

CCSD School Budget Planning Tool Essentials Guide

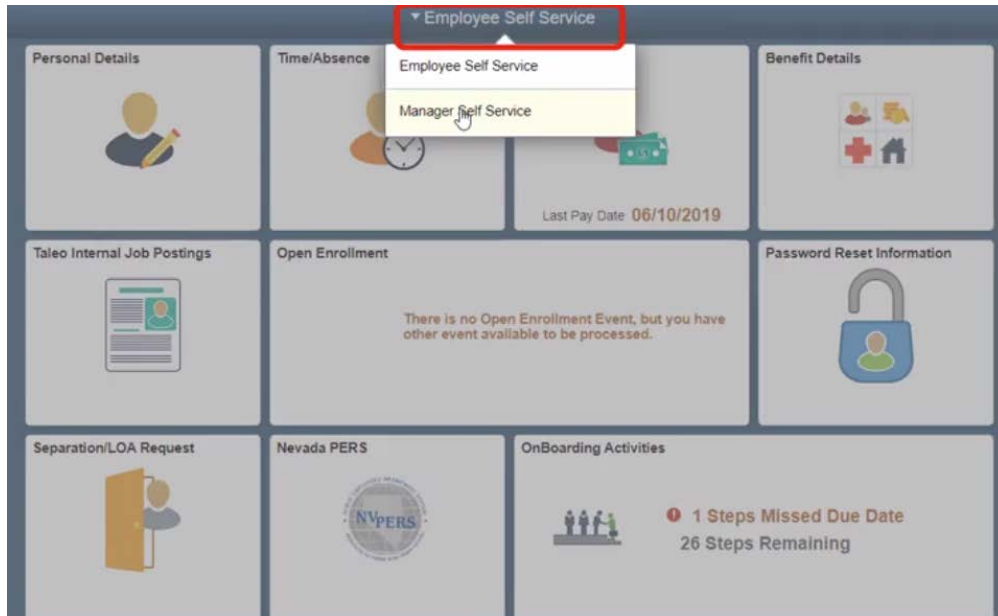
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CCSD School Budget Planning Tool Essentials Guide

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**.

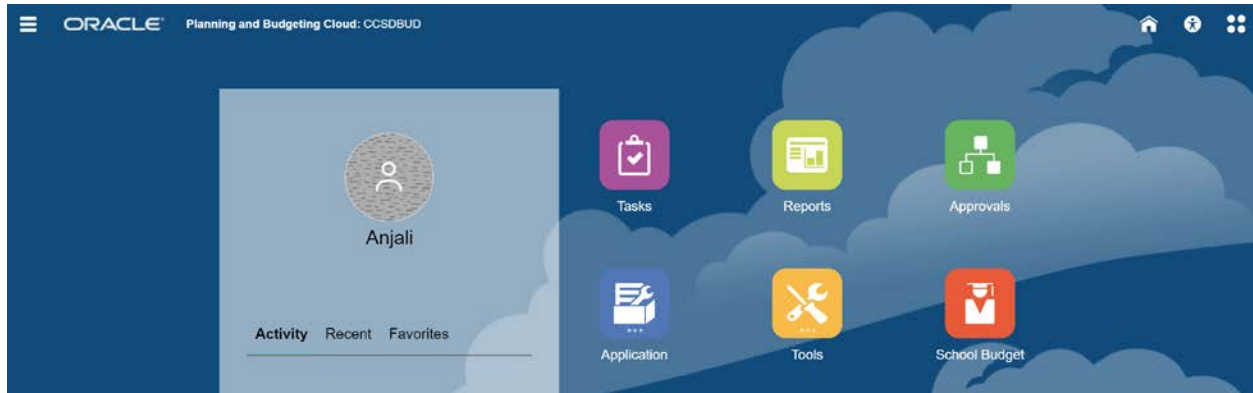


3. From the MSS Dashboard, select the **Budget Planning Tool** tile.



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



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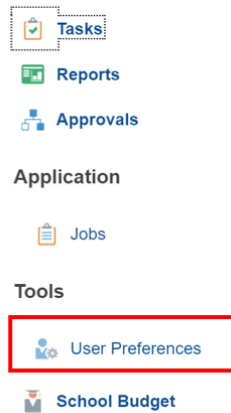
User Preferences

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



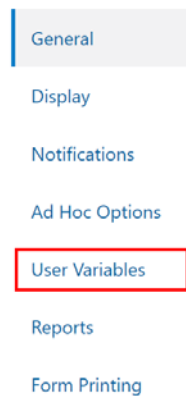
2. Under Tools, click on **User Preferences**.

Navigator: Planners



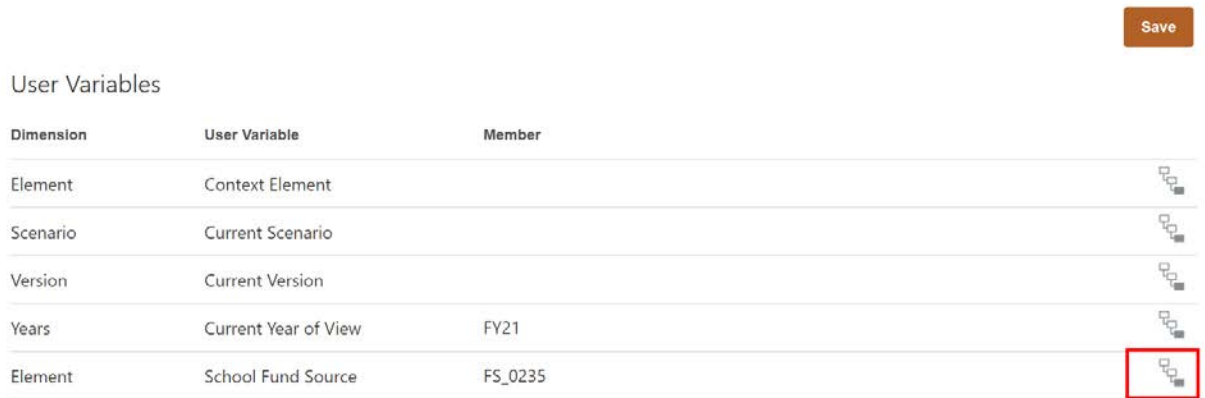
3. Click on User Variables:

Preferences



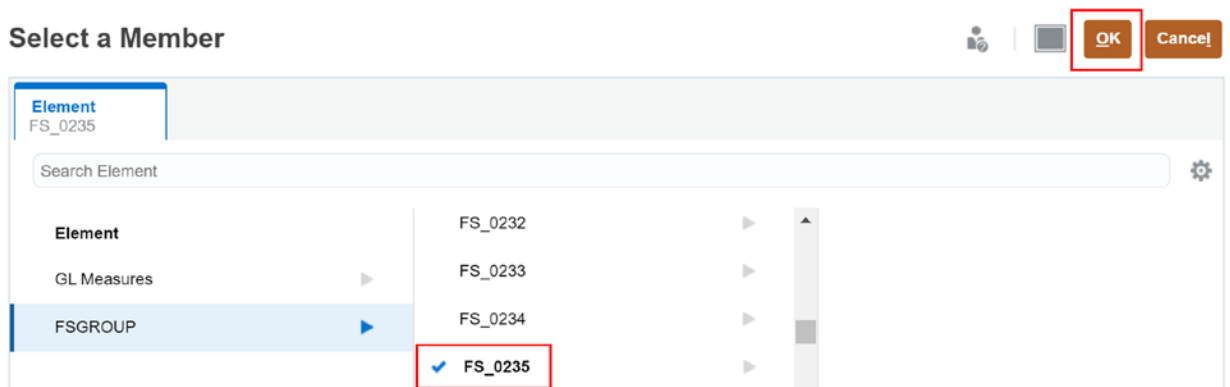
4. Go to the **Element** row, and click on the **Member Selector** icon.

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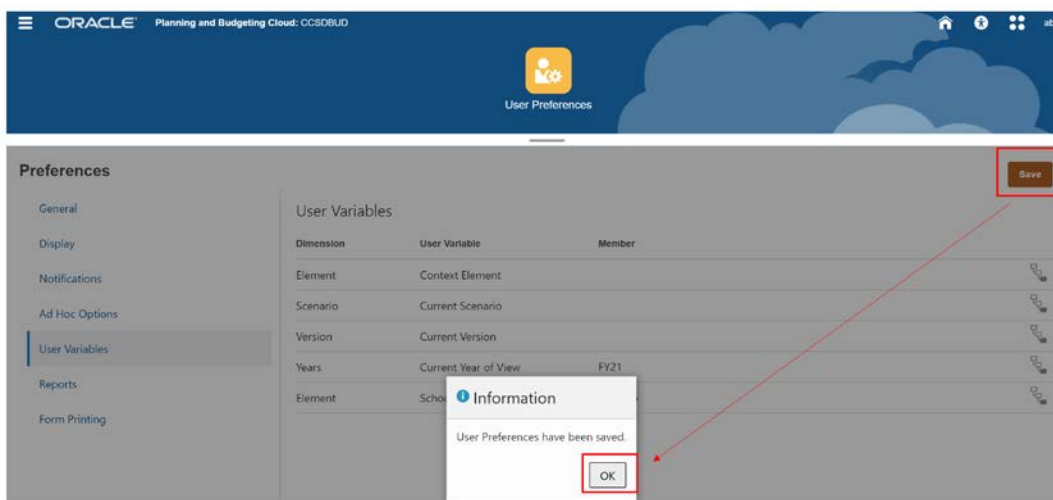


Dimension	User Variable	Member
Element	Context Element	
Scenario	Current Scenario	
Version	Current Version	
Years	Current Year of View	FY21
Element	School Fund Source	FS_0235

- 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**.



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



- Click the **Home** icon to return to the PBCS homepage.

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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.

