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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. You will be brought to the Employee Self Service Dashboard. Using the Top Menu, switch to Manager Self Service.

	▼ Employee :	Self Service					
Personal Details	Time/Absence Employee Self Se Manager fijelf Ser	vice	Benefit Details				
Taleo Internal Job Postings	Open Enrollment There is no Ope other event avai	n Enrollment Event, but you have lable to be processed.	Password Reset Information				
Separation/LOA Request	Nevada PERS	OnBoarding Activities 0 1 Steps 26 Steps	s Missed Due Date s Remaining				

3. From the MSS Dashboard, select the **Budget Planning Tool** tile.

	manager centree	
Approvals	Timesheet Entry	Teem Timel/Absence
32 My Team	View Employee Personal Info	100 Exceptions
Position Requests	Budget Planning Tool	Talent Acquisitions
*		* *

4. You will be brought to the **PBCS homepage**, where you will perform all functions and tasks associated with your location's School Budget.



User Preferences

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

Ξ	ORACLE	Planning and Budgeting Cloud: CCSDBUD

2. Under Tools, click on User Preferences.

Navigator: Planners
Tasks
Approvals
Application
jobs
Tools
Lser Preferences
School Budget

3. Click on User Variables:



4. Go to the **Element** row, and click on the **Member Selector** icon.

			Save
User Variable	es		
Dimension	User Variable	Member	
Element	Context Element		P.
Scenario	Current Scenario		ç _e
Version	Current Version		P
Years	Current Year of View	FY21	Ę.
Element	School Fund Source	FS_0235	С. С.

5. 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**.

Select a Member				
Element FS_0235				
Search Element				‡
Element		FS_0232	▶ ▲	
GL Measures	►	FS_0233	►	
FSGROUP	•	FS_0234		
[✓ FS_0235	►	

6. Click the **Save** button and Click **OK** in the Information window.

E ORACLE	Planning and Budgeting Cloud: CCSOBUD	User Preferences	ñ 0 :: *
Preferences		_	Save
General	User Variables		
Display	Dimension	User Variable Member	
Notifications	Element	Context Element	8
Ad Hoc Options	Scenario	Current Scenario	8
Trees Maniability	Version	Current Version	S.
Oser variables	Years	Current Vear of View FY21	<u></u>
Reports	Element	Schol Information	99 .
Form Printing		User Preferences have been saved.	

7. 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 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 PBCS homepage, click on the **Tasks** icon.



2. From the Task List window, click the dropdown arrow next to **Prepare Budgets**. Click on **School Budget.**

	DBUD					ô 0 ::
	Tasks	Reports	Approvals School Budget		~	
Tasks: All Task Lists T Filter: All B		-				Refresh
Name			Status	Start	End	Instructions
PREPARE BUDGETS			•			0
SCHOOL BUDGET			•			0
ES STAR STUDENT:TEACHER RATIO VALIDA	TION CHECK					0

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

the **Entity** link. From the Select a Member window, select your work location and click **OK**. Click the **Go** arrow to update the grid with your selected location's budget data.

SCHOOL	BUDG	et 🔟						e Bij	<u>S</u> ave	<u>R</u> efresh	Actions	•	<u>C</u> omplete	Previous	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES	EE BUDGET by V	NOR		TION								÷	/	¢
Version Working_SB														<i>→</i>	/	0
Administrat	tive License	d Support Add'l Earnin	gs Supplies and Other Svcs	SLA	A											

4. Once the page is finished updating, the budget grid will be "read-only". From the School Budget form click Actions > Go to Full Screen > and select the employee group to modify information within the Budget (Admin / Licensed / Support).

	Save	<u>R</u> efresh	Actions	s ▼ <u>Complete</u> <u>Previous</u> <u>N</u> ext Clos	se
			- Ca	View Fund Source to GL Allocations	
			-	Colorieta Surde Supplies	
			L£	Calculate Fund Source Supplies	
				Budget For 🔪	•
	强 Admin		-	Go To Full Screen	•
	🔒 Licensed		ß	Update Admin, Licensed and Support subtotals	
ite	🕞 Support	' I		Filter	•
'n	Can Supplies Other	Services	۹	Analyze	
	1.00	100.0	٩	New Ad Hoc Grid	
	0.50	100.0		Show Reasons for Read-Only Cells	
			\sim	Predictive Planning	
	0.00	100.0	+ - × +	Business Rules	
				Smart Push Details	
	1.50		IJ	Grid Validation Messages	
				Spreadsheet Export	

5. You can quickly access and start editing your budget plan through alternate navigation. From the PBCS homepage, click on the **School Budget** icon.



Navigating and Understanding the School Budget

5. 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).

CHOOL E	BUDGET	0						10 Sa	we Refresh	Actio	ons 🕶 🗌 🔤	Complete Breviou	III <u>N</u> ex	t Clo
Scenario Y Budget F	fears E Y21 0	ntity 235 Allen, DeanES										E		<
MANAC	SE POSIT	ION/EMPLOYEE B	UDGET by WO	RK LOCAT	ON									
/ersion Working_SB													1	<
Administrative	Licensed	Support Add'I Earnings Supp	olies and Other Svcs SL	LA										
			Employee Name	Shared Position	Eff Start Date	Eff	Stop Date	Planned FTE	FS Percenta	ge Tot	tal Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	All	location Pct	Gen Fund		
ELE PRINC (S	9 MOS) - U7000	P_10026764_1 ELE PRINC (9 I	CCSD LastName,		7/24/1	9		1.00	100	00	100.00	151,057.92		
Admin Jobs		Total All Positions						1.00				151,057.92		
4 SUMM	ARY TOTA	ALS		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	GAT	ſE
	REN	AINING BUDGET TO SPEND		(107,723.3	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91	842.14
ALLOCATED F	UNDS:					_	-	-						
Target	All J	lobs	FS Amount Actual Cost I	Basis 2,355,966.6	6 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91	842.14
BUDGET SPEN	T:													

6. The **Years** cell contains the fiscal year for the budget you are working in.

Secondation Budget Years FY21 Ently D235 Allen, DeanES Ently D235 Allen, DeanES Image: Condition Secondation Secondatio	ose
MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION Vorsion Working_SB Add Earning Supplies and Other Sive SLA Administrative Usensed Supplies and Other Sive SLA End Employee Name Shared Position Eff Start Date Planned FTE FS Percentage Total Fund Src FS Amount Aver Gen Fund ELE PRINC (8 MOS) - U7000 P_10025764_1 ELE PRINC (8 MOS) CCSD LastName, 7/24/19 1.00 100.00 100.00 101,057.92 Admin Jobs Total All Positions End	3
Moning_S8 Addining Support Add Earning Supplies and Other Sives SLA Administrative Ucensed Support Add Earning Supplies and Other Sives SLA ELE PRINC (8 MOS) - U7000 P10025764_1 ELE PRINC (8 MOS) CSSD Support Assumption As	
Administrative Licensed Support AddI Earnings Supplies and Other Svice SLA Image: Support AddI Earnings Supplies and Other Svice SLA Eff Start Date Eff Stop Date Planned FTE FS Percentage Total Fund Svic FS Amount Aver Allocation Pet ELE PRINC (9 MOS) - U7000 P_10025764_1 ELE PRINC (9 MOS) CCSD LatiNamo, CCSD ST/24/10 Total MI Positions Eff Start Date Eff Stop Date Planned FTE FS Percentage Total Fund Svi Allocation Pet Gen Fund Admin Jobs Total All Positions End CCSD LatiNamo, Total MI Positions Eff Stop Date Planned FTE FS Percentage Total Fund Svi Allocation Pet Gen Fund Admin Jobs Total All Positions End Elf Stop Date Total VII 100.00 100.00 151,057.92 End	2
Image: Figure Sector	
Assumption Assumption Assumption Assumption Assumption Assumption Gen Fund Allocation Pct Gen Fund ELE PRINC (0 MOS) - U7000 P_10025764_1 ELE PRINC (0 MOS) CCSS LastName, 7/24/19 1000 10000 10000 101000 101000 101007.02 Admin Jobs Total All Positions CCSS CCSS 7/24/19 1000 10000 101000 101000 101007.02	
ELE PRINC (@ MOS) - U7000 P_10028764_1 ELE PRINC (@ MOS) CCSD LastName, 7/24/10. 1.00 100.00 100.00 151,057.92 Admin Jobs Total All Positions Image: Company interval and	
Admin Jobs Total All Positions 1.00 1151.057.92	
SUMMARY TOTALS	
Gen Fund CSR HOPE2 Magnet GenF Read by 3 GenF SB178 Title 1 J ZFS-EDIT Food GATE	
REMAINING BUDGET TO SPEND (107.723.30) 0.00 0.00 500.00 (88.206.51) 0.00 (196.428.81) 5.928.16 91.842.11	-
ALLOCATED FUNDS:	
Target All Jobs FS Amount Actual Cost Basis 2,355,966.66 352,822.04 0.00 0.00 89,000.00 37,200.00 0.00 2,834,988.70 42,886.25 91,842.1	

7. The **Entity** cell contains the **school or work location** you are currently budgeting for.

CHOOL BUD	GET 0						80 S	ive <u>R</u> efresh	Acti	ons 🛪 🛛 🖂 !	Complete Previou	Next	Close
Scenario Years Budget FY21	Entity 0235 Allien, DeanES										В		¢
MANAGE	OSITION/EMPLOYEE	BUDGET by WO	RK LOCATI	ON									
/ersion Norking_SB											+	1	¢
Administrative Lic	ensed Support Add't Earnings Se	upplies and Other Svcs SL	A										
		Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percenta	ge To	tal Fund Src	FS Amount Aver		
		Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	A	location Pct	Gen Fund		
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC	(9 MOS) CCSD LastName,		7/24/1	9		1.00	100	.00	100.00	151,057.92		
Admin Jobs	Total All Positions						1.00				151,057.92		
									2	3			
SUMMARY	TOTALS												
			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	GATE	
	REMAINING BUDGET TO SPEND		(107.723.30	0.00	0.00	0.00	500.00	(88,205,51)	0.00	(195.428.81)	5,928.16	91.8	42.14
ALLOCATED FUNDS									_				
larget	All Jobs	FS Amount Actual Cost	Basis 2,355,966.6	6 352,822.04	0.00	D.00	89,000.00	37,200.00	0.00	2.834,988.70	42,886.25	91,8	42.14
BUDGET SPENT:													

8. The **Save** button allows you to save changes you make to the budget scenario. Any unsaved changes in the grid will highlight in yellow. In some scenarios, clicking Save will update the **Summary Totals** area.

SCHOOL B	UDGET	0						1 0	we <u>R</u> efresh	Act	ions 👻 🗌	Complete Previo	un ² (1	<u>N</u> ext	Close
Scenario Ye Budget FY	ars E 21 0	intity 235 Allen, DeanES										5	<u>ا</u>	/	¢
MANAG	E POSIT	ION/EMPLOYEE E	UDGET by WO	RK LOCAT	ON										
Version Working_SB													+	/	¢
Administrative	Licensed \$	Support Add'l Earnings Su	oplies and Other Svcs SL	A											
			Employee Name	Shared Position	Eff Start Date	e Eff s	Stop Date	Planned FTE	FS Percenta	ige T	otal Fund Src	FS Amount Aver			
			Assumption	Assumption	Assumption	Ast	umption	Assumption	Gen Func	I A	Ilocation Pct	Gen Fund			
ELE PRINC (9 I	MOS) - U7000	P_10026764_1 ELE PRINC (6	CCSD MOS) LastName,		7/24/	19		1.00	100	.00	100.00	151,057.92			
Admin Jobs		Total All Positions						1.00	0			151,057.92			
.⊿ SUMMA	RY TOTA	ALS		1.55	1 5545	TRACTOR	a.e. 1				1				
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	3	GATE	
	REN	AINING BUDGET TO SPEND		(107.723.3	0.00	0.00	0.00	500.00	(88.205.51)	0.00	(195.428.81)	5,928.16		91,842	2.14
ALLOCATED FUI	NDS:												_		
Target	All J	lobs	FS Amount Actual Cost E	Basis 2,355,966.6	6 352,822.04	0.00	0.00	89,000.00	37.200.00	0.00	2,834,988,70	42,886.25		91,842	2.14
BUDGET SPENT										_					

9. 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.

CHOOL B	BUDGET	0						No Sa	we <u>R</u> efresh	Acti	lons 🔻 🗌	Complete Previou	Next	Clos
Scenario Ye Budget F1	ears E Y21 0	ntity 235 Allen, DeanES										Ξ		0
MANAG	E POSIT	ION/EMPLOYEE BU	DGET by WOR	RK LOCATI	ON									
/ersion Norking_SB												-	1	¢
Administrative	Licensed 8	Support Add'l Earnings Suppl	es and Other Svcs SLA	<u>.</u>										
			Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percenta	ge To	otal Fund Src	FS Amount Aver-		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	A	llocation Pct	Gen Fund		
ELE PRINC (9	MOS) - U7000	P_10026764_1 ELE PRINC (9 M	OS) CCSD LastName.		7/24/1	9		1.00	100	.00	100.00	151.057.92		
Admin Jobs		Total All Positions						1.00				151,057.92		
SUMMA		ALS												
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	J ZFS-EDIT	Food	GATE	ε
	REM	AINING BUDGET TO SPEND		(107,723,30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195.428.81)	5,928.16	91,8	342.14
ALLOCATED FU	INDS:			1										
larget	All J	obs F	S Amount Actual Cost B	asis 2.355,966.6	6 352.822.04	0.00	0.00	89.000.00	37,200.00	0.00	2,834,988.70	42,886.25	91.8	342.14
UDGET SPENT	T:													

10. 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.
SCHOOL BUDGET O

								and Determined						
Scenario Years Budget FY21	Entity 0235 Allen, DeanES										F	•	/	¢
MANAGE P	OSITION/EMPLOYEE	BUDGET by WO	RK LOCATI	ON										
/ersion Vorking_SB												•	/	¢
Administrative Lice	msed Support Add1 Earnings S	Supplies and Other Svcs SI	LA											
		Employee Name	Shared Position	Eff Start Date	e Effs	Stop Date	Planned FTE	FS Percentag	ge Total Fu	nd Src	FS Amount Aver			
		Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	Allocati	on Pct	Gen Fund			
ELE PRINC (9 MOS)	- U7000 P_10026764_1 ELE PRINC	(9 MOS) CCSD LastName.		7/24/1	19		1.00	100.	00	100.00	151.057.92			
Admin Jobs	Total All Positions						1.00				151,057.92			
SUMMARY	TOTALS													
			Can Fund	C88	HODES		Case E Based has 3	Conf 60170	Title 1 (71	E EDIT	Fred		ATE	
	DEMAINING DUDGET TO SDENI		(107 723 3/	0.00	noPE2	nagnet	Selir Read by 3	(88 205 51)	0.00 /105	428 811	5 028 16	G	01.842	-
ALLOCATED EUNDS-	REMAINING BODGET TO SPEN	, ,	1101,120.00	0.00	0.00	0.00	300.00	(00,200.01)	0.00 (190	(420.01)	3,920.16		01,092	-
Target	All John	ES Amount Actual Cost	Baele 2 365 066 6	6 152 822 04	0.00	0.00	89.000.00	37 200 00	0.00 2.93	098 70	42 896 25		01 8.42	14
an Ber		r o Amount Actual Cost	Lasie 2,303,900,0	v vvs.022.04	0.00	0.00	53,000.00	57.200.00	0.00 2,00	,000.70	42,000,23	0	01,042	27

11. The Administrative 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.

CHOOL	BUDGET	0						1 5	ve <u>R</u> efresh	Acti	ons 🔻 📔 🚺	Complete Provio	Mo	xt Clos
Scenario Budget	Years E FY21 0	intity 235 Allen, DeanES										8		0
MANA	AGE POSIT	ION/EMPLOYEE BU	DGET by WO	RK LOCAT	ION									
Version Working_SB													• /	0
Administrati	lve Licensed	Support Add'l Earnings Suppl	es and Other Svcs SL	A										
			Employee Name	Shared Position	Eff Start Date	Eff 8	top Date	Planned FTE	FS Percenta	ge To	tal Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	A	location Pct	Gen Fund		
ELE PRINC	C (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 M	OS) CCSD LastName,		7/24/1	9		1.00	100.	.00	100.00	151.057.92		
Admin Job	5	Total All Positions		-				1.00				151,057.92		
⊿ SUMN	MARY TOT	ALS												
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GA	TE
	REN	AINING BUDGET TO SPEND		(107,723.3	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	9	1,842.14
ALLOCATED	FUNDS:													
Target	All .	Jobs F	S Amount Actual Cost I	Basis 2,355,966.0	352,822.04	0.00	0.00	89,000.00	37,200,00	0.00	2,834,968.70	42,886.25	9	1,842.14
BUDGET SPI	ENT:													

12. 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.

SCHOOL BUD	GET ^O						16 St	we Refresh	Acti	ons 👻 🗌 📄	Complete Brevious	Next	Clos
Scenario Years Budget FY21	Entity 0235 Allen, DeanES										Ð	1	¢
MANAGE P	OSITION/EMPLOYEE	BUDGET by WOR	K LOCATI	ON									
Version Working_SB											÷	1	0
Administrative Lice	nsed Support Add'l Earnings Su	pplies and Other Svcs SLA											
		Employee Name	Shared Position	Eff Start Date	Eff St	op Date	Planned FTE	FS Percenta	age To	tal Fund Src	FS Amount Aver-		
		Assumption	Assumption	Assumption	Assu	mption	Assumption	Gen Fund	A A	location Pct	Gen Fund		
ELE PRINC (9 MOS)	- U7000 P_10026764_1 ELE PRINC (9 MOS) LastName.		7/24/1	9		1.00	100	0.00	100.00	151,057.92		
Admin Jobs	Total All Positions				-		1.00				151,057.92		
SUMMARY	TOTALS												
			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GAT	E
	REMAINING BUDGET TO SPEND		(107,723.30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,	842.14
ALLOCATED FUNDS:													
Target	All Jobs	FS Amount Actual Cost Ba	sis 2,355,966.6	8 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,	842.14
BUDGET SPENT													

13. 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.

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.

SCHOOL	BUDGET	0						S a	ve <u>R</u> efresh	Actio	ons 🔻 📔 🤤	Complete Previo	us <u>N</u> ex	t C <u>l</u> ose
Scenario Budget	Years E FY21 0	intity 1235 Allen, DeanES										Į	•	¢
MANA	GE POSIT	ION/EMPLOYEE	BUDGET by WOR	K LOCATI	ON									
Version Working_SB													+ /	0
Administrative	e Licensed	Support Add'I Earnings St	upplies and Other Svcs SLA											
			Employee Name	Shared Position	Eff Start Date	Eff S	Stop Date	Planned FTE	FS Percenta	ge Tot	tal Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	AII	location Pct	Gen Fund		
ELE PRINC ((9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS) CCSD LastName,		7/24/1	19		1.00	100.	00	100.00	151,057.92		
Admin Jobs		Total All Positions						1.00				151,057.92		
	ARY TOT	ALS												
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GA	E
	REM	AINING BUDGET TO SPEND		(107,723.30	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91	842.14 ^
ALLOCATED F	FUNDS:													
Target	All	Jobs	FS Amount Actual Cost Ba	sis 2,355,966.6	6 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91	842.14
BUDGET SPER	NT:													

- 14. The **Additional Earnings** 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; and

• Support Add-On and Extra Time.

This tab will automatically update as you enter Prep Buys and Add-On/Extra Time information. It also includes totals at the bottom (by employee type).

SCHOOL	BUDGE	т 0							ND S	ave <u>R</u> efrest	Acti	ons 🔻 📔 🗖 <u>C</u> o	mplete Previous	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES											→	/	0
MANA	GE POS	ITION/EMPLOYEE	E BUDGET by	WORK	LOCATIO	N									
Version Working_SB													÷	1	¢
Administrative	e Licensed	Support Add'l Earnings	Supplies and Other S	vcs SLA											
			Er	mp Name F	S Amount Prep B	uy FSAm	ount Add	On FS	Amount Extra						
			As	sumption	Gen Fund	G	en Fund	1	Gen Fund						_
		LICENSED ADDITIONAL EA	ARNINGS TOTAL		7,597.	02	6,081	.65	1,297.35						
PE INSTR #	ASST - N0179	P_10006407_1 PE INSTR A	SST La	CSD stName,			7,176	.67	8,052.08						
		SUPPORT ADDITIONAL EA	RNINGS TOTAL	SD stNarms			7,176	.67	8.052.08						~
	IARY TO	TALS													
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	J ZFS-EDIT	Food	GATE	
	1	REMAINING BUDGET TO SPE	ND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,8	42.14
ALLOCATED	FUNDS:														
BUDGET SPE	ENT:	All Jobs	FS Amount Actu	ai Cost Basis	3 2,355,966.66	352,822.04	0.00	0.00	89,000	37,200.00	0.00	2,834,988.70	42,886.25	91,8	42.14

- 15. 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;
 - Legal Services;
 - And more.

The service type appears on the left, while the funding source displays at the top. This is a **modifiable** tab. Totals are also displayed at the bottom of the tab.

SCHOOL	BUDO	SET O							1 6 S	eve <u>R</u> efrest	Acti	ions 👻 🗌 🖸 Co	mplete Brevious	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES											->	1	¢
MANA	GE P	OSITION/EMPLOYE	E BUDGE	T by WORK	LOCATIO	N									
Version Working_SB													÷	1	¢
Administrative	e 🗧 Lícens	ed Support Add'l Earnings	Supplies and O	Other Svcs SLA											
Period BegBalance													+	1	¢
			Gen Fund	GenF Read by 3	CSR	GenF SE	3178	GATE	Sp Ed						
Enter total	year dolla	r amount to a Funding Source:													-
511654000	Extra Du	ty Licensed													
511681000	Preparat	ion Periods		88.500.00		37.2	00.00								
5117952000	Extra Du	ty Support Staff													
5118259000	Extra Du	ty Administrator													
532000000	0 Educatio	n Services													
533000000	Employe	e Training													
534000000	Other Pr	ofessional Services													
534300000	Legal Se	rvices													
E24400000	Arabitan	hural Carulane Drafi													
	ARY -	TOTALS													
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	# ZFS-EDIT	Food	GATE	
		REMAINING BUDGET TO SPI	END		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16	91,8	42.14
ALLOCATED	FUNDS:														
Target		All Jobs	FS Amou	nt Actual Cost Basis	2,355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,8	42.14
BUDGET SPI	ENT:														

- 16. The Service Level Agreement (SLA) tab houses Service Level Agreement information. This may include:
 - ELL Placement Testing Personnel;
 - Partnership Field Trips;
 - Attendance Officers;
 - And more.

