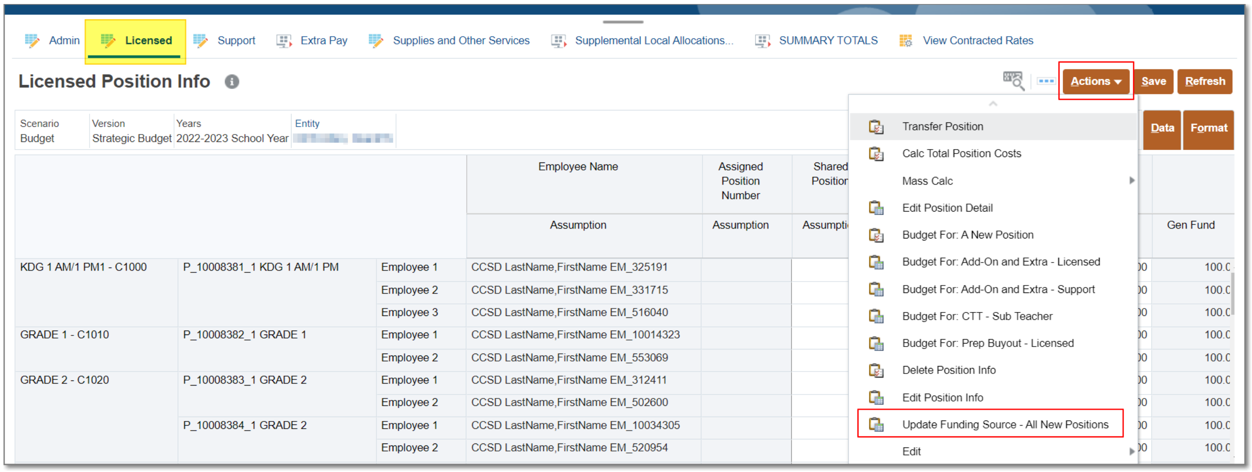
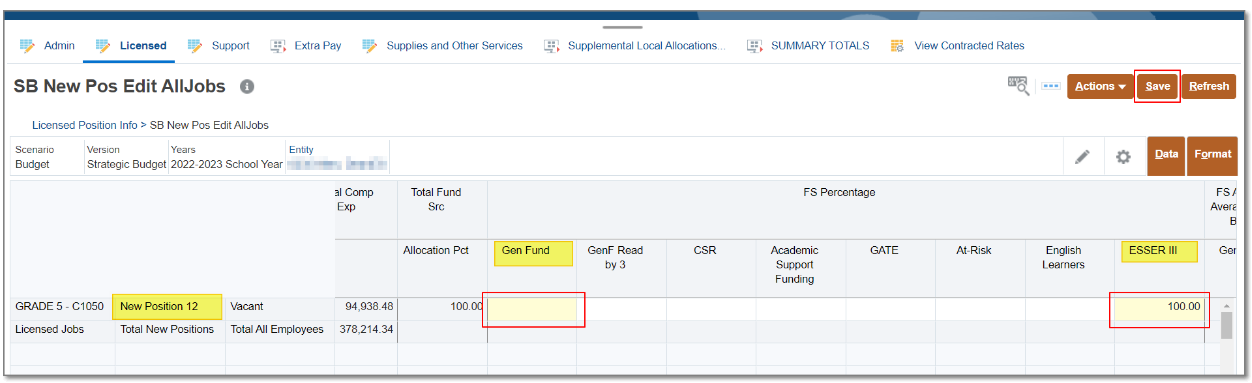
Change the Funding Source of a New Position

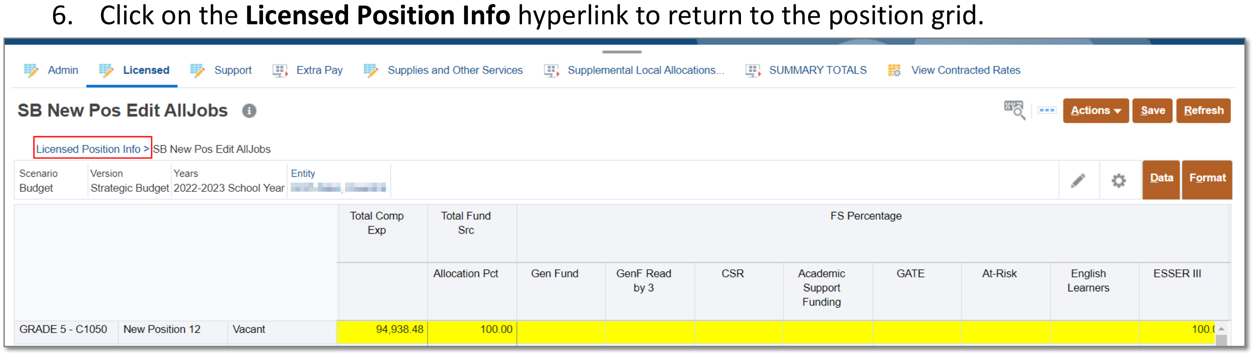
1. From the Admin, **Licensed**, or Support tabs Click **Actions**.
2. Select **Update Funding Source - All New Positions**.



3. Locate the vacant position to change the funding source for and **Delete** the value from the unwanted funding source.
4. **Enter** the desired allocation in the appropriate funding source (funding sources must total 100 percent).
5. Click **Save.**



6. Click on the **Licensed Position Info** hyperlink to return to the position grid.



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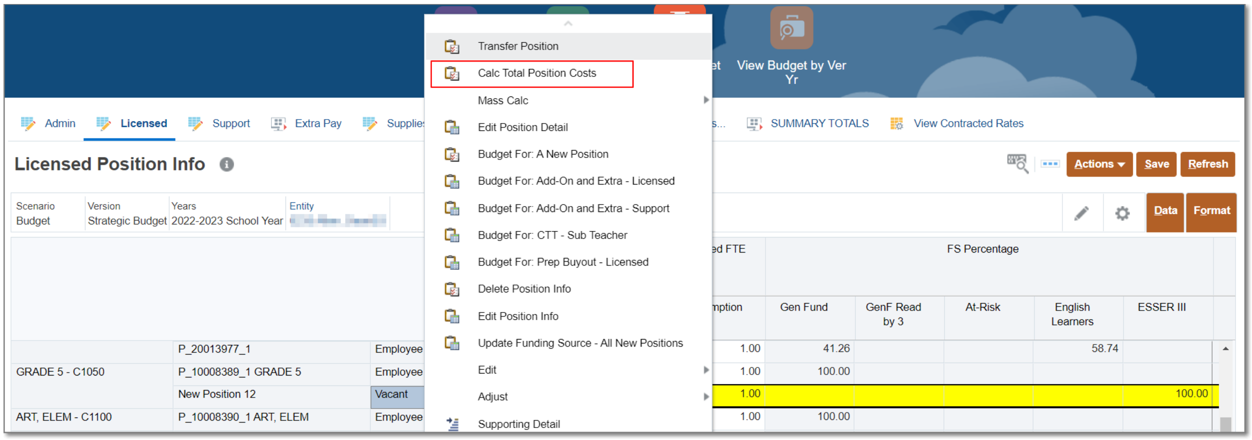
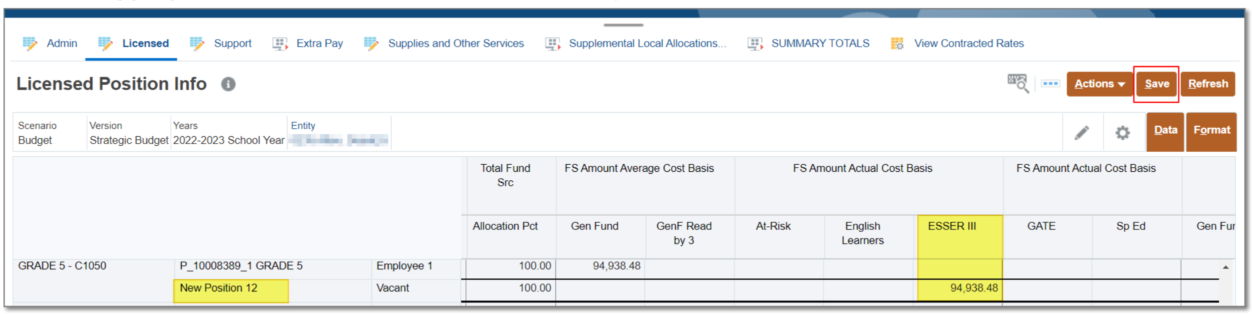
7. **Right-click** the yellow highlighted position.
8. Select **Calc Total Position Costs.**



9. Confirm the dollar amount calculated in the funding source column desired, and click **Save** to aggregate this new amount in the **Summary Totals.**



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Allocation Calculator (Split funding a New position)

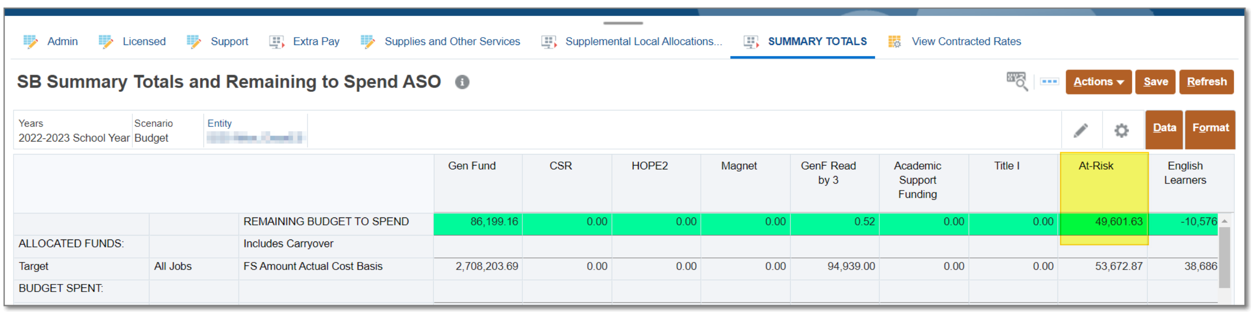
A *new position* needs to be created to continue with the allocation calculator. The user should transfer the employee into the new position for the calculator to calculate a percent allocation based on the transferred employee's actual salary (position cost).

In this scenario, there is a remaining budget to spend of $49,601.63 in At-Risk funds. The budget owner would like to use those remaining funds on funding a Grade 2 - C1020 employee whose *actual* salary is $85,901.36 annually.

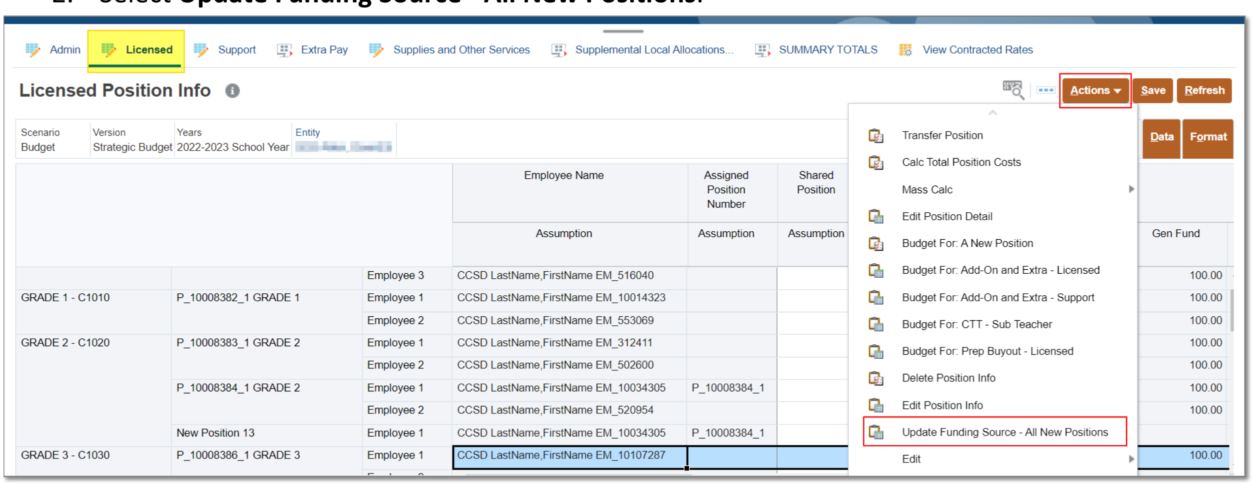
The allocation calculator is a tool that calculates the percentage to allocate to the At-Risk funding source in order to zero out that fund.

Two requirements for the use of this tool:

- Must be a New Position
- Must transfer a Licensed employee to the new position

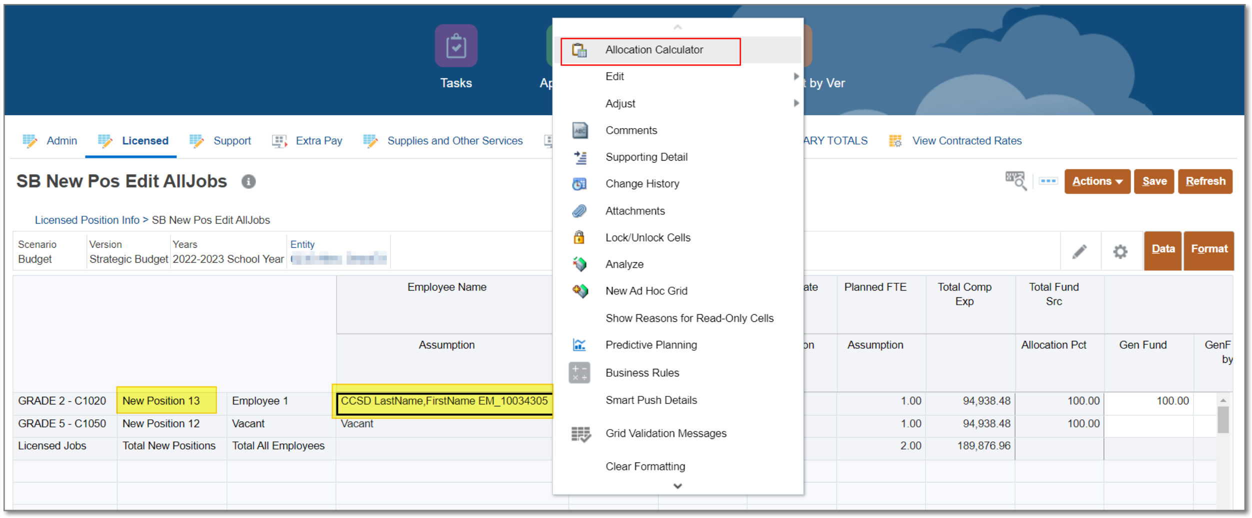


1. From the Admin, **Licensed**, or Support tabs Click **Actions.**
2. Select **Update Funding Source - All New Positions**.