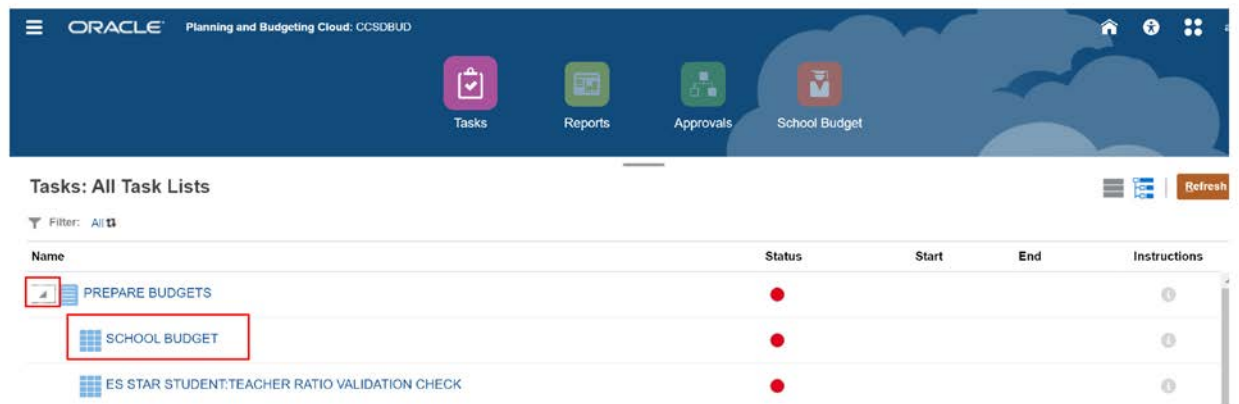
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Accessing and Editing the School Budget

1. From the PBCS homepage, click on the **Tasks** icon.



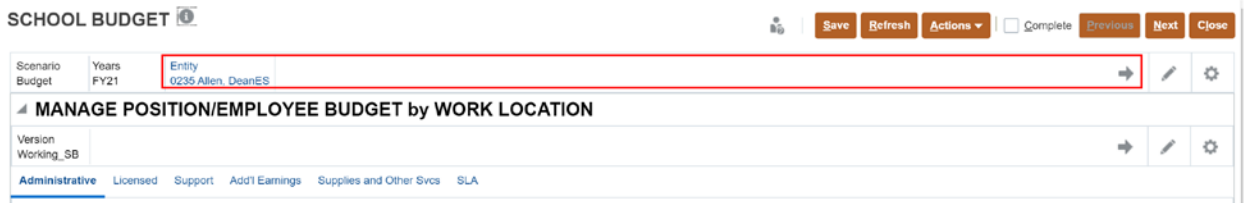
2. From the Task List window, click the dropdown arrow next to **Prepare Budgets**. Click on **School Budget**.



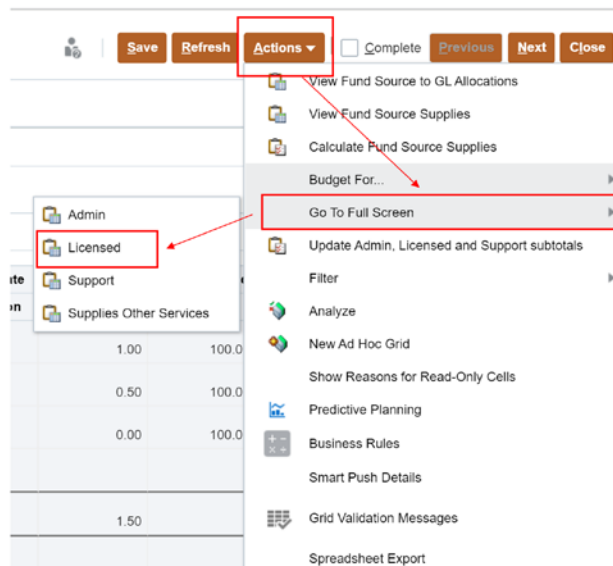
3. Confirm you are accessing the correct work location in the **Entity** field. (This will be useful if you are assigned to **multiple locations**). *If* you need to change the work location displayed, click on

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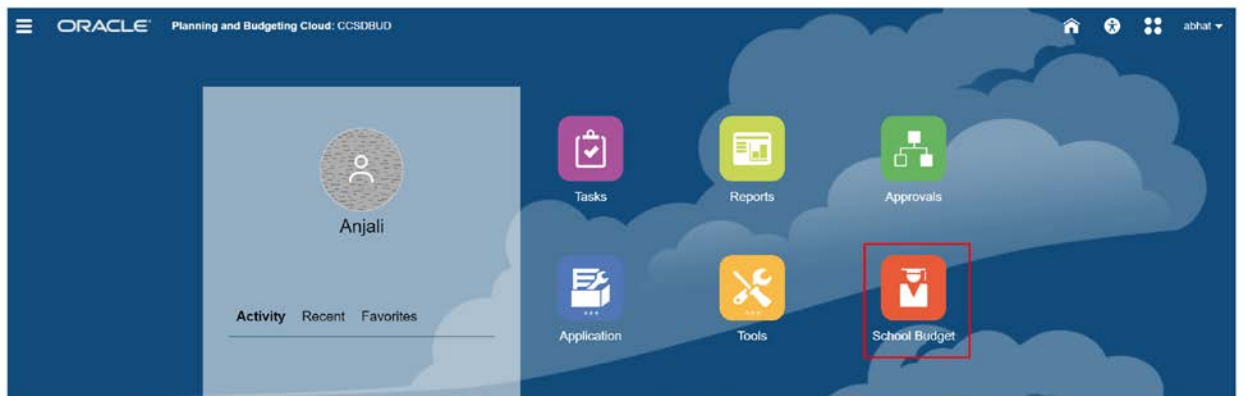
the **Entity** link. From the Select a Member window, select your work location and click **OK**. Click the **Go** arrow to update the grid with your selected location's budget data.



- 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).



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



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Navigating and Understanding the School Budget

- 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).

SCHOOL BUDGET ? Save Refresh Actions Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Employee Name Assumption	Shared Position Assumption	Eff Start Date Assumption	Eff Stop Date Assumption	Planned FTE Assumption	FS Percentage Gen Fund	Total Fund Src Allocation Pct	FS Amount Aver Gen Fund
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS) CCSD LastName,		7/24/19		1.00	100.00	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	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	91,842.14	
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	91,842.14
BUDGET SPENT:											

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

SCHOOL BUDGET ? Save Refresh Actions Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Employee Name Assumption	Shared Position Assumption	Eff Start Date Assumption	Eff Stop Date Assumption	Planned FTE Assumption	FS Percentage Gen Fund	Total Fund Src Allocation Pct	FS Amount Aver Gen Fund
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS) CCSD LastName,		7/24/19		1.00	100.00	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	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	91,842.14	
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	91,842.14
BUDGET SPENT:											

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

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SCHOOL BUDGET ⓘ

Scenario Budget: Years FY21, Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative | Licensed | Support | Add'l Earnings | Supplies and Other Svcs | SLA

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver.
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	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	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	91,842.14	
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	91,842.14
BUDGET SPENT:												

- 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 BUDGET ⓘ

Scenario Budget: Years FY21, Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative | Licensed | Support | Add'l Earnings | Supplies and Other Svcs | SLA

	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver.
	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	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	GATE	
REMAINING BUDGET TO SPEND		(107,723.30)	0.00	0.00	0.00	500.00	(68,205.51)	0.00	(195,428.81)	5,928.16	91,842.14	
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	91,842.14
BUDGET SPENT:												

- 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.

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SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget: Years: FY21 Entity: 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName.	7/24/19	1.00	100.00	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	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	91,842.14		
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	91,842.14
BUDGET SPENT:												

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 ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget: Years: FY21 Entity: 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000	P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName.	7/24/19	1.00	100.00	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	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	91,842.14		
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	91,842.14
BUDGET SPENT:												

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.

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SCHOOL BUDGET ? Save Refresh Actions Complete Previous Next Close

Scenario Budget: FY21 Entity: 0255 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative | Licensed | Support | Add'l Earnings | Supplies and Other Svcs | SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS)	CCSD		7/24/19	1.00	100.00	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	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	91,842.14		
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	91,842.14
BUDGET SPENT:												

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 BUDGET ? Save Refresh Actions Complete Previous Next Close

Scenario Budget: FY21 Entity: 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative | **Licensed** | Support | Add'l Earnings | Supplies and Other Svcs | SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS)	CCSD		7/24/19	1.00	100.00	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	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	91,842.14		
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	91,842.14
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.

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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 Save Refresh Actions Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed **Support** Add'l Earnings Supplies and Other Svcs SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000 P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName,	7/24/19		1.00	100.00	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	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	91,842.14		
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	91,842.14
BUDGET SPENT:												

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

CCSD School Budget Planning Tool Essentials Guide

- 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 BUDGET Save Refresh Actions Complete Previous Next Close

Scenario Budget FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support **Add'l Earnings** Supplies and Other Svcs SLA

	Emp Name	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra
	Assumption	Gen Fund	Gen Fund	Gen Fund
LICENSED ADDITIONAL EARNINGS TOTAL		7,597.02	6,081.65	1,297.35
PE INSTR ASST - N0179	P_10008407_1 PE INSTR ASST		7,176.67	8,052.08
SUPPORT ADDITIONAL EARNINGS TOTAL			7,176.67	8,052.08

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	91,842.14	
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	91,842.14
BUDGET SPENT:												

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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 BUDGET ⓘ Save Refresh Actions Complete Previous Next Close

Scenario Budget: Years: FY21 Entity: 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version: Working_SB

Administrative Licensed Support Add'l Earnings **Supplies and Other Svcs** SLA

Period: BegBalance

	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE	Sp Ed
Enter total year dollar amount to a Funding Source:						
5116540000 Extra Duty Licensed						
5116810000 Preparation Periods		88,500.00		37,200.00		
5117952000 Extra Duty Support Staff						
5118259000 Extra Duty Administrator						
5320000000 Education Services						
5330000000 Employee Training						
5340000000 Other Professional Services						
5343000000 Legal Services						
5344000000 Architectural Services						

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	91,842.14		
ALLOCATED FUNDS:												
Target	All Jobs	FS Amount Actual Cost Basis	2,355,566.66	352,822.04	0.00	0.00	89,000.00	37,200.00	0.00	2,834,988.70	42,886.25	91,842.14
BUDGET SPENT:												

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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 BUDGET ⓘ

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs **SLA**

	Gen Fund
ESD - Academic Centers	0.00
ESD - Attendance Officers	4,274.42
ESD - Correctional Schools	6,518.66
ESD - Substance Abuse (SAAP) Instructors	117.28
FD - Landscape Maintenance	19,652.28
SSD - Gifted and Talented Education Specialists	65,284.31
TRANSP - General Education Transportation	22,772.30
Total Service Level Agreements	124,905.52

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE	
ALLOCATED FUNDS:	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	
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	91,842.14

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.

SUMMARY TOTALS

		Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	
ALLOCATED FUNDS:	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	
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	

CCSD School Budget Planning Tool Essentials Guide

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.

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



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

The screenshot shows the 'SCHOOL BUDGET' interface with the 'Student Teacher Ratio Validations' page. The breadcrumb trail is 'SB Home > Student Teacher Ratio Validations'. The table below has columns for 'Scenario Budget', 'Version Working_SB', 'Years FY21', 'Entity', 'ST Ratio Limit', 'Students', and 'Difference'. The 'Value Count' row is highlighted in red/pink, indicating that the ratio has not yet been calculated. The 'ST Ratio Limit' column has a black box around the input field.

Scenario Budget	Version Working_SB	Years FY21	Entity	ST Ratio Limit	Students	Difference
Elementary Star 1 or 2 Schools						
Elementary Star 3 or 4 or 5 Schools						
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			Elem - Star 3 or 4 or 5 - Grade 3	23.00		23.00
			Value Count	3.00	0.00	3.00
Click SAVE to update the ratios						

CCSD School Budget Planning Tool Essentials Guide

- 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):

SCHOOL BUDGET ? Save Refresh Actions

SB Home > Student Teacher Ratio Validations

Scenario	Version	Years	Entity	ST Ratio Limit	Students	Difference
Budget	Working_SB	FY21				
Elementary Star 1 or 2 Schools						
Elementary Star 3 or 4 or 5 Schools						
Grade1			Elem - Star 3 or 4 or 5 - Grade 1	20.00	16.60	3.40
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 ratios

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.