This tab also includes totals at the bottom of the tab.

SCHOOL	BUDO	BET 0							16 S	ave Refresh	Actions -	Complete	Previous	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES											+	1	٥
MANA	GE P	SITION/EMPLOYEE	BUDGET by W	ORK LO	CATIC	N									
Version Working_SB													+	1	Φ
Administrative	Licens	ed Support Addi Earnings Su	opplies and Other Svcs	ILA											
[Gen Fund												
ESD - Acade	mic Cent	ers	0.00												
ESD - Attend	dance Off	icers	4,274.42												
ESD - Correc	ctional Se	hools	6,518.66												
ESD - Subst	tance Abu	se (SAAP) Instructors	117.28												
FD - Landsca	ape Main	lenance	19.652.28												100
SSD - Gifted	and Tale	nted Education Specialists	65,284.31												
TRANSP - G	ieneral Ec	lucation Transportation	22,772.30												
Total Service	e Level A	greements	124,905.52												
⊿ SUMM	ARY 1	TOTALS			900 <u>8</u> 00				2011/2001/2011/02011/01						
				G	Sen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I a ZF	S-EDIT F	Food	GATE	
		REMAINING BUDGET TO SPEN	D	(1)	07,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00 (195,	428 81)	5,928.16	91,84	2.14
ALLOCATED P	FUNDS:														
Target		All Jobs	FS Amount Actual Co	st Basis 2,3	355,966.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00 2,834	,988.70	42,886.25	91,84	2.14
BUDGET SPEN	NT:														

17. The **Summary Totals** area contains a running total of each tab available in the School Budget form. This includes Administrative, Licensed, Support, Additional Earnings, 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.

			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food
	REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(88,205.51)	0.00	(195,428.81)	5,928.16
ALLOCATED FUNDS:											
Target	All Jobs	FS Amount Actual Cost Basis	2,355,966.66	352.822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25
BUDGET SPENT:											
Working_SB	Admin Jobs	Total Funding Amount	151,057.92							151,057.92	
	Licensed Jobs	Total Funding Amount	1,675,904.69	352,822.04			0.00	88,205.51		2,116,932.24	
		FS Amount Prep Buy	7,597.02							7,597.02	
		FS Amount Add-On	6,081.65							6,081.65	
		FS Amount Extra	1,297.35							1,297.35	
	Support Jobs	Total Funding Amount	434,978.16					0.00		434,978.16	36,958.09
		FS Amount Add-On	7,176.67							7,176.67	
		FS Amount Extra	8,052.08							8,052.08	
	All Jobs	Supplies and Other Services	46,638.90				88,500.00	37,200.00		172,338.90	
		Service Level Agreement	124,905.52							124,905.52	
TOTAL BUDGET SPENT			2,463,689.96	352,822.04			88,500.00	125,405.51		3,030,417.51	36,958.09
	REMAINING BUDGET TO SPEND		(107 723 30)	0.00	0.00	0.00	500.00	(88 205 51)	0.00	(195 428 81)	5 928 16

SCHOOL BUDGET 0

Student Teacher Ratio Validation (Elementary schools only):

The Student Teacher Ratio Validation applies to Elementary Star rated (1 to 5) schools for Grades 1, 2, and 3. The ratios are reviewed and updated for each open Budget Planning Cycle. Budget plans should not be promoted until the student teacher ratio validation check has been calculated and within the - 1.50 threshold limit.

 From the School Budget form, right-click the Entity (school) and select View Student Teacher Ratio Validation:

SCI	HOOL	BUDG	ET 🔍		
Sce Bud	enario Iget	Years FY21	Entity 0235 Allen, Dean	ES	
G	View S	udent Teach	er Ratio Validation	OYE	E BUDGET by WORK LOCATION
Ū,	Calc To	tal Position (Costs		
	Mass C	alc		▶ arnings	Supplies and Other Svcs SLA

10

2. If the ratio has not yet calculated, the Value Count row will be shaded in red/pink below to flag the validation.

Scenario Budget	Version Working_SB	Years FY21	Entity					
				ST Ratio Limit	Students	Difference		
Elementary	Star 1 or 2 Schoo	ols						
Elementary	Star 3 or 4 or 5 S	chools						
Grade1			Elem - Star 3 or 4 or 5 - Grade 1	20.00		20.00		
Grade2			Elem - Star 3 or 4 or 5 - Grade 2	20.00		20.00		
Grade3	Grade3		Elem - Star 3 or 4 or 5 - Grade 3	23.00		23.00		
			Value Count	3.00	0.00	3.00	٦	
Click SAVE	to undate the rati	05						

3. As the form indicates, click **SAVE** to update the ratios and click **OK** in the pop-up information window. The form will flag validation issues (if any):

CD Llama	Student Teach	or Pat	a Validations					-0	علي النفينين		
Scenario Budget	Version Working_SB	Years FY21	Entity	6						/	1
				ST Ratio Limit	Students	Difference					
Elementary	Star 1 or 2 Schoo	ols									
Elementary	Star 3 or 4 or 5 S	chools									
Grade1			Elem - Star 3 or 4 or 5 - Grade 1	20.00	16.60	3.40	2.8				
Grade2		- (Elem - Star 3 or 4 or 5 - Grade 2	20.00	21.80	-1.80]				
Grade3			Elem - Star 3 or 4 or 5 - Grade 3	23.00	23.60	-0.60					
			Value Count	3.00	3.00	0.00					
Click SAVE	to update the ratio	ns									

In the example above, the ratio in Grade 2 is greater than the -1.50 threshold, thus shaded in pink. To resolve this issue, the administrator will need to increase the FTE count for the given Grade level as needed (i.e. add a position) and then return to this form and re-calculate by saving the page.

4. The Student Teacher Ratio Validation form must be calculated and in compliance with the Budget Planning cycle ratios to be able to promote your budget plan for approval. Schools outside of these ratios can request additional funding by completing the Add-on Approval Form. <u>Add-on Approval Form</u>

Save <u>R</u>efresh <u>A</u>ctions

SCHOOL	BUDGET	0
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SB Home	> Student Teacl	ner Ratio) Validati	ons						
Scenario Budget	Version Working_SB	Years FY21		Entity 0235 Allen, DeanES						
					ST	Ratio Limit	Students	Difference		
Elementary St	tar 1 or 2 Schoo	ls								
Elementary St	tar 3 or 4 or 5 S	chools								
Grade1			Elem -	Star 3 or 4 or 5 - Grad	e 1	20.00	19.67	0.33		
Grade2			Elem -	Star 3 or 4 or 5 - Grad	e 2	20.00	17.50	2.50		
Grade3			Elem -	Star 3 or 4 or 5 - Grad	e 3	23.00	20.25	2.75		
			Value C	ount		3.00	3.00	0.00		
Click SAVE to	update the ratio	os								

Increasing the Headcount of an Existing Position

Increase the headcount of an existing position and use the same funding source allocation of the existing position.

Feature:

- The User cannot select a "Vacant" position since they can simply update the *Hours* (Support Professionals) or *FTE* (Licensed and Admin) of the position to increase the count and budget cost
- The Vacant position created by the Feature will use the *same funding* source allocation of the existing position
- The selected existing Position's relevant data will be copied to the same data intersection but instead of Employee 1, or Employee 2, etc. of the existing Position, the new data will be "Vacant".
 - Employee specific data such as EMPL_ID, Name, Hire Date will be blank for the Vacant position
 - Primary Pay Rate will use the Average Salary Rate for the Vacant position
- From the SB Home page navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab).



2. From the School Budget form select a position from Admin, Licensed or Support tab, then rightclick from the position cell and select Budget For...> Increase Position Headcount.

SCHOO SB Home	SB Position II	T O	insed Transf	0	Transfer Position			e Bij	Save Refre	Actions -	100	omplete	Previous Next	t Close
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	-	Mass Calc	.,					1	0	Data Ad hoc	Format
				4	Update Funding Source Allocations Edit Position Info	•		Shared Position	Eff Start Date	Eff Stop Date	Plann	IN FTE		FS Perce
				G	Go to Licensed Summary		1	Assumption	Assumption	Assumption	Assu	nption	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_10008	1381_1 KDG 1 AM/1 PM	G	View Fund Source to GL Allocations		W_325191		8/7/19			1.00	100.00	-
				G	View Fund Source Supplies		W_331715		8/7/19			1.00	100.00	
				G	Calculate Fund Source Supplies		M_516040		8/7/19			1.00	100.00)
GRADE 1 - 0	C1010	P_10008	1382_1 GRADE 1		Budget For		A New Po	sition	/19			1.00		
				R	Delete Position Info		Pren Bur	out - Licensed	/19			1.00		
									/19			1.00		
					Go to Full Screen	1	Add-On a	ind Extra - Licensed	0/20			0.00		
		New Pos	iltion 8	G	Analyze and Fix GL Allocations		Add-On a	ind Extra - Support				1.00		
GRADE 2 - 0	C1020	P_10008	1383_1 GRADE 2		Edit		Job2- Su	oport Staff	/19			1.00	100.00	,
		P_10008	1384_1 GRADE 2		Adjust		C. CTT. Su	h Teacher	/19			1.00		
		New Pos	iltion 5				un orreso	e romanitari	-			1.00		
ARL-ELEM,	2ND - C1025	P_10008	385_1 ARL-ELEM, 2ND	3	Supporting Detail		D Increase	Position Headcount	/19			1.00	100.00	

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 (means need to calculate).

SCHOOL BUDGET

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						1	٥	Data Ad hoc	Format
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce
					Assumption	Assumption	Assumption	Assumption	Assum	nption	Gen Fund	CSF
KDG 1 AM/1 P	PM1 - C1000	P_1000	8381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName. FirstName EM_325191		8/7/19			1.00	5 100.00	-
				Employee 2	CCSD LastName, FiratName EM_331715		8/7/19			1.00	100.00	E
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19			1.00	100.00	5
				Vacant			8/7/19			1.00	0 100.00) <mark>.</mark>
GRADE 1 - C	RADE 1 - C1010	P_1000	8382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19			1.00	0	
			P_10008382_1 GRAUE 1	Employee 2	CCSD LastName, FirstName EM_303745		8/7/19			1.00	0	
				Employee 3	CCSD LastName, FirstName EM_553069		8/7/19			1.00	2	
				Employee 4	CCSD LastName FirstName EM 524230		2/20/20			0.00	a	

85 B

Save Refresh Actions - Complete Previous Next Close

5. Right-click the vacant position and select **Calc Total Position Costs** to complete the calculation of the position.

SCHOO	LBUDGE	тО				R.	Transfer Position	e to	Save Refro	esh Actions -		mplete	Bravious	Next	Close
SB Home	e > SB Position Ir	nfo Detail-Lice	insed Transf			G	Calc Total Position Costs								
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES				Mass Calc				1	¢	Data Ad	hoc	F <u>o</u> rmat
						6	Update Funding Source Allocations Edit Position Info	⊁ s n	Eff Start Date	Eff Stop Date	Planne	d FTE)	FS Perce
						-03	Go to Eldensed Summary	ion	Assumption	Assumption	Assur	nption	Gen Fun	d	CSR
KDG 1 AM/1	PM1 - C1000	P_10008	381_1 KDG 1 AM/1 PM	Employee 1	*ccsp	G	View Fund Source to GL Allocations		8/7/19			1.0	0 1	00.00	(4)
				Employee 2	CCSD	Ch.	View Fund Source Supplies		8/7/19			1.0	0 1	00.00	
				Employee 3	CCSD	Q	Calculate Fund Source Supplies		8/7/19			1.0	0 1	00.00	
				Vacant			Budget For		8/7/19			1.0	0 1	00.00	-

6. Click **Save** to refresh the totals.

SCHOOI SB Home	> SB Position In	T 🕚	nsed Transf			ĥô	<u>Save</u> <u>R</u> efre	sh Actions ▼	<u> </u>	mplete	Previous N	oxt C <u>i</u> ose
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						/	¢	Data Ad ho	c F <u>o</u> rmat
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce
					Assumption	Assumption	Assumption	Assumption	Assun	nption	Gen Fund	CSF
KDG 1 AM/1	PM1 - C1000	P_100083	881_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19			1.0	0 100	00
				Employee 2	CCSD LastName, FirstName EM_331715		8/7/19			1.0	0 100	00
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19			1.0	100	00
				Vacant			8/7/19			1.0	0 100.	00

Adding and Adjusting Positions

 From the School Budget form, click Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab)



2. To add a position click the Actions menu, click Budget for..., and select A New Position

SCHOO	L BUDGET	0					ĥò	5	ave Refresh	Action		Previous	Next	Close
SB Home	> SB Position Info	Detail-Sup	port Transf						1	P	Calc Total Position	n Costs		
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES							9	Mass Calc			Format
						Employee Name	Sha Pos	red tion	Months Work Override	G	Update Funding S Edit Position Info	Source Allocation	ns 🕨	Pe
						Assumption	Assun	ption	Assumption	G	Go to Licensed St	ummary		G
FRST AID/S	FTY AST - N0090	P_100	008400_1 FRST AID/SFTY	AST	Employee 1	CCSD LastName, FirstName EM_542377			09 Months	G	View Fund Source	e to GL Allocatio	ins	4
ELEM SCHO	OL CLERK - NO14	3 P_100	08404_1 ELEM SCHOOL	CLERK	Employee 1	CCSD LastName. FirstName EM_317741			11 Months	G	View Fund Source	e Supplies		
SCH OFFICE	E MANAGE - N031	0 P_100	08411_1 SCH OFFICE M	ANAGE	Employee 1	CCSD LastName, FirstName EM_548030			11 Months	R	Calculate Fund Se	ource Supplies	. 1	
COMPUTER	TECH I - N1555	P_100	08412_1 COMPUTER TE	CHI	Employee 1		-				Dedant Ser	contraction of Protons		
		P_200	03817_1 COMPUTER TE	CHI	Employee 1	CCSD LastName, FirstName EM_1005897	A New I	osition			Budget For			
CUSTODIAN	- N8040	P_100	05637_1 CUSTODIAN		Employee 1	CCSD LastName, FirstName EM_1020044	Prep Bu	ryout - Li	icensed	G	Delete Position In	fo		
		P_100	08413_1 CUSTODIAN		Employee 1	CCSD LastName, FirstName EM_1020076	Add-On	and Ext	tra - Licensed		Go To Full Screen		Þ	
HD CUST I -	N8110	P_100	008414_1 HD CUST I		Employee 1	CCSD LastName, FirstName EM_317295	Add-On	and Ext	tra - Support	Ch	Analyze and Fix C	L Allocations		
SCHOOLAI	DE - N0100	P_100	08401_1 SCHOOL AIDE		Employee 1	CCSD LastName, FirstName EM_1004139	CL lob2 C	unnert C	the fill		Edit			
LIBRARY AN	DE - N0105	P_100	08402_1 LIBRARY AIDE		Employee 1	CCSD LastName, FirstName EM_1002838	J002- 5	upport a	Statif		alone in the second		- 9	
		P 100	08403 1 LIBRARY AIDE		Employee 1	CCSD LastName FirstName EM 1002838	CTT - S	ub Tead	her		Adjust		*	

3. You will be brought to the **SB Add Position** form. If you right-clicked on a Job to add the new position the job code you clicked from will display in the **Job Link** at the top of the form. To change the Job that you are adding, click the **Job link**.

Period Years BegBalance FY21	Scenario	Version	Table .	Transa and								
	buuget	Working_SB	0235 Allen, DeanE	Job PE INSTRA	SST - N0179					1	🔅 Data	Ad hoc Form
		Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			FS P	ercentage	
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE

4. In the **Select a Member** window that appears, locate the desired Job. (**NOTE:** These are sorted by job code rather than position title. You may use the **Search Job** bar to search for available jobs.) Once the blue checkmark appears next to the desired position, click **OK**.

Select a Member			Cance	
Job "TI INS ASST III - N0198"				
Search Job			¢	ŀ
Total All Jobs		✓ TI INS ASST III - N0198	•	
All Jobs		TI INST ASST IV - N0199		
Admin Jobs	►	ADMIN CLERK - N0200		
Licensed Jobs	►	TI FACES FAM LRN - N0205		
Support Jobs	•	OFFICE SUPERVISOR - N0206		
Police Jobs	►	SECRETARY II - N0220		

5. 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).

SCHOOL	BUDG	et							Save	<u>R</u> efresh Ac	tions 👻
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Dea	Job INES TI INS ASS	F III - N0198				[÷
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	
Support Only-	Enter #Month	ns and Hours	-								

6. Click the Actions menu and select Add Position.

SCHOOL	BUDGE	et O							*0	Save R	eiresh	Action	• • Con plete Printous	Next Close
SB Home	> SB Position	Info Detail-Su	port Transf > SB	Add Position								Q	Add Position	
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Deant	Job TI INS ASST	111 - N0198							Calc Total Position Costs Edit Position Info	Format
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date				0	View Fund Src to GL Allocations	
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen	Fund	GenF R by 3	-	Sort Analyze	► ATE
Support Only-	Enter #Month	s and Hours					-					-	New Ad Hoc Grid	

 In the NextPositionAdd window that appears, enter 1 in the Proposed number of FTE to purchase field. Ensure that the Default field is set to Vacant. Click the Launch button.

		* Enter	r proposed number of FTE to			
* Enter proposed number of FTE to purchase	1	A	100% to General Fund	s 100		
* Select FROM Job Code	"N0198"	P _O	* Default is 1 for Primary jol with EGI. Enter 2 i	f 1		
* Enter Default as VACANT	Vacant		Secondary job and no EG			

8. The SB Add Position form will highlight the added position row in red. If you entered a Support Staff 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. The Funding Source defaults to 100% in the Gen Fund. Update the Funding Source to the desired fund by typing the percentage into the appropriate funding source column. The updated cells will show in yellow to indicate that the data in the form needs to be Saved. Click Save to update and remove the yellow highlight.

SCHOOL SB Home	BUDG	ET 0	pport Transf > SB	Add Position)	Save	Refresh Act	lions 🕶 🗌 🛄 Com	elete Previos	Next Close
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, Deal	Job TI INS ASS	r III - N0198					/	O Data	Ad hoc Format
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date					
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SB178	Magnet	Title I
Support Only-	Enter #Mont	hs and Hours											-
New Position	6		Villant	10	09 Months	6.00					100.00		

9. The position added still shows in red to indicate that the position needs to be calculated. Right click on the new position row. From the menu that appears, select **Calc Total Position Costs**.

SCHOOL	BUDO	SET 0			×					Save	Refresh Act	ions 🖛	Co	molete	Previou	Next Clo	
				R	Add Position					0	Daniel Dan		- 20	- aproto	-		
SB Home	> SB Positi	on Info Detail-Su	ipport Tra	Q.	Calc Total Position Costs												
Period BegBalance	Years FY21	Scenario Budget	Ver Wo	G	Edit Position Info		0198						1	¢	Data	Ad hoc Form	at
			Emp Na	6	View Fund Src to GL Allocations Edit		ours Per / Override	Eff Start Date	Eff Stop Date								
			Assur	*#	Supporting Detail		sumption	Assumption	Assumption	Gen Fund	HOPE2	GenF	SB178		Magnet	Title I	
Support Only-	-Enter #Mor	nths and Hours		61	Change History		-							-			•
New Position	6		Vacant		Filter	,	6.0	ä					100	00			

10. If you entered a Support Staff position, you will see that the Planned FTE has auto-calculated (based upon the information entered in the Override fields) on the SB Add Position form. To return to the previous Full Screen School Budget form, click on the SB Position Info Detail link.

SCHOOL	BUDGE	T O							Save	Refresh Act	tions 🕶	<u>C</u> om	plete Previo	Mext Close
SB Home	SB Position	Info Detail-Su	oport Transf > SB	Add Position										
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0235 Allen, De	anES TI INS ASS	T III - N0198						/	O Data	Ad hoc Format
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date						
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SI	8178	Magnet	Title I
Support Only-	Enter #Months	s and Hours												-
New Position	6		Vacant	0.	56 09 Months	6.00						100.00	2	

11. Confirm the dollar amount calculated in the fund source column desired and click **Save** to aggregate this new amount in the **Summary Totals**. After you save, click the **SB Home** link to return to the School Budget form and review the updated totals in the summary.

SB Home SB Position Info I	Detail-Support Transf				3	Save	Refresh Action	ns 🕶 🗌 🗌 Comt	Provious	Next Close
Scenario Version Ye Budget Working_SB F1	ars Entity 21 0235 Allen, DeanES							/	🗘 Data Ac	thoc Forma
			intage	FS Perce	ntage	Total Fund Src	FS Amount Aver	age Cost Basis	FS Amount Actu	ual Cost Basis
			GenF SB178	Food	Sp Ed	Allocation Pct	Gen Fund	GenF SB178	Food	Sp Ed
	P_10008410_1 INSTRUCTIONAL AST	Employee 1				100.00	5,231.18			
TI INS ASST III - N0198	New Position 6	Vacant	100.00			100.00		31,779.25		
FS WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1		100.00		100.00			0.00	
SR FOOD SRVC WRKR - N5030	P_10023567_1 SR FOOD SRVC WRKR	Employee 1		100.00		100.00			38,958.09	
	FORM TOTALS		100.00	200.00	2.010	2.100.00	445.258.48	31,779.25	36,958.09	158,69

Change the Funding Source of a New Position

While Existing Position Funding cannot be edited (no update to PeopleSoft Department Budget Table), you can change the funding source of a New Vacant Position.

 From the School Budget form, click Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab)



2. Click Actions > Select Update Funding Source Allocations > select the employee type i.e. Admin New Positions, Licensed New Positions, Support New Positions, or All New Positions.