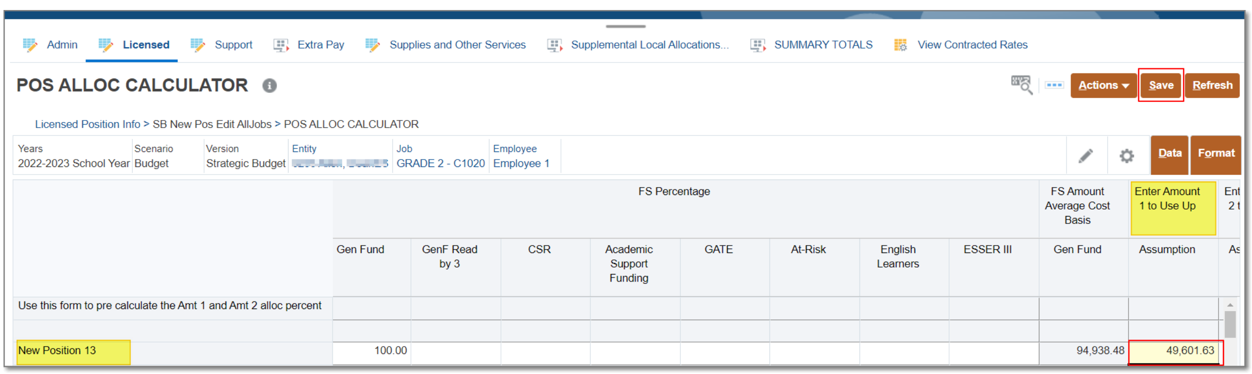


3. Locate the vacant position to update the funding source and **right-click.**
4. Select **Allocation Calculator.**

Note: The two requirements have been completed; The identified employee has been ***transferred*** to ***New Position 13***.



5. Enter the remaining balance (from Summary Totals) to spend down in the **Enter Amount 1 to Use Up** field.
   a. You can enter up to two amounts.
6. Click **Save.**



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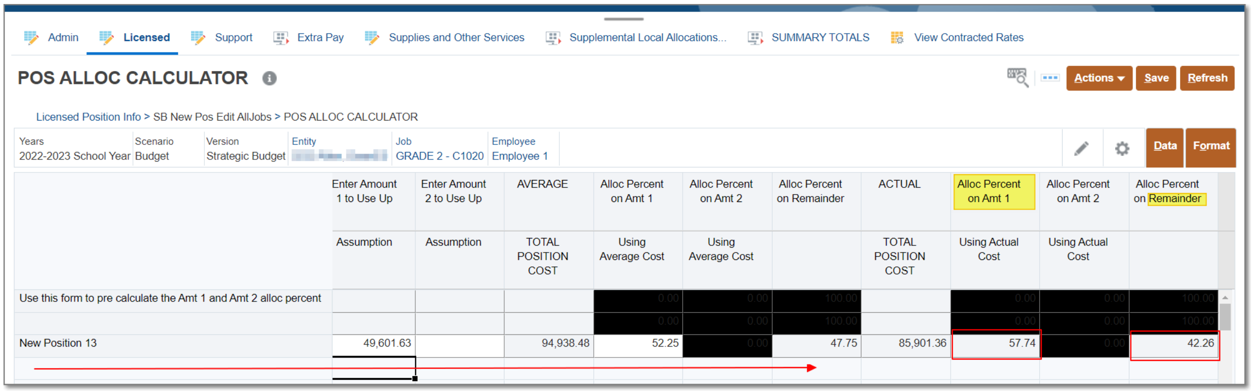
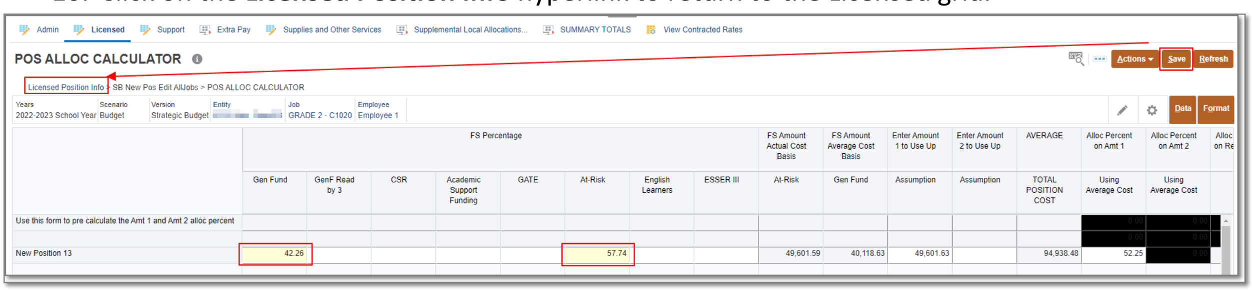
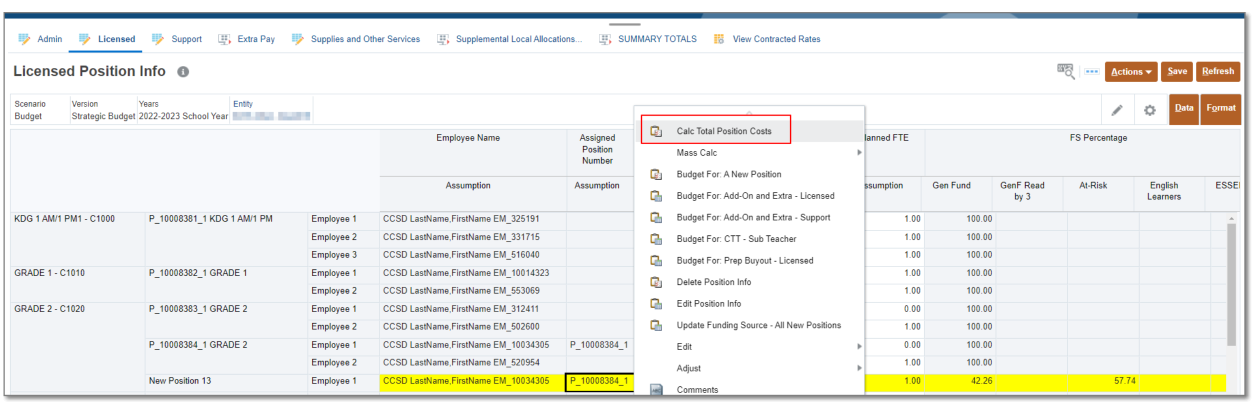
7. The system will now have calculated the percentage allocation using both average and actual amounts. The At-Risk funding source calculates position costs using the actual salary of the transferred employee in New Position 13. From our scenario, New Position 13 needs to be split funded with 57.74 percent allocated to the At-Risk funding source in order for the position to consume the $49,601.63 from our scenario. A position allocation percentage should always equal 100 percent thus the percentage in the *Remainder* cell should be used to complete the funding source allocation.



8. **Copy** (**CTRL + C**) the calculated percentages into the desired funding source fields.
9. Click **Save.**
10. Click on the **Licensed Position Info** hyperlink to return to the Licensed grid.



11. Right-click the yellow position.
12. Select **Calc Total Position Costs.**



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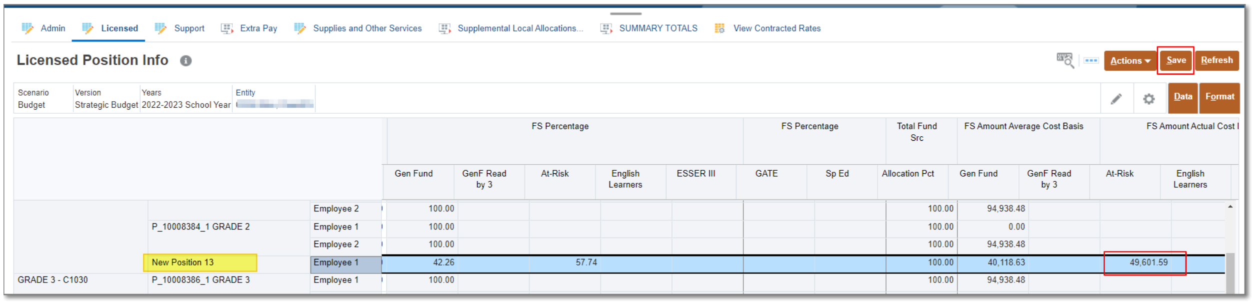
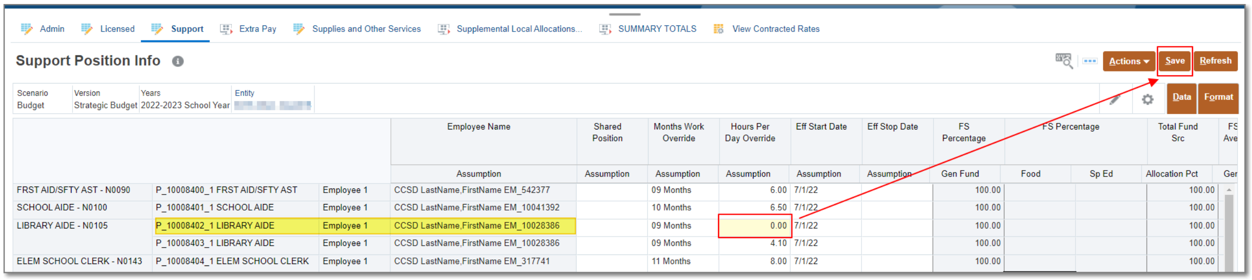
13. Confirm the dollar amount calculated in the funding source column desired and click **Save** to aggregate this new amount in the **Summary Totals**.

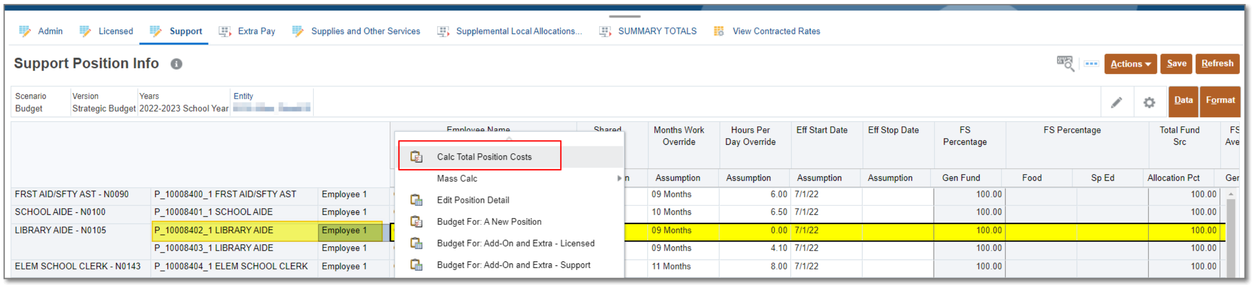


Removing a Position

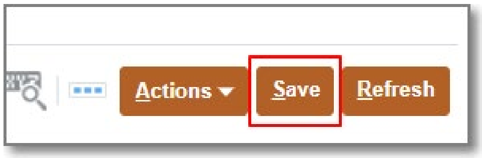
1. From the Admin, Licensed, or **Support** tabs locate the position to remove.
    a. If the position is **Administrative** or **Licensed**, change the **Planned FTE** field to 0.
    b. If Support, change the **Hours Per Day** to zero.
2. Click **Save.**



3. The position row will highlight in yellow. **Right-click** on the position number.
4. Select **Calc Total Position Costs.**



5. Click **Save** when the calculation has completed to reduce position costs in the **Summary Totals**.



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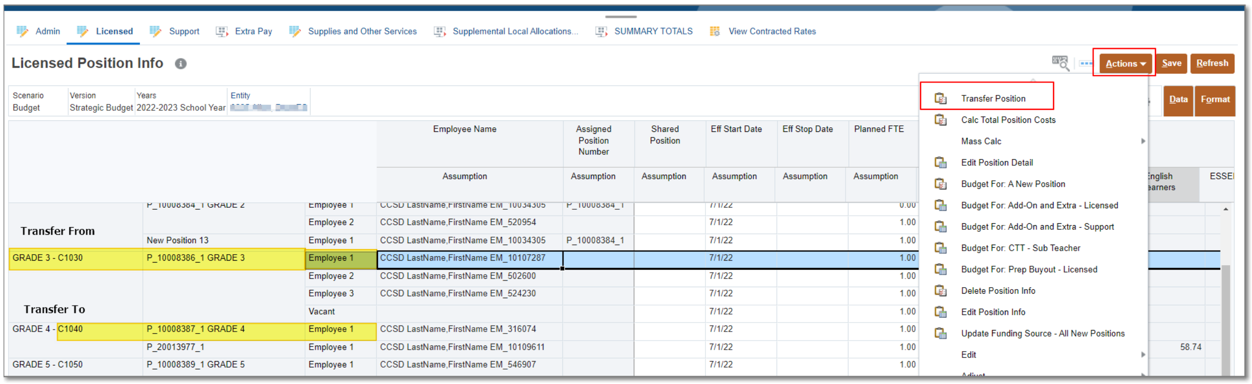
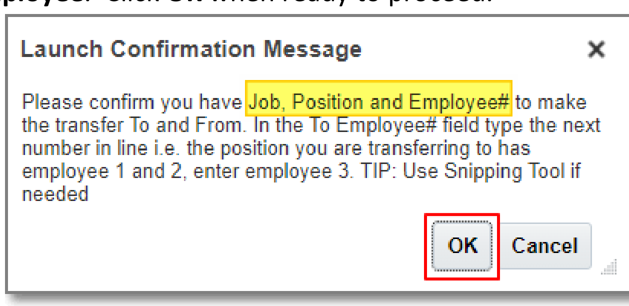
Transfer to an Existing Position (P_XXXXXXXX_X)

1. Review the **Licensed** page to identify the employee to transfer, as well as *identify the **existing position number** needed to transfer the employee*. **Highlight** the employee row from the cell to the left of the employee name.
    a. The scenario displayed is transferring *Employee 1* of position number *P_10008386_1* in Job Code GRADE 3 - C1030 to existing position number *P_10008387_1*, Job Code GRADE 4 - C1040. There is one incumbent in that position, thus the transferred employee would be labeled *Employee 2.*
2. Click **Actions.**
3. Select **Transfer Position.**



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

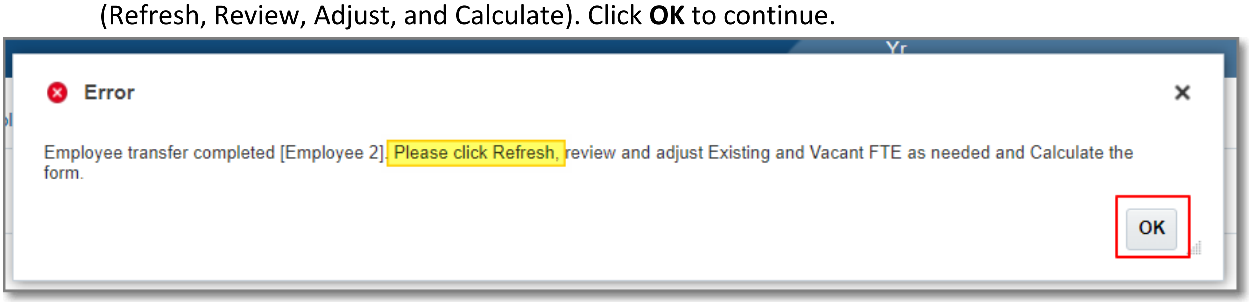


5. Update the *TO* position information grid with the identified **employee/existing position number/job code.**

   a. To minimize the **Transfer Position** screen, drag the bottom right corner upwards.
   b. If there is an Employee 1, Employee 2 in the existing position, type the next employee number in line; *Employee 3,* even if Employee 1, 2, etc. have a zero FTE.
   c. The *quotation marks* can be removed completely in the editable fields, or they can be left as is.