- 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](#)

SCHOOL BUDGET ? Save Refresh Actions

SB Home > Student Teacher Ratio Validations

Scenario	Version	Years	Entity	ST Ratio Limit	Students	Difference
Budget	Working_SB	FY21	0235 Allen, DeanES			
Elementary Star 1 or 2 Schools						
Elementary Star 3 or 4 or 5 Schools						
Grade1			Elem - Star 3 or 4 or 5 - Grade 1	20.00	19.67	0.33
Grade2			Elem - Star 3 or 4 or 5 - Grade 2	20.00	17.50	2.50
Grade3			Elem - Star 3 or 4 or 5 - Grade 3	23.00	20.25	2.75
Value Count				3.00	3.00	0.00

Click SAVE to update the ratios

CCSD School Budget Planning Tool Essentials Guide

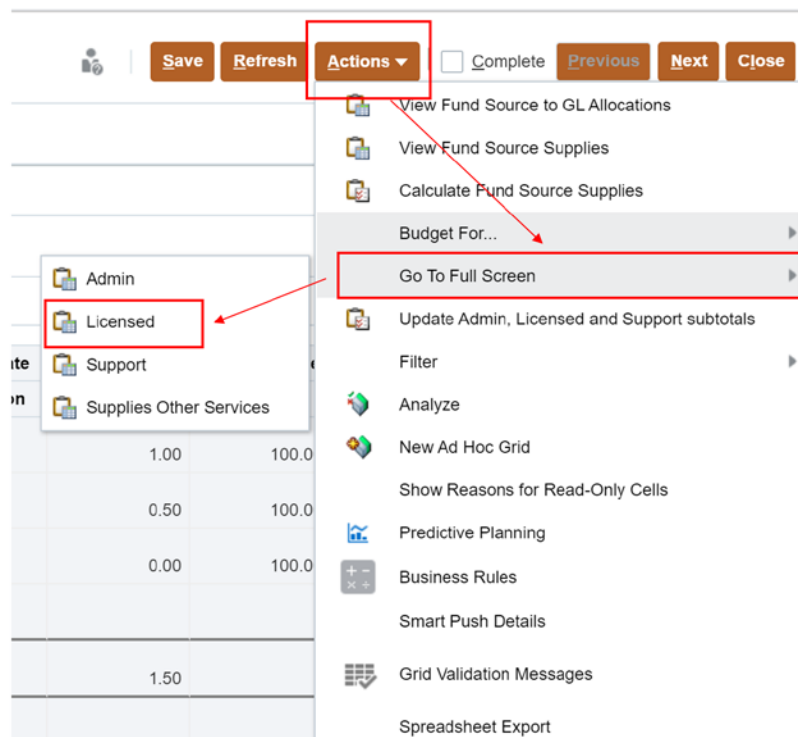
Increasing the Headcount of an Existing Position

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

Feature:

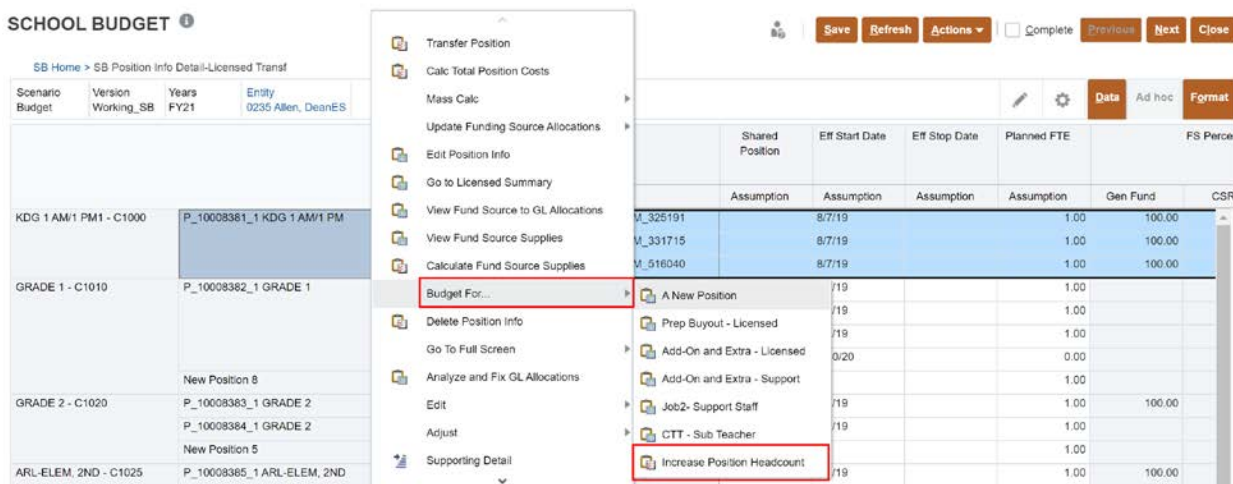
- The User cannot select a “Vacant” position since they can simply update the *Hours* (Support Professionals) or *FTE* (Licensed and Admin) of the position to increase the count and budget cost
- The Vacant position created by the Feature will use the *same funding* source allocation of the existing 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

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

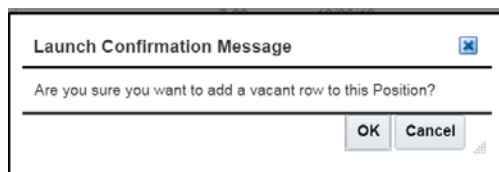


2. From the School Budget form select a position from Admin, **Licensed** or Support tab, then right-click from the position cell and select **Budget For...> Increase Position Headcount**.

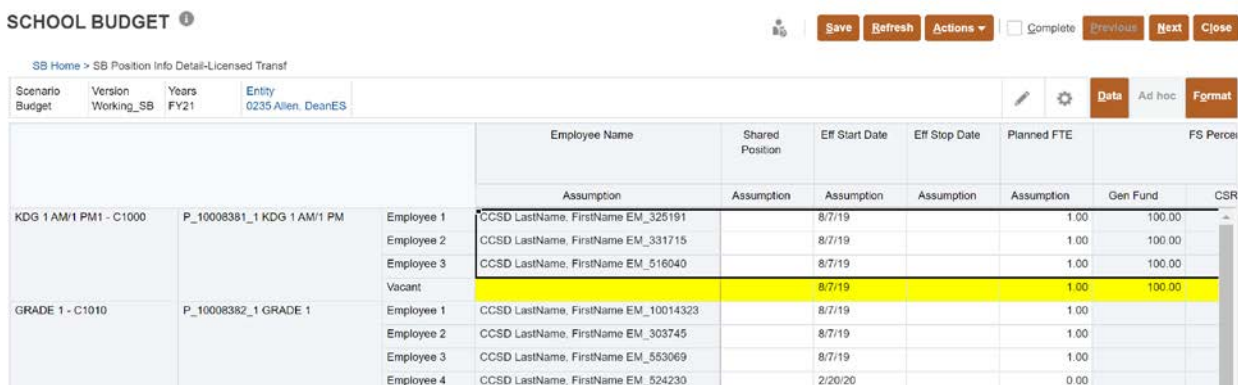
CCSD School Budget Planning Tool Essentials Guide



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

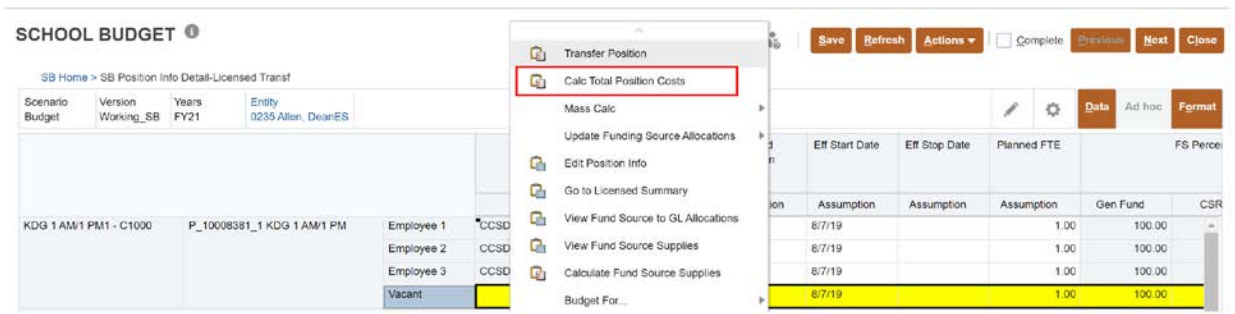


4. When done, scroll to the position and a new vacant position row will be created and highlighted in yellow (means need to calculate).

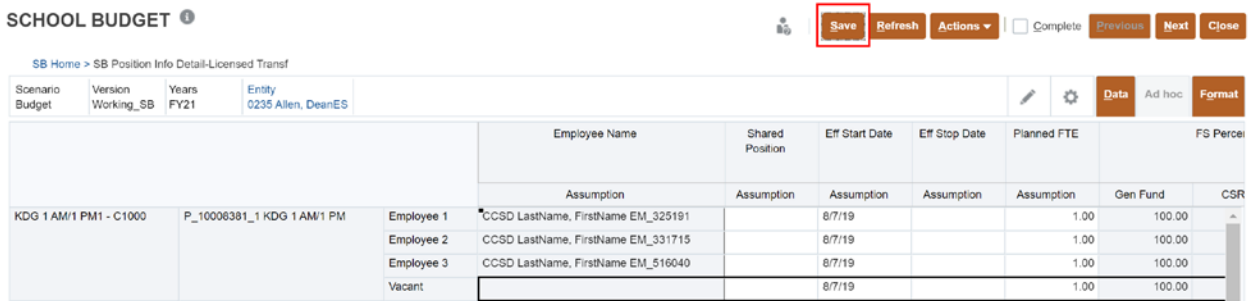


5. Right-click the vacant position and select **Calc Total Position Costs** to complete the calculation of the position.

CCSD School Budget Planning Tool Essentials Guide



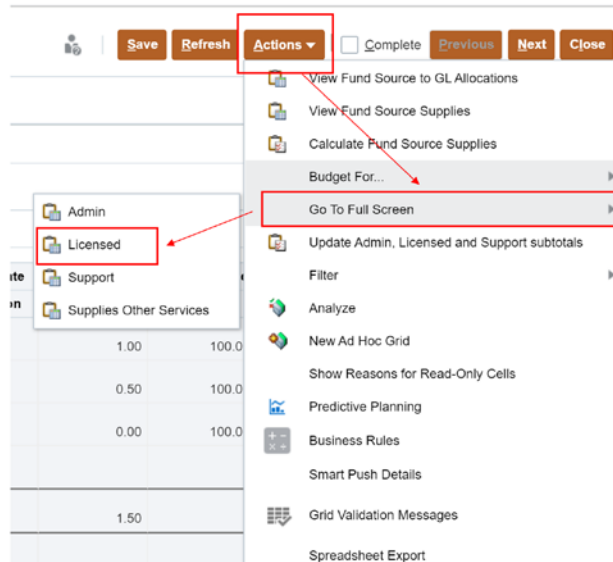
6. Click **Save** to refresh the totals.