SCHOO	L BUDGE	T O					e Bô	Save Refre	sh A	ctions •	Complete Previous N	ext Close
SB Home	> SB Position In	nfo Detail-Lice	nsed Transf								ransfer Position	
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES								alc Total Position Costs	F <u>o</u> rmat
					Employee Name	1	Shared	Eff Start Date	Ef	м	lass Calc	FS Percer
						F	🖓 Adri	in New Positions		U	pdate Funding Source Allocations	
					Assumption	As	Ca Lice	nsed New Positions		Q E	dit Position Info	CSR
KDG 1 AM/1	PM1 - C1000	P_10008	381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191	1	C Sup	port New Positions		G G	io to Licensed Summary	*
				Employee 2	CCSD LastName, FirstName EM_331715			lew Positions		Ch V	lew Fund Source to GL Allocations	
				Employee 3	CCSD LastName, FirstName EM_516040			8///19	-	D v	iew Fund Source Supplies	
GRADE 1 - 0	01010	P_10008	382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323			8/7/19		- c	alculate Eurod Cource Curpline	
				Employee 2	CCSD LastName, FirstName EM_303745			8/7/19			aculate Fund Source Supplies	
				Employee 3	CCSD LastName, FirstName EM_553069			8/7/19		B	udget For	
GRADE 2 - 0	C1020	P_10008	383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411			8/7/19		D D	elete Position Info	
		P_10008	384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954			8/7/19		G	to To Full Screen	
		New Pos	ition 5	Vacant	Vacant					Ch A	nalyze and Fix GL Allocations	

3. From the **SB New Pos Edit AllJobs** form, select the vacant position to change funding source allocation, right click, and select **Edit Funding Source**:

SCHOOL BUDG	ET O	_	A						Refresh	Actions -	Con	niete Brev	Next Clos
		Q	Edit Funding Source					10	and the second second	All second second	<u>M</u> on	and a second	
SB Home > SB Position	in Info Detail	Q	Calc Total Position Costs										
Scenario Version Budget Working_	Years SB FY21		Edit	•							/	O Dat	a Ad hoc F <u>o</u> rm
		*1	Adjust Supporting Detail	,	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	Total Comp Exp	FS Percentage	То	tal Fund Src	FS Amount Average Cost Basis
		Cu	Charge History		Assumption	Assumption	Assumption	Assumption		GenF SB178	Allo	cation Pct	GenF SB178
TI INS ASST III - N0198	New Positi	1	Lock/Unlock Cells	1	÷			0.56	31,779,25	100.0	00	100.00	31,779.25
Licensed Jobs	Total New		Filter	*				1.00	88,205.51				88,205.51
			Sort										
		١	Analyze										

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

SCHOO	SB Position	T O	rt Transf	> SB New Pos Edit AlU	lobs > SB Edit Po	sition FSAlloc			1	ave <u>R</u> efresh	Actions *	0	complete Bro	vious <u>N</u> e	xt Cjose
Scenario Budget	Years FY21	Entity 0235 Allen, D	BanES	lob FI INS ASST III - N0198	Position New Position 6	Employee Vacant	/					1	0	ta Ad ho	F <u>ormat</u>
	Employ Name	ee a			FS Percen	tage			Pay Base	Pay Cycle	Primary Pa Rate	У	District Average Rate	Budget Dat	Start B
	Assump	tion Gen I	und	GenF Read	CSR	GenF SB178	GATE	Sp Ed	Assumption	Assumption	Assumptio	n	Assumption	Assum	ption A
Strategic Bu	dget Vacant		100.00						Hourly	Biweekly		15.86	15	86 7/1/20	-

5. Click the **SB Position Info Detail-Support** link. Confirm that the new position is now budgeted to the updated funding source and click **Save**.

SB Home	> SB Position Info	Detail-Su	oport Transf									
Scenario Budget	Version 1 Working_SB F	ears Y21	Entity 0235 Allen, DeanES						/	1	Data	Ad hoc Form
					urs Per Override	Eff Start Date	Eff Stop Date	FS Percentage	FS Perce	ntage	Total Fund Src	FS Amount Average Cost Basis
					umption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund
INSTRUCT	ONAL AST - N0190	P_10	008409_1 INSTRUCTIONAL AST	Employee 1	5.00	12/22/19		1		100.00	100.00	
		P_10	008410_1 INSTRUCTIONAL AST	Employee 1	1.50	12/22/19		100.00			100.50	5,231,18
TI INS ASST	III - N0198	New I	Position 6	Vacant	6.00			100.00			100.00	31,779.25
FS WKR FL	DATER - N5010	P_10	008415_1 FS WKR FLOATER	Employee 1	0.00	12/22/19			100.00		100.00	
SR FOOD S	RVC WRKR - N503	0 P_10	023567_1 SR FOOD SRVC WRKR	Employee 1	5.50	12/22/19			100.00		100.00	
		FORM	I TOTALS			1111-07			253.90	500 20	27646	477,037,73

6. You can navigate back to your School Budget form by clicking the **SB Home** link and review your updated **Summary Totals**.

Removing a Position

 From the SB Home page navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab).



2. In the list of positions that appears, locate the position that you wish to remove. If the position is **Administrative** or **Licensed**, change the **Planned FTE** field to 0 and click **Save**.

сноо	L BUDGE	T O				* 80	Save Refre	esh Actions +		plete	Elevious Next	Close
SB Home	> SB Position Ir	nfo Detail-Lice	ansed Transf				T					
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						1	¢	Data Ad hoc	Format
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned	FTE		FS Percei
					Assumption	Assumption	Assumption	Assumption	Assump	tion	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_10008	3381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191		8/7/19			0.00	100	
				Employee 2	CCSD LastName, FirstName EM_331715	-	8/7/19			1.00	100.00	
				Employee 3	CCSD LastName, FirstName EM_516040	-	8/7/19			1.00	100.00	
GRADE 1 - C	01010	P_10008	3382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323	-	8/7/19			1.00		
				Employee 2	CCSD LastName, FirstName EM_303745	-	8/7/19			1.00		
				Employee 3	CCSD LastName, FirstName EM_553069	-	8/7/19			1.00		
GRADE 2 - C	01020	P_10008	3383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411		8/7/19			1.00	100.00	
		P_10008	3384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954	-	8/7/19			1.00		

3. Once the form has saved, the position row will highlight in yellow. **Right-click** on the position number, then select **Calc Total Position Costs**.

зсноо	BUDGE	то					×	1	Save Refre	sh Actions -	Co	nplete	Next	Close
						Q	Transfer Position	ľ	10 C					
SB Home	> SB Position In	nfo Detail-Lice	nsed Transf			Q.	Calc Total Position Costs							
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES				Mass Calc	×			1	¢	Data Ad hoc	Format
						9	Update Funding Source Allocations Edit Position Info	* 	Eff Start Date	Eff Stop Date	Planne	d FTE		FS Perce
						40	Of the Licensed Summary	pm	Assumption	Assumption	Assum	ption	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_10008	381_1 KDG 1 AM/1 PM	Employee 1	CCSD	6	View Fund Source to GL Allocations		8/7/19			0.00	100	+
				Employee 2	CCSD	G	View Fund Source Supplies		8/7/19			1.00	100.00	
				Employee 3	CCSD	G	Calculate Fund Source Supplies		B/7/19			1.00	100.00	
GRADE 1 - C	01010	P_10008	382_1 GRADE 1	Employee 1	CCSD		Budget For		8/7/19			1.00		

4. Note that the dollar amount coming from the original funding source (for example, the General Fund) now reflects **0.00**. Click **Save** to aggregate the new total in the Summary Totals. Click on the **SB Home** link to review updated Summay Totals.

SCHOOL SB Home	SB Position I	T 🛈	ensed Transf					Sav.	Refresh	Actions *	02	mplete Previous	<u>N</u> ext Close
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES								/	O Data	Ad hoc Format
					F	S Percentage		FS Perc	entage	Total Fun Src	d	FS Amou	nt Average Cost Ba
					Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocation	Pct	Gen Fund	CSR
KDG 1 AM/1	PM1 - C1000	P_1000	8381_1 KDG 1 AM/1 PM	Employee 1	100					1	00.00	0.00	-
				Employee 2	100.00					1	00.00	88,205.51	-
				Employee 3	100.00					1	00.00	88,205.51	
GRADE 1 - C	1010	P_1000	8382_1 GRADE 1	Employee 1		100.00				- 1	00.00		88,205.51
				Employee 2		100.00				1	00.00		88.205.51
				Employee 3		100.00				1	00.00		88,205.51
GRADE 2 - C	1020	P_1000	8383_1 GRADE 2	Employee 1	100.00					1	00.00	88,205.51	
		P_1000	8384_1 GRADE 2	Employee 1		100.00				1	00.00		88,205.51

 If you are removing a Support position, From the School Budget form, navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support).

	Save Save	Refresh Action	s - Cios	se
		G	View Fund Source to GL Allocations	
		G	View Fund Source Supplies	
		G	Calculate Pund Source Supplies	
			Budget For	Þ
	🕞 Admin		Go To Full Screen	Þ
	🕞 Licensed 🖌	Q	Update Admin, Licensed and Support subtotals	
te	Gupport Support		Filter	Þ
n	💁 Supplies Other Ser	vices 📢	Analyze	
	1.00	100.0 🔌	New Ad Hoc Grid	
	0.50	100.0	Show Reasons for Read-Only Cells	
	0.00	100.0 	Predictive Planning	
	0.00	100.0	Business Rules	
			Smart Push Details	
	1.50	115	Grid Validation Messages	
			Spreadsheet Export	
			Open in Smart View	

 Locate the position you wish to remove in the employee grid. Change the Hours Per Day Override field to 0 and Click Save (Please note that you do not need to update the Months Work Override field).

as Home > as Posicion into	Detail-Support Transf								
Scenario Version Y Budget Working_SB F	21 0235 Alien, DeanES					/	0 •	ta Ad hoc Fo	ormat
			Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	P
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	(
SPTA II - N0162	P 10008406 1 SPTA II	Employee 1	CCSD LastName FirstName EM 10049345		09 Months	0.00	1/19/20		
		Employee 2	CCSD LastName, FirstName EM_10090528		09 Months	6.00	12/22/19		
		Employee 3	CCSD LastName, FirstName EM_319789		09 Months	6.00	12/22/19		
		Employee 4	CCSD LastName, FirstName EM_540930		09 Months	6.00	12/22/19		
PE INSTR ASST - N0179	P_10008407_1 PE INSTR ASST	Employee 1	CCSD LastName, FirstName EM_10022402		09 Months	0.50	12/22/19		
	P_10008408_1 PE INSTR ASST	Employee 1	CCSD LastName, FirstName EM_10022402		09 Months	6.00	12/22/19		1.
NSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473		09 Months	5.00	12/22/19		
	P_10008410_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473		09 Months	1.50	12/22/19		
FI INS ASST III - <mark>N0</mark> 198	New Position 6	Vacant	Vacant		09 Months	6.00			
	D 10000415 1 EC WARD EL OATED	Employee 1	CCSD LastName FirstName EM 10049345		09 Months	0.00	12/22/19		
S WKR FLOATER - N5010	P_10000413_1F3 WAAFECONTEN	an project i							

- 7. Once the form has saved, the position row will highlight in yellow. **Right-click** on the position number, then select **Calc Total Position Costs**.
- 8. Click **Save** to aggregate new total in the Summary Totals. Click on the **SB Home** link to review updated Summay Totals.

SCHOOI SB Home	BUDGE	T 🛈	pport Transf					Si Si	ve <u>R</u> efresh	Actions 👻	<u>مي</u> [mplete	rovious <u>N</u> ext	Close
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES								1	0	Data Ad hoc	Format
					op Date	FS Percentage	FS Per	centage	Total Fund Src	FS Amount Average Cost Basis		FS Amount	Actual Cost Bas	s
					amption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund		Food	Sp Ed	
		P_20	003817_1 COMPUTER TECH I	Employee 1		100.00			100.00	34,369.4	40			^
CUSTODIAN	- N8040	P_10	005637_1 CUSTODIAN	Employee 1		100.00			100.00	45,833.0	62			
		P_10	008413_1 CUSTODIAN	Employee 1		100.00			100.00	45,833.0	62			
HD CUST I -	N8110	P_10	008414_1 HD CUST I	Employee 1		100.00			100.00	63,512.3	33			
SCHOOL AIL	DE - N0100	P_10	008401_1 SCHOOL AIDE	Employee 1		100.00			100.00	33,005.3	38			
LIBRARY AIL	DE - N0105	P_10	008402_1 LIBRARY AIDE	Employee 1		100.00			100.00	8,846.2	28			
		P_10	008403_1 LIBRARY AIDE	Employee 1		100.00			100.00	21,992.4	43			
SPTA II - NO	162	P_10	008406_1 SPTA II	Employee 1	1			100.00	100.00				-	0.00

Transfer to Existing Position

 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 BUDGE	fo Detail-Ucensed Transf									Save	Refresh Ac	tions +	Complete Pressour	Next Close	
Scenario Version Budget Working_SB	Years Entry FY21 0235 Alien, DeanES											1	O Rela	Ad hoc Format	
			Employee Name	Shared Position	Eff Start Dote	Eff Stop Date	Planned FTE		FS Percentage		FS Per	centage	Total Fund Src	FS Amou	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Genf SB178	Gen GATE	So Ed	Allocation Pct	Oen Fund	
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		1.00		100.00				100.00	*	Transfer Fro
		Employee 2	CCSD LastName, FirstName EM_303745		8/7/19		1.00	1	100.00	-			100.00		1st Grade C
		Employee 3	CCSD LastName, FirstName EM_553069		8/7/19		1.00		100.00				100.00		Position 100
		Employee 4	CCSD LastName. FirstName EM_524230		2/20/20		1.00		100.00				100.00		
	New Position 8	Vacant	Vacant				1.00		100.00				100.00		
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411		8/7/19		1.00	100.00					100.00	88,205 ±	
	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954		8/7/19		1.00		100.00				100.00		
	New Position 5	Vacant	Vacant				1.00			100.00			100.00		
ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Employee 1	CCSD LastName, FirstName EM_10064404	-	8/7/19		1.00	100.00					100.00	.88,205.5	100
GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305	1	7/1/20		1.00	100.00					100.00	88.205.t	Transfer To
		Employee 2	CCSD LastName, FirstName EN_502600		8/7/19		1.00	100.00					100.00	88,205.5	General Fur
		Employee 3	CCSD LastName, FirstName EM_524230		2/20/20		1.00	100.00					100.00	88.205.5	10008386
GRADE 4 - C1040	P_10008387_1 GRADE 4	Employee 1	CCSD LastName, FirstName EM_10109611		7/1/20		1.00	100.00					100.00	88,205.5	
		Employee 2	CCSD LastName, FirstName EM_316074		8/7/19		1.00	100 00					100.00	88,205.5	

 Highlight the employee row > Right Click > Select Transfer Position: SCHOOL BUDGET I

SB Home	> SB Position I	nfo Detail-Licer	ised Transf											2
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES											
						Employee Name		Shared	Eff Start Date	Eff Stop Date	Planned FTE		FS Percentage	
					G	Transfer Position		1 03001						
					C	Calc Total Position Costs		Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17
GRADE 1 - C	:1010	P_100083	182_1 GRADE 1	Employee 1		Mass Calc	Þ		8/7/19		1.00		100.00	
				Employee 2					8/7/19		1.00		100.00	
				Employee 3		Update Funding Source Allocations	Þ		8/7/19		1.00		100.00	
				Employee 4	G	Edit Position Info			2/20/20		1.00		100.00	
		New Posit	ion 8	Vacant	G	Go to Licensed Summary					1.00		100.00	
GRADE 2 - C	1020	P_100083	183_1 GRADE 2	Employee 1	C.	View Fund Source to GL Allocations			8/7/19		1.00	100.00		
		P_100083	184_1 GRADE 2	Employee 1	-	View Fund Source Supplies			8/7/19		1.00		100.00	
		New Posit	tion 5	Vacant		view runu oburce ouppiles					1.00			10
ARL-ELEM,	2ND - C1025	P_100083	85_1 ARL-ELEM, 2ND	Employee 1	<u>s</u>	Calculate Fund Source Supplies			8/7/19		1.00	100.00		
GRADE 3 - C	1030	P_100083	86_1 GRADE 3	Employee 1		Budget For	►		7/1/20		1.00	100.00		
				Employee 2	Ū.	Delete Position Info			8/7/19		1.00	100.00		
				Employee 3		Go To Full Screen	►		2/20/20		1.00	100.00		
GRADE 4 - C	1040	P_100083	87_1 GRADE 4	Employee 1	-	Edit Desition Datail			7/1/20		1.00	100.00		
				Employee 2		Euit Fusition Deidli			8/7/19		1.00	100.00		
				Vacant	G	Analyze and Fix GL Allocations			7/1/20		1.00	100.00		
						E 43								

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.

Launch Confirmation Message	×
Please confirm you have Job, Position and Employee# to the transfer To and From. In the To Employee# field type ti number in line i.e. the position you are transferring to has employee 1 and 2, enter employee 3. TIP: Use Snipping T needed	make he next ool if
ОКСа	ncel

5. 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"	te.
* Select FROM Job Code	"C1010"	₽
* Select FROM Position	"P_10008382_1"	₽

	10	Launch	<u>C</u> ancel
* Select TO Employee	"Employee 4"		₽q _
* Select TO Position	"P_10008386_1"		₽ ₽ _
* Select TO JOB	"C1030"		₽ ₽ _

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 4):

SB Home > SB Positi	on Info Detail-Licens	ed Transf													
Scenario Version Budget Working_	Years SB FY21	Entity 0235 Allen, DeanES											1	Data	Ad hoc
				Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	I	S Percentage		FS Per	centage	Total Fi Src
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocatio
KDG 1 AM/1 PM1 - C100	P_1000838	1_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191			8/7/19		1.00	100.00					
			Employee 2	CCSD LastName, FirstName EM_331715			8/7/19		1.00	100.00					
			Employee 3	CCSD LastName, FirstName EM_516040			8/7/19		1.00	100.00					
			Vacant				8/7/19		1.00	100.00					
GRADE 1 - C1010	P_1000838	2_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323	P_10008382_1		8/7/19		0.00		100.00				
			Employee 2	CCSD LastName, FirstName EM_303745			8/7/19		1.00		100.00				
			Employee 3	CCSD LastName, FirstName EM_553069	\wedge		8/7/19		1.00		100.00				
			Employee 4	CCSD LastName, FirstName EM_524230			2/20/20		1.00		100.00				
	New Positio	on 8	Vacant	Vacant					1.00		100.00				
GRADE 2 - C1020	P_1000838	3_1 GRADE 2	Employee 1	CCSD LastName, FirstName Etr_312411			8/7/19		1.00	100.00					
	P_1000838	4_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954			8/7/19		1.00		100.00				
	New Positio	on 5	Vacant	Vacant					1.00			100.00			
ARL-ELEM, 2ND - C102	P_1000838	5_1 ARL-ELEM, 2ND	Employee 1	CCSD LastName, FirstName EM_10084404			8/7/19		1.00	100.00					
GRADE 3 - C1030	P_1000838	6_1 GRADE 3	Employee 1	CCSD castName, FirstName EM_10034305			7/1/20		1.00	100.00					
			Employee 2	CSD LastName, FirstName EM_502600			8/7/19		1.00	100.00					
			Employee 3	CCSD LastName, FirstName EM_524230			2/20/20		1.00	100.00					
			Employee 4	CCSD LastName, FirstName EM_10014323	P_10008382_1		8/7/19		1.00	100.00					

Note: the <u>Assigned Position Number</u> fields will display the source position # for both the source and <u>target</u> rows.