6. Click **Launch.**

7. When the process is complete, an ERROR pop-up with instructions of the next steps to take (Refresh, Review, Adjust, and Calculate). Click **OK** to continue.



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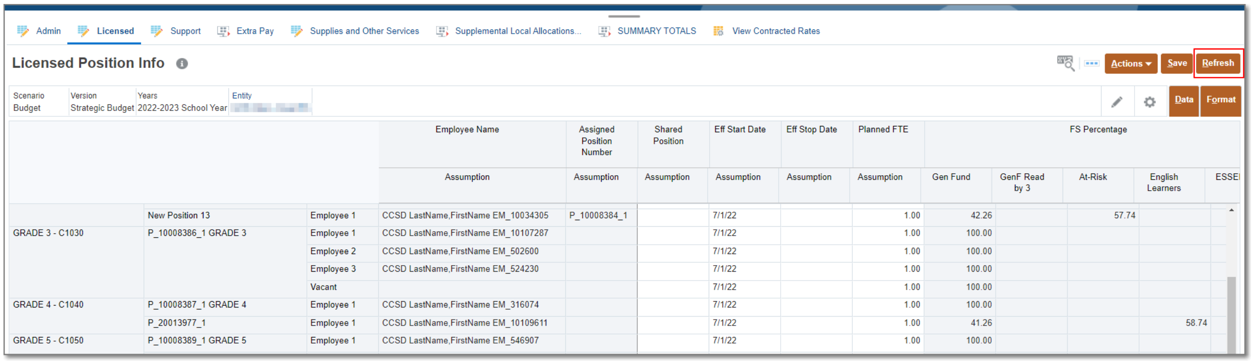
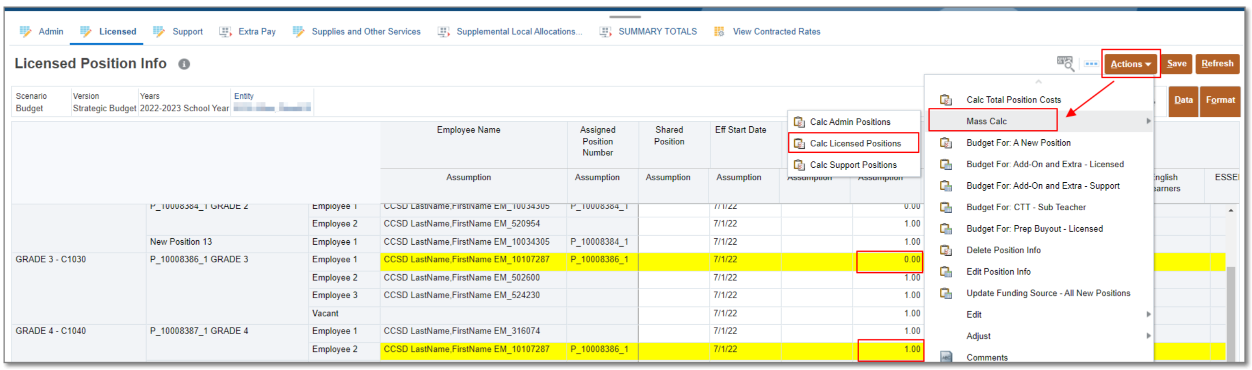
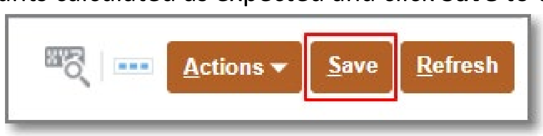
8. Click **Refresh.**



9. To calculate both rows simultaneously, click the **Actions** menu.
    a. Click **Mass Calc.**
    b. Select **Calc Licensed Positions.**



10. Confirm the dollar amounts calculated as expected and click **Save** to update **Summary Totals.**



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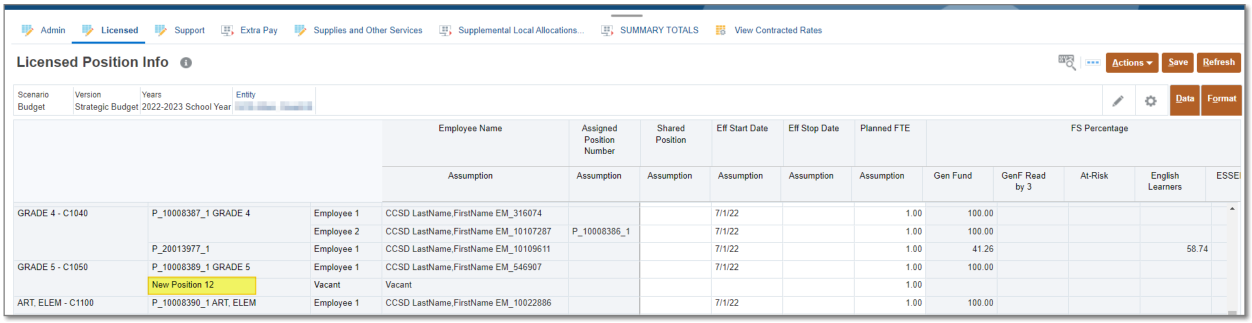
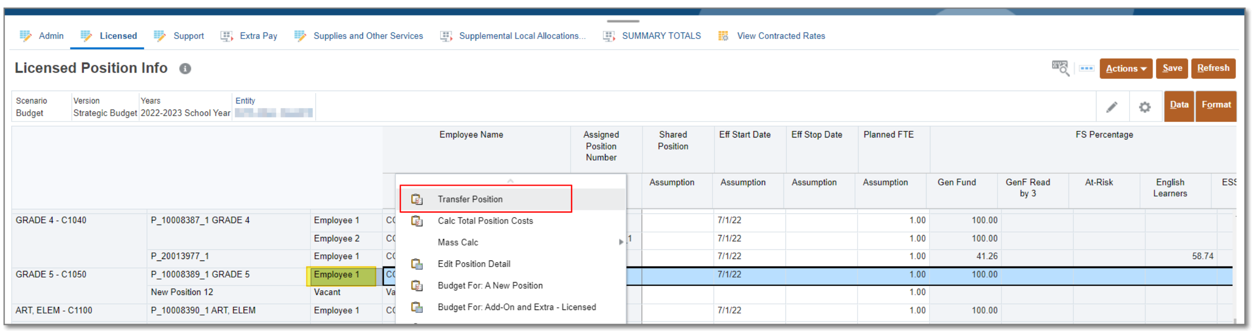
Transfer to a New Vacant Position (New Position X)

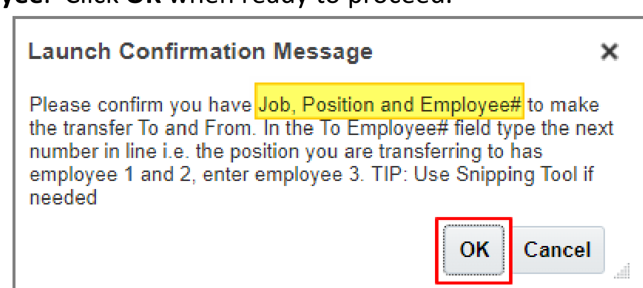
1. Create the New Position needed first (see instructions for Adding a New Position). *New Position 12* was created for this scenario; Grade 5 - C1050 funded by ESSER III, to transfer a teacher from a General Funded Grade 5 - C1050 position.



2. Review the Licensed page to identify the employee to transfer. **Highlight** the employee row from the cell to the left of the employee name.
3. Right-click.
4. Select **Transfer Position.**



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



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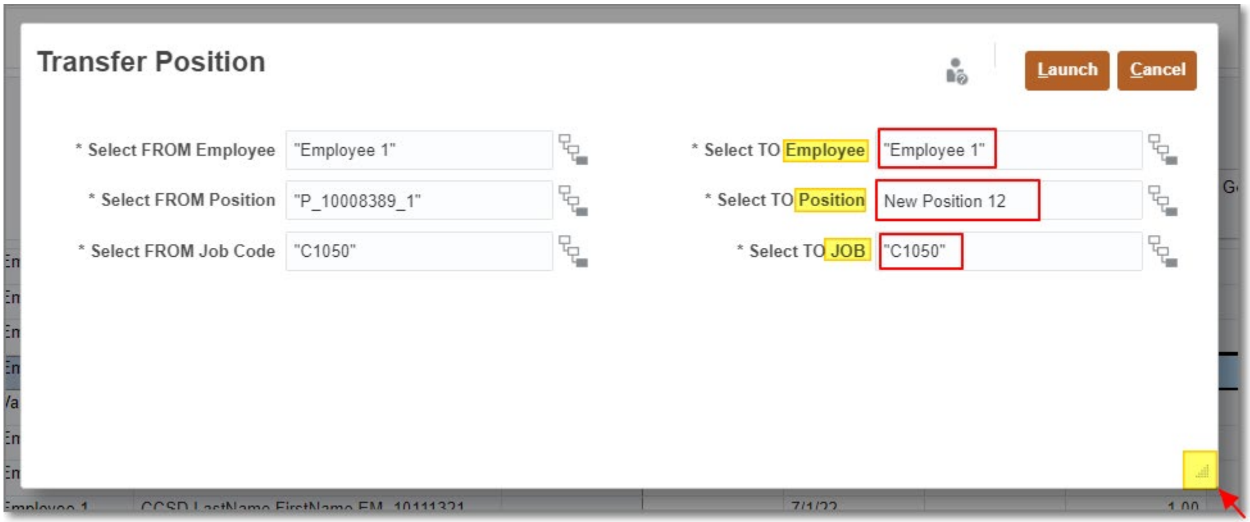
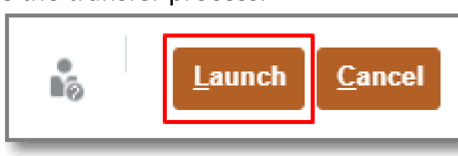
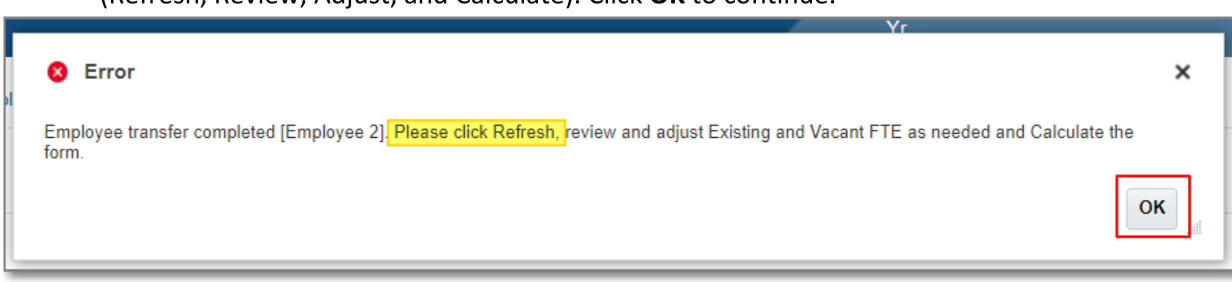
6. Update the *TO Position* information grid with the identified **employee/new position number/job code**.
   a. To minimize the **Transfer Position** screen, drag the bottom right corner upwards.
   b. Use Employee 1 for the initial transfer to a new vacant position.
   c. The *quotation marks* can be removed completely in the editable fields, or they can be left as is.



7. Click **Launch** to complete the transfer process.



8. When the process is complete, an ERROR pop-up with instructions of the next steps to take (Refresh, Review, Adjust, and Calculate). Click **OK** to continue.