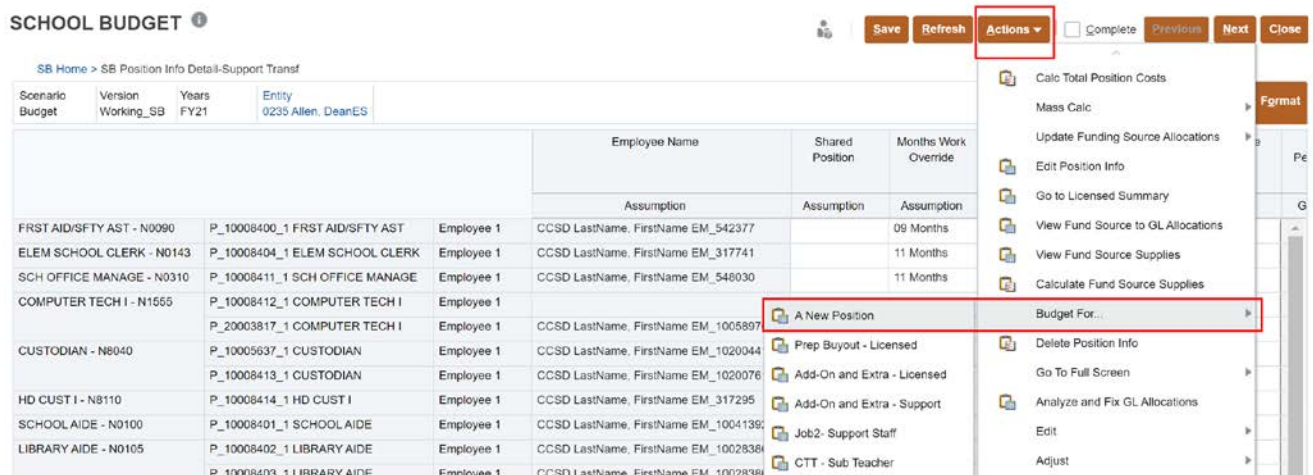
CCSD School Budget Planning Tool Essentials Guide

Adding and Adjusting Positions

1. 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**



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**.

CCSD School Budget Planning Tool Essentials Guide

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf > SB Add Position

Period	Years	Scenario	Version	Entity	Job							
BegBalance	FY21	Budget	Working_SB	0235 Allen, DeanES	PE INSTR ASST - N0179							
		Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	FS Percentage				
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
Support Only-Enter #Months and Hours												

- 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 OK Cancel

Job
"TI INS ASST III - N0198"

Search Job

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

- 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 BUDGET Save Refresh Actions

SB Home > SB Position Info Detail-Support Transf > SB Add Position

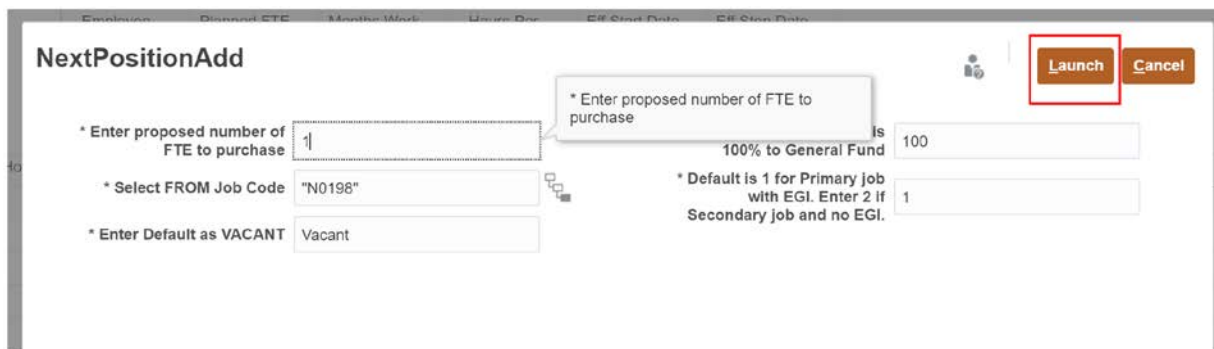
Period	Years	Scenario	Version	Entity	Job							
BegBalance	FY21	Budget	Working_SB	0235 Allen, DeanES	TI INS ASST III - N0198							
		Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date					
		Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3			
Support Only-Enter #Months and Hours												

- Click the **Actions** menu and select **Add Position**.

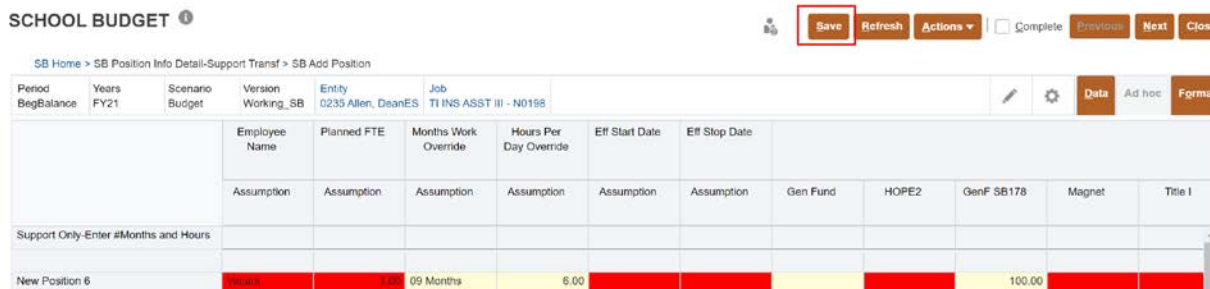
CCSD School Budget Planning Tool Essentials Guide



7. 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.

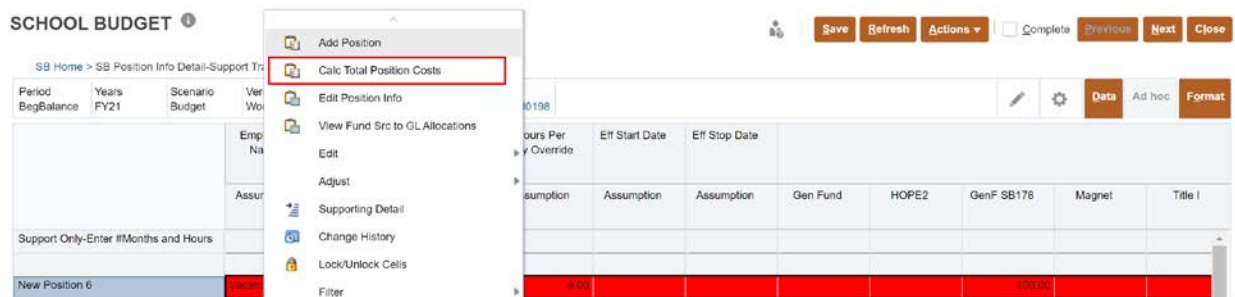


8. The **SB Add Position** form will highlight the added position row in red. If you entered a **Support Staff** position, enter the appropriate job information in the **Months Work Override** and **Hours Per Day Override** cells (based on the type of employee/their schedule). If the position is Administrative 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.

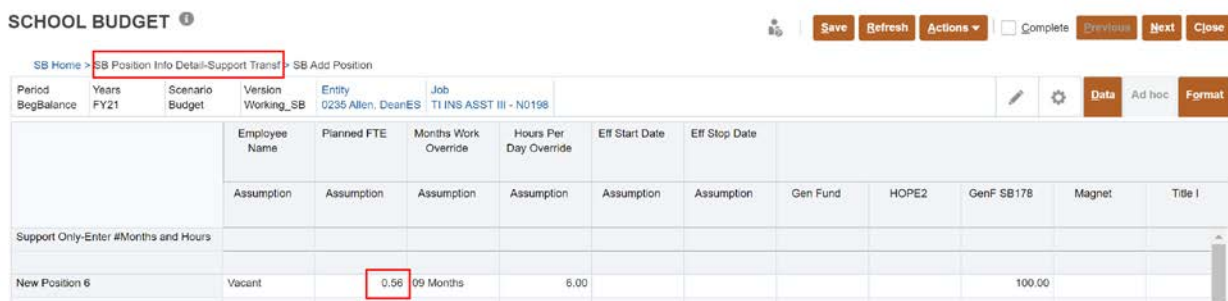


CCSD School Budget Planning Tool Essentials Guide

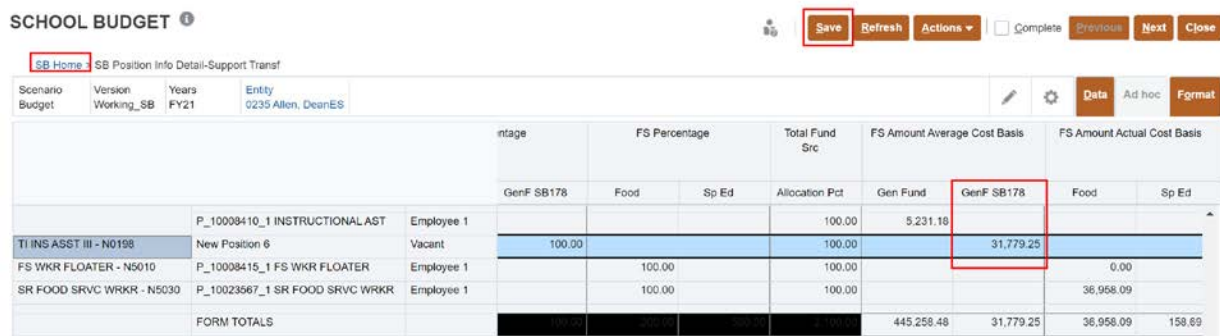
- The position added still shows in red to indicate that the position needs to be calculated. Right click on the new position row. From the menu that appears, select **Calc Total Position Costs**.



- 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.



- 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.