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

SCHOOL BUDGE	T O)	5ave	Betresh Ac	tions 👻 🗌 🛄 😭	mplete fmm	Next
S8 Home > S8 Position I	nto Detail-Licensed Transf														
Scenario Version Budget Working_SB	Years Entity FY21 0235 Allen, D	anES											/	0 200	Adhioc
				Employee Name	Assigned Position	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	9	S Percentage		FS Per	centage	Total Fi
			Q	Transfer Position	Number										
			R	Calc Total Position Costs	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocation
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM	1 PM Employee 1	-		10		8/7/19		1.00	100.00					
		Employee 2		Mass cale	2		8/7/19		1.00	100.00					
		Employee 3		Update Funding Source Allocations			8/7/19		1.00	100.00					
		Vacant	Q	Edit Position Info		1	8/7/19		1.00	100.00					1 3
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	Q	Go to Licensed Summary	10008382_1		8/7/19		0.00		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:

	to Detail-Doensed Transi														
Scenario Version Budget Working_SB	Years Entity FY21 0235 Allen, DeanES													10	Data Adhoc Fr
		Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			FS Percentage		Total Fund Src	FS Amount Average Cost Basis		
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB178	Gen GATE	Sp Ed	Allocation Pct	Gen Fund	CSR Ger
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1			2/7/19		1.00	100.00					100.00	88,205.51	
		Employee 2			8/7/19		1.00	100.00					100.00	88,205.51	
		Employee 3			8/7/19		1.00	100.00					100.00	88,205.51	
	-	Vacant			8/7/19		1.00	100.00					100.00	88.205.51	
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	P_10008382_1		8/7/19		0.00		100.00				100.00		0.00
		Employee 2		1	8/7/19		1.00		100.00	1		1	100.00		88,205.51
		Employee 3			8/7/19		1.00		100.00				100.00		88,205.51
		Employee 4			2/20/20		1.00		100.00				100.00		88,205.51
	New Position 8	Vacant					1.00		100.00				100.00		88,205.51
GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1			8/7/19		1.00	100.00					100.00	88,205.51	
	P_10008384_1 GRADE 2	Employee 1			8/7/19		1.00		100.00				100.00		88,205.51
	New Position 5	Vacant					1.00			100.00			100.00		
ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Employee 1			8/7/19		1.00	100.00					100.00	88,205.51	
GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1			7/1/20		1.00	100.00					100.00	88.205.51	
		Employee 2			8/7/19		1.00	100.00					100.00	88,205.51	
		Employee 3			2/20/20		1.00	100.00					100.00	88,205.51	
		Employee 4	P_10008382_1		8/7/19		1.00	100.00					100.00	88,205.51	

Transfer to New Vacant Position

 From the SB Home page navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab)



 Right click a position row you wish to insert a new position and select Budget For > A New Position

SCHOOL BUDG	ET												0		4	Save	Betresh	Actions ¥
Scenario Years Budget FY21	Ently 0290 Damell, Marshall C.ES																	
MANAGE PO	SITION/EMPLOYED	EBI	JDGET by	WORK LO	CATI	ON												
Version Working_S8																		
Administrative License	Support Addi Earnings	Suppl	es and Other Svi	a sla														
			Employee Name Shared Position E		Eff S	lart Date	Eff Stop Date	Planned FTE			FSF	hercentage		FS Per	centage	,	otal Fund Sro	FS Amo
			Assumption	Assumption	Ass	mption	Assumption	Assumption	Ge	n Fund	CSR	GenF Read by 3	GenF 58178	Gen GATE	50	Ed J	docation Pct	Gen F
KDG 1 AM1 PM1 - C1000	P_10010117_1 KDG 1 AM/1	PM				8/7/19		1.00	0	100.00							100.0	88.
	P_10010117_1 KDG 1 AM1	PM				8/7/19		0.00	0	100.00							100.0	5
	P_10010117_1 KDG 1 AM1	PM				6/7/19		1.00	0	100.00			0.00				100.0	80.
	P_10010117_1 KDG 1 AM*	-				8/7/19		1.00	0	100.00							100.0	88.
GRADE 1 - C1010	P_10010118_1 GRADE 1	G	Calc Total Po	# Position Costs		8/7/19		1.00	0	71.14	14 20.01	00					100.0	62.
	P_10010118_1 GRADE 1		Mass Calc			\$7/19		1.00	0	100	100	00					100.0	10
	P_10010118_1 GRADE 1	0	Edt Pestion	unlong source Allocations		\$/7/19		0.00	100 100	100.00							100.0	2
	P 10010119 1 GRADE 1	9	3 Oo to License	1 Summary		6/7/19		0.00	0	_	500.00	00	_		_		100.0	
SUMMARY T	OTALS	9 9	Vew Fund So Vew Fund So	ource to GL Allocatio	ons													
	REMAINING BUDGET TO SPI		Budget For			CSR Ch AN	NOPE2 Ma	gnet GenF Rea	0.98	GenF \$8178	0.00	2FS-EDIT For 1.01	0.00 (88	205.51)	0.00	4 25'5-NO	5.51)	
ALLOCATED FUNDS:		0	Delete Positio	on linto		Ch Pres	Buildul - Licensed	_										
Target	All Jobs		Go To Full Sc	zeen		Add-On and Extra - Li		ensed 89	000 00	100,800.00	0.00 3,4	451,067.41 45	741.83	815	835.86	861,57	8.69	
DUDGET SDENT-						-												
3. <u>Confirm the Job selected is correct</u>, then click **Actions > Add Position**

сноо	BUDGE	т												0	* 8.j	Save Be	tresit [Action	• Complete Previo
SB Home Period BegBalance	SB Add Posit Years FY21 Employ Name	Scenario Budget ee Pl	Versic Worki anned FTE	n ng_SB Mar C	Entity 0200 Dame nths Work Sverride	I, Marshall C ES Hours Per Day Override	Job KDG 1 AM/1 PM/ Eff Start Date	Eff Stop Date										9 9 9 9	Calc Total Position Costa Edit Position Info View Fund Src to GL Allocatio
There are no	Assumpt	tion A data for thi	ssumption	As	sumption	Assumption	Assumption	Assumption	Gen Fund	HOPE2	GenF SB178	Magnet	Title I	21st Century	Adult Ed	Adult Correct	Bon	() ()	Analyze New Ad Hoc Grid

4. Follow the same procedure when adding a new position and Launch:

NextPositionAdd				1	6	Launch	<u>C</u> ancel
* Enter proposed number of FTE to purchase	1		* New Position Default is 100% to General Fund	100			
* Select FROM Job Code	"C1000"	4	* Default is 1 for Primary job with EGI. Enter 2 if Secondary job and no EGI.	1			
* Enter Default as VACANT	Vacant						

5. Enter the desired <u>funding source allocation</u>, then click **Save:**

SCHOOL	BUDGE	ET 0	enced Transf > SE	Add Position					Save	Refresh Action	s ▼	Dete <u>Previous</u>	<u>N</u> ext Clos
Period BegBalance	Years FY21	Scenario Budget	Version Working_SB	Entity 0280 Darnell, N	Job tarshall C.ES KD0	3 1 AM/1 PM1 - C10	000				/	🗘 Data	Ad hoc Forma
			Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date			FS Perc	entage	
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Support Only-	Enter #Months	s and Hours		-					4				-
New Position	5		Mapant	10	0				50.0		50.00		

6. Highlight the New position row > right-click > **Calc Total Position Costs**:

SCHOOL BUDGE		^]				Save	Refresh Action	ns 🔻 🗌 <u>C</u> omp	ete Previous	<u>N</u> ext Cl
	G.	Add Position										
SB Home > SB Position In	G	Calc Total Position Costs										
Period Years BegBalance FY21	G	Edit Position Info		all C.ES	Job KDG 1 AM/1 PM1 - C10	000				/	Data Ar	d hoc F <u>o</u> rr
	C.	View Fund Src to GL Allocations		onths Wor	rk Hours Per	Eff Start Date	Eff Stop Date			FS Perc	entage	
		Edit	Þ	Override	Day Override							
		Adjust	Þ									
	12	Supporting Detail		.ssumption	n Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Support Only-Enter #Months a	01	Change History										
	Ô	Lock/Unlock Cells										
New Position 5		Filter	•					50.00		50.00		
New Position 5		Filter	•					50.00		50.00		

7. Return to the previous *SB Position Info Detail-Licensed Transf* form and note the new position added.

Review the licensed page to identify the employee you want to transfer as well as the new position details to transfer that employee to:

10 Hone - 10 Postor III	b Ortal-Loanset Transf							(A)		- pro	Deser Tree		Decree	Bee clear	
Scenario Version Budget Warking_58	Nam Ently FY21 G200 Genet, Marylad G	15										1	O Deta	Ad loc Fgmat	
			Employee Name	Shared Pesition	Et Start Date	Eff Shop Date	Planced FTE		PS Pwp	rtage		FS Perc	artaga	Total Fund SH	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Genif Read By 3	Ger# 58175	Gen GATE	10 E d	Allocation Pct	
KEIG 1 AM1 PM1 - C1000	P_10010117_1 KDG 1 AM1 PM	Employee 1			87719		1.00	100.00						10 -	
		Employee 2			87/19		0.00	100.00						10	
		Employee 3			8/7/19		1.00	100.00			1.00			10	Transfer From General
		Employee 4	Contraction of the second s		67/19		1.00	100 30			1.			10	Funded Position 1001011
	Nev Postor 2	Vecent	Vicent				1.00	50.00			50.00			14	
GRADE 1 - C1010	P_10010110_1 URBLE 1	17001001			B		1.00	71.54			-		_	-	Transfer To 50% Genifund
		Employee 2			6/7/19		1.00		100.00					10	50% 58178 funded positio
		Employee 3			87/19		0.00	100.00						- 10	
	P_10010118_1 ORADE 1	Employee 1			8/7/19		0.00		100.00						
		Employee 2			8/7/19		1.00		100.00					- 10	
ORADE 2 - C1020	P_10010130_1 GRADE 2	Employee 1			20119		1.00	100.00							
		Employee 2			87/19		1.00	100.00							
	P_10010121_1 GRADE 2	Employee 1			8/7/19		1.00		100.00					10	
		Employee 2			8/7/19		1.00		100.00					10	

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

SCHOOL BUDGET	r								0		<u>S</u> ave	Refresh Action	is ▼ <u>C</u> om	plete Previou	s <u>N</u> ext
SB Home > SB Position In	fo Detail-Licensed Transf														
Scenario Version Budget Working_SB	Years Entity FY21 0280 Darnell, Marshall C.ES												/	Data	Ad hoc
				Employee Name	Shared	Eff Start Date	Eff Stop Date	Planned FTE		FS Perc	entage		FS Per	centage	Total I
			G	Transfer Position	Position										51
			Q	Calc Total Position Costs	Assumptio	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	Allocati
KDG 1 AM/1 PM1 - C1000	P_10010117_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		0.00	100.00						
		Employee 3	G	Edit Position Info		8/7/19		1.00	100.00			0.00			
		Employee 4	G	Go to Licensed Summary		8/7/19		1.00	100.00						
	New Position 2	Vacant	G	View Fund Source to GL Allocations				1.00	50.00			50.00			
GRADE 1 - C1010	P_10010118_1 GRADE 1	Employee 1	-	View Fund Source Sunnlies		8/7/19		1.00	71.14	28.86					
		Employee 2	_			8/7/19		1.00		100.00					
		Employee 3		Calculate Fund Source Supplies		8/7/19		0.00	100.00						
	P_10010119_1 GRADE 1	Employee 1		Budget For	•	8/7/19		0.00		100.00					
		Employee 2	G	Delete Position Info		8/7/19		1.00		100.00					
GRADE 2 - C1020	P_10010120_1 GRADE 2	Employee 1		Go To Full Screen	F	7/31/19		1.00	100.00						
		Employee 2	0	Edit Position Detail		8/7/19		1.00	100.00						
	P_10010121_1 GRADE 2	Employee 1	-	E de l'Orient d'orient		8/7/19		1.00		100.00					
		Employee 2		Eat	P	8/7/19		1.00		100.00					

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



10. 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 previous step. Click **Launch** to complete the transfer process:

Transfer Position

* Select FROM Employee	"Employee 4"	R.
* Select FROM Job Code	"C1000"	₽
* Select FROM Position	"P_10010117_1"	₽ _C

	∎õ	<u>L</u> aunch	<u>C</u> ancel
* Select TO Employee	"Employee <mark> 2</mark> "		7 0
* Select TO Position	"New Position 2"		
* Select TO JOB	"C1000"		R _C

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".

11. When the process is done, you will see the pop up window below. It is not an ERROR, it is instructions of the next steps to take (Refresh, Review, Adjust, and Calculate). Click **OK** to continue:

Г	Desition	
÷	S Error	×
Ŀ	Employee transfer completed [Vacant]. Please click Refresh, and review and adjust VACANT FTE as needed and Ca	Iculate the form.
E		OK
E:		UN
PAIC	D,AMANDA LEE EM_544838 8/7/19 1.00	100.00

12. Click Refresh:

SCHOOL	BUDGE	т								0		di See	Batheah Action		nglata 2	Sevious	Seat
S8 Home -	SE Poster I	to Detail-Licer	sed Transf														
Scenario Budget	Version Working_58	Years FY21	Ently 6250 Damet, Marshall C.E.	s										1	0	Date	Adhec
					Employee Name	Shared Position	Eff Start Date	Eff Step Date	Parvel FTE		15 Pa	rcentage		FSP	rcentage		Total S
					Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Genif Read by 3	Genif S8178	Own GATE	54	Er	Alocat
KDG 1 AM1 PI	W1 - C1000	P_10010	117_1 KDG 1 AM1 PM	Employee 1			8/7/19		1.00	100.00							
				Employee 2			\$17.19		0.00	100.00							
				Employee 3			6/7/19		1.00	100.00			0.00				
				Employee 4			6/7/19		1.00	100.00							
		New Pos	ition 2	Vacant					1.00	50.00			50.00				

The transferred employee rows will be displayed in yellow:

SCHOOL BUDGET	r							0	4	Save	Saltesh Act	ions +	Pate Dress	in Bed	Cjose
58 Home - 58 Position Inf	to Detail Coansed Transf														
Scenario Version Budget Working_58	Years Entry PY21 6200 Dennet, Marshall C	. 65										1	O Dete	Adhor	Fpmat
			Employee Name	Assigned Position Number	Shared Position	Eff Start Date	E# Stop Date	Parried FTE		rs P	ercentage		PS.	Percentage	
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	Gen# 58178	Gen GATE		p Ed
KDG 1 AMP1 PM1 - C1000	P_10010117_1 KD0 1.4M/1 PM	Employee 1			-	87/19		1.00	100.00						-
		Employee 2				8/719		8.00	100.00						- 1
		Employee 3				8719		1.00	100.00			0.00			
		Employee 4		P_10010117_1		8/7/19		0.00	100.00						
	New Position 2	Employee 2		P_10010117_5		6/719		1.00	53.90			50.00			

13. Calculate each row: **right-click** the highlighted row > **select Calc Total Position Costs**:

SCHOOL	BUDGE	т									0	N ₀	Save	Refresh Activ	ons ▼ Con
S8 Home	> SB Position In	fo Detail-Licer	nsed Transf												
Scenario Budget	Version Working_SB	Years FY21	Entity 0200 Damell, Marshall C ES												1
						Employee Name	Assigned Position	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS P	ircentage	
					G	Transfer Position	Number								
					Q	Calc Total Position Costs	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178
KDG 1 AM/1	PM1 - C1000	P 1001	117 1 KDG 1 AM/1 PM	Employee 1	_	Mass Calc	+	1	8/7/19		1.00	100.00			
		0.5700	-	Employee 2		Update Funding Source Allocations			8/7/19		0.00	100.00			
				Employee 3	G	Edit Position Info		-	8/7/19		1,00	100.00			0.0
				Employee 4	Ch.	Go to Licensed Summary	10010117_1		8/7/19		0.00	100.00			
		New Po	ultion 2	Employee 2	0	View Fund Source to GL Allocations	_10010117_1		8/7/19		1.00	50.00			50.0

14. 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	BUDGE	т								0	4	Save	Befresh Activ	005 ¥	Comp	iete
S8 Home	- SB Position In	to Detail-Licen	sed Transf													
Scenario Budget	Version Working_SB	Years FY21	Entry 0200 Damel, Marshall C E	s											/	¢
					Employee Name	Assigned Position Number	Shared Position	Eff Start Dute	Eff Stop Date	Planned FTE		FSP	rcentage			
					Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Gen# Read by 3	Oen# 5	8178	1
KDG 1 AM1 P	PM1 - C1000	P_10010	117_1 KDG 1 AM/1 PM	Employee 1				8/7/19		1.00	100.00					
				Employee 2				8/7/19		0.00	100.00					
				Employee 3				8/7/19		1.00	100.00				0.00	
				Employee 4		P_10010117_1		8/7/19		0.00	100.00					
		New Pot	ition 2	Employee 2		P_10010117_1		8/7/19		1.00	50.00				50.00	

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:



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



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:

SCHOO	L BUDGET							Save	Refresh A	tions v	Co	mplete Previou	Next Clo
					n				and the second second		17		
S8 Horn	e > S8 Position Infe	o Detail-Licensed	d Transf	Q	Transfer Position								
Scenario Budget	Version Working_SB	Years FY21	Entity 0411 Hoggard, Ma	Q	Calc Total Position Costs					4	/	O Data	Ad hoc Form
					Mass Calc Update Funding Source Allocations		mployee Name	Assigned Position Number	Shared Position	Eff Start Da	ate	Eff Stop Date	Planned FTE
				6	Edit Position Info								
				G	Go to Licensed Summary		Assumption	Assumption	Assumption	Assumptio	'n	Assumption	Assumption
MUSIC, ELE	M - C1250	P_1001457	2_1 MUSIC, ELEI	Ch.	View Fund Source to GL Allocations					8/7/19	-		1)
PHYSICAL B	ED - C1260	P_1001457	1 PHYSICAL E	Ch.	View Fund Source Supplies					8/7/19			0
ECSE AUTIS	SM-KIDS - C6031	P_1001457	4_1 ECSE AUTIS	G	Calculate Fund Source Supplies					9/9/19			1)
GEN RR EL	EM - C6050	P_10014571	5_1 GEN RR ELE		Budget For					8/7/19			1)
GATE ELEN	- C6130	P_1001457	6_1 GATE ELEM	0	Delete Position Info					8/7/19			1)
COUNSELC	RIELE - C8000	P_10014577	7_1 COUNSELOF	-						8/7/19			1.
LIBRARY EL	LE - C8040	P_1001457	8_1 LIBRARY EL	2231	Go to Full Scheen	1				8/7/19			t)
LEARN STR	AT, ELEM - C8111	P_10014575	9_1 LEARN STR	G.	View Edit Position Totals					8/7/19			1.
					Edit					8/7/19			10
					Adjust	+				8/7/19			10
				-1	Supporting Detail			P_10014581_1		8/7/19			10
RBG3 LEAR	INING STR - C811	2 P_1001458	0_1 RBG3 LEAR	_	~					8/7/19			1
LRN STRT 1	TL1 ELE - C8114	P_1001458	LRN STRT TT	L1 ELE	Employee 1			P_10014581_1		8/7/19		-	0.1
Licensed Jol	bs	Total All Pos	itions		Total All Employees						-		31.)
								D. Contraction		T.			1

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

SCHOOL	BUD	GET							Save	<u>R</u> efresh <u>A</u> ct	ions 🔻 📄 🛄 <u>C</u> or	mplete Previous	Next	Clos
SB Home >	SB Posi	ition Info Detail-Lice	ensed Transf > SB	Edit Position Detail										
Scenario Budget	Years FY21	Entity 0411 Hogga	ard, MabelES (Mag	Job (Pr LRN STF	RT TTL1 ELE - C8114							→	/	¢
A Positio	on In	formation [Detail											
Position P_10014581_1	1 LRN S	TRT TTL1 ELE	nployee nployee 1									→	/	¢
	ıte	Months Work Ov	Hours Per Day	Planned FTE	Calculated Actual	Base Salary	Calculated Aver	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Posit	ic Multi Job	Total E	mploye
	'n	Assumption	Assumption	Assumption	Budget Sp	pent	Budget Spent	Actual Base Sala	Average Base S	Assumption	Assumption	Assumption	Assu	mption
Strategic Bud	get	09 Months	0.00	0.00		0.00	0.00	0.00	0.00	Primary	P_10014581_1	No		0.0
Version Working_SB	Position P_1001	14581_1 Employee	e 1									+	/	0
Deals Calera	-	Astrol Basis				YearTotal	Jul	Aug	Sep	Oct	Nov	Dec		Jan
Basic Salary E	xpense	-Actual Basis	Ass	sumption		0.0	0.0	0.0			.00 0.	.00 0.	00	
Benefits Expe	ense-Act	uai Basis	Put	upational Injury	Aanagement	0.0	0.0	0.0	0.0	0 0	00 0.	00 0.	00	
			Sta	te Unemplovment	Ins	0.0	0.0	0.0	0.0	0.00	.00 0.	.00 0.	00	
			Med	dicare		0.0	0.0	0.0	0.0	0 00	.00 0.	.00 0.	00	
TOTAL COMP	ENSATI	ON EXPENSE-ACT	UAL BASIS TO	TAL SALARY & FR		0.0	0.0	0.0	0.0	0 00	.00 0.	.00 0.	00	
Basic Salary B	Expense	-Average Basis	Ass	umption		0.0	.0 00	0.0	0.0	0 00	00 0.	.00 0.	.00	
Benefits Expe	nse-Ave	erage Basis	Put	olic Emp Retireme	nt System	0.0	0.0	0.0	0.0	.0 00	.00 0.	.00 0.	00	
			Occ	upational Injury N	Aanagement	0.0	0.0	0.0	0.0	.0 00	.00 0.	.00 0.	00	
			Sta	te Unemployment	Ins	0.0	0.0	0.0	0.0	0 00	.00 0.	.00 0.	00	
			Mer	licare		0.0	0 00	0.0	0.0	0 00	00 0	00 0	00	

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

SCHOOL	BUD	GET							Save	Refresh Ac	tions 👻	<u>C</u> om	plete Previou	Next	t Cio
SB Home > Scenario Budget	SB Pos Years FY21	Entity 0411 Hoggi	insed Transf > 8 ard, MabelES (N	B Edit Position Detai Job LRN ST	RT TTL1 ELE - C8114								-	. /	, ¢
A Positio	on In	formation [Detail												
Position P_10014581_1	1 LRN S	STRT TTL1 ELE	nployee nployee 1										-	. /	0
	ite	Months Work O	Hours Per Da	y O Planned FTE	Calculated Actual	Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assign	ed Positic	Multi Job	Total	Employe
	'n	Assumption	Assumption	Assumption	Budget S	pent	Budget Spent	Actual Base Sal	Average Base S	Assumption	Assu	mption	Assumption	Ass	umption
Strategic Budg	get	09 Months	0.	00.00		0.00	0.00		1		P_1001	4581_1	No		0.0
								G	Edit Position Inf	0					
1.002								Q	Calculate Total	Compensation Exp	0 0				
✓ Compe	ensa	tion Month	ly Spread	Detail				Ch.	View Fund Sou	rce to GL Allocatio	ns				
Version Working_SB	Positio P_100	n Employee 14581_1 Employee	e 1					6	Update Position	Totals			-)	1	\$
						YearTotal	Jul	G	Edit New Positi	on Detail	- 1	Nov	Dec		Jan
Basic Salary E	Expense	e-Actual Basis	1	ssumption		0.	00 0.0	0	Calc Alloc to GL	String-All Position	ns	0.0	0 0	.00	
Benefits Expe	nse-Ac	tual Basis	F	ublic Emp Retireme	ent System	0,	00 0.0	0	Add Position		- 1	0.0	0 0	.00	
			c	Occupational Injury	Management	0,	00 0.0	0	Calc Total Posit	ion Costs	- 1	0.0	0 0	.00	
			\$	tate Unemploymen	t Ins	0.	0.0	0		-		0.0	0 0	.00	
			1	ledicare		0.	00 0.0	io Litta	Edit Position Inf	0		0.0	0 0	.00	
TOTAL COMPI	ENSATI	ION EXPENSE-ACT	TUAL BASIS	OTAL SALARY & F	RINGE BENEFITS	0.	00 0.0		View Fund Src	to GL Allocations	+	0.0	0 0	.00	
					1				Edit				1		
Basic Salary E	Expense	e-Average Basis	4	ssumption		0.	00 0.0	0	Adjust		Þ	0.0	0 0	.00	
Benefits Expe	nse-Av	erage Basis	F	ublic Emp Retireme	ent System	0.	00 0.0	0	Comments			0.0	0 0	.00	
			(occupational Injury	Management	0.	00 0.0	0 +=	Supporting Date	all.		0.0	0 0	.00	
			5	tate Unemploymen	t Ins	0.	0.0	0	Sapporang Deta	3 11		0.0	0 0	.00	
			1	ledicare		0.	00 0.0	0	Change History			0.0	0 0	.00	
						1		1	Attachments		- 1	Dele		100	10.0

5. The cell will highlight in light yellow > click SAVE > Return to the previous page by clicking the SB Position Info Detail-Licensed Transf link. You can also update the FTE field here to "1" and Save (you will need to right click and Calc Total Position Costs when you return to the licensed grid).