9. Click **Refresh.**

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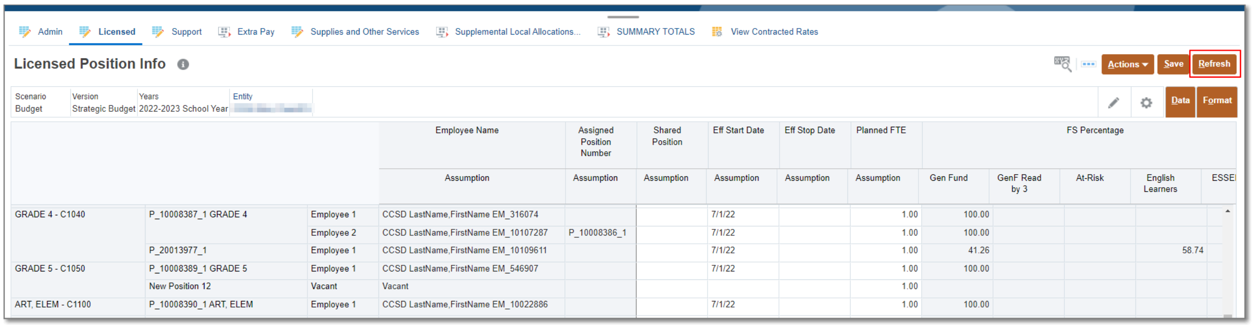
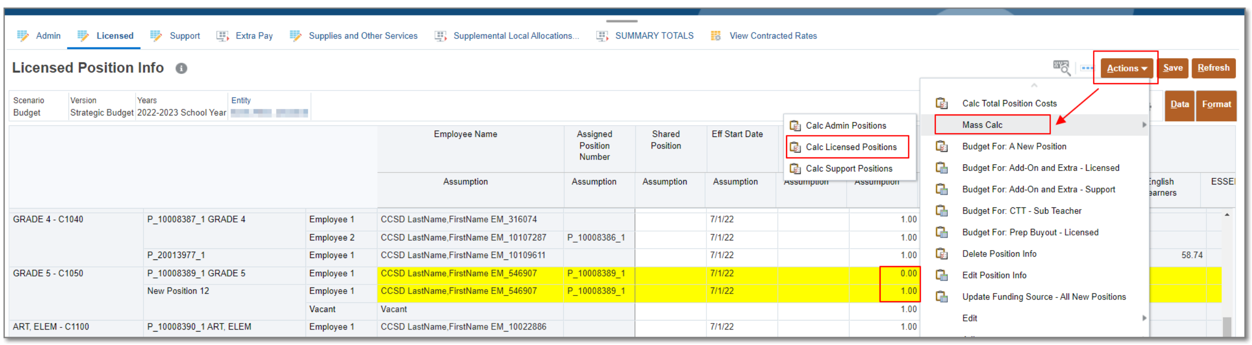
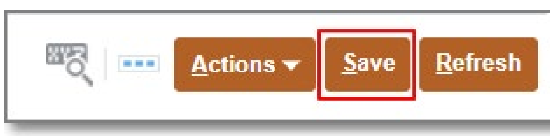


10. To Calculate both rows simultaneously, click the **Actions** menu.
    a. Click **Mass Calc.**
    b. Select **Calc Licensed Positions.**



11. Confirm the dollar amounts calculated as expected, and click **Save** to update **Summary Totals.**



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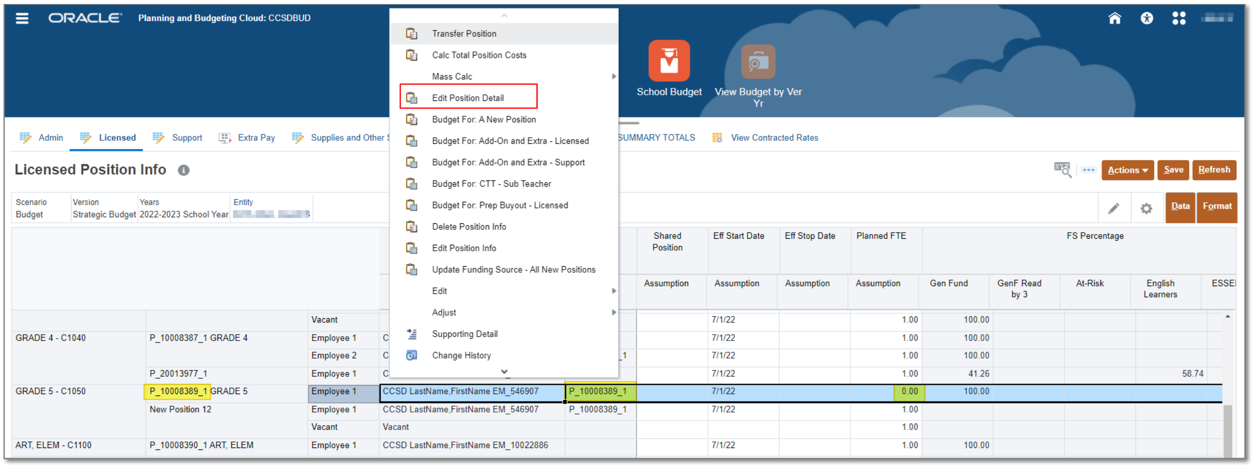
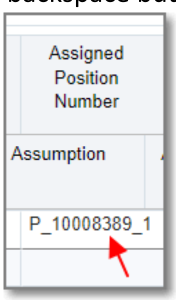
How to Clear a Transfer - Reinstating a Transfer to its Original Position

1. From the **Licensed** tab, identify the employee's original position that the first transfer was launched from and **right-click** from the Employee cell.
    a. Employee transfers have two rows of data, if transferred successfully. The original employee's position would have a "0" in the **Planned FTE** column.
    b. Another tip for identifying which is the original employee position row is, the position number to the left of the employee name will match the position number to the right of the employee name.
2. Select **Edit Position Detail.**



3. **Scroll** to the far right.
4. In the **Planned FTE** cell, enter a "1".
5. Continue scrolling right, and in the **Assigned Position Assumption** cell delete the position number.
    a. Click in the cell, and click the backspace button on the keyboard.



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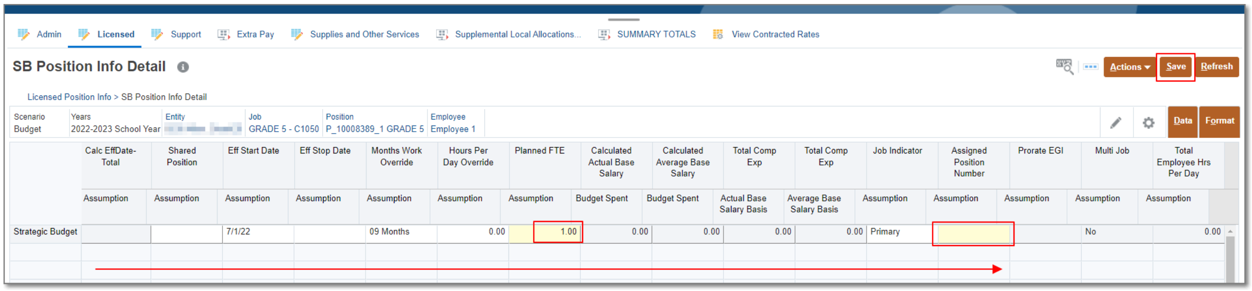
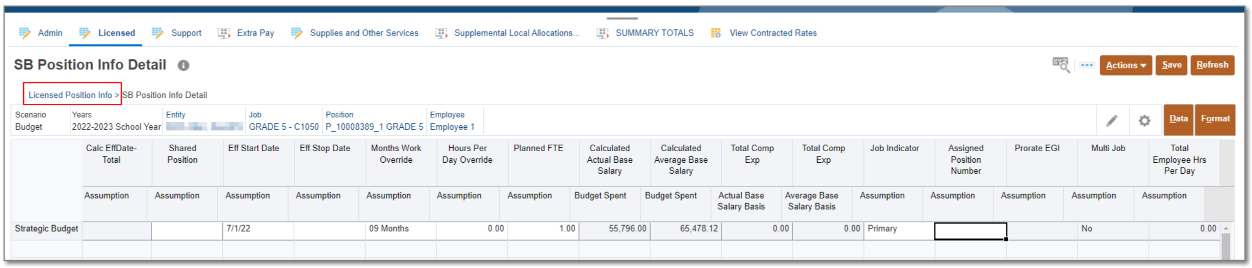
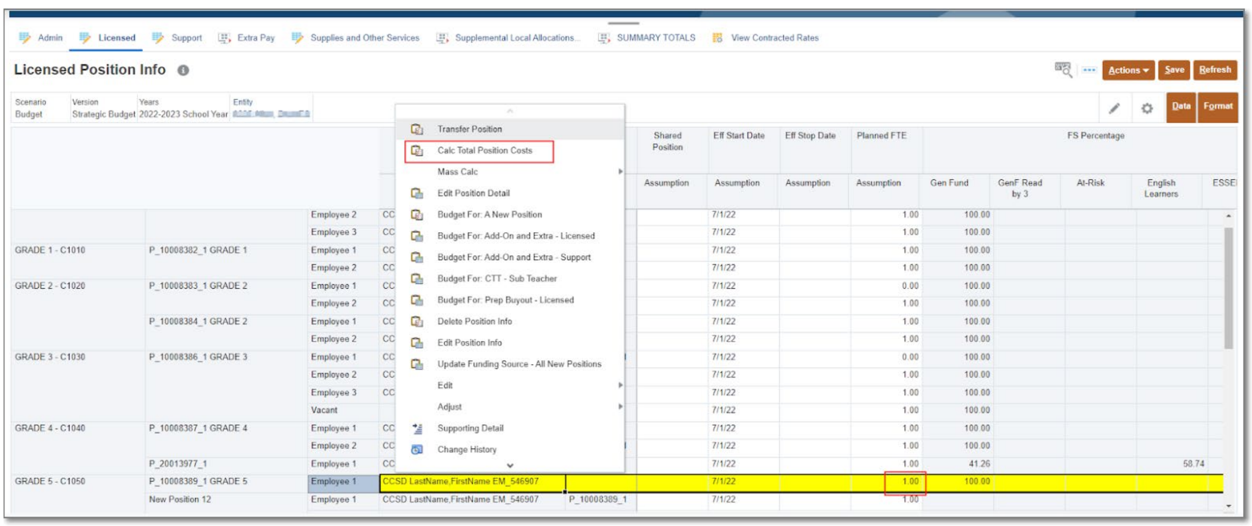
6. Click **Save.**



7. Return to the Licensed grid by clicking the **Licensed Position Info** link.



8. The position will be highlighted in yellow, right-click.
9. Select **Calc Total Position Cost.**



10. Once the original employee row has been calculated, the second employee row that has a value in the *Assigned Position Number* column can be deleted. Highlight the employee's transferred **to** position row.
11. Right-click.
12. Select **Delete Position Info.**

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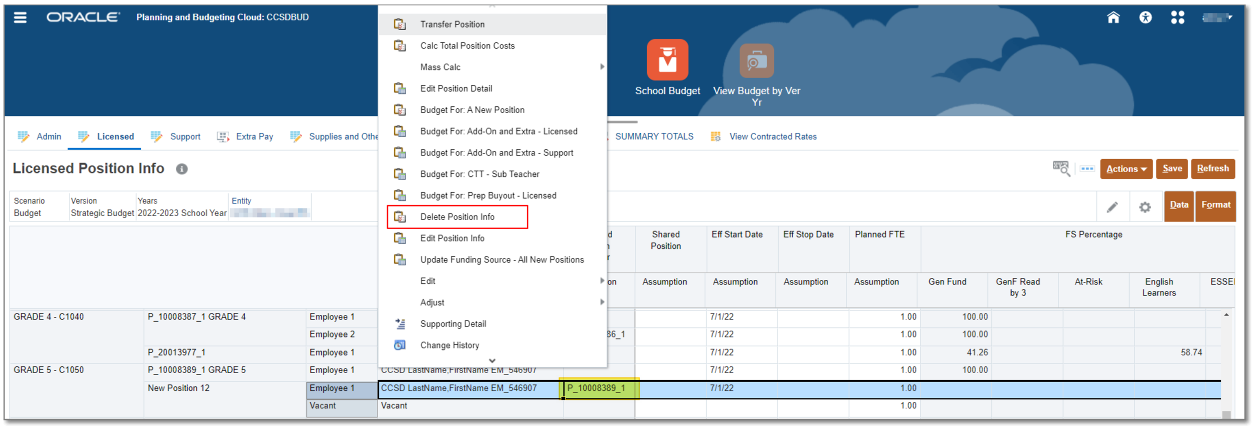
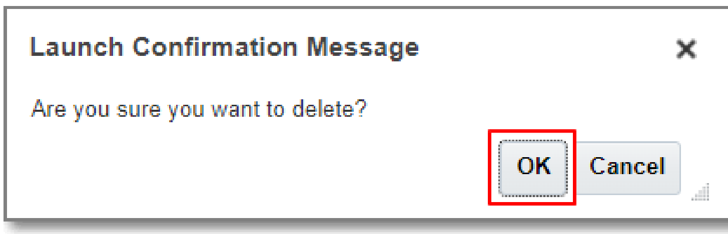


13. Click **OK** in the confirmation message.



14. Review and confirm the employee information to delete, click **Launch.**

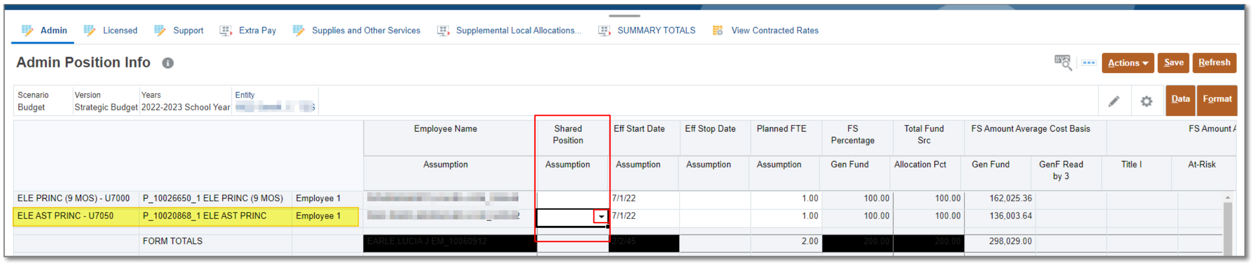
15. Click **Save** to update Summary Totals.

16. The user will be returned to the **Licensed Position Info** page. Now that the employee's transfer data has been cleared and removed, the employee is listed under their original position row, and a new transfer can be launched for the employee.

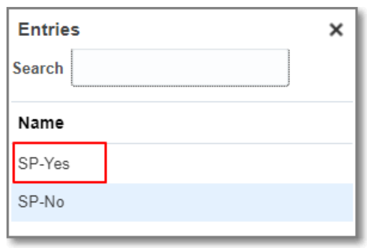
***Double-click here to return to the Table of Contents**

Budgeting for a Shared Position

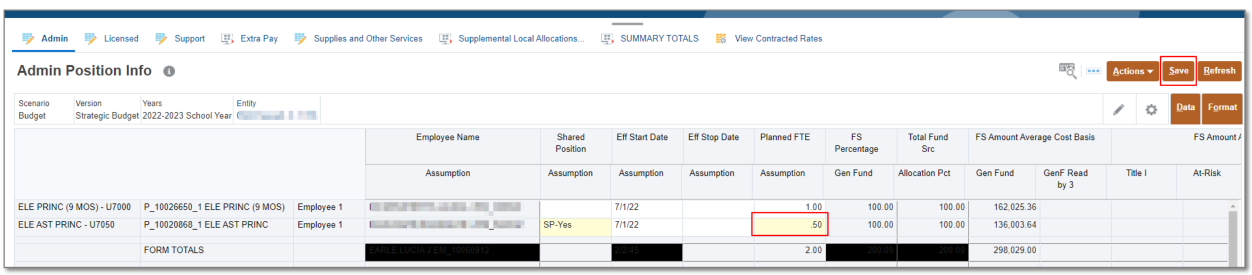
1. From the **Admin**, Licensed, or Support tab locate the desired position row in the employee grid, and click into the **Shared Position** column next to the employee's name.