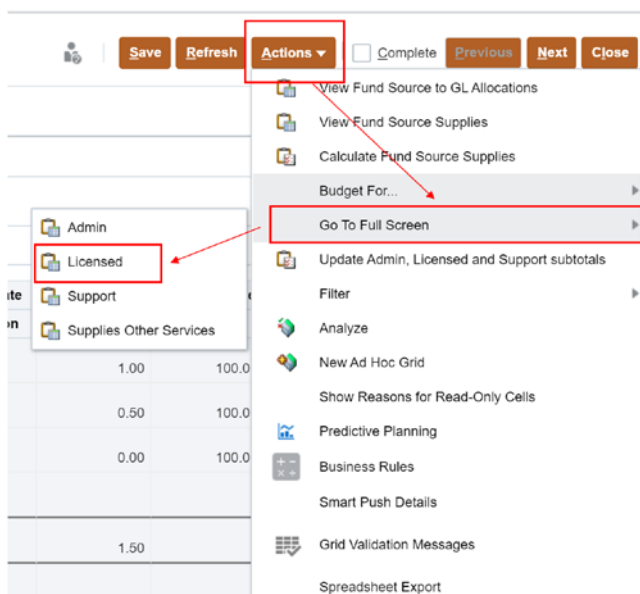


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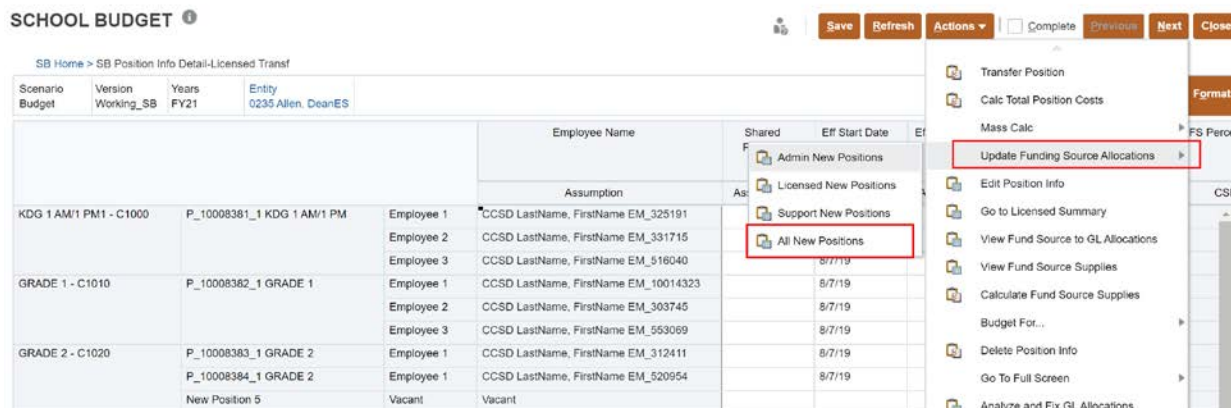
Change the Funding Source of a New Position

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.

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

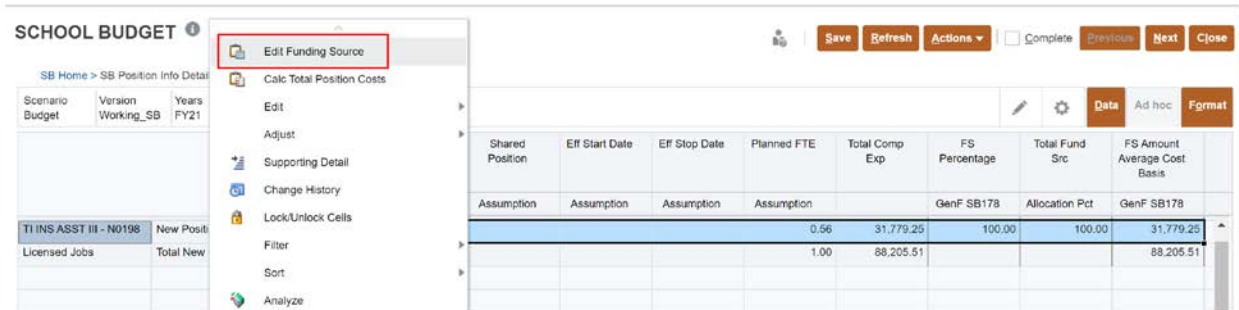


2. Click **Actions** > Select **Update Funding Source Allocations** > select the employee type i.e. Admin New Positions, Licensed New Positions, Support New Positions, or **All New Positions**.



CCSD School Budget Planning Tool Essentials Guide

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



- 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**:



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

CCSD School Budget Planning Tool Essentials Guide

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

[SB Home](#) > SB Position Info Detail-Support Transf

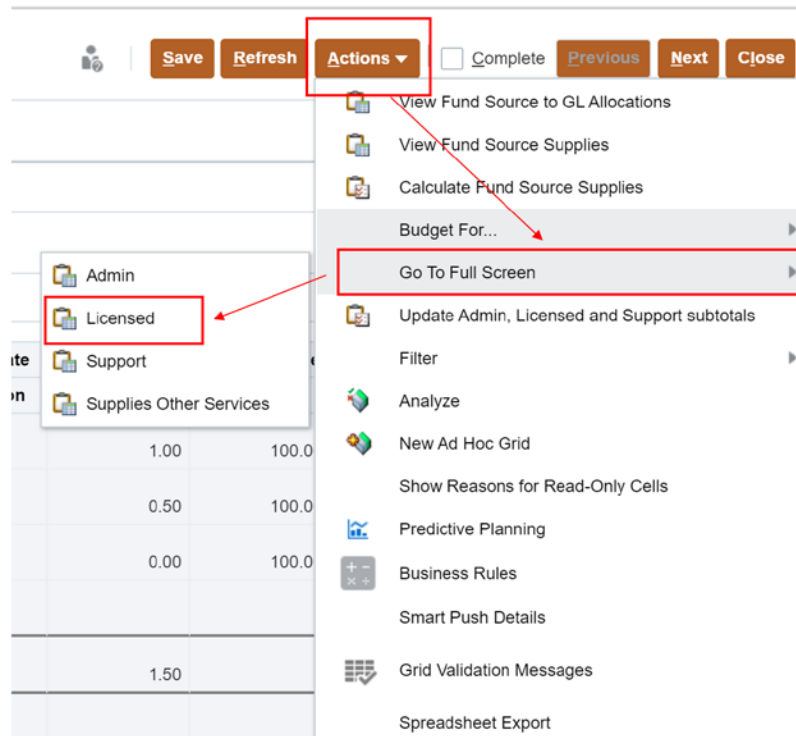
Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	us Per Override	Eff Start Date	Eff Stop Date	FS Percentage	FS Percentage	Total Fund Src	FS Amount Average Cost Basis	
				umption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund
INSTRUCTIONAL LAST - N0190	P_10008409_1	INSTRUCTIONAL LAST	Employee 1	5.00	12/22/19				100.00	100.00	
	P_10008410_1	INSTRUCTIONAL AST	Employee 1	1.50	12/22/19		100.00			100.00	5,231.18
TI INS ASST III - N0198	New Position 6		Vacant	6.00			100.00			100.00	31,779.25
FS WKR FLOATER - N5010	P_10008415_1	FS WKR FLOATER	Employee 1	0.00	12/22/19			100.00		100.00	
SR FOOD SRVC WRKR - N5030	P_10023567_1	SR FOOD SRVC WRKR	Employee 1	5.50	12/22/19			100.00		100.00	
FORM TOTALS											477,037.73

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

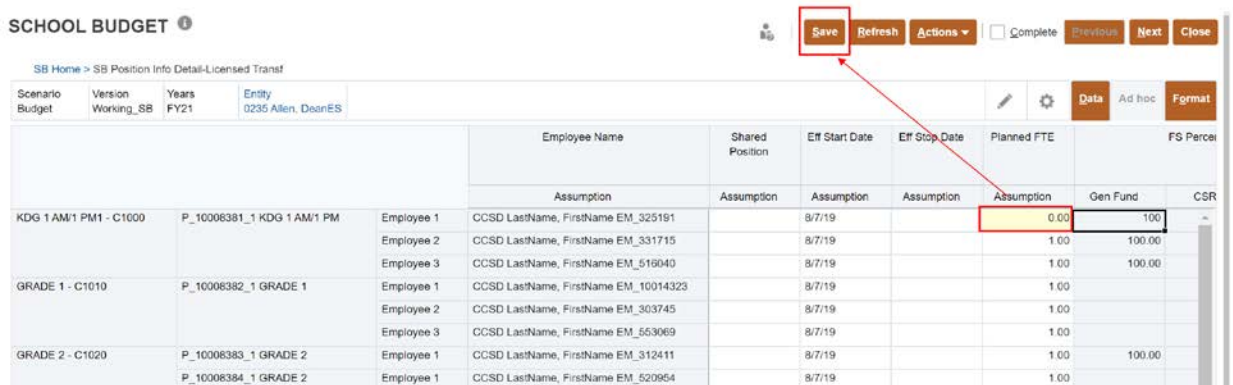
CCSD School Budget Planning Tool Essentials Guide

Removing a Position

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

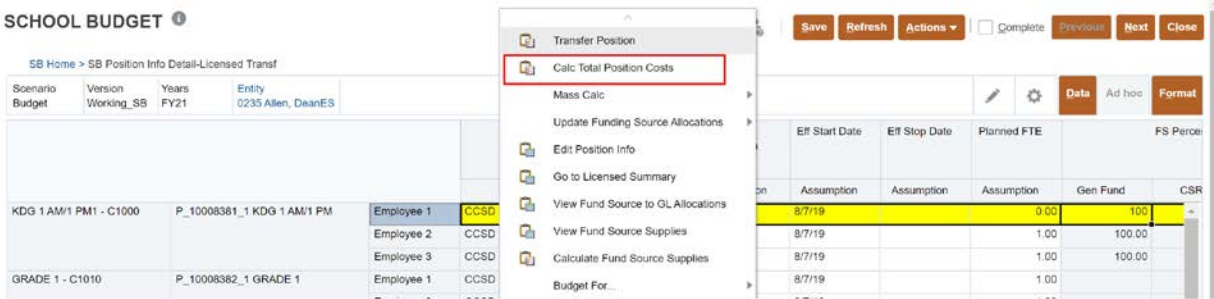


2. In the list of positions that appears, locate the position that you wish to remove. If the position is **Administrative** or **Licensed**, change the **Planned FTE** field to 0 and click **Save**.