SCHOOL	BL	JDO	θET								Save	<u>R</u> efresh <u>A</u> ct	ions ▼ │	plete Previous	<u>N</u> ext	C
SB Home :	> SB	Positi	on Info Detail-Lic	ensed Transf	SB Edit Pos	sition Detail										
Scenario Budget	Yea FY2	rs 1	Entity 0411 Hogg	ard, MabelES	(Magnet) (Pr	Job LRN STR	RT TTL1 ELE - C8114	4						\rightarrow	/	
⊿ Positi	on	Infe	ormation	Detail												
Position P_10014581_	_1 LR	N ST	RT TTL1 ELE	mployee mployee 1			_							→	/	+
		ite	Months Work C	v Hours Per	Day O Plan	ned FTE	Calculated Actual	Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total E	mplo
		'n	Assumption	Assumpt	tion Ass	umption	Budget S	pent	Budget Spent	Actual Base Sala	Average Base Sa	Assumption	Assumption	Assumption	Assu	mpti
Strategic Bud	dget		09 Months		0.00	0.00		0.00	0.00	0.00	0.00	Primary		NO		
⊿ Comp	en	∢ sati	on Month	ly Sprea	ad Detai	il										
Version Working_SB	Pos P_1	sition 10014	581_1 Employe	ee 1										→	/	1
								YearTotal	Jul	Aug	Sep	Oct	Nov	Dec		Jan
Basic Salary	Expe	nse-	Actual Basis		Assumptio	n		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0	
Benefits Exp	ense	Actu	al Basis		Public Emp	Retireme	nt System	0.0	0.0	0.0	0.0	0 0.	.00 0.0	0.0	0	
					Occupation	nal Injury N	lanagement	0.0	0.0	0.0	0.0	0 0.	0.0	0.0	0	
					State Unen	nployment	Ins	0.0	0 0.0	0 0.0	0.0	00 0.	00 0.0	0.0	0	
					Medicare			0.0	0 0.0	0 0.0	0.0	0 0.	00 0.0	0 0.0	0	
TOTAL COMP	PENS	ATIO	N EXPENSE-AC	TUAL BASIS	TOTAL SAI	LARY & FR	INGE BENEFITS	0.0	0 0.0	0.0	0.0	0.00	00 0.0	0 0.0	0	

6. 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).

S8 Home > S8 Position Info	Detail-Licensed Transf							
icenario Version) ludget Working_SB /	Pears Ently 1921 0411 Hoggard, MabelES (Mi	ignet) (Pr					/ 0 044	Ad hoc Fermat
			Employee Name	Assigned Position Number	Shared Position	Eff Start D	ate Eff Stop Date	Planned FTE
			Assumption	Assumption	Assumption	Assumption	on Assumption	Assumption
NUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1				8/7/19		1.1
HYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1				8/7/19		11
CSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1				9/9/19		1.1
EN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1				8/7/19		1.
ATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1				8/7/19		1.1
OUNSELORIELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1				8/7/19		1.1
IBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1				8/7/19		1.1
EARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1				8/7/19		10
		Employee 2				8/7/19		1.
		Employee 3		-		8/7/19		t
		Employee 4		P_10014581_1		8/7/19		10
803 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR	Employee 1		_		8/7/19		U.
RN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1				8/7/19		0.
inensed links	Total All Positions	Total All Employees						31

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

SCHOOL BUDGET				A		Eaus	Patrash A	diana -		malata	Desistant	Next Ch
			Q	Transfer Position		gane	Benesit	cuons v		A STATEMENT	Fierman	Berr Cie
SB Home > SB Position Info	Detail-Licensed Transf		Q	Calc Total Position Costs								
Scenario Version Y Budget Working_SB F	ears Entity Y21 0411 Hoggard, MabelES (Ma	ignet) (Pr		Mass Calc					1	٥	Data	Ad hoc Form
			9	Update Funding Source Allocations Edit Position Info Go to Licensed Summary	isig osit um	ned tion ber	Shared Position	Eff Star	t Date	Eff St	op Date	Planned FTE Assumption
			0	View Fund Source to GL Allocations	8.1							
ART, ELEM - C1100	P_10014571_1 ART, ELEM	Employee 1	C.	View Fund Source Supplies			1	8/7/19				1.
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1	G	Calculate Fund Source Supplies				8/7/19				1)
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1		Budget For			-	8/7/19				1.
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1	0	Delate Position Info	-			9/9/19				10
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1		Deeve Poston eno				8/7/19				1/
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1		Go To Full Screen			-	8/7/19				1)
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1		Edit				8/7/19				1/
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1		Adjust				8/7/19				30
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1	1.1	Supporting Detail				8/7/19				1.
		Employee 2	-	Change History				8/7/19				1)
		Employee 3	Cu.	Change Hatory				8/7/19				1.
		Employee 4			P_1001	4581_1		8/7/19				10
RB03 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR	Employee 1				3	2	8/7/19				1.
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1					1	8/7/19				0.
Licensed Jobs	Total All Positions	Total All Employees			-			1				31)
										-		Contraction of the second seco

8. Click **OK** in the confirmation message:



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

Delete Position Info					<u>C</u> ancel
* Select FROM Employee	"Employee 4"	P _Q	* Select FROM Job Code	"C8111"	₽ ₀
F * Select FROM Position	"P_10014579_1"	Pop.			
F					

10. 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.

Scenario Version V	sars Entry	and the				1	0 0.0	d hoc Farms
product internal of the	And And another and a feet	(Pred D-1	Rent of Rent		-	Excess Date		
			Employee Name	Position	Er part pare	En proje Carle	Parent Fig	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
		Employee 2			8779		1.00	. 1.4
		Employee 3			87.19		1.00	100
WADE 5 - C1050	P_10014570_1 GRADE 5	Employee 1			87/19		1.00	1007
		Employee 2			7/91/19		1.00	1001
		Employee 3			8/719		1.00	100/
RT, ELEM - C1100	P_10014571_1 ART. ELEM	Employee 1			8719		1.00	100/
NISIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1			87/19		1.00	1007
WISICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1			8/7/19		1.00	100-0
CSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1			9/9/19		1.00	
IEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1			8/719		1.00	
ATE ELEM - C0130	P_10014570_1 GATE ELEM	Employee 1			8719		1.00	
OUNSELORIELE - CR000	P_10014877_1 COUNSELOR/ELE	Employee 1			87/19		1.00	100-1
IBRARY ELE - C8040	P_10014576_1 LIBRARY ELE	Employee 1			8/7/19		1.00	100
EARN STRAT, ELEM - CB111	P_10014579_1 LEARN STRAT, ELEM	Employee 1			8/719		1.00	100.1
		Employee 2			87719		1.00	100.4
		Employee 3			8/719		1.00	100.1
IBG3 LEARNING STR - CB112	P_10014580_1 REG3 LEARNING STR	Employee 1			8/7/19		1.00	
RN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			8/7/19		0.00	7/
icensed Jobs	Total At Positions	Total All Employees				1	31.00	

Budgeting for a Shared Position

 From the SB Home page navigate to Actions > Go to Full Screen > and select the employee tab to edit (Admin / Licensed / Support tab)



2. Locate the desired employee name in the employee grid and click into the **Shared Position** column next to the employee's name. A dropdown arrow will appear. Click the dropdown arrow, then select **SP-Yes**.

SCHOOL BUDGET	0								- h	Same 1	artresh diction	ALT Concise	-	est Otto
98 Home - 58 Position Inte Scenario Versian Budger Working_58	o Desair Lucensen Trenst - SB Position Into Di Years Errosi PY21 0225 Alles DeartES	nak Support Transf										/ 0	Rea .MA	Fgmat
			Emprovee Name	Pothon	Monthy Work Override	Hours Per Day Overnide	Etf brait Date	Elli biso Date	F0 Percentage	FB Pe	rcentage	Total Fund Sec	FS Amount Average Cost Basis	Ft Anount
			Attungtion	Assumption	Assumption	AddunteDort	Assumption	Assemption	Gen Fland	Foot	To Ed	Allocation Pol	Oet Find	Foot
	P_20003017_1 COMPUTER TECH1	Employee 1	CCSD Lashiane, Festbarre EM_10058879	\$P.Yee	Entries		×		100.00			100.00	54,385.40	
CUSTODIAN - N8040	P_10005637_1 CUSTODIAN	Employee 1	CCSD Lazhame, FrstName EM_10200441		Search 1		1 1		100.00			100.00	40,355.17	
	P_1000E413_1 CUSTODIAN	Employee 1	OCSD LastName FirstName EM_10200761				-		100.001			100.00	45,833.82	
HD CUST I - NB110	P_10008414_1 HD CUST1	Employee 1	CCBD LastName, FirstName EM_317295		Name				100.00			100.00	03,512,33	
SCHOOL AIDE - 10100	P_1000E401_1 SCHOOL AIDE	Employee 1	CCND Lachiane, Firstname EM_10041303		SP-Yes		-		100.02			100.00	23,009.38	
LIERARY AIDE - N0105	P_10008402_1 LIBRARY A/DE	Entelloyee 1	CCSD LastName, FirstName EM_10028389		THE NO.				200.00			100.00	0.046.23	
	in shouldn't to marally airly	Serverage 1	CONTRACTOR STATISTICS FOR STREET		0.440				100 000			800.001	71.097.81	

3. In the **Hours Per Day** field enter the number of hours the selected employee will work at your location and click **Save**. If the position you are flagging as shared is Admin or Licensed, update the **Planned FTE** column.

SCHOO 58 Har	L BUDGE	T O	censed Transf > 58 Position Info D	etal-Support Tranci							80	Seve	Betresh Actio	ns + 1 Complet	2 Breened 1	lext Close
Scenario Budget	Version Working_58	Years FY21	Entry 9235 Alten, DeanES							/				1 0	Data Ad b	ec Format
					Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	F8 Percentage	FS Po	ecentage	Total Fund Sirc	FS Amount Average Cost Basis	FS Amount
					Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
		P_2	003817_1 COMPUTER TECH1	Employee 1	CCSD LastName, FirstName EM_10058970	SP-Yes	10 Months	4.00	7/1/20		100.00			100.00	20,163.66	
CUSTODIA	N - N8040	P_1	005637_1 CUSTODIAN	Employee 1	OCSD LastName, FirstName EM_10200441		12 Months	8.00	4/8/20		100.00			100.00	40,355.17	
		P_1	008413_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_10200761		12 Months	7.00	7/1/20		100.00			100.00	45,833,62	
HD CUST	- N8110	P_1	008414_1 HD CUST I	Employee 1	CCSD LastName, FirstName EM_317295		12 Months	8.00	12/22/19		100.00			100.00	63,512.33	

4. Right-click the position number and select Calc Total Position Costs.

SE Home > SE Position Inf	• O	on info	Detail-Support Transf							1	Save	Heltesh Act	ions 🕶 🕴 🛄 Gar	nglata Surailia	Next Close
Scenario Version Budget Working_S8	Years Ently FY21 0235 Allen, DeanES												1	O Reta	Ad boc Format
	f	-	Em	sloves Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	F8 Percentage	FS Per	centage	Total Fund Brc	FS Amount Average Cost Basis	F8 Amount Actu
	L	40	Carc Total Position Cedts	pten	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
	P_20003817_1 COMPUTER		Lindate Funding Source Allocations	Iame EM_10058970	SP-YM	10 Months	4.00	7/1/20		100.00		-	100.00	20,163.65	-
CUSTODIAN - N8040	P_10005637_1 CUSTODIAN	-	Printer and a second	Jame EM_10200441	1	12 Months	6.00	4/8/20		100.00			100.00	40,355,17	
	P_10008413_1 CUSTODIAN	UD.	Edt Position into	ame EM_10200761		12 Months	7.00	7/1/20		100.00			100.00	45,833,62	
HD CUST I - NE110	P_10008414_1 HD CUST I	0	Go to Licensed Summary	ame EM_317295		12 Months	8.00	12/22/19		100.00			100.00	63,512,33	
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AB	0	View Fund Source to GL Allocations	Jame EM_10041392		10 Months	8.50	3/11/20		100.00			100.00	33,005 38	
LIBRARY AIDE - N0105	P_10008402_1 LIBRARY AL	0	View Fund Source Supplies	arrie EM_10028385		09 Months	2.50	12/22/19		100.00			100.00	8,846.28	
	P_10000403_1 LIBRARY AL	0.	Calculate Fund Rource Subsides	ame EM_10028386		09 Months	4.10	12/22/19		100.00			100.00	21,992.43	
CLERK TYPIST I - N0110	P_10008400_1 FRST AID/S	40	Carvaille I and Ovariae Outpres	ame EM_542377		09 Months	2.00	12/22/19		100.00			100.00		
SPTA 8 - N0162	P_10008406_1 SPTA II	0	Budget For	Lame EM_10049345		09 Months	0.00	1/19/20				100.00	100.00		

5. When the position is done calculating, click **Save** before returning to SB Home.

Budgeting for a Prep Buy Out

From the School Budget form, click the Actions menu, click Budget for..., and select Prep Buyout

 Licensed.

Scenario Budget	Years E FY21 0	ntity 235 Allen, DeanES								G	View Fund Source to GL Allocations	
MAN	AGE POSIT	ION/EMPLOYEE BUDG	ET by WO	RK LOCATI	ION					Ē.	Calculate Fund Source Supplies	
ersion							G	Prep Buyout - Lice	nsed		Budget For	
dministrat	the Licensed	Support Addi Eaminge Supplies a	of Other Succ. SI	٨			G	Add-On and Extra	- Licensed		Go To Full Screen	
unninis u av	Livenseu	oupport Audit carmings ouppres a		~			C.	Add-On and Extra	- Support	G	Update Admin, Licensed and Support subtotals	5
			Employee Name	Shared Position	Eff Start Date	Eff Stop D	Date	Planned FTE	FS Percentage		Filter	
			Assumption	Assumption	Assumption	Assumpt	ion	Assumption	Gen Fund	-	Analyze	
ELE PRIN	C (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19			1.00	100.0	4	New Ad Hoc Grid	
											Show Reasons for Read-Only Cells	
										ĩ	Predictive Planning	
Admin Jol	bs	Total All Positions						1.00		+ - × +	Business Rules	
											Smart Push Details	
										IJ	Grid Validation Messages	
											Spreadsheet Export	
											Open in Smort View	

2. 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** and select **Edit Prep Buy Details**.

SCHOOL	BUDG	ET		Q	Edit Prep Buy Details			1 0 St	we <u>R</u> efresh	Actions -	Complet	e Brevio	un <u>N</u> ext	Close
SB Home	> SB PrepBu	iy-Mult		0	View Prep Buy and Fringe									
Scenario Budget	Years FY21	Version Working_SE	Entity 0235 Allen, DeanES	0	View Prep Buy GL Code String						/ 0	Data	Ad hoc F	ormat
					Edit Adjust	,	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	FS A Prej	mount Buy	FS Percentage- Prep Buy	Pi
					Supporting Detail			Assumption		Assumption	Gen	Fund	Gen Fund	
				0	Filter	,	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unsp Cost	ecified Center	Unspecified Cost Center	U C
Enter # of Pre	p Buys and F	Prep Days:			Sort	*				1	1			1
				-	Analyze	- 1								
KDG 1 AM/1	PM1 - C1000	P	10008381_1 KDG 1 AM/1 PM	•	New Ad Hoc Grid						1.			
		P_	10008381_1 KDG 1 AM/1 PM		Show Reasons for Read-Only Cells						1			
		P_	10008381_1 KDG 1 AM/1 PM	the state		- 1								
		P_	10008381_1 KDG 1 AM/1 PM	66	Predictive Planning									
GRADE 1 - C	1010	P	10008382_1 GRADE 1		Business Rules		1							
		P	10008382_1 GRADE 1		Smart Push Details									
		P_	10008382_1 GRADE 1		~									
		P_	10008382_1 GRADE 1	c	CSD LastName, FirstName EM_524230)								

3. You will be brought to the SB PrepBuy form. Enter 1 in the Number of Preps column next to the employee name. Enter the appropriate number of days in the Prep Buy Days column. *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. If desired, enter a comment in the Prep Buy Note column (such as a justification for the Prep Buy). 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. Click Save when finished (this will calculate the prep buy costs and will automatically update the Summary Totals and the Additional Earnings tab on the School Budget form).

SB Home	> SB PrepBuy	-Mult > SB Pre	pBuy							•				
Scenario Budget	Years FY21	Entity 0235 Allen,	DeanES	Job KDG 1 A	M/1 PM1 - C10	Employee 00 Employee 1	Position P_10008381_1	KDG 1 AM/1 PM				/ 0	Data Ad hoc	Format
		1	Employee Name	N	o of Preps	Prep Buy Days	Block Schedule		Prep Buy Note	Earnings Expense- Actual Basis			FS Percer	ntage-Prep
		A	ssumption	A	ssumption	Assumption	Assumption		Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	CSR	Title I	21st
Enter # of Pr	ep Buys and Pr	ep Days:												-
Working_SB		00	SD		1.00	184.00		purchasing a p	ep period for the school year		100.00]		

4. You will be able to view the newly entered Prep Buy information in the employee grid by clicking on the **SB PrepBuy-Mult** link to return to the previous form.

SB Home	L BUDGE		Buy					* 80	<u>Save</u> <u>R</u> efresh	Actions -		mplete	vevious	Next	Cļose
Scenario Budget	Years FY21	Entity 0235 Allen, I	DeanES	Job KDG 1 AM/1 PM1 - C10	Employee 00 Employee 1	Position P_10008381_	1 KDG 1 AM/1 PM				/	0	Data	Ad hoc	Format
		E	Employee Name	No of Preps	Prep Buy Days	Block Schedule		Prep Buy Note	Earnings Expense- Actual Basis	FS Amount Prep Buy					FS
		A	ssumption	n Assumption	Assumption	Assumption		Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	Ger	n Fund		CSR	Tit
Enter # of Pr	ep Buys and Pre	p Days:							_		1				Â
Working_S8		CC 1 se	SD Mama	1.00	183.00		purchasing a pr	ep period for the school year	6,903.68	7,065.91	1	100.0	0		
											-		_		

5. To view the Prep Buy information in the **Additional Earnings** tab of the School Budget form, click the **SB Home** link.

SB Home > SB PrepBuy-Mult	0			Sav	e <u>R</u> efresh	Actions +	Complete Provide	Mext C	lose
Scenario Years Ve Budget FY21 W	ersion Entity /orking_SB 0235 Allen, DeanES						/ O Data	Ad hoc Fg	rmat
		Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	FS Amount Prep Buy	FS Percentage- Prep Buy	Pi
		Assumption		Assumption		Assumption	Gen Fund	Gen Fund	
		Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	Unspecified Cost Center	UC
Enter # of Prep Buys and Prep D	lays:	•							-
KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_325191	1.00	183.00		purchasing a prep period for the school year	7,065.91	100.0	D
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_331715							
	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName, FirstName EM_516040							

6. Click the **Additional Earnings** tab. You will now be able to view the position and its Prep Buy information.

SCHOOL E	BUDGET	r 0				₿°0	Save Refresh Actions - Complete Previous	Next	Close
Scenario Ye Budget F	'ears 'Y21	Entity 0235 Allen, DeanES					\rightarrow	/	¢
MANAG	SE POSI	ITION/EMPLOYEE BUDGET	by WOR	K LOCATION					
Version Working_SB							÷	1	¢
Administrative	Licensed	Support Add'l Earnings Supplies and Oth	ner Svcs SLA						
			Emp Name	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra			
			Assumption	Gen Fund	Gen Fund	Gen Fund			
KDG 1 AM/1 P	M1 - C1000	P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,	7,065.91	0.00	0.00			^
		P_10008381_1 KDG 1 AM/1 PM	CCSD LastName,		2,254.28	708.57			
GRADE 2 - C1	1020	P_10008383_1 GRADE 2	CCSD LastName,	7,597.02					
GRADE 4 - C1	1040	P_10008387_1 GRADE 4	CCSD LastName,		3,827.37	588.78			
		LICENSED ADDITIONAL EARNINGS TOTAL		14,662.93	6,081.65	1,297.35			-

Budgeting for a Job 2

1. From the SB Home page navigate to **Actions** > **Go to Full Screen** > and select the **Support** tab.



 Find the desired employee from the Support employee grid and right-click on their position number. From the menu that appears, click Budget for..., and select Job2 – Support Professional.

SB Home	e > SB Position Inf	o Detail-Su	oport Transf		G	Calc Total Position Costs		ĺ							
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES			Mass Calc					1	1	O Dat	Ad hoc	Format
					9 9 9	Update Funding Source Allocations Edit Position Info Go to Licensed Summary	,		Shared Position Assumption	Months Work Override Assumption	Hours Per Day Override Assumption	Eff S Ass	start Date	Eff Stop Date	Pe
FRST AID/S	FTY AST - N0090	P_10	008400_1 FRST AID/SFTY AST	Emplo	Lth	View Fund Source to GL Allocations		7		09 Months	6.00	12/2	2/19		<u>^</u>
ELEM SCHO	OOL CLERK - N01	43 P_10	008404_1 ELEM SCHOOL CLERK	Emplo	G	View Fund Source Supplies		1		11 Months	8.00	12/2	2/19		
SCH OFFIC	E MANAGE - N03	10 P_10	008411_1 SCH OFFICE MANAGE	Emplo	C	Calculate Fund Source Supplies		þ		11 Months	8.00	12/2	2/19		
COMPUTER	TECH I - N1655	P_10	008412_1 COMPUTER TECH I	Emplo		Budget For	,	D.	A New Position			12/2	2/19		
		P_20	003817_1 COMPUTER TECH I	Emplo	0	Delate Resition Info		0	See Descent Lines		4.00	7/1/2	0		
CUSTODIAN	N - N8040	P_10	005637_1 CUSTODIAN	Emplo	12	Delete Posteer mit		La r	rep Buyout - Lider	ised	7.00	4/8/2	0		
		P_10	008413_1 CUSTODIAN	Emplo		Go To Full Screen	1	Q, /	Add-On and Extra -	Licensed	7.00	7/1/2	0		
HD CUST I	N8110	P_10	008414_1 HD CUST I	Emplo	G	Analyze and Fix GL Allocations		Q1 /	Add-On and Extra -	Support	8.00	12/2	2/19		
SCHOOL AI	DE - N0100	P_10	008401_1 SCHOOL AIDE	Emplo		Edit	>	Q.	lob2- Support Staff	6	6.50	3/11/	20		
LIBRARY AI	DE - N0105	P_10	008402_1 LIBRARY AIDE	Emplo		Adjust		0.0	TT - Sub Teacher		2.50	12/2	2/19		
		P_10	008403_1 LIBRARY AIDE	Emplo	+=	Purseation Dated		-		-	4.10	12/2	2/19		
SPTA II - NO	162	P_10	008406_1 SPTA II	Emplo	-	onhhormið harait		LEI I	ncrease Position H	eadcount	0.00	1/19	20		
				Emplo	01	Change History		528		09 Months	6.00	12/2	2/19		
				Employ		CLOSEFE PROVIDE PROVIDE PRESS		.a		09 Months	6.00	12/2	0/10		-

3. 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. From the menu that appears, select **Copy this Job to Job2**.