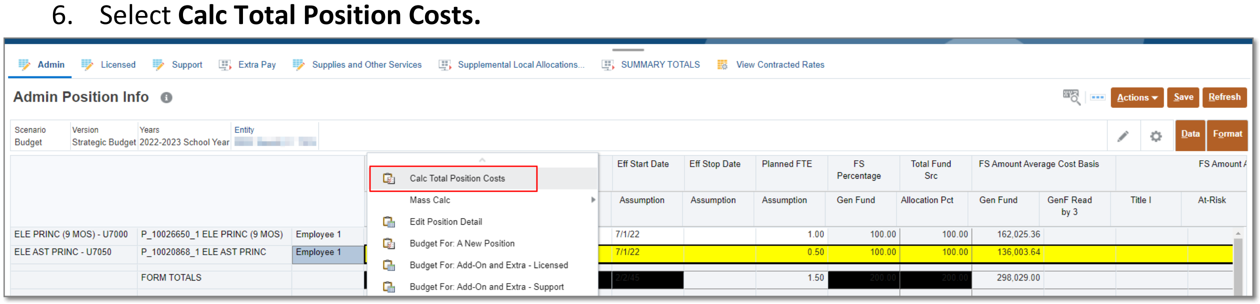
2. Select **SP-Yes** from the dropdown menu.



3. Edit the **Planned FTE** field accordingly.
   a. For Support Professionals, update the **Hours Per Day** cell.
4. Click **Save.**



5. **Right click** the yellow highlighted position number.
6. Select **Calc Total Position Costs.**



7. Click **Save** to update **Summary Totals**.

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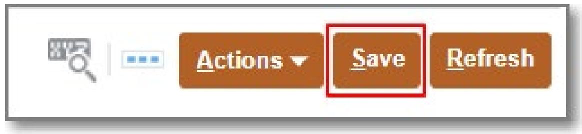
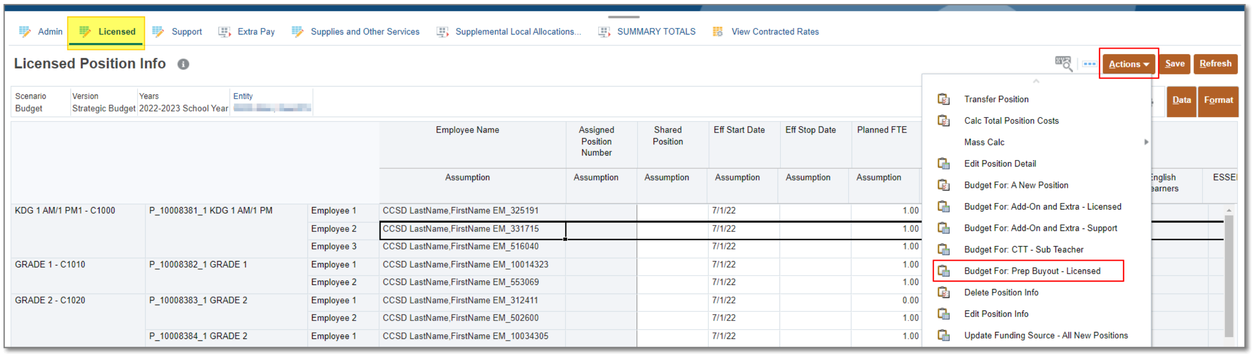
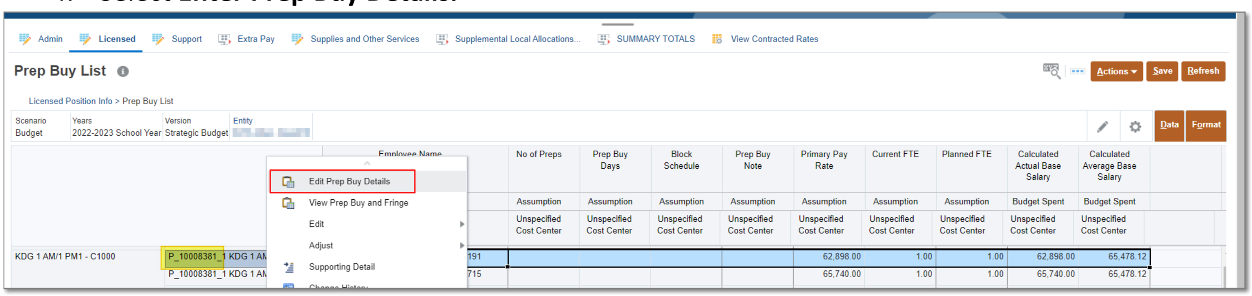

Actions
Save
Refresh

Budgeting for a Prep Buyout

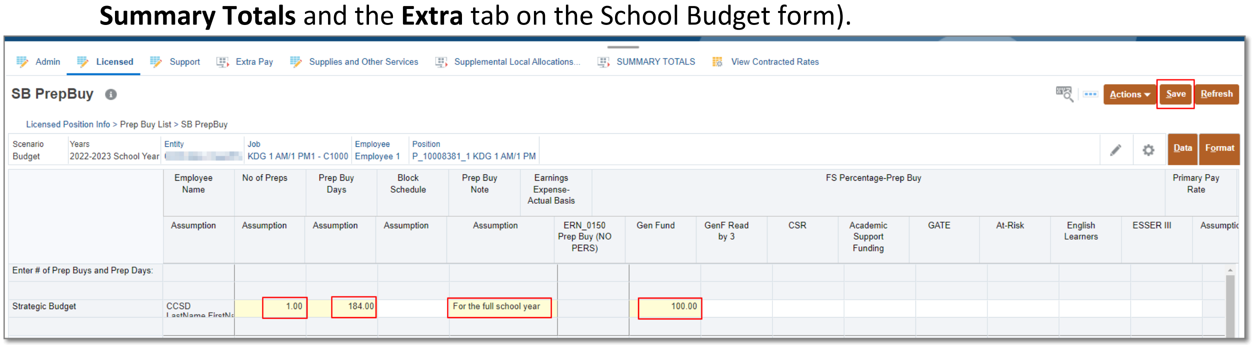
1. From the **Licensed** tab click the **Actions** menu.
2. Select **Budget For: Prep Buyout - Licensed**.



3. From the list of positions available, scroll to the desired position, then right-click on the **position number.**
4. Select **Enter Prep Buy Details.**



5. Enter **1** in the **Number of Preps** cell.
6. Enter the appropriate number of days in **Prep Buy Days.**
7. *If the school is on a block schedule*, select **Yes** in the dropdown under **Block Schedule**. If not, select **No**, or leave the cell blank.
8. If desired, enter a comment in the **Prep Buy Note,** and click **Save** in the note cell.
9. Enter **100** under the desired funding source column.
10. Click **Save** when finished (this will calculate the prep buy costs and will automatically update the **Summary Totals** and the **Extra** tab on the School Budget form).



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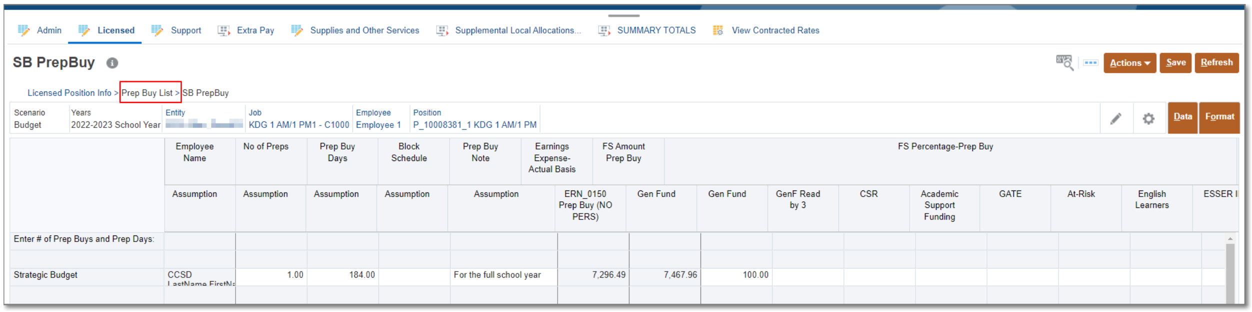
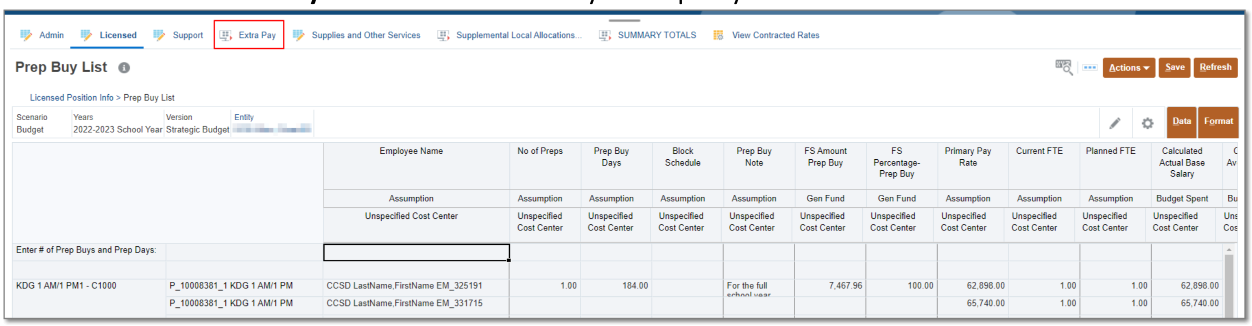
11. Click the **Prep Buy List** hyperlink to return to the previous form, and continue budgeting for prep buys.



12. Click the **Extra Pay** tab to view a summary of Prep Buys.



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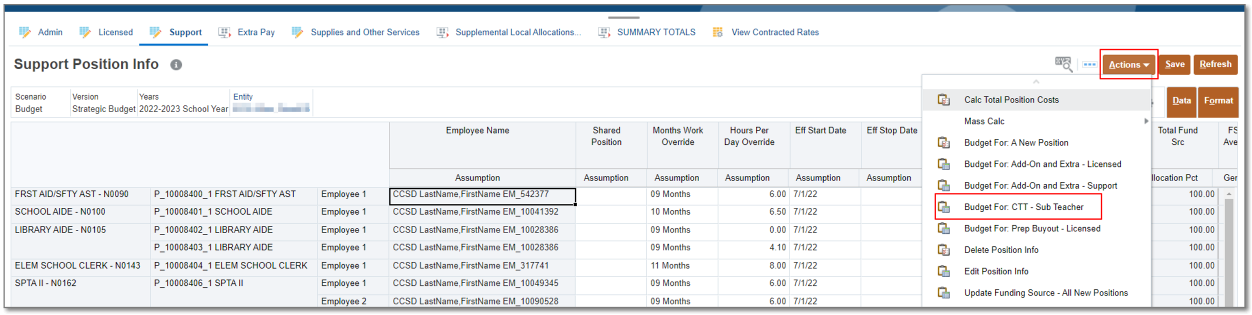
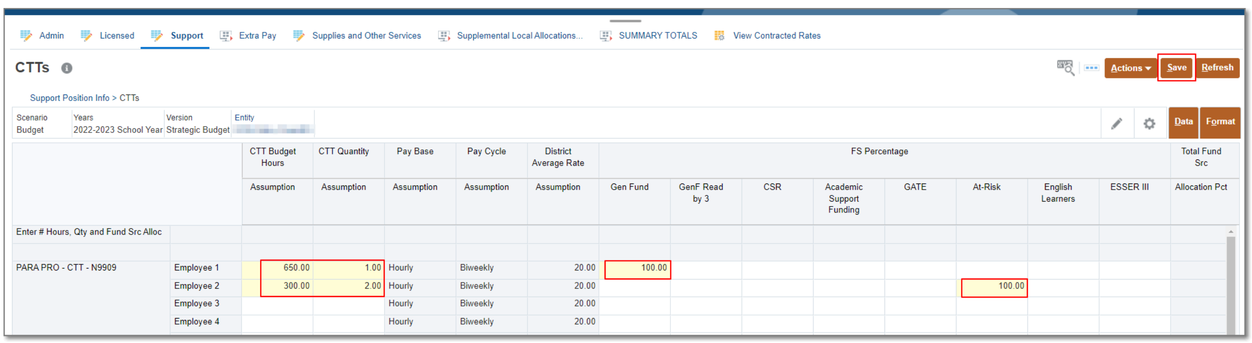
Budgeting for a Certified Teacher Tutor (CTT)

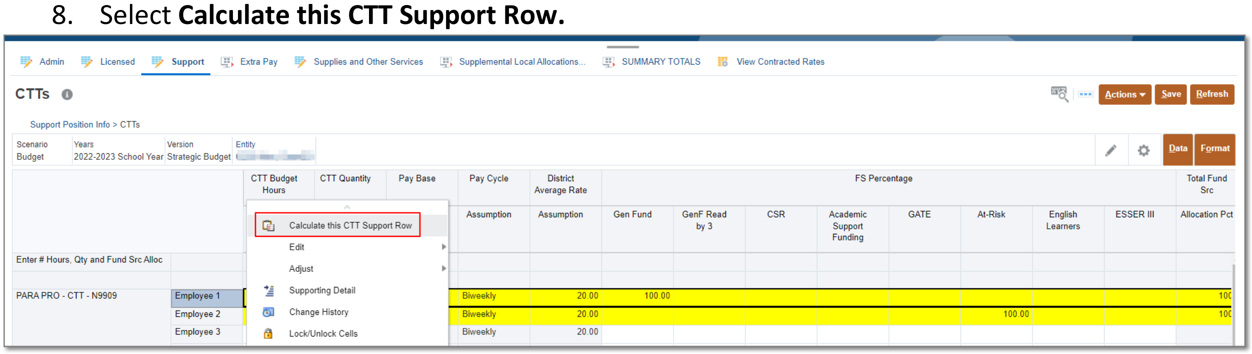
1. From the **Support** tab click the **Actions** menu.
2. Select **Budget For: CTT - Sub Teacher.**



3. Enter the number of hours desired in the **CTT Budget Hours** cell.
4. Enter the number of CTTs to budget for in the **CTT Quantity** cell.
5. Enter **100** in the appropriate funding source cell.
6. Click **Save.**