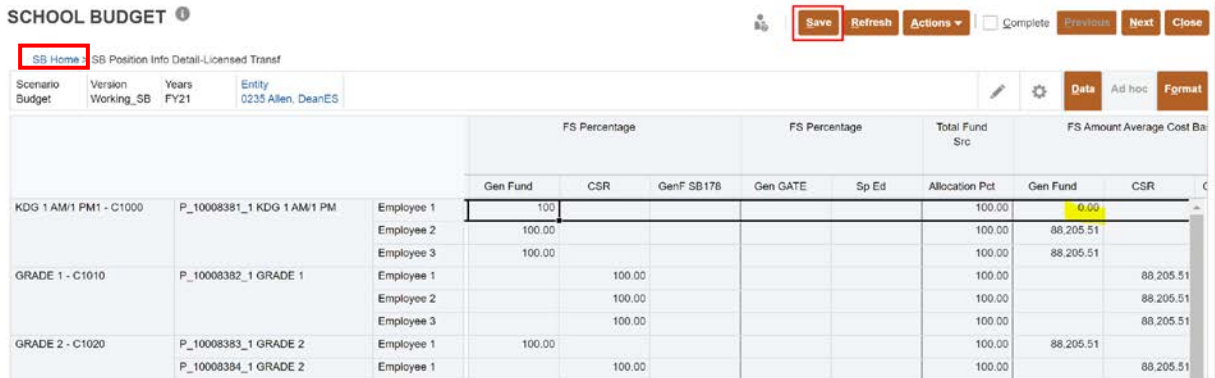


CCSD School Budget Planning Tool Essentials Guide

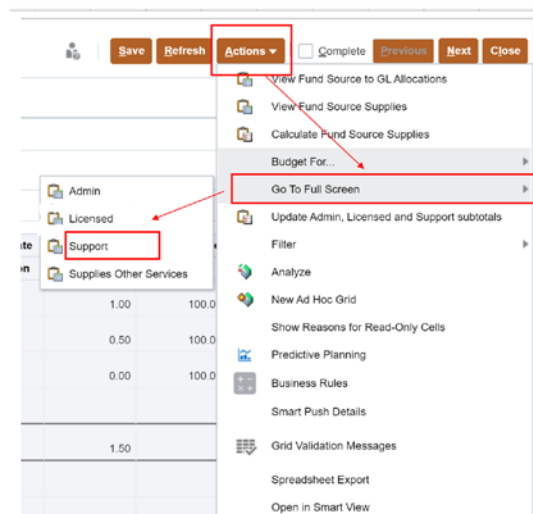
- Once the form has saved, the position row will highlight in yellow. **Right-click** on the position number, then select **Calc Total Position Costs**.



- 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 Summary Totals.



- 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**).



CCSD School Budget Planning Tool Essentials Guide

- 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).

SCHOOL BUDGET 1

SB Home > SB Position Info Detail-Support Transf

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

Save Refresh Actions Complete Previous Next Close

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES							
				Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	Pe
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	G
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			
		Employee 1	CCSD LastName, FirstName EM_10022402		09 Months	6.00	12/22/19			
INSTRUCTIONAL AST - N0190	P_10008409_1 INSTRUCTIONAL AST	Employee 1	CCSD LastName, FirstName EM_542473		09 Months	5.00	12/22/19			
		Employee 1	CCSD LastName, FirstName EM_542473		09 Months	1.50	12/22/19			
TI INS ASST III - N0198	New Position 6	Vacant	Vacant		09 Months	6.00				
FS WKR FLOATER - N5010	P_10008415_1 FS WKR FLOATER	Employee 1	CCSD LastName, FirstName EM_10049345		09 Months	0.00	12/22/19			
SR FOOD SRVC WRKR - N5030	P_10023567_1 SR FOOD SRVC WRKR	Employee 1	CCSD LastName, FirstName EM_324401		09 Months	5.50	12/22/19			
FORM TOTALS										

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

- Click **Save** to aggregate new total in the Summary Totals. Click on the **SB Home** link to review updated Summary Totals.

SCHOOL BUDGET 1

SB Home > SB Position Info Detail-Support Transf

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeanES

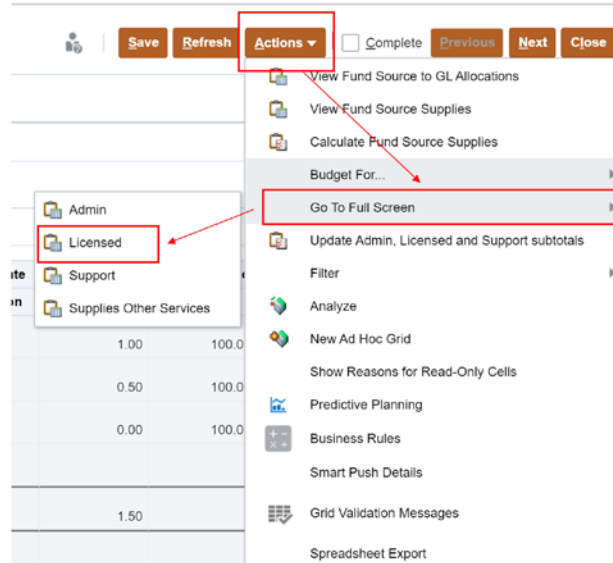
Save Refresh Actions Complete Previous Next Close

				op Date	FS Percentage	FS Percentage		Total Fund Src	FS Amount Average Cost Basis	FS Amount Actual Cost Basis	
				mpion	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food	Sp Ed
CUSTODIAN - N8040	P_20003817_1 COMPUTER TECH I	Employee 1			100.00			100.00	34,369.40		
	P_10005637_1 CUSTODIAN	Employee 1			100.00			100.00	45,833.62		
	P_10008413_1 CUSTODIAN	Employee 1			100.00			100.00	45,833.62		
HD CUST I - N8110	P_10008414_1 HD CUST I	Employee 1			100.00			100.00	63,512.33		
SCHOOL AIDE - N0100	P_10008401_1 SCHOOL AIDE	Employee 1			100.00			100.00	33,005.38		
LIBRARY AIDE - N0105	P_10008402_1 LIBRARY AIDE	Employee 1			100.00			100.00	8,846.28		
	P_10008403_1 LIBRARY AIDE	Employee 1			100.00			100.00	21,992.43		
SPTA II - N0162	P_10008406_1 SPTA II	Employee 1					100.00	100.00			0.00

CCSD School Budget Planning Tool Essentials Guide

Transfer to Existing Position

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



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

SCHOOL BUDGET

SU Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entry 0235 Alan, DeanE5	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	F5 Percentage	F5 Percentage	Total Fund Src	F5 Amos	
				Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17%	Gen GATE	Allocation Pct	Gen Fund
GRADE 1 - C1010	P_10000362_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323		8/7/19			1.00	100.00		100.00		
		Employee 2	CCSD LastName, FirstName EM_303745		8/7/19			1.00	100.00		100.00		
		Employee 3	CCSD LastName, FirstName EM_553099		8/7/19			1.00	100.00		100.00		
		Employee 4	CCSD LastName, FirstName EM_524230		2/29/20			1.00	100.00		100.00		
		Vacant	Vacant					1.00	100.00		100.00		
GRADE 2 - C1029	P_10000361_1 GRADE 2	Employee 1	CCSD LastName, FirstName EM_312411		8/7/19			1.00	100.00		100.00	88,205.1	
		Employee 1	CCSD LastName, FirstName EM_520954		8/7/19			1.00	100.00		100.00		
		Vacant	Vacant					1.00		100.00		100.00	
ARL-ELEM_2ND - C1025	P_10000365_1 ARL-ELEM_2ND	Employee 1	CCSD LastName, FirstName EM_10064404		8/7/19			1.00	100.00		100.00	88,205.1	
GRADE 3 - C1030	P_10000366_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305		7/1/20			1.00	100.00		100.00	88,205.1	
		Employee 2	CCSD LastName, FirstName EM_502600		8/7/19			1.00	100.00		100.00	88,205.1	
		Employee 3	CCSD LastName, FirstName EM_524230		2/29/20			1.00	100.00		100.00	88,205.1	
GRADE 4 - C1040	P_10000367_1 GRADE 4	Employee 1	CCSD LastName, FirstName EM_10109611		7/1/20			1.00	100.00		100.00	88,205.1	
		Employee 2	CCSD LastName, FirstName EM_316074		8/7/19			1.00	100.00		100.00	88,205.1	

Transfer From 1st Grade CSR Position 10008386

Transfer To 3rd General Fund 10008386

CCSD School Budget Planning Tool Essentials Guide

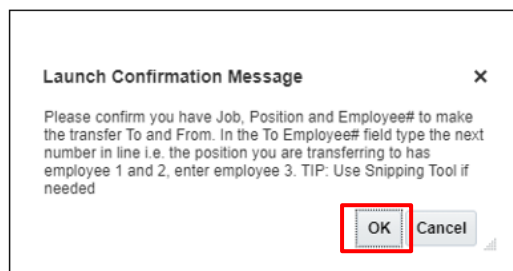
- Highlight the employee row > Right Click > Select **Transfer Position**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage		
					Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF SB17
GRADE 1 - C1010				P_10008382_1 GRADE 1	Employee 1	8/7/19		1.00			100.00
						8/7/19		1.00			100.00
						8/7/19		1.00			100.00
						2/20/20		1.00			100.00
GRADE 2 - C1020				New Position 8	Vacant			1.00			100.00
				P_10008383_1 GRADE 2	Employee 1	8/7/19		1.00	100.00		
				P_10008384_1 GRADE 2	Employee 1	8/7/19		1.00			100.00
				New Position 5	Vacant			1.00			100.00
ARL-ELEM, 2ND - C1025				P_10008385_1 ARL-ELEM, 2ND	Employee 1	8/7/19		1.00	100.00		
GRADE 3 - C1030				P_10008386_1 GRADE 3	Employee 1	7/1/20		1.00			100.00
					Employee 2	8/7/19		1.00			100.00
					Employee 3	2/20/20		1.00			100.00
GRADE 4 - C1040				P_10008387_1 GRADE 4	Employee 1	7/1/20		1.00			100.00
					Employee 2	8/7/19		1.00			100.00
					Vacant	7/1/20		1.00			100.00

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



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

Transfer Position

* Select FROM Employee "Employee 1"

* Select FROM Job Code "C1010"

* Select FROM Position "P_10008382_1"

* Select TO Employee "Employee 4"

* Select TO Position "P_10008386_1"

* Select TO JOB "C1030"

CCSD School Budget Planning Tool Essentials Guide

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”.