SCHOOL BUDGET		~					•	Defeat		Devidence	Neut
	G	Copy this Job to Job2					24ve	Kellesn Action		Previous	Mext Ciose
SB Home > SB Position Info Deta		Edit	•								
Scenario Years Versio Budget FY21 Workin		Adjust	F AID/	SFTY AST Employe	ie ie 1				/	🔅 Data A	i hoc F <u>o</u> rmat
	14	Supporting Detail	Nork	Hre Par Day	Pay Base	Pay Cycle	Primany Pay	District	Current ETE	Eff Start Date	Eff Stop Date
	61	Change History	VOIR	ris For Day	P by Dabb	ruy Cycle	Rate	Average Rate	Guilent PTE	En ount bate	En olop ballo
	â	Lock/Unlock Cells									
		Filter	tion	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
FRST AID/SFTY AST - N0090 CC:		ritei	8	6.00	Hourly	Biweekly	18.14	16.21	0.56	12/22/19	<u>^</u>
		Sort	•								

4. Click **OK** in the Launch Confirmation message.

Launch Confirmation Message	×
Select Job2 to proceed	OK Cancel

5. You will be brought to the **Copy Job1 to Job2** window. Click the **Member Selector** icon next to the **Select TO JOB** field.

Copy Job1 to Job2					Launch	<u>C</u> ancel
* Select FROM Employee	"Employee 1"		* Select FROM Position	"P_10008400_1"		ęç
* Select FROM Job Code	"N0090"	P.Q.	* Select Work Location	"WL_0235"		20
* Select TO JOB	"N0090"	P.0	* Select Year	"FY21"		20
						_

6. From the Select a Member window that appears, locate and select the desired Job 2 from the list of available jobs and click **OK**.

Select a Member				Cance <u>l</u>
Job "ELEM SCHOOL CLERK - N0143"				
Search Job				ф.
Total All Jobs		ELEM SCHOOL CLERK - N0143	*	
All Jobs		REGISTRAR I - N0145		
Admin Jobs	►	REGISTRAR II - N0146		
Licensed Jobs	►	SCH OFFICE MANAGE - N0310		
Support Jobs	•	ADMIN SCH SEC - N0320		
Police Jobs	►	COMPUTER TECH I - N1555		
Police Admin Association	►	COMP TECH II - N1556		
Strategic Jobs	►	COMP TECH III - N1557		
DFLT		CUSTODIAN - N8040		
		CUSTODIAL LEAD - N8100	-	
4				•
Members Job > Tota	al All Jobs >	Support Jobs > ELEM SCHOOL CLERK - N	0143	

7. The **Select TO JOB** field will now show the new position code. Click **Launch**.

Copy Job1 to Job2			Launch	<u>C</u> ancel
* Select FROM Employee	"Employee 1"	* Select FROM Position	"P_10008400_1"	°c_
* Select FROM Job Code	"N0090"	* Select Work Location	"WL_0235"	°.
* Select TO JOB	N0143	* Select Year	"FY21"	Ç.

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





9. You will now be able to verify that the Job 2 displays correctly. Return to the School Budget form by clicking the **SB Position Info Detail-Support Transf** link.

Nus <u>N</u> ext Close
Ad hos Format
Date Eff Stop Date
ption Assumption
The last way in the last

10. The new Job 2 will appear highlighted in **yellow** (as it has not yet been saved). For the new job, modify the hours worked in the **Hours Per Day Override** field. After adjusting one or both jobs, click **Save**.

SCHOOL BUDGET	0			16 E	ave Refresh	Actions -	Complete Prev	Next	Cļose
SB Home > SB Position Info D	etail-Support Transf				*				
Scenario Version Yea Budget Working_SB FY	rs Entity 21 0235 Allen, DeanES					/	¢ 🛛	ta Ad hoc Fg	ormat
			Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Dale	Eff Stop Date	Pe
			Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	G
FRST AID/SFTY AST - N0090	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	6.00	12/22/19		*
ELEM SCHOOL CLERK - N0143	P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	2	12/22/19		
	P_10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName, FirstName EM_317741		11 Months	8.00	12/22/19		
SCH OFFICE MANAGE - N0310	P_10008411_1 SCH OFFICE MANAGE	Employee 1	CCSD LastName. FirstName EM_548030		11 Months	8.00	12/22/19		

11. Click on the **Actions** menu, click **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.)

SCHOO	L BUDGET	0				ĥĝ	ave <u>R</u> efresh	Action	s - Complete Previous Ne	xt Close
SB Hom	e > SB Position Info	Detali-Su	pport Transf					G	Calc Total Position Costs	
Scenario Budget	Version Working_SB	rears FY21	Entity 0235 Allen, DeanES			Calc Admin	n Positions		Mass Calc	Format
					Employee Name	Calc Licen	sed Positions		Update Funding Source Allocations	*
						Calc Supp	ort Positions	G	Edit Position Info	Pe
					Assumption	Assumption	Assumption	G	Go to Licensed Summary	G
FRST AID/S	FTY AST - N0090	P_10	008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	C.	View Fund Source to GL Allocations	
ELEM SCH	DOL CLERK - N014	3 P_10	008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377		09 Months	R	View Fund Source Supplies	

12. When the calculation is done processing, neither Job will be highlighted. click **Save** to update the Support totals in the Summary Totals area. After you save, click the **SB Home** link to review the updated totals in the summary.

SCHOOL	BUDGET	0				₿ ₿ĝ	<u>R</u> efresh	Actions -	<u>C</u>	omplete	Previous	Next	Close
SB Home	> SB Position In	fo Detail-Suppo	ort Transf										
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						ø	٥	<u>D</u> ata	Ad hoc	F <u>o</u> rmat
					Employee Name	Shared Position	Months Work Override	Hours Per Day Override	E	Eff Start Da	ite Ef	f Stop Date	Pe
					Assumption	Assumption	Assumption	Assumption		Assumptio	n A	ssumption	G
FRST AID/SF	TY AST - N0090	P_1000	8400_1 FRST AID/SFT	YAST Employee 1	CCSD LastName, FirstName EM_542377		09 Months	6.	00 1	2/22/19			-
ELEM SCHOO	OL CLERK - N01	43 P_1000	8400_1 FRST AID/SFT	YAST Employee 1	CCSD LastName, FirstName EM_542377		09 Months	2.	.00 1	2/22/19			

Budgeting for a Certified Teacher Tutor (CTT)

1. From the SB Home page navigate to **Actions** > **Go to Full Screen** > and select the **Support** tab.



2. Click on the Actions menu, click Budget for..., and select CTT - Sub T

SCHOOL	L BUDGET	0					10 10	Save Refresh	Action	s 🔻 🗌 Complete Brovians	Next Close
SB Home	> SB Position Inf	Detail-S	Support Transf						12	Calc Total Position Costs	
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES						40	Mass Calc	, Format
					Employee Name		Shared Position	Months Work Override	Q	Update Funding Source Allocations Edit Position Info	Pe
					Assumption	,	ssumption	Assumption	G	Go to Licensed Summary	G
FRST AID/SE	FTY AST - N0090	P_	10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377			09 Months	G	View Fund Source to GL Allocations	4
ELEM SCHO	OL CLERK - N01	43 P_	10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377			09 Months	Ch	View Fund Source Supplies	
		P_	10008404_1 ELEM SCHOOL CLERK	Employee 1	CCSD LastName, FirstName EM_317741			11 Months	R	Calculate Fund Source Supplies	
SCH OFFICE	MANAGE - NO3	0 P_	10008411_1 SCH OFFICE MANAGE	Employee 1	CCSD LastName, FirstName EM_548030	-			-	Durdent For	12
COMPUTER	TECH I - N1555	P_	10008412_1 COMPUTER TECH I	Employee 1		La Al	New Position	1		Budger For	1
		P_3	20003817_1 COMPUTER TECH I	Employee 1	CCSD LastName, FirstName EM_10058970	Pr Pr	ep Buyout -	Licensed	Q	Delete Position Info	
CUSTODIAN	I - N8040	P_1	10005637_1 CUSTODIAN	Employee 1	CCSD LastName. FirstName EM_1020044	C Ad	ld-On and E	xtra - Licensed		Go To Full Screen	· ·
		P_	10008413_1 CUSTODIAN	Employee 1	CCSD LastName, FirstName EM_1020076	Dh Ad	Id-On and E	xtra - Support	C	Edit Position Detail	
HD CUST I -	N8110	P_	10008414_1 HD CUST I	Employee 1	CCSD LastName, FirstName EM_317295	12 10	b2. Support	Staff	D.	Analyze and Fix GL Allocations	
SCHOOL AID	DE - N0100	P_	10008401_1 SCHOOL AIDE	Employee 1	CCSD LastName, FirstName EM_1004139	-	or outpoil				
LIBRARY AIL	DE - N0105	P_1	10008402_1 LIBRARY AIDE	Employee 1	CCSD LastName, FirstName EM_1002838	Ch CI	T - Sub Tea	cher		For	

 You will be brought to the SBT CTT form. Enter the appropriate number of hours in the CTT Budget Hours field. Enter the number of CTTs to budget for in the CTT Quantity field. Enter 100 in the appropriate funding source (for example, the General Fund). Remember: A CTT cannot be split-funded. Click Save.

SCHOOI	LBUDG	ET 🛈							Save	Refresh Actio	ons 👻 🗌	Com	plete Erevice	<u>N</u> ext Close
SB Home Scenario Budget	Years FY21	n Info Detail-S Version Working_	Entity SB 0235 Allen, I	DeanES								1	O Data	Ad hoc Format
			CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate	Total Comp Exp			FS	Perce	entage	
			Assumption	Assumption	Assumption	Assumption	Assumption		Gen Fund	GenF Read by 3	CSR		GenF SB178	GATE
Enter # Hour	s, Qty and Fu	nd Src Alloc												-
PARA PRO -	CTT - N9909		650.00	3.00					100.00					

4. Return to the previous form by clicking on the SB Position Info Detail-Support Transf link.

SR Home	SB Position	Info Detail-S	unnort Transf + SR	CIT								12.0	-	
Scenario Budget	Years FY21	Version Working_	Entity SB 0235 Allen, I	DeanES							1	1	Qata	Ad hoc Forme
			CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate			FS P	ercentage			
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Title I	21st Cente	iry	Sp Ed	Victory
Enter # Hour	s. Qty and Fun	d Src Alloc												-
PARA PRO	CTT - N9909		650.00	3.00	Hourty	Biweekly	20.00	100.00						
												_		-

5. To view the newly added CTT, scroll to the bottom of the Support employee grid.

SCHOOL BUDGET					85	Save	Refresh Action	ns 💌 🗌 🛄 Çomş	liete Previous	Next Close
SB Home > SB Position Info De	tail-Support Transf									
Scenario Version Year Budget Working_SB FY2	s Entity 1 0235 Allen, DeanES							1	Data A	i hoc Format
			Eff Start Date	Eff Stop Date	FS Percentage	FS Perce	ntage	Total Fund Src	FS Amount Average Cost Basis	FS Amount Ac
			Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
INSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	12/22/19				100.00	100.00		
	P_10008410_1 INSTRUCTIONAL AST	Employee 1	12/22/19		100.00			100.00	5,231.18	
TI INS ASST III - N0198	New Position 12	Vacant			100.00			100.00	31,779.25	
FS WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1	12/22/19			100.00		100.00		
SR FOOD SRVC WRKR - N5030	P_10023567_1 SR FOOD SRVC WRKR	Employee 1	12/22/19			100.00		100.00		36,95
PARA PRO - CTT - N9909	No_Position	No Employee			100.00			100.00	39,916.50	
	FORM TOTALS		1827		0.035.05	≡60.68	560.03	2.200.00	471,464.32	36,95

To edit the CTT hours, quantity, and/or funding source use the same navigation for this course.

Budgeting for Licensed Add-On or Extra Time

1. From the School Budget form, click on the Actions menu, click Budget for..., and select Add-On and Extra – Licensed.

SCHOOL B	UDGET	U						ŝ	ave <u>R</u> efresh	Acti	ons 🔻 🗌 🛄 🖸	mplete Previou	s <u>N</u> ext C <u>l</u> ose
Scenario Yea	ars Er	ntity								Q	View Fund S	Source to GL Alloca	itions
Budget FY	21 02	235 Allen, DeanES								Q	View Fund S	Source Supplies	
MANAG	E POSIT	ION/EMPLOYEE B	UDGET by WO	RK LOCA	TION					G	Calculate Fi	und Source Supplie	96
Version							G	Prep Buyout - Lic	ensed		Budget For.		,
Working_SB	Lineneed C	Support Add Earnings Pro	alias and Other Sura 21				G	Add-On and Extr	a - Licensed		Go To Full S	Screen	1
Administrative	Licensed a	support Addit Earnings Sup	pries and Other Svcs St				- G	Add-On and Extr	a - Support	G	Update Adm	nin, Licensed and S	upport subtotals
			Employee Name	Shared Positi	on Eff Start Da	te Eff	Stop Date	Planned FTE	FS Percenta	ge	Filter)
			Assumption	Assumption	Assumptio	n As	sumption	Assumption	Gen Fund		Analyze		
ELE PRINC (9 M	MOS) - U7000	P_10026764_1 ELE PRINC (9	MOS) LastName,		7/24	/19		1.00	100	.0 🔍	New Ad Ho:	: Grid	
											Show Reas	ons for Read-Only	Cells
						_				- 12	Predictive P	fanning	
Admin Jobs		Total All Positions						1.00)		Business R	ules	
											Smart Push	Details	
											Crid Validat	on Montoon	
										=5	Gild Validat	on wessages	
											Spreadshee	t Export	
										_	Open in Sm	art View	
	RY TOTA	LS											
				Gen Fe	und CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	A ZFS-EDIT	Food	GATE
	REM	AINING BUDGET TO SPEND		105,12	21.93 0.0	0.00	0.00	0.00	(88,205.51)	0.00	16,916.42	5,928.16	91,842.14
ALLOCATED FUN	NDS:												
Target	All J	obs	FS Amount Actual Cost	Basis 2,355,96	6.66 352,822.0	4 0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:													
Working_SB	Adm	in Jobs	Total Funding Amount	151,05	57.92						151,057.92		

 You will be brought to the SB Licensed AddOn-Mult form. From the grid of available positions, right-click on the desired position number. From the menu that appears, select Edit Fund Source Details.

SCHOO SB Home	SB LicAddOr	T 💿		G	Edit Fund Source Details View Add-On Extra With Fringe		\$0	<u>Save</u> <u>R</u> efr	esh Actions -	100	omplete	Proviaci Next	Close
Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	6	View Add-On Extra GL Code String					1	¢	Data Ad hoc	Format
					Calc TEST Edit Adjust	d-On Days	Add-On Minutes	Days of Add- On Minutes	Add-On Note	Extra	Days	Extra Minutes	Days of E Minute
				1	Supporting Detail	ssumption	Assumption	Assumption	Assumption	Assu	mption	Assumption	Assump
KDG 1 AM/1	PM1 - C1000	P_100083	81_1 KDG 1 AM/1 PM		Change History								-î l
		P_100083	81_1 KDG 1 AM/1 PM 81_1 KDG 1 AM/1 PM		Filter								

3. 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. When you are done entering values, click Save.

SB Home	> SB LicAddOn-Mult > SB L	cAddOnExtra-F5										
Scenario Budget	Years Entity FY21 0235 Alien	Job DeanES KDG 1 AM/1	PM1 - C1000	Employee Posi Employee 1 P_1	tion 0008381_1 KDG 1 /	M/1 PM					+	/ 0
⊿ Mana	ige Licensed Add	d-On (PERS)										
		Employee Nam	e Add-On Day	s Add-On Minut	es Days of Add-O	n Add-On No	te Earnings Expen	11		FS Per	centage-Add-On	
		Assumption	Assumption	Assumption	Assumption	Assumptio	en ERN_0202 Add-	Gen Fund	CSR	Title I	21st Century	Sp
Enter Add-O	On # Days, Minutes and Fun	ding:										
		CCSD				19 minutes						
Working_SB	3	LastName,		19.0	00 18	for each da	L =	100.00				
		4										
⊿ Mana	ige Licensed Ext	ra (NO PERS)	<u></u>									
		Employee Name	Extra Days	Extra Minutes	Days of Extra MI	Extra Note	Earnings Expens			FS Perce	ntage-Extra	
		Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	CSR	Title I	21st Century	Sp Ed
Enter Extra	# Days, Minutes and Fundi	ng:										
		CCSD				teacher working 2						

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. 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. Remember: You **cannot** split-fund add-on or extra time for a licensed employee.

 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. Return to the previous form by clicking the SB Licensed AddOn-Mult link.

Scenario Years Entity	Job	E	nployee Positi	ion						-	1
Budget FY21 0235 Allen. De	anES KDG 1 AM/1 I	PM1 - C1000 E	mployee 1 P_10	008381_1 KDG 1 A	W/1 PM					<u> </u>	1
Manage Licensed Add-	On (PERS)										
	Employee Name	Add-On Days	Add-On Minute	es Days of Add-Or	Add-On Not	e Earnings Expens	FS Amount Add-			FS Perc	entage-Add
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR	Title I	21st
Enter Add-On # Days, Minutes and Funding	g:										
	CCSD		10.00		19 minutes	0.007.00	0.474.00	103.30			
vorking_58	Lastvame.		19.00	0 184.00	for each day	2,637.83	3,4/1.38	100.00			
						- L					
Managa Liconcod Extra								9			
Manage Licensed Extra	(NO PERS)	Extra Dava	Evtra Minutes	Davis of Evtra Mi	Evtra Note	Earnings Evnens FS	Amount Extra	9		ES Barra	tane Evtra
Manage Licensed Extra	(NO PERS) Employee Name Assumption	Extra Days Assumption	Extra Minutes Assumption	Days of Extra Mi Assumption	Extra Note Assumption	Earnings Expens FS ERN_0151 Extra	Amount Extra Gen Fund	Gen Fund	CSR	F5 Percer Title I	ntage-Extra 21st Cer
✓ Manage Licensed Extra inter Extra # Days, Minutes and Funding:	(NO PERS) Employee Name Assumption	Extra Days Assumption	Extra Minutes Assumption	Days of Extra Mi Assumption	Extra Note	Earnings Expens FS ERN_0151 Extra	Amount Extra Gen Fund	Gen Fund	CSR	FS Percer Title I	ntage-Extra 21st Cer

5. On the SB Licensed AddOn-Mult form, note that the positon now reflects the information you entered in the Add-On and/or Extra fields. To view the fringe benefits for the newly entered time, **right-click** on the position number and select **View Add-On Extra with Fringe**.

SCHOO SB Hom	SB LicAddO	n-Mult		G	Edit Fund Source Details			* 85	Save Refree	sh Actions +	<u>ي</u> ا	omplete	Previous Next	Close
Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	Q	View Add-On Extra GL Code String						1	٥	Data Ad hoc	Format
				Q	Cale TEST Edit Adjust	* *	vdd-On Days	Add-On Minutes	Days of Add- On Minutes	Add-On Note	Extra	Days	Extra Minutes	Days of E Minute
				*1	Supporting Detail		Assumption	Assumption	Assumption	Assumption	Assur	nption	Assumption	Assump
KDG 1 AM	PM1 - C1000	P_100083	81_1 KDG 1 AM/1 PM	đ	Change History Lock/Unlock Cells Filter			19.00	0 184.00	19 minutes for each day of the school year		2.00)	

6. 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. To return to the School Budget form, click on the SB Home link. You may now view the updated Licensed Add-On and/or Extra totals in the Summary Totals area and in the Additional Earnings tab.