7. Calculate each row by right-clicking the yellow row to calculate.
8. Select **Calculate this CTT Support Row.**



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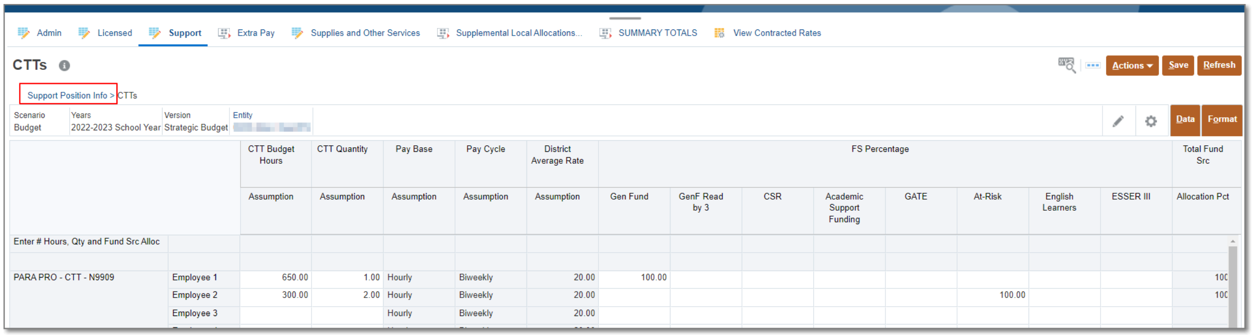
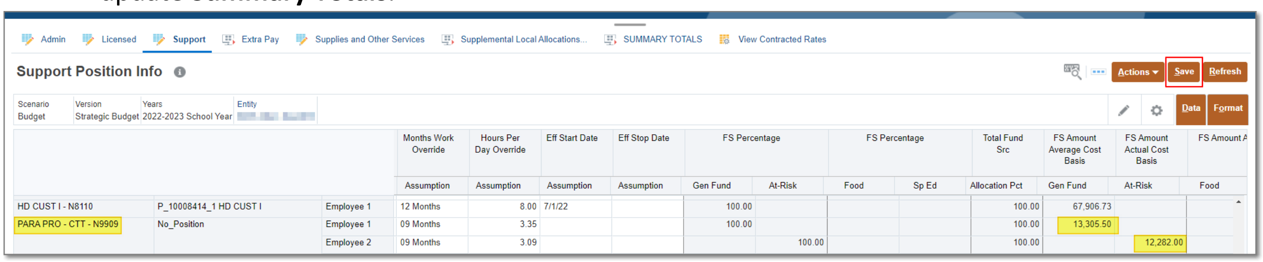
9. When all the populated CTT rows have been calculated, click on the **Support Position Info** hyperlink to return to the support grid.



10. Scroll to the bottom of the Support grid to review the newly added CTTs, and click **Save** to update **Summary Totals**.



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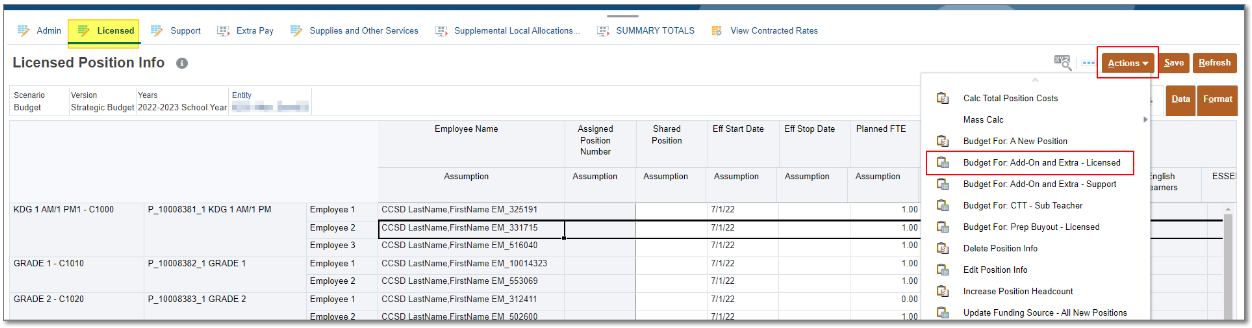
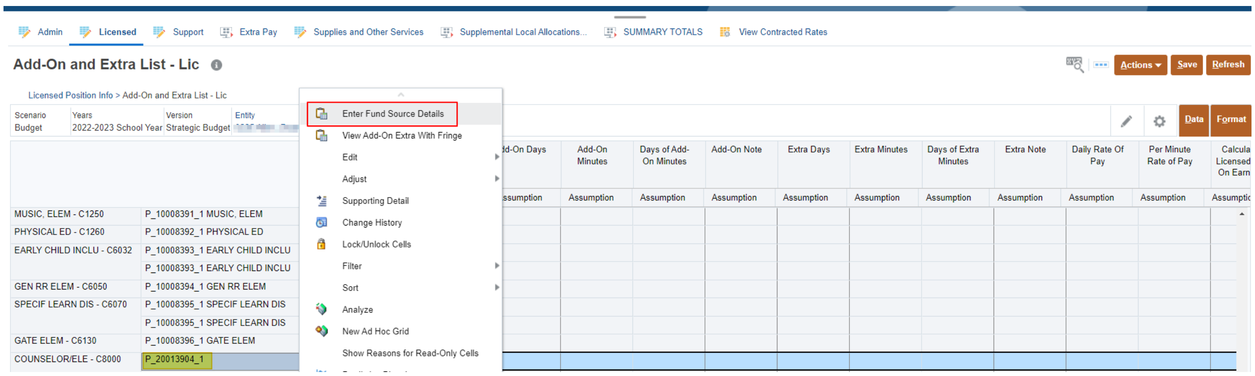
Budgeting for Licensed Add-On or Extra Time

1. From the **Licensed** tab, click the **Actions** menu.
2. Select **Budget For: Add-On and Extra - Licensed.**



3. From the grid of available positions, **right-click** on the desired position number.
4. Select **Enter Fund Source Details.**



5. In the **Add-On and Extra Details - Lic** form enter information in *both* the Add-On and Extra area, if appropriate.
   a. **Add-On** area (at the top)
      i. Non-classroom staff can get **Add-On Days** (i.e. Counselors, Librarians, etc).
      ii. **Add-On Minutes** and **Days of Add-On Minutes** are for schools that have a longer contracted school day (i.e. 19 minutes).
   b. **Extra** area (at the bottom)
      i. **Extra Days** are for Licensed staff working outside of their 9-Month contract (i.e. staying extra days after school is out to clean/organize the classroom).
      ii. **Extra Minutes** and **Days of Extra Minutes** are for Licensed staff that come in early or stay late (i.e. early bird, late bird).
   c. Add a comment in the **Note** field if desired.
   d. Enter **100** under the desired funding source column.
6. When done entering values, click **Save.**

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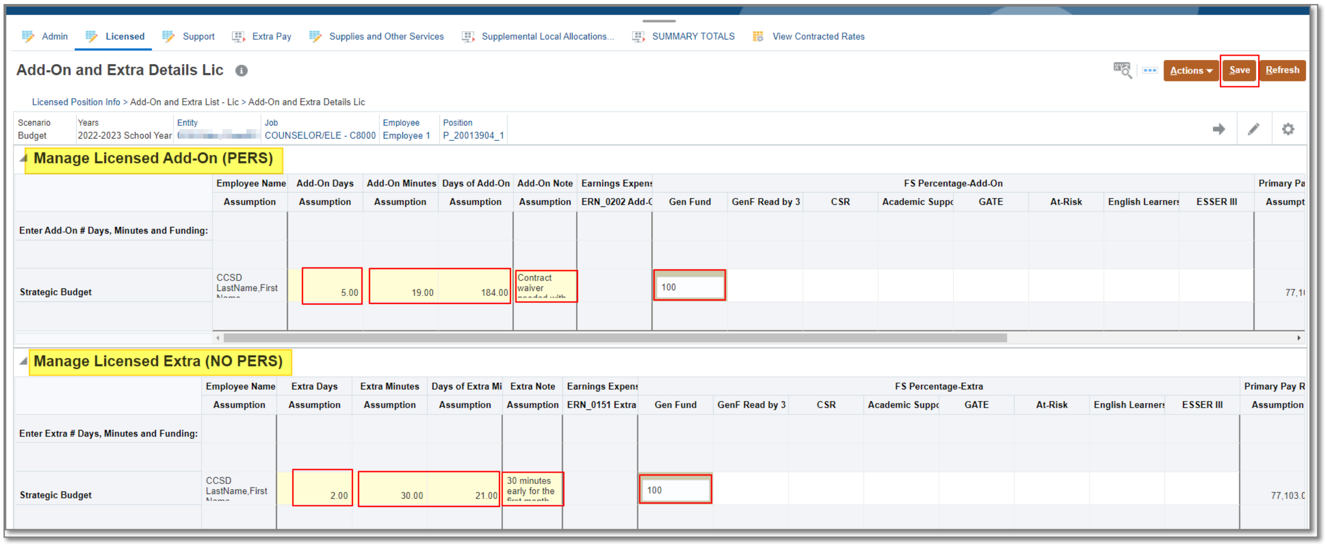
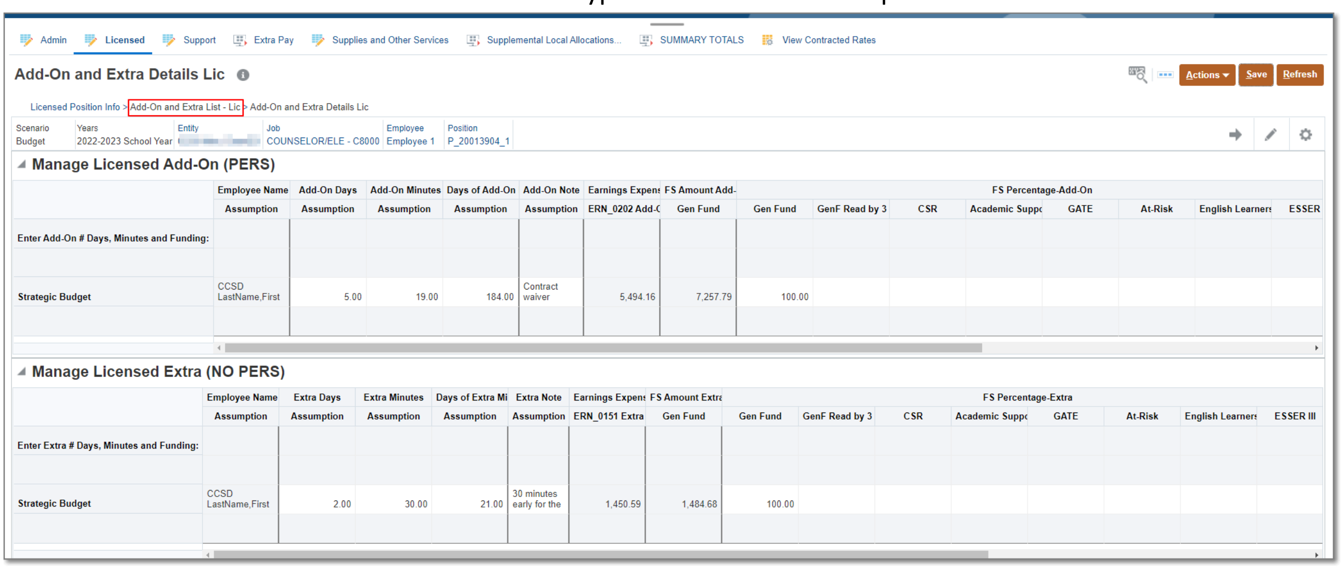


7. Click on the **Add-On and Extra List - Lic** hyperlink to return to the previous form.



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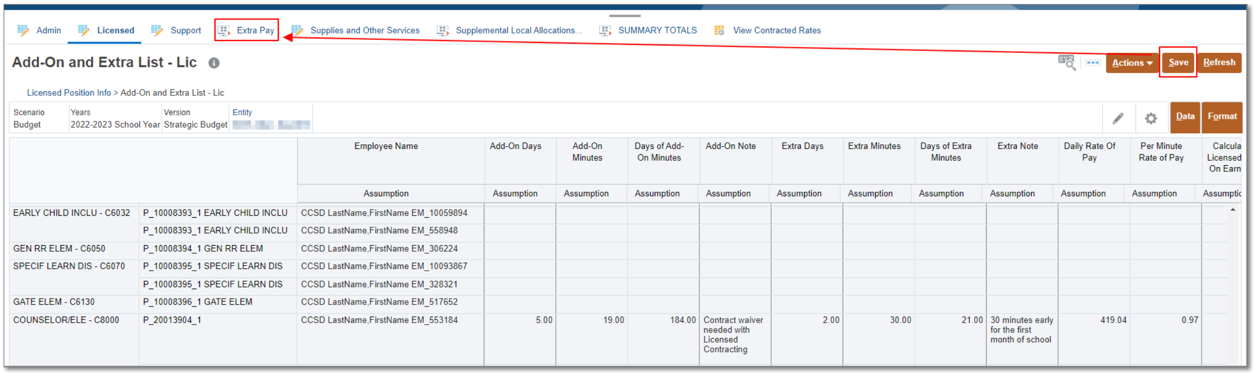
8. Click **Save** to update Summary Totals or to continue budgeting extra time, right-click on the desired position (step 3).
9. Click the **Extra Pay tab** to view a summary of Extra time budgeted.