- 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):

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0235.Allen, DeanES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			FS Percentage		Total Fun Src
				Assumption	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	CCSD LastName, FirstName EM_325191				8/7/19		1.00	100.00					1
		Employee 2	CCSD LastName, FirstName EM_331715				8/7/19		1.00	100.00					1
		Employee 3	CCSD LastName, FirstName EM_516040				8/7/19		1.00	100.00					1
		Vacant					8/7/19		1.00	100.00					1
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323	P_10008382_1			8/7/19		0.00		100.00				1
		Employee 2	CCSD LastName, FirstName EM_303745				8/7/19		1.00		100.00				1
		Employee 3	CCSD LastName, FirstName EM_553069				8/7/19		1.00		100.00				1
		Employee 4	CCSD LastName, FirstName EM_524230				2/20/20		1.00		100.00				1
GRADE 2 - C1020	New Position 8	Vacant	Vacant						1.00		100.00				1
		Employee 1	CCSD LastName, FirstName EM_312411				8/7/19		1.00	100.00					1
		Employee 1	CCSD LastName, FirstName EM_520954				8/7/19		1.00		100.00				1
ARL-ELEM, 2ND - C1025	P_10008385_1 ARL-ELEM, 2ND	Vacant	Vacant						1.00			100.00			1
		Employee 1	CCSD LastName, FirstName EM_10084404				8/7/19		1.00	100.00					1
GRADE 3 - C1030	P_10008386_1 GRADE 3	Employee 1	CCSD LastName, FirstName EM_10034305				7/1/20		1.00	100.00					1
		Employee 2	CCSD LastName, FirstName EM_502600				8/7/19		1.00	100.00					1
		Employee 3	CCSD LastName, FirstName EM_524230				2/20/20		1.00	100.00					1
		Employee 4	CCSD LastName, FirstName EM_10014323	P_10008382_1				8/7/19		1.00		100.00			

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

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

SCHOOL BUDGET ⓘ

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0235.Allen, DeanES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			FS Percentage		Total Fun Src
				Assumption	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	CCSD LastName, FirstName EM_325191				8/7/19		1.00	100.00					1
		Employee 2	CCSD LastName, FirstName EM_331715				8/7/19		1.00	100.00					1
		Employee 3	CCSD LastName, FirstName EM_516040				8/7/19		1.00	100.00					1
		Vacant					8/7/19		1.00	100.00					1
GRADE 1 - C1010	P_10008382_1 GRADE 1	Employee 1	CCSD LastName, FirstName EM_10014323	P_10008382_1			8/7/19		0.00		100.00				1
		Employee 2	CCSD LastName, FirstName EM_303745				8/7/19		1.00		100.00				1
		Employee 3	CCSD LastName, FirstName EM_553069				8/7/19		1.00		100.00				1
		Employee 4	CCSD LastName, FirstName EM_524230				2/20/20		1.00		100.00				1

- 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:

CCSD School Budget Planning Tool Essentials Guide

SCHOOL BUDGET

Save Refresh Actions Complete Estimate Next

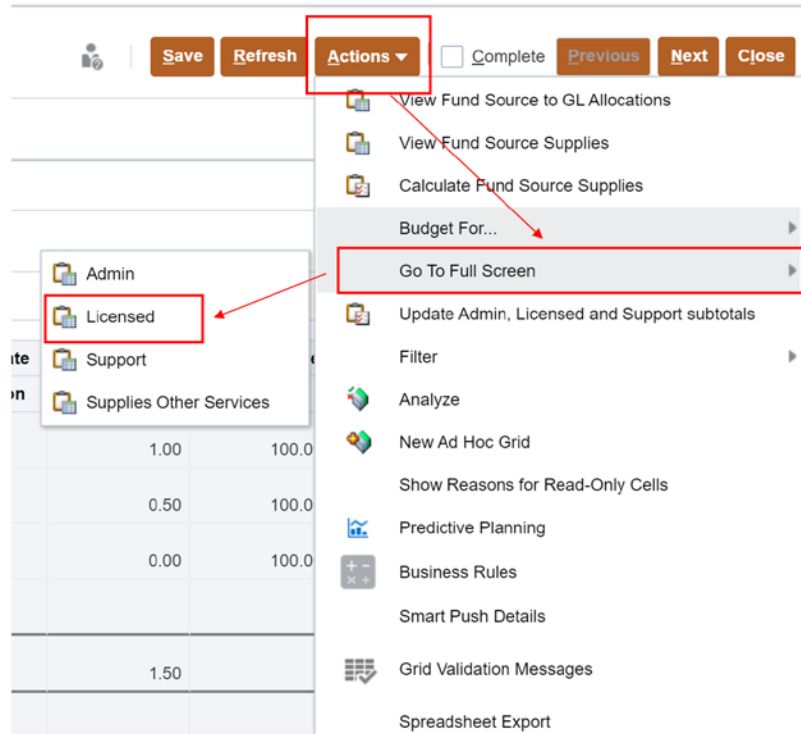
SB Home > SB Position into Detail-Licensed Transit

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Altier, DeaneS	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		
									Gen Fund	CSR	Gen# SB176	Gen OATE	Sp Ed	Allocation Pct		Gen Fund	CSR	Gen#
KDG 1 AM/1 PM1 - C1000	P_10000381_1 KDG 1 AM/1 PM	Employee 1				8/7/19		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_10000382_1 GRADE 1	Employee 1	P_10000382_1			8/7/19		0.00		100.00			100.00				9.00	
		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			
		Employee 4				2/20/20		1.00	100.00				100.00		88,205.51			
GRADE 2 - C1020	P_10000383_1 GRADE 2	Employee 1				8/7/19		1.00	100.00				100.00		88,205.51			
		Vacant						1.00	100.00				100.00		88,205.51			
ARL-ELEM. 2ND - C1025	P_10000384_1 GRADE 2	Employee 1				8/7/19		1.00	100.00				100.00		88,205.51			
		Vacant						1.00	100.00		100.00		100.00		88,205.51			
GRADE 3 - C1030	P_10000385_1 ARL-ELEM. 2ND	Employee 1				8/7/19		1.00	100.00				100.00		88,205.51			
		Employee 2				7/1/20		1.00	100.00				100.00		88,205.51			
		Employee 3				8/7/19		1.00	100.00				100.00		88,205.51			
GRADE 3 - C1030	P_10000386_1 GRADE 3	Employee 1				2/20/20		1.00	100.00				100.00		88,205.51			
		Employee 4	P_10000382_1			8/7/19		1.00	100.00				100.00		88,205.51			

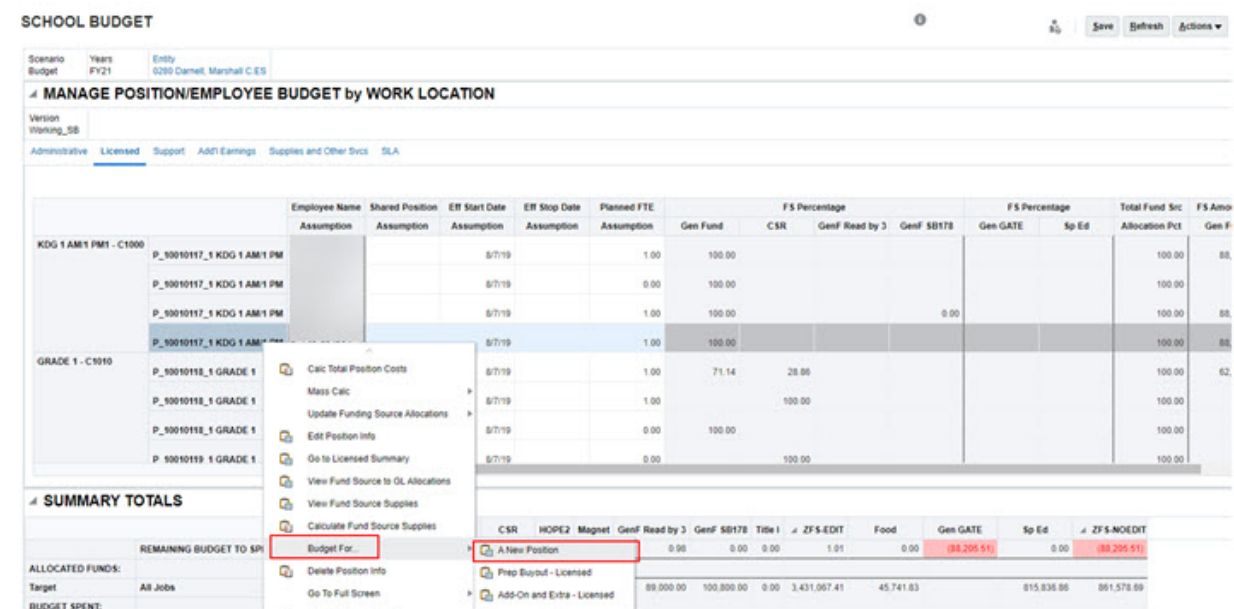
CCSD School Budget Planning Tool Essentials Guide

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**



CCSD School Budget Planning Tool Essentials Guide

3. Confirm the Job selected is correct, then click **Actions > Add Position**

SCHOOL BUDGET

SB Home > SB Add Position

Period BegBalance: FY21, Scenario Budget, Version Working_SB, Entity 0280 Darnell, Marshall C.ES, Job KDG 1 AM/1 PM1 - C1000

Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	Gen Fund	HOPE2	GenF SB178	Magnet	Title I	21st Century	Adult Ed	Adult Correct	Bon
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption									

There are no valid rows of data for this form.

Actions: Add Position, Calc Total Position Costs, Edit Position Info, View Fund Src to GL Allocations, Filter, Analyze, New Ad Hoc Grid, Show Reasons for Read-Only Cel

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

NextPositionAdd

Launch Cancel

* Enter proposed number of FTE to purchase:

* Select FROM Job Code:

* Enter Default as VACANT:

* New Position Default is 100% to General Fund:

* Default is 1 for Primary job with EGI. Enter 2 if Secondary job and no EGI:

5. Enter the desired funding source allocation, then click **Save**:

SCHOOL BUDGET

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

Period BegBalance: FY21, Scenario Budget, Version Working_SB, Entity 0280 Darnell, Marshall C.ES, Job KDG 1 AM/1 PM1 - C1000

Employee Name	Planned FTE	Months Work Override	Hours Per Day Override	Eff Start Date	Eff Stop Date	FS Percentage				
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE
New Position 5	Vacant	1.00				50.00		50.00		

CCSD School Budget Planning Tool Essentials Guide

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

The screenshot shows the 'SCHOOL BUDGET' interface. On the left, a sidebar contains a list of positions, with 'New Position 5' selected. A context menu is open over this position, listing several actions. The 'Calc Total Position Costs' option is highlighted with a red box. The main table area shows a row for 'New Position 5' with a red background, indicating it is selected. The table columns include 'Job', 'Hours Per Day Override', 'Eff Start Date', 'Eff Stop Date', 'FS Percentage', 'Gen Fund', 'GenF Read by 3', 'CSR', 'GenF SB176', and 'GATE'. The 'Gen Fund' and 'GenF Read by 3' columns for the selected row show values of 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:

The screenshot shows the 'SCHOOL BUDGET' interface with a list of positions and employees. A new position, 'New Position 2', is highlighted in red. A blue box highlights a row of employee data for 'Employee 4' in the 'KDG 1 AMY PM1 - C1000' position. The table columns include 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', 'FS Percentage', 'Gen Fund', 'CSR', 'GenF Read by 3', 'GenF SB176', 'Gen GATE', 'Sp Ed', and 'Allocation Pct'. The 'Gen Fund' column for the highlighted row shows a value of 50.00. Red and blue annotations are present on the right side of the table, indicating transfers from and to specific funded positions.