Scenario Version Yea Budget Working_SB FY	rs Entity Job 21 0235 Allen, DeanES KDG 17	AM/1 PM1 - C1000	Position P_10008381_1						\rightarrow	10
VIEW LICENSED	ADD-ON WITH FRINGE	BENEFITS								
		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0202 Add-On (PERS)	2.637.83	219.82	219.82	219.82	219.82	219.82	219.82	219.82	219.
Benefits Expense-Add-On	Public Emp Retirement System	771.56	64.30	64.30	64.30	64.30	64.30	64.30	64,30	64.
	Occupational Injury Management	22.42	1.87	1.87	1.87	1.87	1.87	1.87	1.87	13
	State Unemployment Ins	1.32	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.
	Medicare	38.25	3.19	3.19	3.19	3.19	3.19	3.19	3.19	3.
	TOTAL ADD-ON & FRINGE BENEFITS	3,471.38	289.28	289.28	289.28	289.28	289.28	289.28	289.28	289.
VIEW LICENSED	EXTRA WITH FRINGE B	ENEFITS								
VIEW LICENSED	EXTRA WITH FRINGE B	ENEFITS YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
VIEW LICENSED Earnings Expense-Actual Basis	EXTRA WITH FRINGE B	ENEFITS YearTotal 650.40	Jul 54.20	Aug 54.20	Sep 54.20	Oct 54 20	Nov 54.20	Dec 54.20	Jan 54.20	Feb 54.2
VIEW LICENSED Earnings Expense-Actual Basis Benefits Expense-Extra	EXTRA WITH FRINGE B ERN_0151 Extra (NO PERS) Occupational injury Management	* ENEFITS YearTotal 650.40 5.53	Jul 54.20 0.46	Aug 54.20 0.46	Sep 54.20 0.46	Oct 54.20 0.46	Nov 54.20 0.46	Dec 54.20 0.46	Jan 54.20 0.46	Feb 54.2 0.4
VIEW LICENSED Earnings Expense-Actual Basis Benefits Expense-Extra	EXTRA WITH FRINGE B ERN_0151 Extra (NO PERS) Occupational Injury Management State Unemployment ins	* ENEFITS YearTotal 650.40 5.53 0.33	Jul 54.20 0.46 0.03	Aug 54.20 0.46 0.03	Sep 54.20 0.46 0.03	Oct 54 20 0.46 0.03	Nov 54.20 0.46 0.03	Dec 54.20 0.46 0.03	Jan 54.20 0.46 0.03	Feb 54.21 0.4 0.02
VIEW LICENSED Earnings Expense-Actual Basis Benefits Expense-Extra	EXTRA WITH FRINGE B ERN_0151 Extra (NO PERS) Occupational injury Management State Unemployment ins Medicare	 ENEFITS YearTotal 650.40 5.53 0.33 9.43 	Jul 54.20 0.46 0.03 0.79	Aug 54.20 0.46 0.03 0.79	Sep 54.20 0.45 0.03 0.79	Oct 54 20 0 46 0 03 0 79	Nov 54.20 0.46 0.03 0.79	Dec 54.20 0.46 0.03 0.79	Jan 54.20 0.46 0.03 0.79	Feb 54.2 0.4 0.0 7

Budgeting for Support Add-On or Extra Time

1. Click on the Actions menu, click on Budget for..., and select Add-On and Extra – Support.

								Ch.	View Fund Source to GL Allocations
Years E FY21 0	ntity 235 Allen, DeanES							C	View Fund Source Supplies
GE POSIT	ION/EMPLOYEE BUD	ET by WO	RK LOCATI	ON				G	Calculate Fund Source Supplies
						强 Prep Buyout - Lio	ensed		Budget For
						强 Add-On and Extra	a - Licensed 🖌	\sim	Go To Full Screen
ve Licensed a	support Addit Earnings Supplies a	nd Other Svcs SL	A			强 Add-On and Extra	a - Support	G	Update Admin, Licensed and Support subtotals
		Employee Name	Shared Position	Eff Start Date	Eff Stop Da	te Planned FTE	FS Percentage		Filter
		Assumption	Assumption	Assumption	Assumptio	n Assumption	Gen Fund	-	Analyze
(9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.0	-	New Ad Hoc Grid
									Show Reasons for Read-Only Cells
								ii.	Predictive Planning
\$	Total All Positions					1.00		+ - × +	Business Rules
									Smart Push Details
									Grid Validation Messages
									Spreadsheet Export
	Years E PY21 00 AGE POSIT ve Licensed 5	Years Ently PY21 0235 Allen, DeanES AGE POSITION/EMPLOYEE BUDC ve Licensed Support Add1 Earnings Support P_10028764_1 ELE PRINC (9 MOS) s Total All Positions	Years PY21 Ently 0235 Allen, DeanES AGE POSITION/EMPLOYEE BUDGET by WOI ve Licensed Support AddI Earnings Supplies and Other Svcs K Employee Name Assumption CCSD CCSD as Total All Positions a Total All Positions	Years PY21 Entry 0235 Allen, DeanEG AGE POSITION/EMPLOYEE BUDGET by WORK LOCATI ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Support Add1 Earnings Supplies and Other Svcs SLA ve Licensed Supplies and Other Svcs SLA ve Licensed CCSD Licensed Licensed s Total All Positions Image: Supplies and Supplies an	Years PY21 Ently C235 Allen, DeanES AGE POSITION/EMPLOYEE BUDGET by WORK LOCATION we Licensed Support AddTEamings Supplies and Other Svcs SLA Employee Name Shared Position Essumption Assumption Assumption Assumption (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS) CCSD LasiName, Image: Start All Positions Image: Start All Position	Years PY21 Ently C235 Allen, DeanES AGE POSITION/EMPLOYEE BUDGET by WORK LOCATION ve Licensed Support Add1 Earnings Support CCSD Support Add1 Earnings Support Carter Support Total All Positions Image: Image: Image:	Years PY21 Entry C235 Allen, DeanES AGE POSITION/EMPLOYEE BUDGET by WORK LOCATION Image: state of the state of	Years PY21 Entry (225 Alen, DeanEG) GGE POSITION/EMPLOYEE BUDGET by WORK LOCATION Yee Licensed Prep Buyout - Licensed Add-On and Extra - Licensed Add-On and Extra - Support Yee Licensed Support Add-On and Extra - Licensed Add-On and Extra - Support Yee Image: Support Employee Name Assumption Eff Start Date Eff Storp Date Assumption Planned FTE Assumption F Percentage Assumption Yee Total All Positions CCSD LastName Total All Positions Image: Support Assumption Total All Positions Image: Support Assumption Total All Positions Image: Support Assumption Image: Support Assumption	Years Entry FY21 C235 Allen, DeanEG AGE POSITION/EMPLOYEE BUDGET by WORK LOCATION Image: Constraint of the strate

 You will be brought to the SB Support AddOn-Mult form. From the grid of available positions, right-click on the desired position number. From the menu that appears, select Edit Fund Source Details.

SCHOO	L BUDGET	0		0	Edit Fund Source Details				Ng 5	ave <u>Refresh</u>	Actions +		Complete Ere	Nous Next	Close
Scenario Budget	Years 1 FY21	Version Working_SB	Entity 0235 Allen, DeanE	6	View Add-On Extra With Fringe View Add-On Extra GL Code String Edit Adjust			Days of Add- On Hours	Add-On Hours	Add-On Note	Days of Extra Hours	/	Extra Hours	ta Ad hoc Extra Note	Format Ca Lick On
CUSTODIAN	i - N8040	P_1000	5637_1 CUSTODIAN	2 61 6	Change History Lock/Unlock Cells		100441	Assumption	Assumption	Assumption	Assumption		Assumption	Assumptio	n As
HD CUST I -	N8110	P_1000	B413_1 CUSTODIAN B414_1 HD CUST I		Filter Sort	1	100761 1295								
SCHOOL AIL	DE - N0100 DE - N0105	P_1000 P_1000 P_1000	9401_1 SCHOOL AII 9402_1 LIBRARY AI 9403_1 LIBRARY AI	() ()	Analyze New Ad Hoc Grid		141392 128386 128386								
SPTA II - NO	162	P_1000 P_1000 P_1000	8406_1 SPTA II 8406_1 SPTA II 8406_1 SPTA II	121 121	Show Reasons for Read-Only Cells Predictive Planning Business Rules)49345)90528)789								
PE INSTRA	SST - N0179	P_1000 P_1000 P_1000	8406_1 SPTAIL 8407_1 PE INSTR A 8408_1 PE INSTR A		Smart Push Details		1930 122402 122402								=
INSTRUCTION	ONAL AST - N0190	P_1000	8409_1 INSTRUCTIO 8410_1 INSTRUCTIO	DNAL AS	CCSD LastName, FirstName EM CCSD LastName, FirstName EM	1_54	12473 12473								

3. 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. When you are done entering values, click **Save**.

	e > SB SupAddOn-Mult > SI	s suprassier s										
Scenario Budget	Years Entity FY21 0235 All	n, DeanES PE INSTR	ASST - N0179	Employee Posi Employee 1 P_10	tion 0008407_1 PE INS	TRASST					\rightarrow	/ 0
⊿ Man	age Support Ad	d-On (PERS)										
		Employee Name	Max Workday	s Max Hours	Days of Add-Or	Add-On Hour	s Add-On Note	Earnings Expens			FS Percer	tage-Add-Or
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	CSR	Title I	21st Cer
Enter Add-	On # Days, Hours and Fun	ding:					_					
Working_S	8	CCSD LastName,			183.00		2 additiona 🗘		100.00			
											0	
		(
« Man	age Support Ext	ra (NO PERS)										
4 Man	age Support Ext	ra (NO PERS)	lax Days-Extra	Days of Extra Hc	Extra Hours	Extra Note Ea	Irnings Expens			FS Percen	tage-Extra	
4 Man	age Support Ext	ra (NO PERS) Employee Name & Assumption	lax Days-Extra Assumption	Days of Extra Hc Assumption	Extra Hours Assumption	Extra Note Ea	rnings Expens RN_0151 Extra	Gen Fund	CSR	FS Percen Title 1	tage-Extra 21st Century	Sp Ed
Mana	age Support Ext	ra (NO PERS) Employee Name M Assumption	fax Days-Extra Assumption	Days of Extra Hc Assumption	Extra Hours Assumption	Extra Note Ea	rnings Expens RN_0151 Extra	Gen Fund	CSR	FS Percen Title I	tage-Extra 21st Century	Sp Ed

If you are entering **add-on time**, enter the appropriate number of days in the **Days of Add-On Hours** field. 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.

If you are entering **extra time**, enter the appropriate number of days in the **Days of Extra Hours** field. Once you have entered the days, enter the number of hours (which will apply to the days) in the **Extra Hours** field.

Remember: You **cannot** split-fund add-on or extra time for a support employee.

4. 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. Return to the previous form by clicking the **SB Support AddOn-Mult** link.

Scanario Years Entity	Job	Err	ployee Positio	m						-	1	~
Budget FY21 0235 Allen,	JeanES PE INSTR /	ASST - N0179 Em	ployee 1 P_100	08407_1 PE INS	IR ASST					7.	-	~
Manage Support Add-	On (PERS)											
	Employee Name	Max Workdays	Max Hours	Days of Add-Or	Add-On Hour	s Add-On Note	Earnings Expens	FS Amount Add-				FS Pe
	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR		Title I
nter Add-On # Days, Hours and Fundin	g:											
	0080					2 artitional						
/orking_SB	LastName,	194.00	7.50	183.00	2.0	0 hours each	5,453.40	7,176.67	100.00			
							II	L				
	- 3											
Manage Support Extra	(NO PERS)											
Manage Support Extra	(NO PERS) Employee Name M	lax Days-Extra D	ays of Extra Hc	Extra Hours	Extra Note Ea	rnings Expen: F	S Amount Extra			FS Percen	tage-Exti	ra
Manage Support Extra	(NO PERS) Employee Name N Assumption	lax Days-Extra D Assumption	ays of Extra Hc Assumption	Extra Hours Assumption	Extra Note Ea	rnings Expent Fi RN_0151 Extra	S Amount Extra Gen Fund	Gen Fund	CSR	FS Percen Title I	tage-Extr 21st C	ra entury
Manage Support Extra	(NO PERS) Employee Name N Assumption	fax Days-Extra D Assumption	ays of Extra Hc Assumption	Extra Hours	Extra Note Ea	rnings Expen: F: RN_0151 Extra	S Amount Extra Gen Fund	Gen Fund	CSR	FS Percen Title I	tage-Ext 21st C	ra entury

5. On the SB Support AddOn-Mult form, note that the positon now reflects the information you entered in the Add-On and/or Extra fields. To view the fringe benefits for the newly entered time, **right-click** on the position number and select **View Add-On Extra With Fringe**.

SCHOO	L BUDGET	0						S S	we Refresh	Actions -	Complete Prev	ous Next	Close
									and the second second	COMPLEX CONTRACTOR		and the second s	Contraction (Section
SB Home	e > SB SupAddOn-M	ult		G	Edit Fund Source Details						_		-
Scenario Budget	Years Ve FY21 W	rsion Entit orking_SB 0235	y Allen, DeanE	Q.	View Add-On Extra With Fringe						/ 🔅 Dat	Ad hoc	² ormat
				G	View Add-On Extra GL Code String Edit Adjust	*	Days of Add- On Hours	Add-On Hours	Add-On Note	Days of Extra Hours	Extra Hours	Extra Note	C. Lio On
				*4	Supporting Detail		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	As
				61	Change History								-
FRST AID/S	FTY AST - N0090	P_10008400_1	FRST AID/SF	A	Lock/Unlock Cells	377							
ELEM SCHO	DOL CLERK - N0143	P_10008400_1	FRST AID/SF			377							-
		P_10008404_1	ELEM SCHC		Filter	741							
SCH OFFIC	E MANAGE - N0310	P_10008411_1	SCH OFFICE		Sort	▶ 030				1			
COMPUTER	R TECH I - N1555	P_10008412_1	COMPUTER	1	Analyze								
		P_20003817_1	COMPUTER	-	New Ad Hoc Grid	58970							
CUSTODIAN	N - N8040	P_10005637_1	CUSTODIAN		Show Reasons for Read-Only Cells	00441							
		P_10008413_1	CUSTODIAN	1~	Desclicitus Discolars	00761							
HD CUST I	N8110	P_10008414_1	HD CUST I	105.	Predictive Planning	295							
SCHOOL AI	DE - N0100	P_10008401_1	SCHOOL AIE		Business Rules	41392							
LIBRARY AI	DE - N0105	P_10008402_1	LIBRARY AIL		Smart Push Details	28386							
		P_10008403_1	LIBRARY AIL		¥	28386							
SPTA II - NO	162	P_10008406_1	SPTA II		CCSD LastName, FirstName EM_	10049345							
		P_10008406_1	SPTA II		CCSD LastName, FirstName EM_	10090528							
		P_10008406_1	SPTA II		CCSD LastName, FirstName EM	319789							
		P_10008406_1	SPTA II		CCSD LastName, FirstName EM_	540930							
PE INSTR A	SST - N0179	P_10008407_1	PE INSTRASS	ST	CCSD LastName, FirstName EM_	10022402	183.00	2.00	2 additional hours each day	66.0	8.00	Extra days to make the	

6. 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. To return to the School Budget form, click on the **SB Home** link. You may now view the updated Support Add-On and/or Extra totals in the Summary Totals area and in the Additional Earnings tab.

Scenario Version Yea	rs Entity Job	Po	osition						-	1 0
Budget Working_SB FY2	1 0235 Allen, DeanES PE INSTR	ASST - N0179 P	10008407_1						7	1 4
VIEW LICENSED	ADD-ON WITH FRINGE B	ENEFITS								
		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0202 Add-On (PERS)	5,453.40	0.00	0.00	0.00	605 93	605.93	605.93	605.93	605.93
Benefits Expense-Add-On	Public Emp Retirement System	1,595.12	0.00	0.00	0.00	177 24	177.24	177.24	177.24	177.2
	Occupational Injury Management	46.35	0.00	0.00	0.00	5.15	5.15	5.15	5.15	5.1
	State Unemployment Ins	2,73	0.00	0.00	0.00	0.30	0.30	0.30	0.30	0.3
	Medicare	79.07	0.00	0.00	0.00	8.79	8.79	8.79	8.79	8.7
	TOTAL ADD-ON & FRINGE BENEFITS	7.176.67	0.00	0.00	0.00	797.41	797.41	797.41	797.41	797.4
		NEEITE						1		
	EXTRA WITH FRINGE BE	MEITIS		Aug	San	Oct	Nov	Dec	Jan	Eab
		VearTotal	- 11.11		oop				our	
Earnings Expense-Actual Basis	ERN 0151 Extra (NO PERS)	YearTotal 7,867.20	0.00	0.00	0.00	874.13	874.13	874.13	874.13	874.13
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS) Occupational injury Management	YearTotal 7,867.20 66.87	0.00	0.00	0.00	874.13 7.43	874.13 7.43	874.13 7.43	874.13 7.43	874.13 7.43
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS) Occupational Injury Management State Unemployment Ins	YearTotal 7,867.20 66.87 3.93	0.00	0.00	0.00 0.00 0.00	874.13 7.43 0.44	874.13 7.43 0.44	874.13 7.43 0.44	874.13 7.43 0.44	874.13 7.43 0.44
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS) Occupational Injury Management State Unemployment Ins Medicare	YearTotal 7,867.20 66.87 3.93 114.07	0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00	874.13 7.43 0.44 12.67	874.13 7.43 0.44 12.67	874.13 7.43 0.44 12.67	874.13 7.43 0.44 12.67	874.13 7.43 0.44 12.67

Budgeting for Supplies and Other Services

1. From the School Budget form, select the **Supplies and Other Services** tab.

SCHOOL BU	UDGET	0						🛔 🗌 💁	ve <u>R</u> efresh	Actions -	Complete Previou	Next	Close
Scenario Yea Budget FY2	ars Er 21 02	ntity 235 Allen, DeanES										1	٥
MANAGE	E POSIT	ION/EMPLOYEE E	UDGET by WO	RK LOCATI	ON								
Version Working_SB											-	1	¢
Administrative	Licensed S	upport Add'l Earnings Su	oplies and Other Svcs SL	A									
			Employee Name	Shared Position	Eff Start Date	Eff S	top Date	Planned FTE	FS Percentag	e Total Fund Src	FS Amount Aver		
			Assumption	Assumption	Assumption	Ass	umption	Assumption	Gen Fund	Allocation Pct	Gen Fund		
ELE PRINC (9 M	10S) - U7000	P_10026764_1 ELE PRINC (9	MOS) CCSD LastName.		7/24/1	9		1.00	100.0	100.00	151.057.92		
Admin Jobs		Total All Positions						1.00			151,057.92		
	RY TOTA	LS											
				Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I J ZFS-EDI	T Food	GATE	
	REM	AINING BUDGET TO SPEND		(239.480.88	(88,205.51)	0.00	0.00	500.00	(68,205.51)	0.00 (415,391.9)	5,928.16	91,8	12.14
ALLOCATED FUN	IDS:					_							_
Target	All J	obs	FS Amount Actual Cost E	lasis 2,355,966.6	5 352,822.04	0.00	0.00	89,000.00	37,200.00	0.00 2,834,988.7	0 42,886.25	91,8	12.14
BUDGET SPENT:													

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. Click **Save** when you are finished updating.

CHOOL	BUDGE	T O						Save Re	efresh Actions + Complete Pravious	Next	Cļos
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES							÷	1	¢
MANA	GE PO	SITION/EMPLOYE	E BUDGET	by WORK		N					
Version Working_SB									+	1	0
Administrativ	e Licensed	Support Add1 Earnings	Supplies and Other	r Svcs SLA							
Period BegBalance	5								+	/	¢
			Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory			
Enter total	year dollar a	mount to a Funding Source:									1
511654000	0 Extra Duty I	Licensed	5,000.00								
511681000	0 Preparation	Periods									
511795200	0 Extra Duty	Support Staff									
511825900	0 Extra Duty	Administrator									
532000000	0 Education S	Services									
533000000	0 Employee 1	Fraining									
534000000	0 Other Profe	ssional Services									
	1 and Cand	ces									

3. Click on the Actions menu, then select Calculate Fund Source Supplies.

ve <u>R</u> efresh A	Actions - Ciose
	View Fund Source to GL Allocations View Fund Source Supplies
	Calculate Fund Source Supplies
	Budget For Go To Full Screen Update Admin, Licensed and Support subtotals Filter
	Analyze New Ad Hoc Grid
	Show Reasons for Read-Only Cells Predictive Planning Business Rules Smart Push Details
	Grid Validation Messages Spreadsheet Export Open in Smart View

4. You may now view the updated Supplies and Other Services totals in the Summary Totals area.

сноо	BUDGE	T O							1 0 S	ive <u>R</u> efresh	Actio	ns 🕶 🗌 🖸 <u>C</u> om	plete Bravious	Next	Close
Scenario Budget	Years FY21	Entity 0235 Allen, DeanES											+	1	0
A MAN	AGE PO	SITION/EMPLOY	EE BUDGET	by WORK	LOCATIC	N									
Version Working_SB													+	1	Q
Administrativ	ve Liçensed	Support Add'l Earnings	Supplies and Oth	er Svcs SLA											
Period BegBalanc	æ												+	1	٥
			Gen Fund	CSR	Title I	21st Cen	tury	Sp Ed	Victory						
Enter total	i year dollar a	mount to a Funding Source:													-
511654000	0 Extra Duty	Licensed	5.000.00												
511681000	0 Preparation	Periods													
511795200	0 Extra Duty	Support Staff													
511825900	0 Extra Duty	Administrator													
532000000	00 Education \$	Services													
533000000	00 Employee 1	raining													
534000000	00 Other Profe	ssional Services													
534300000	00 Legal Servi	ces													
624400000	n Architectur	al Candean Braff													٠
	MARY TO	DTALS													_
					Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	A ZES-EDIT	Food	GATE	22 T
			FS Amount /	Add-On	7,176.67	Con	HOFEE	magnet	out read by o	our ouro	mart	7,176.67	1000	GAIL	
			FS Amount I	Extra	8,052.08							8,052.08			
		All Jobs	Supplies and	d Other Services	5,000.00		_		88,500.00	37,200.00	2	130,700.00			
			Service Leve	Agreement	124,905.52	_	-	_				124,905.52			1
TOTAL BUD	GET SPENT				2,553,808.64	441,027.55			88,500.00	125,405.51	3	3,208,741.70	36,958.09		0.00

Exporting a Tab and Budget Totals

1. From the School Budget form, select the tab that you wish to export. Click on the **Actions** menu, then select **Spreadsheet Export**.

SCHOOL	BUDGET	0					Sa	ve <u>R</u> efresh	Action	s - Complete Previous Next Clo
Scenario	Years	intity							G	View Fund Source to GL Allocations
Budget	FY21 0	235 Allen, DeanES							G	View Fund Source Supplies
MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION										Calculate Fund Source Supplies
Version										Budget For
working_SB	has been ad a	Durant Addi Famina Duralisa a	od Olher Sure Di							Go To Full Screen
Administrat	ive Licensed a	Support Add1 Earnings Supplies a	nd Other Sycs St	.^					Q,	Update Admin, Licensed and Support subtotals
			Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage		Filter
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	٩	Analyze
ELE PRING	C (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,		7/24/19		1.00	100.0	۹)	New Ad Hoc Grid
										Show Reasons for Read-Only Cells
									Ĩ.	Predictive Planning
Admin Job	DS	Total All Positions					1.00		+ - x +	Business Rules
										Smart Push Details
									₩	Grid Validation Messages
										Spreadsheet Export

- 2. In the Spreadsheet Export window, click Export.
- **Spreadsheet Export**



Click on the export button for spreadsheet export

3. 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. If you are in **Mozilla Firefox**, a dialog box should appear, indicating that the file will open in Microsoft Excel. Click **OK**.