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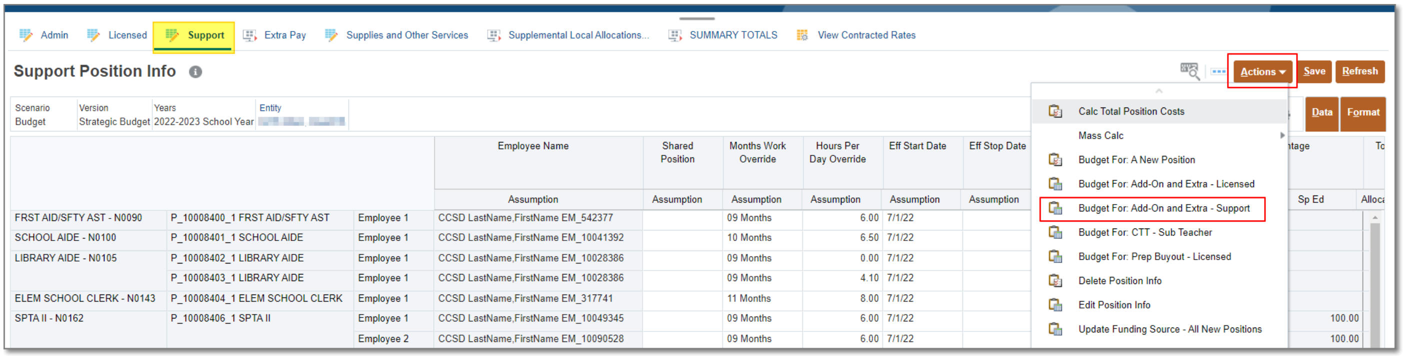
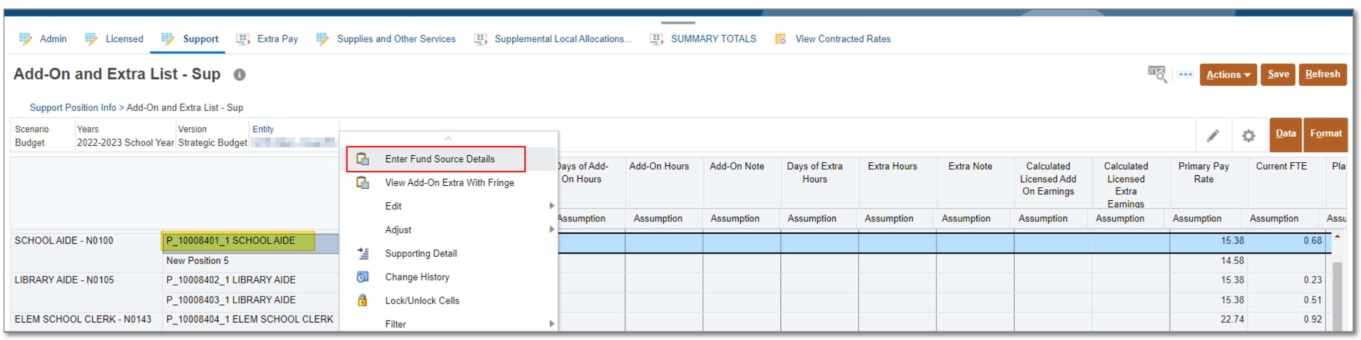
Budgeting for Support Add-On or Extra Time

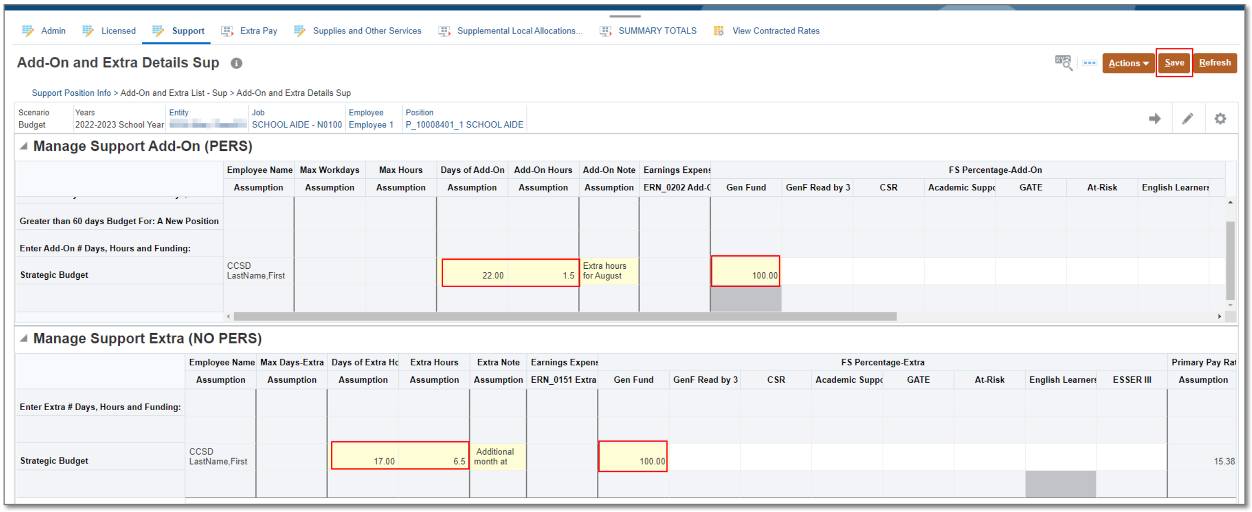
1. From the **Support** tab, click the **Actions** menu.
2. Select **Budget For: Add-On and Extra - Support.**



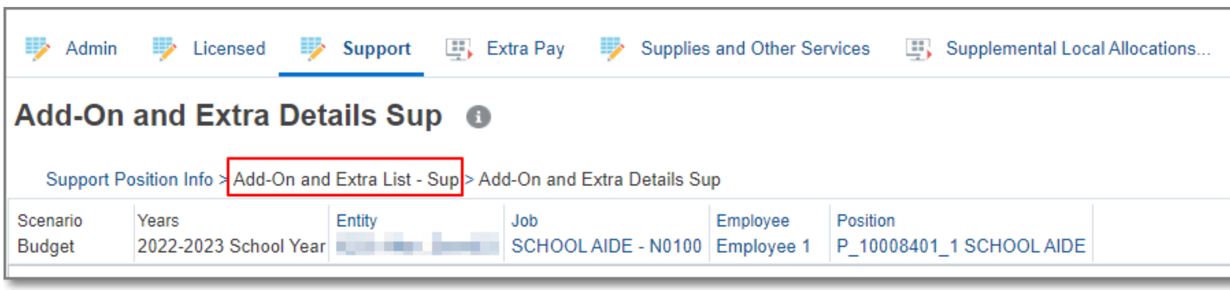
3. From the grid of available positions, **right-click** on the desired position number.
4. Select **Enter Fund Source Details.**



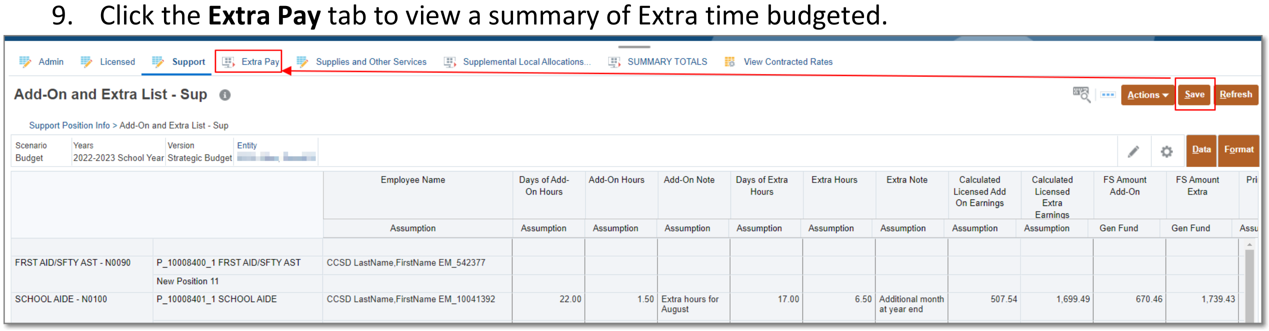
5. In the **Add-On and Extra List - Sup** form enter information in *both* the Add-On and Extra area if appropriate.
   a. **Add-On** area (at the top)
      i. **Days of Add-On** and **Add-On Hours** are for Support professionals working additional time within their work-year assignment, but not for the entire assignment length (i.e. working an additional hour within their assigned work year. Use this feature if the extra time is under 60 days. If longer than 60 days *Budget For a New Position,* so the employee can have an additional employee record and accrue leave time).
   b. **Extra** area (at the bottom)
      i. **Days of Extra Hours** and **Extra Hours** are for Support professionals that will work past their assigned time (i.e. extending a 9-month employee an additional month).
6. When done entering values, click **Save.**



7. To Return to the previous form, click on the **Add-On and Extra List - Sup** hyperlink.



8. Click **Save** to update Summary Totals or to continue budgeting extra time, right-click on the desired position (step 3).
9. Click the **Extra Pay** tab to view a summary of Extra time budgeted.



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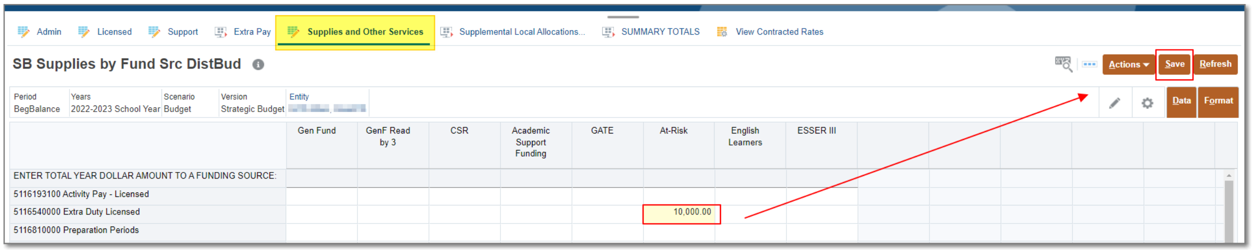
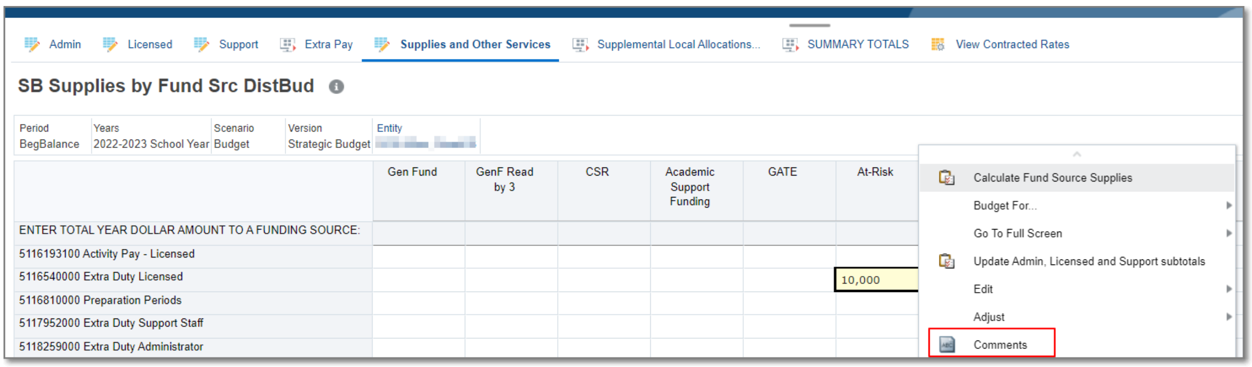
Budgeting for Supplies and Other Services

1. From the **Supplies and Other Services** tab, enter or edit dollar amounts in the appropriate funding source columns.
2. Click **Save** when finished to update the Summary Totals.



3. To enter a comment for the budgeted item, right-click the cell.
4. Select **Comments.**



5. Type in the text box and click **Post** when the comment has been entered. To exit the text box click **Close.**

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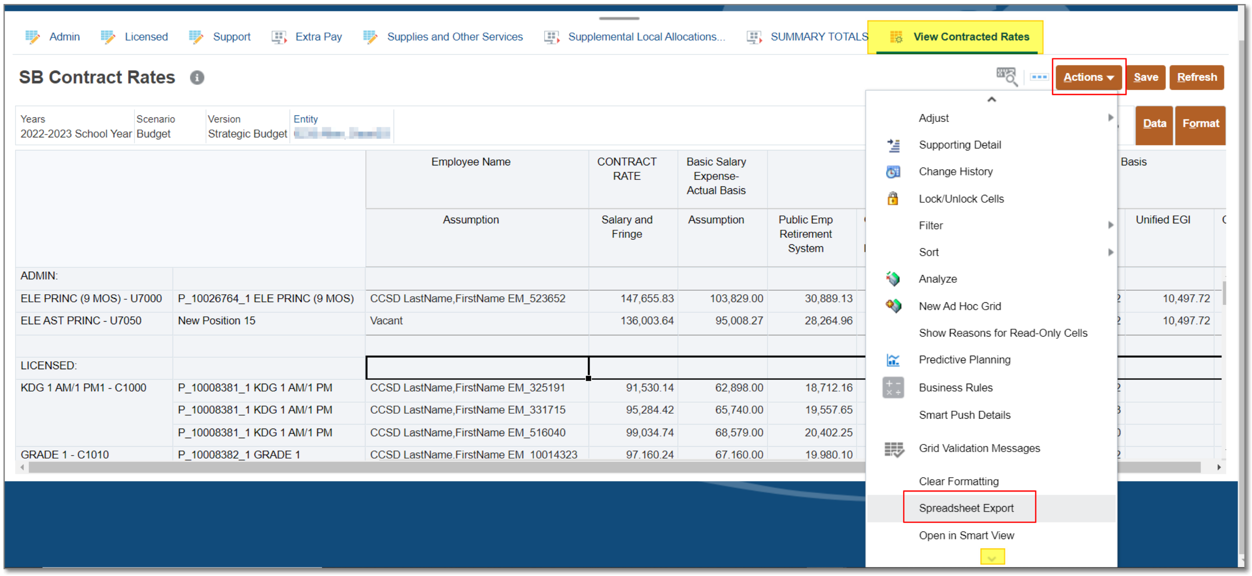
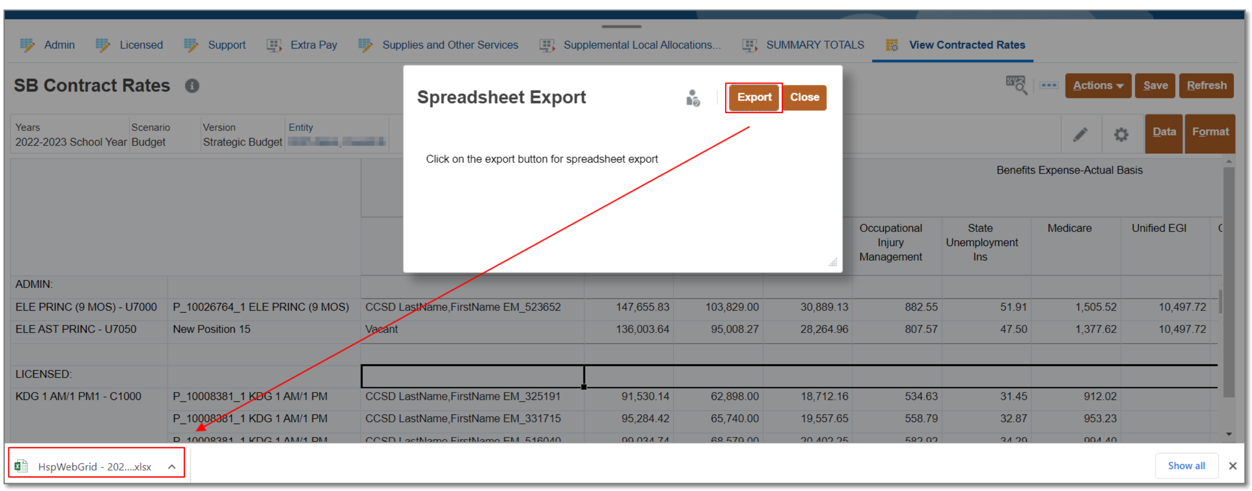
Exporting a Tab and Budget Totals