									1	and the second	Cio:
Scenano Veara Budget PY21	Entry 0235 Allen, DognES									4 1	0
MANAGE P	OSITION/EMPLOYEE	BUDGET by WORK	LOCATION								
Version Working SB									9	1 1	
Administrative Lice	reed Support. Addi Earrings S	upplies and Other Syca SLA									
		Employee Name Shar	ed Position Eff Sta	rt Date Eff Sto	op Date	Planned FTE	ES Percentag	e Total Fund Src	F5 Amount Aver		
		Spreadshe	et Export	ĥ	Exp	ort Close	Gen Fund	Allocation Pct	Gen Fund		
ELE PRINC (9 MOS)	U7000 P_10026764_1 ELE PRINC	(8 MOS) Lat					1/00.0		151.057.92		
		Click on the expo	ort button for spreadsh	eet export				_			
Admin Jobs	Total All Positions								151.057.92		
		-	_	_	-	-					
		-									
SUMMARY	TOTALS										
SUMMARY	TOTALS	-	Gen Fund Ct	SR HOPE2 1	Magnet Ge	mF Read by 3	GenF SB178	Attie I 🥣 ZFS-EDI	T Food	GÂ	re
	TOTALS REMAINING BUDGET TO SPEND		Gen Fund CC (m2.347.nm) (m2.24	SR HOPE2 I	Magnet Ge 0.00	mF Read by 3 500.00	GenF 5B178 1 (80.200.51)	ntie I 👒 ZFS-EDI α ου (ζέλιη 71% bo	T Food 0 5,028 16	GA	re 342.13
SUMMARY	TOTALS Remaining Budget to spent All Jobs	FS Amount Actual Cost Basis	Gen Fund CC (1102/84 / 1111) 2.355.966.66 362 8	SR HOPE2 1 05.51) 0.00	Magnet Ge 0.00	mF Read by 3 500.00 89.000.00	GenF 58178 1 (80.200.61) 37.200.00	Intel ZFS-EDI 0.00 CSR4.75.100 0.00 2.834.988.70	T Food 1 5,028 18	GA in 01	FE 3642 14 842 14
SUMMARY	TOTALS REMAINING BUDGET TO SPENC All Joba	FS Amount Actual Cost Basis	Gen Fund Ct (1992 Auf 1997, 1982 2 2.395 Sec 66 302 9	SR HOPE2 (05A1) 0.00	Magnet Ge 0.00	inF Read by 3 500.00 89.000.00	GenF 58178 .1 (80.200.87)	Rite 1 - 4 ZFS-EDI 0.00 - 2.834.988.70	T Food 0 5,028 18 0 42 585 25	GA In 01	FE 342 14 842 14

4. Once the Excel file opens, you will be able to view all information contained within the exported tab, including the Totals information.

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Pas CI	te state st	$\begin{array}{c} \mathbf{A} & \mathbf{A} \\ \mathbf{A} & \mathbf{A} \end{array} = = \mathbf{A} \\ \mathbf{A} & \mathbf{A} \end{array}$	 	t General Conc Center - \$ - % \$.00 .00 Number 5	ditional Format as Cell latting · Table · Styles · Styles	Insert Delete Format Cels	∑ AutoSum * A ↓ Fill * Sort & Clear * Filter * Sort & Editing	Find & Select -
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1		1		0235 Allen, DeanES	BaseData	Budget	Working_S8	
2 3 4 5 6 7 8 9				Employee Name Assumption BegBalance Unspecified Fund Unspecified 10 Unspecified 10 Unspecified Cost Center	Shared Position Assumption BegBalance Unspecified Fund Unspecified IO Unspecified FuncArea Unspecified Cost Center	Elf Start Date Assumption BegBalance Unspecified Fund Unspecified F0 Unspecified FuncArea Unspecified Cost Center	Eff Stop Date Assumption BegBalance Unspecified Fund Unspecified ForcArea Unspecified Cost Center	PI Ar Br Unsp Unspec Unspeci
10	KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 1	CCSD LastName, FirstName EM_325191	and the second	8/7/19		
11	KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		
12	KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		
13	KDG 1 AM/1 PM1 - C1000	P_10008381_1 KDG 1 AM/1 PM	Vacant		1	8/7/19		
14	GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19		
15	GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 2	CCSD LastName, FirstName EM_303745		8/7/19		
16	GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 3	CCSD LastName, FirstName_EM_553069	8	8/7/19		
17	GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 4	CCSD LastName, FirstName EM_524230	13	2/20/20		
18	GRADE 1 - C1010	New Position 8	Vacant	Vacant	1	3		
19	GRADE 2 - C1020	P_10008383_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411	1	8/7/19		
20	GRADE 2 - C1020	P_10008384_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_520954		8/7/19		
21	GRADE 2 - C1020	New Position 5		Vacant				
22	ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Employee 1	CCSD LastName, FirstName EM_10084404	5	8/7/19		
23	GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305	1	7/1/20		
24	GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 2	CCSD LastName, FirstName_EM_502600	6	8/7/19		
25	GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 3	CCSD LastName, FirstName EM_524230	63	2/20/20		
26	GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 4	CCSD LastName, FirstName EM_10014323	1	8/7/19		
27	GRADE 4 - C1040	P_10008387_1 GRADE 4	Employee 1	CCSD LastName, FirstName EM_10109611		7/1/20		
28	GRADE 4 - C1040	P_10008387_1 GRADE 4	Employee 2	CCSD LastName, FirstName_EM_316074		8/7/19		
29	GRADE 4 - C1040	P_10008387_1 GRADE 4				7/1/20		
30	GRADE 5 - C1050	P_10008389_1 GRADE 5	Employee 1	CCSD LastName, FirstName_EM_546907		8/7/19		
View Employee's Actual Salary Rate

To view an employee's actual salary within the Budget Planning Tool, you must be in **Full Screen**.

1. From the School Budget click Actions > Go To Full Screen > Select Admin, Licensed, or Support



2. Locate the employee you want to view the salary for and click to highlight the position

SCHOOL	BUDGE	0										ľ,
SB Home :	SB Position In	fo Detail-Licen	sed Transf									
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES									
					Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE		FS Percentage	
					Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	G
KDG 1 AM/1 P	M1 - C1000	P_10008381_1 KDG 1 AM/1 PM		Employee 1	CCSD LastName, FirstName EM_325191		8/7/19		1.00	100.00		
				Employee 2	CCSD LastName, FirstName EM_331715		8/7/19		1.00	100.00		
				Employee 3	CCSD LastName, FirstName EM_516040		8/7/19		1.00	100.00		
GRADE 1 - C1010 P_10008382_1 GRADE 1 Employee 1 CCSD LastName, FirstName EM_10014323 8/7/19 1.1				1.00		100.00	Т					
				Employee 2	CCSD LastName, FirstName EM_303745		8/7/19		1.00		100.00	-
				Employee 3	CCSD LastName, FirstName EM_553069		8/7/19		1.00		100.00	

3. Once the employee row is highlighted, right click > select Edit Position Info



4. You will be able to see both the employees **Actual** salary and **Average** salary for the position

· Compensation monany opres		
Version Position Employee Vorking_SB P_10008382_1 Employee 1		
		YearTotal
asic Salary Expense-Actual Basis	Assumption	63,985.00
3enefits Expense <mark>.Actual </mark> Basis	Public Emp Retirement System	18,715.61
	Occupational Injury Management	543.87
	State Unemployment Ins	31.99
	Medicare	927.78
	Certified EGI	7,637.88
OTAL COMPENSATION EXPENSE-ACTUAL BASIS	TOTAL SALARY & FRINGE BENEFITS	91,842.14
asic Salary Expense-Average Basis	Assumption	61,221.60
Benefits Expense <mark>-Average</mark> Basis	Public Emp Retirement System	17,907.32
	Occupational Injury Management	520.38
	State Unemployment Ins	30.61
	Medicare	887.71
	Certified EGI	7,637.88
OTAL COMPENSATION EXPENSE AVG BASIS	TOTAL SALARY & FRINGE BENEFITS	88 205 51

Compensation Monthly Spread Detail

Printing Budget Plans

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



2. Uncheck the **Show POV Options** checkbox, expand the CCSD folder to the Budget folder, and click the PDF action icon to the right of the **SB_ALLFUNDS_V1 report**.

ORACLE Planning and Budgeting Cloud: CCSDBUD							Â	0 ::	THOMAC12
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	Tasks	Data	Reports	Approvals	Academy				
Reports			—						Retrest
Shew POV Options									
Name			Description					Actions	
🛛 🔜 Home									
BUDGET									
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Report1									88
SB_ALLFUNDS_EMP_V1		3	School Strategic Budge	I-All Fund Sources-with E	Imployee Names				88
SB_ALLFUNDS_NTS_V1)	School Strategic Budge	-All Fund Sources w/ No	nes			6	
SB_ALLFUNDS_V1		3	School Strategic Budg	et-All Fund Sources				6	88

 From the prompt pop-up window type your work location directly in the fields (use this format: WL_0235). Copy it to the other three Enter Entity prompts, and then click OK to proceed. The screen will go blank, however, the report is processing. Please give it about 30 seconds. Any report in the list can be ran following the same navigation.

Respond to Prom	npts at Report Level 🗸			
Prompt	Selection	Туре	Source	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: GenFund	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: All	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: GF Supp	
Enter Entity:	WL_0235	Report	Report: SB_ALLFUNDS_V1 Grid: All	

4. When done, the PDF should display on your browser. Depending on your browser type, you can use the available PDF tools like search, zoom in/out, print and download functionalities.

	•												
Markan Cost Distancing Bunger Plan Distance Distance Varia Image: Plan Distance Distance <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>													
Minimize D2325 Allenges Vit_2333 Series Disponsibility AL FUNCING SOURCES Series Disponsibility	CCSD				CCSD Strateg	gic Budget Pla	n					1/23/2021	
WL_023 Description Description Cost Flood Gene Fland Cost Cost <td>CLARK COUNTY SCHOOL OF THEY</td> <td></td> <td></td> <td></td> <td>0235 All</td> <td>en, DeanES</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	CLARK COUNTY SCHOOL OF THEY				0235 All	en, DeanES							
Number Gene Field Gene Field<	WL_0235				2020-2021	School Year							
ALL Function Source 1 Pinst Summary 151.08 3.94% Licensed Jala Total Funding Amount 1.764.110 80.208 441.028 80.208 375,514 2.757.003 71.91% Licensed Jala Total Funding Amount 1.764.110 80.208 441.028 80.208 375,514 2.757.003 71.91% Licensed Jala Total Funding Amount 0.002<			Gen Fund	GenF SB178	CSR	Food	Gen GATE	GenF Read by 3	Sp Ed	Cost	Cost (%)		
Pun Summary Attim Jobs Total Funding Amount 151,098 98,009 41,028 98,009 375,519 150,098 3,94% Lienneel Jobs Total Funding Amount 1,776,119 98,009 41,028 98,009 375,519 150,098 3,94% Lienneel Jobs FS Amount Stras 1,287 128,59 128,5	ALL FUNDING SOURCES												
Numeration Total Funding Amount: 151.058 3.94% Admin.bls Total Funding Amount: 1.744.110 88.206 441.028 08.206 375.51 2.725.06 3.94% Leeneed.aba Total Funding Amount: 1.744.110 88.206 441.028 08.206 375.51 2.725.06 3.94% Leeneed.aba FS Amount AssCon 6.002 <	No. Common												
Likemed John Total Funding Amount 1,764,110 85,206 41,028 86,206 378,514 2,757,003 71,91% Likemed John FS Amount MadSOn 6,002 7,177 0,106 6,002 7,177 0,106 8,002 0,203 7,177 0,106 7,177 0,106 7,177 0,106 7,177 0,106 7,177 0,106 7,177 0,106 7,177 0,106 7,177 0,106 7,177	Admin Jobs	Total Funding Amount	151.058							151.058	3.94%		
Licensed.obs F3 Anoxif MpB By 14.663 14.663 0.33% Licensed.obs F3 Anoxif MpB By 14.663 0.32% 0.03% Licensed.obs F3 Anoxif MpB By 1.287 1.287 0.03% Support Abs TedH Fundsy Andor 1.297 0.03% 1.28,456 537,978 16.64% Support Abs TedH Fundsy Andor 471,464 36,580 1.28,456 537,978 16.64% Support Abs TedH Fundsy Andor 7.177 1.28,450 128,450 0.17% Support Abs Ted Howser Mentoins 8.050 122,450 32.32% 124,050 0.22% Support Abs Ted Howser Mentoins 8.050 124,050 124,050 124,050 22,050 3.333,127 166,057 Supplies and Device Device 124,660 411,028 36,539 66,264 85,500 504,977 3.333,127.5 166,057 VL_0235 Los Pation Anoremetric Ted Anoremetric F3 Anoxif F3 Ano	Licensed Jobs	Total Funding Amount	1,764,110	88,206	441,028		88,20	06	375,514	2,757,063	71.91%		
Likemed Joke F3 Annuxt Ad-SCin 6.082 6.092 0.1% Likemed Joke F3 Annuxt Ad-SCin 6.082 0.1% 1.287 0.03% Support Ake Total Funding Annuxt 417,444 30.090 122,459 532,878 16.64% Support Ake Total Funding Annuxt 417,444 30.090 120,459 523,878 16.64% Support Ake F3 Annuxt Exh 8.002 2.01% 100,92 0.21% Support Ake F3 Annuxt Exh 8.002 2.21% 100,92 0.21% Support Ake F3 Annuxt Exh 8.002 124,006 1	Licensed Jobs	FS Amount Prep Buy	14,663							14,663	0.38%		
Litemed. Job F3 Amount Entra 1,297 0.0% Buppont Jobs Table Tanding Amount 17.177 0.0% Suppont Jobs F3 Amount Most On 7.177 0.19% Supples and Services Service Lovef Agreement 37.200 85.00 123.000 3.28% Supples and Services Service Lovef Agreement 124.000 441.028 36.950 63.204 86.500 53.833.875 166.50 VM_0235 Job Postion Assumption F3 Amount F1 Amount	Licensed Jobs	FS Amount Add-On	6,082							6,082	0.16%		
Support Abba Total range Answert 417,444 30,300 12,425 52,787 10,954 Support Abba F3 Answert Bohn 8,002 27,177 0,1954 Support Abba F3 Answert Bohn 8,002 0,275 8,002 0,275 Support Abba F3 Answert Bohn 8,002 0,275 8,002 0,275 Supples and Direk Services 37,200 85,000 122,000 3,295 Supples and Direk Services 2,248,809 125,406 441,028 36,550 65,206 85,000 55,373 3,333,875 166,000 Vil0235 Job Postion Assumption Gen Fund Gen Fund Gen Fund F3 Answert	Licensed Jobs	FS Amount Extra	1,297							1,297	0.03%		
Budget Abs F3 Amount Read-on 1,17 1,17 0.19% Supplex Abs F3 Amount Exist BD02 37.200 85.000 125,200 3.28% Supplex Abs F3 Amount Exist BD02 37.200 85.000 125,200 3.28% Supplex and Services Services Level Agreement 2.448.049 125.406 441,828 36.958 68.206 69.4570 3.323.87 106.05 Wit_0235 Job F6 Amount Exist F6 Amoun	Support Jobs	Total Funding Amount	471,464			36,958			129,456	637,878	16.64%		
WL_0235 Supplement	Support Jobs	ES Amount Add-Un	8.052							8.052	0.1976		
Supplex and Services Services Service Level Agreement 124.005 124.005 124.005 124.005 124.005 124.005 124.005 124.005 124.005 124.005 126.005 32.055 Wit_6235 Wit_6235 Wit_6235 Wit_6235 Band Cen Fund Gen Fund FS Anout Anout Anout Anount Anount <td cols<="" td=""><td>Copport scool</td><td>Supplies and Other Services</td><td>0,004</td><td>37,200</td><td></td><td></td><td></td><td>88.50</td><td></td><td>0,004</td><td>0.2114</td><td></td></td>	<td>Copport scool</td> <td>Supplies and Other Services</td> <td>0,004</td> <td>37,200</td> <td></td> <td></td> <td></td> <td>88.50</td> <td></td> <td>0,004</td> <td>0.2114</td> <td></td>	Copport scool	Supplies and Other Services	0,004	37,200				88.50		0,004	0.2114	
Total 2,548,809 115,609 441,828 36,958 68,509 504,879 3,833,875 106,09 WL_0235 Job Postlon Assumption Gen Fund	Russian and Reasons									125,700	3.2076		
WL_0235 Job Postion Assumption Gen Fund Gen Fund Gen Fund Gen Fund Gen Fund Gen Fund Gen GATE Special Bit Let PRINC (# MOS)- UT000 P_10002780/L1 Months Werk Paraled TE Bases <	oupplies and services	Service Level Agreement	124,908						0	125,700	3.26%		
Brund Total Administrative Staffing Month Wink Register F3 Amout Property 1 Months F3 Amout Property 1 \$10,057.02 F3 Amout Property	Total	Service Level Agreement	124,906 2,548,809	125,406	441,028	36,958	88,21	6 88,50	0 504,970	125,700 124,908 3,833,875	3.26% 3.26% 100.00		
ELE PRINC (9 MOS) - U7000 P_10026704_1 11 Months 8 1 \$151,007.32 Total Administrative Staffing 2 302,155.44 KDG 1 AM/1 PM1 - C1000 P_10008381_1 09 Months 1 \$88,205.51 \$7,005.51 \$3,471.38 \$596,609 Old Months 7 1 \$808,205.51 \$2,224.28 \$706.57 O9 Months 7 1 \$808,205.51 \$2,224.28 \$706.57 O9 Months 7 1 \$808,205.51 \$2,254.28 \$706.57	Total WL_0235 Job	Service Level Agreement	124.906 2,548.809 Assumption	125,406	441,028 Gen 1	36,958 Fund Gen Fund	88,21 Gen Fund	Gen Fund GenF	504,970 58173 CSR	125,700 124,006 3,833,875 Food	3.26% 3.26% 100.00	Sp Ed	
PORP 1 1 500,752 Total Administrative Starting 2 2 2 KDG 1 AMI PM1 - C1000 P_10008381_1 09 Morris 1 580,205.51 \$12,471.38 \$666.69 09 Morris 7 1 580,205.51 \$2,264.20 \$706.57 09 Morris 7 1 \$680,205.51 \$2,264.20 \$706.57 09 Morris 7 1 \$680,205.51 \$2,264.20 \$706.57	wyskie and services Total WL_0235 Job	Service Level Agreement Position	124.006 2,548,809 Assumption Shared Months Position Overrid	125,406 Work • Avg Hours	441,028 Gen I FS Amo Fire Basis	36,958 Fund Gen Fund Junt Prop Buy	68,24 Gen Fund FS Amount Add-On	Gen Fund GenF FS Amount Average Extra Basis	564,970 564,970 SB178 CSR sunt FS Amount E Cost Average Cost Basis	Food Food FS Amount Basis	3.20% 3.20% 100.00 FS Amount P Average Cost A Basis B	Sp Ed S Amount chail Cost este	
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5. When done, click the **Close** button (upper right). Repeat running the report using the XLS version and HTML as an option.



Promoting (Submitting) a Work Location Budget

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.

Filter		Giear All Apply Cancel	
		Select	
	Scenario	Budget	
	Version	DefaultScen PositionRequest	
	Approvals Status	~	
	Approval Unit		
More			

6. Select **Strategic Budget** as the Version. Depending on your *alias settings* in User Preferences the Strategic Budget option may appear as **Working_SB**.

T Filter: E	Budget t 1	Working_SB 11							
		Filter			• •	Clear All	Apply	Cancel	
			Scenario	Budget		~			
			Version	Strategic Budget		\sim			
			Approvals Status	Select					
			Approval Unit	Tentative Budget			2		
				Final Budget			τ		
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		More		Base					
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				Final					
				LastSaved					
				SharedPositions					
				Target					
				What if					
				Loaded Assumption - W	orking				
				Strategic Budget					

7. Click Apply.

Filter		Ng	Clear All	Apply	Cance <u>l</u>
Scenario	Budget		\sim		
Version	Strategic Budget		\sim		
Approvals Status			\sim		
Approval Unit			5		

SUBMIT AND REVIEW

8. In the Submit and Review form that appears, click the **Planning Unit** (work location) for your school.

Approvals Sort By: Approval Unit Filter: Budget 11 Working_SB 11 0235 Allen, DeanES SG_0235 Under Review

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

Change Status: 0235 Allen, DeanES

2	Action P	Promote		\sim
	Annotatio	n		
1				
	Change	Status		

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

Char	nge S	Status: 0235 Allen, DeanES	
	Action Annota	Promote	~
	Chan	ge Status	

11. By clicking Change Status you are submitting your budget.



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

Chan	ge S	tatus: 0235 Allen, DeanES				<u>R</u> efresh D <u>o</u> ne
2	Action	Promote	\sim	Owner	<automatic></automatic>	~
10	Annota	ion				
1						
	Chang	e Status				

13. 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**.

Promote by abhat Under Review Reply	12/10/20 9:46 AM
Originate by DSALASISI Under Review Reply	12/10/20 6:19 AM
Start by DSALASISI 1st Pass Reply	12/10/20 6:19 AM

14. Click Done.

Char	nge Status: 0235 Allen, DeanES	<u>R</u> efresh D <u>o</u> ne
	Promote by abhat Under Review Reply	12/10/20 9:46 AM
	Originate by DSALASISI Under Review Reply	12/10/20 6:19 AM
	Start by DSALASISI 1st Pass Reply	12/10/20 6:19 AM

15. Note that the Submit and Review form now shows the submitted work location is **Under Review.**



16. When finished, click **Close** to return to the Tasks List.



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**.

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.

Error Messages when Submitting a School Budget

FOR ELEMENTARY SCHOOLS ONLY: If upon submitting your budget, you receive a **Failed: Invalid Data** message, this is due to the *Student Teacher Ratio Validation Check* either not calculated or it was calculated and your ratios exceed the student ratio limit.



		ST Ratio Limit	Students	Difference
Elementary Star 1 or 2 Schools				
Grade1	Elem - Star 1 or 2 - Grade 1	16.00	19.50	-3.50
Grade2	Elem - Star 1 or 2 - Grade 2	16.00	16.00	0.00
Grade3	Elem - Star 1 or 2 - Grade 3	19.00	20.33	-1.33
Elementary Star 3 or 4 or 5 Schools				
	Value Count	3.00	3.00	0.00
Click SAVE to update the ratios				

To calculate your Student Teacher Ratios: While within your school budget, click **Next** this will bring you to the *Student Teacher Ratio Validation Check* screen.

SCHO	OL BUD	GET Ø	Said - Shi	6	Save listed Action .	D Complete Dinida	N	-	Close -
Staruno Dudgat	Years FV21	Solty 2202 Elive L. WURES					+	1	0

Click **Save** to calculate your ratios. Red indicates you are not in compliance.

FOR ALL SCHOOLS: If upon submitting your budget, you receive a **Failed: Not Enough Access** message, please disregard. Despite this error message, the promotion of your budget works correctly. The error message is an Oracle coding bug and is being addressed.