1. From the School Budget form, click on the tab to export.
2. Click on the **Actions** menu.
3. Select **Spreadsheet Export.**



4. Click **Export.**
    a. In **Google Chrome**, the spreadsheet will appear in the downloads tray at the bottom of the screen.



    b. In **Mozilla Firefox**, a dialog box should appear indicating that the file will open in Microsoft Excel.
        i. Click **OK**

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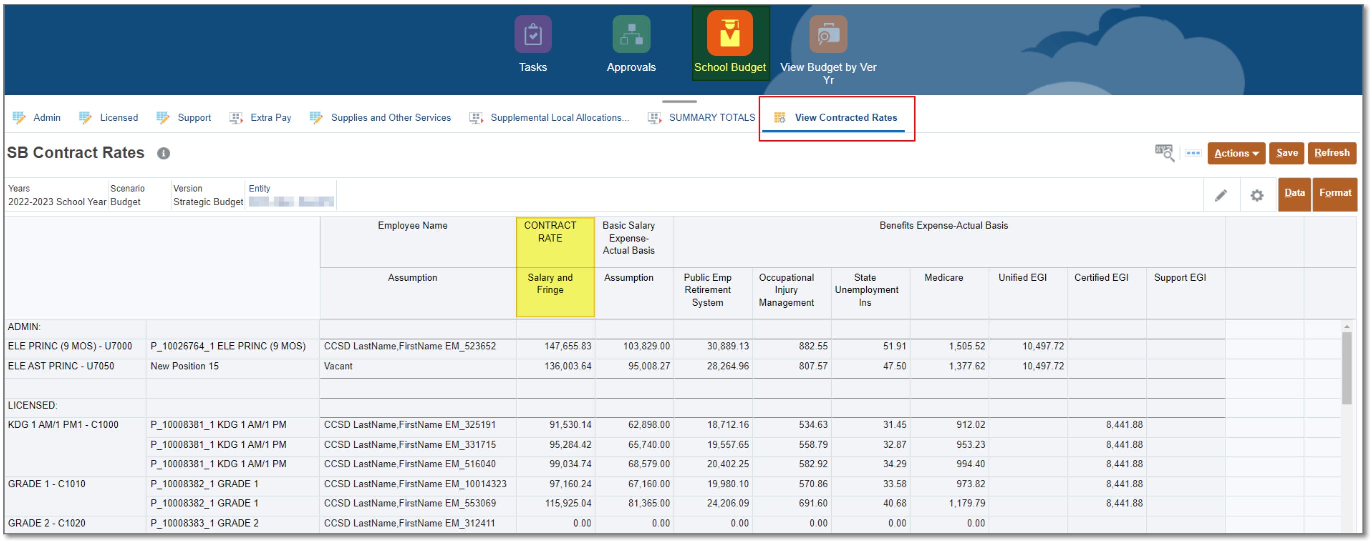
View Employee's Actual Salary Rates

1. From the School Budget, click the **View Contracted Rates** tab.
2. A list of employees' **Actual** salaries by employee group will appear.
    a. If the position is **vacant** the average salary will be displayed.
    b. If the employee has not been budgeted for (**zero FTE or zero hours**) no dollar amount will be displayed.



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Printing Budget Plans

1. From the Budget Planning Tool Home page, click the **Budget Reports** icon card.

2. From the list of reports, click on the report tile to run (reports run in PDF format).

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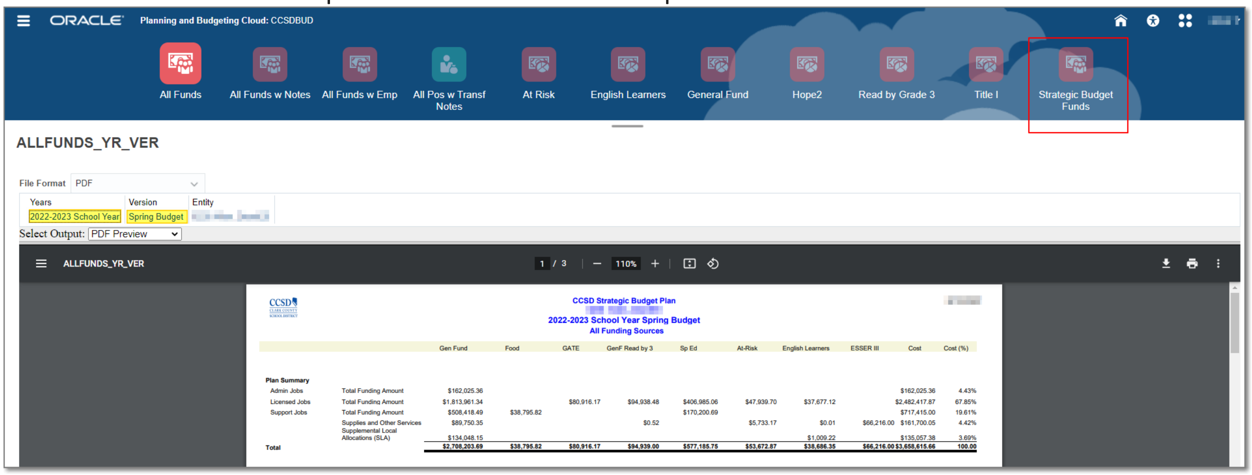
3. Click into the **Years, Version, and Entity** hyperlinks to run a different version of the same report executed.
    a. The version **Strategic Budget** is the *current live* budget.
4. Click on another report tile to run a different report.



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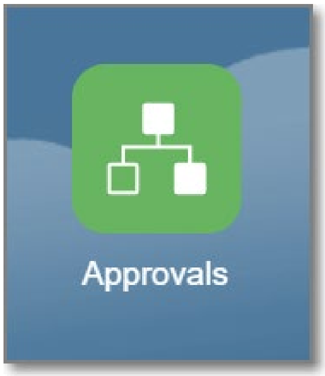
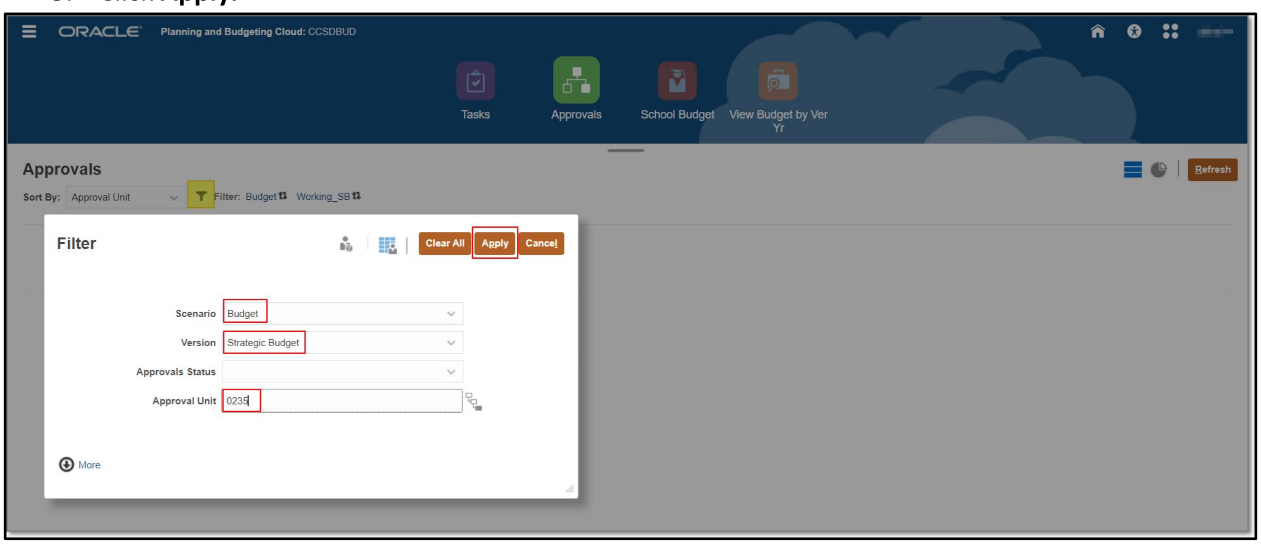
Promoting Submitting a Work Location Budget

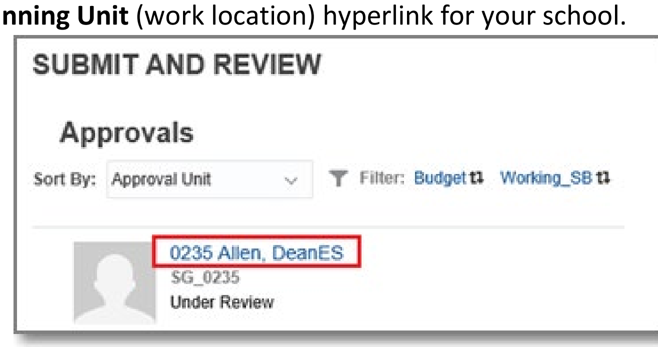
1. From the Budget Planning Tool Home page, click on the **Approvals** icon.



2. From the *Filter* window, select **Budget** as the Scenario.
3. Select **Strategic Budget** as the Version.
4. Enter the four-digit work location in the **Approval Unit** field
5. Click **Apply.**



6. Click on the **Planning Unit** (work location) hyperlink for your school.



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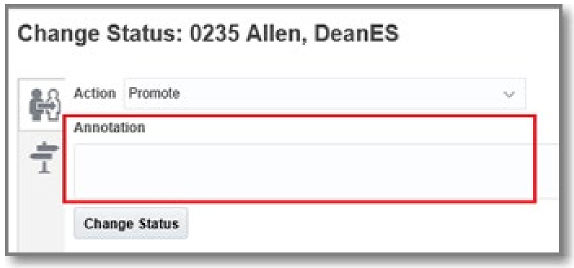
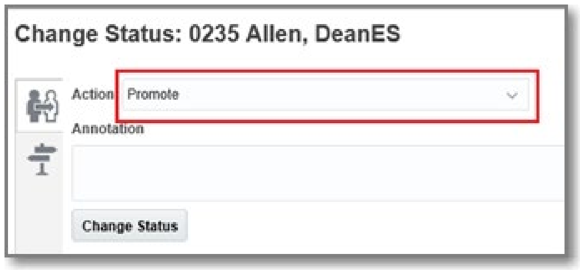
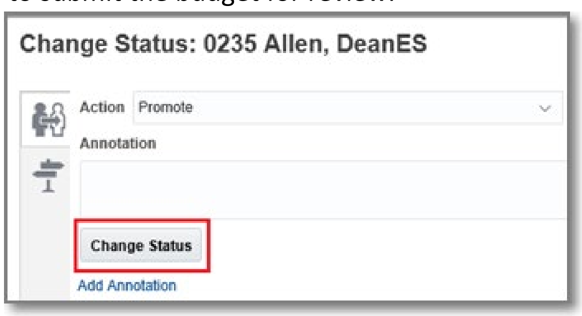
7. Add an **Annotation** (or note) for the next reviewer and/or approver to view if desired.



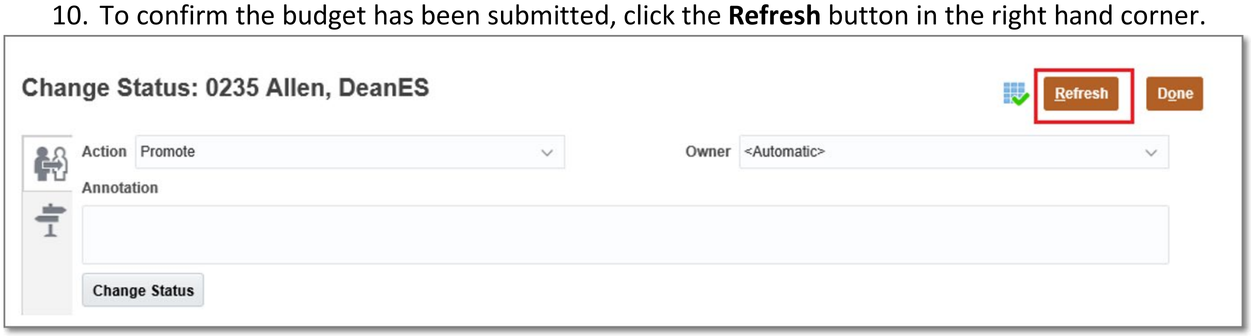
8. Ensure that the Action dropdown is set to **Promote.**



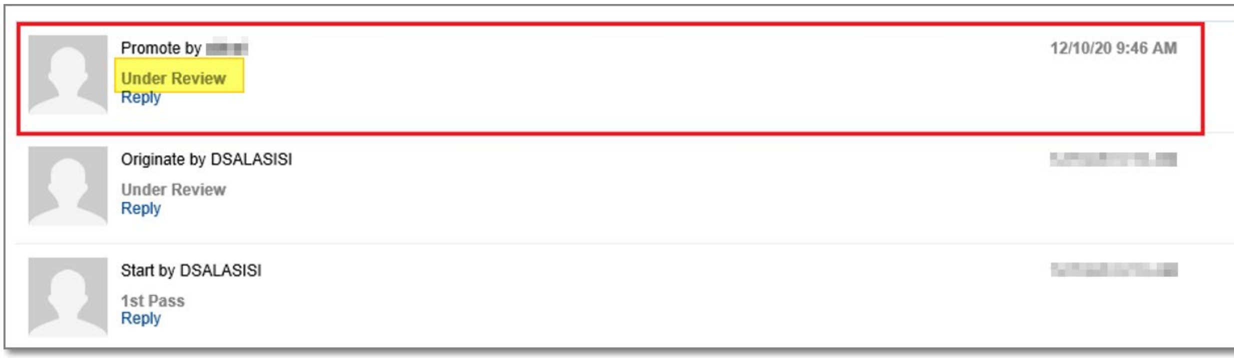
9. Click **Change Status** to submit the budget for review.



10. To confirm the budget has been submitted, click the **Refresh** button in the right hand corner.



11. After the refresh, note that a "**Promote by**" row appears with your user ID, as well as the date and time stamp. The status will also show as **Under Review.**



12. Click **Done**.