CCSD School Budget Planning Tool Essentials Guide

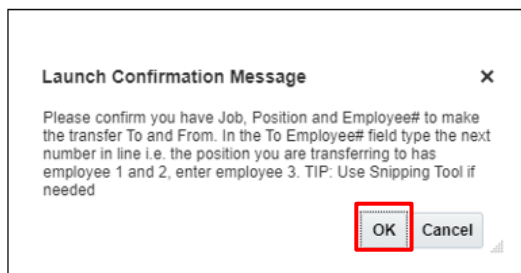
8. Highlight the employee row > Right Click > Select **Transfer Position**:

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0280 Darnell, Marshall C ES	Employee Name		Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				FS Percentage		Total FTE
				Job Code	Employee					Gen Fund	CSR	GenF Read by 3	GenF SB178	Gen GATE	Sp Ed	
KDG 1 AM/1 PM 1 - C1000				P_10010117_1 KDG 1 AM/1 PM	Employee 1	Employee 4	8/7/19		1.00	100.00						
					Employee 2											
					Employee 3											
					Employee 4											
GRADE 1 - C1010				P_10010119_1 GRADE 1	Vacant	New Position 2	8/7/19		1.00	50.00						
					Employee 1											
					Employee 2											
					Employee 3											
GRADE 2 - C1020				P_10010120_1 GRADE 2	Employee 1	Employee 2	8/7/19		1.00	100.00						
					Employee 2											
					Employee 1											
					Employee 2											

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"

* Select FROM Job Code "C1000"

* Select FROM Position "P_10010117_1"

* Select TO Employee "Employee 2"

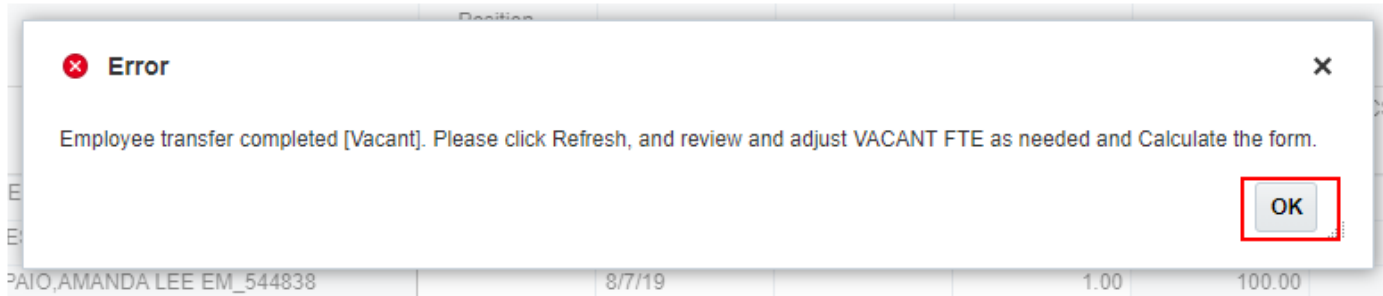
* Select TO Position "New Position 2"

* Select TO JOB "C1000"

CCSD School Budget Planning Tool Essentials Guide

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”.

- 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:



- Click **Refresh**:

SCHOOL BUDGET

SB Home - SB Position Info Detail: Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity G200 Carmel, Marshal C ES	Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage				FS Percentage	Total	
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB175	Gen GATE	Sp Ed	Allocat
KDG 1 AM1 PM1 - C1000	P_10010117_1	KDG 1 AM1 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		8/7/19		1.00	100.00						
				New Position 2			Vacant			1.00	50.00			50.00	

The transferred employee rows will be displayed in yellow:

SCHOOL BUDGET

SB Home - SB Position Info Detail: Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity G200 Carmel, Marshal C ES	Employee Name	Assigned Position Number	Shared Position	EF Start Date	EF Stop Date	Planned FTE	FS Percentage				FS Percentage	Total
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB175	Gen GATE	Sp Ed
KDG 1 AM1 PM1 - C1000	P_10010117_1	KDG 1 AM1 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			8/7/19		1.00	100.00					
				Employee 2			8/7/19		1.00	50.00			50.00		

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET Save Refresh Actions Complete

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0200 Darneil, Marshall C.ES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage			
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178
KDG 1 AM/1 PM1 - C1000	P_10010117_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					8/7/19		0.00	100.00			
		New Position 2	Employee 2		P_10010117_1			8/7/19		1.00	50.00		

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 BUDGET Save Refresh Actions Complete

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0200 Darneil, Marshall C.ES	Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage				
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	GenF Read by 3	GenF SB178	
KDG 1 AM/1 PM1 - C1000	P_10010117_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 Position 2	Employee 2		P_10010117_1			8/7/19		0.00	50.00			50.00

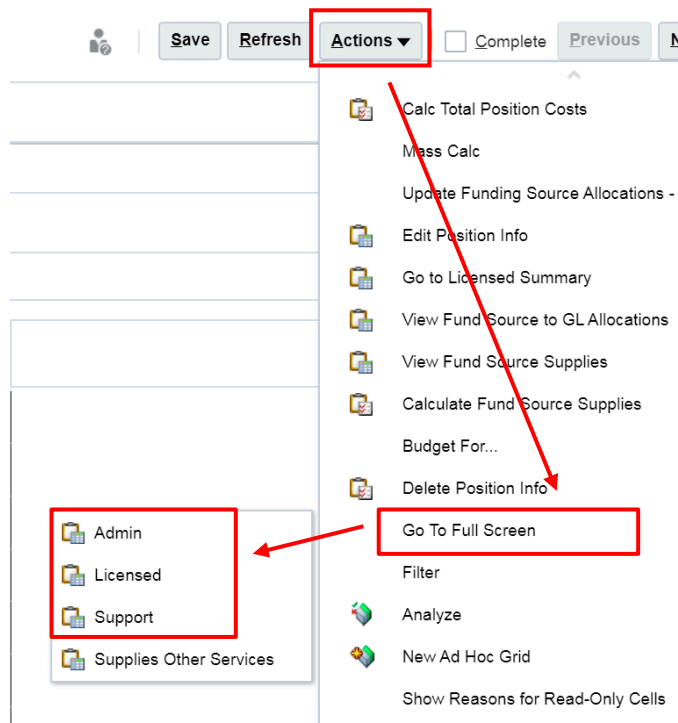
CCSD School Budget Planning Tool Essentials Guide

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

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



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



CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget: Working_SB, Years: FY21, Entity: 0411 Hoggard, M...

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

Buttons: Data, Ad hoc, Format

Context Menu:

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

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
			8/7/19		1.1
			8/7/19		1.1
			9/9/19		1.1
			8/7/19		1.1
			8/7/19		1.1
			8/7/19		1.1
			8/7/19		1.1
			8/7/19		1.1
			8/7/19		1.1
	P_10014581_1		8/7/19		1.1
			8/7/19		1.1
RBG3 LEARNING STR - C8112	P_10014580_1 RBG3 LEARN				
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			0.1
Licensed Jobs	Total All Positions	Total All Employees			31.1

CCSD School Budget Planning Tool Essentials Guide

- In the form scroll the top screen to the far right

SCHOOL BUDGET

Save Refresh Actions Complete Previous Next Close

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

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

Position Information Detail

Position P_10014581_1 LRN STRT TTL1 ELE	Employee Employee 1
---	---------------------

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

Compensation Monthly Spread Detail

Version Working_SB	Position P_10014581_1	Employee Employee 1
--------------------	-----------------------	---------------------

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

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

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

Position Information Detail

Position P_10014581_1 LRN STRT TTL1 ELE Employee Employee 1

ite	Months Work Ov	Hours Per Day O	Planned FTE	Calculated Actual Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total Employee
n	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Sal	Average Base S	Assumption	Assumption	Assumption	Assumption
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary	P_10014581_1	No	0.00

Compensation Monthly Spread Detail

Version Working_SB Position P_10014581_1 Employee Employee 1

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

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

- The cell will 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 BUDGET

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

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

Position Information Detail

Position P_10014581_1 LRN STRT TTL1 ELE Employee Employee 1

ite	Months Work Ov	Hours Per Day O	Planned FTE	Calculated Actual Base Salary	Calculated Avera	Total Comp Exp	Total Comp Exp	Job Indicator	Assigned Positic	Multi Job	Total Employee
n	Assumption	Assumption	Assumption	Budget Spent	Budget Spent	Actual Base Sal	Average Base S	Assumption	Assumption	Assumption	Assumption
Strategic Budget	09 Months	0.00	0.00	0.00	0.00	0.00	0.00	Primary		No	0.00

Compensation Monthly Spread Detail

Version Working_SB Position P_10014581_1 Employee Employee 1

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

Scenario Budget Version Working_SB Years FY21 Entity 0411 Hoggard, Mabel/ES (Magnet) (Pr)

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1			
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1			
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1			
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1			
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1			
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1			
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1			
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1			
		Employee 2			
		Employee 3			
		Employee 4			
RBG3 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR	Employee 1			
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			
Licensed Jobs	Total All Positions	Total All Employees			

Original Position Number Transferred From

- Highlight the employee's transferred to position row > right click > **Delete Position Info**

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed Transf

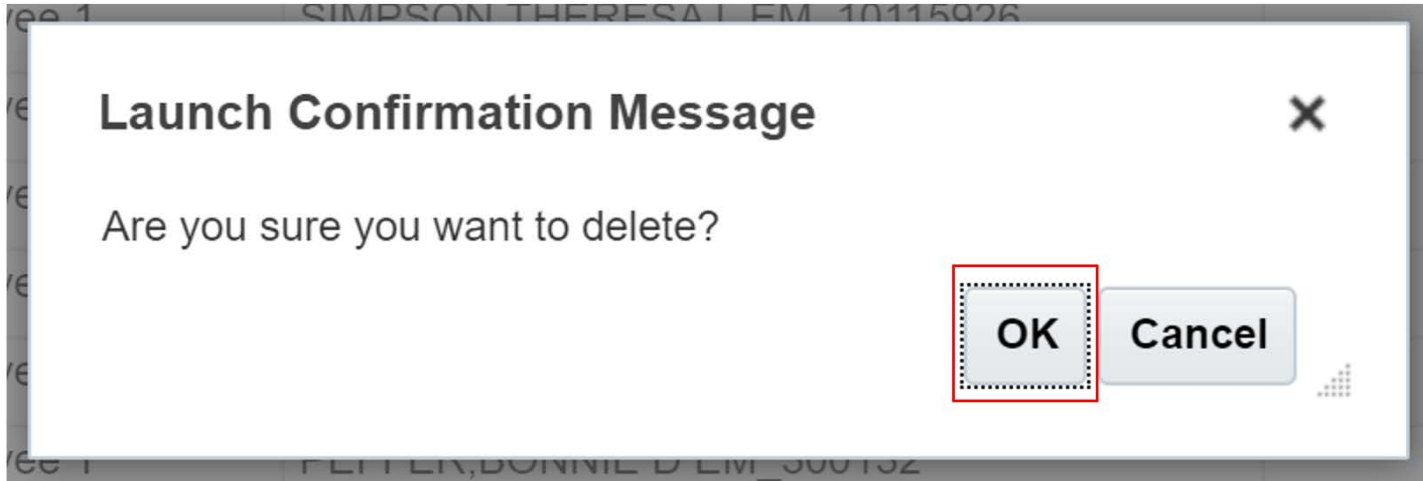
Scenario Budget Version Working_SB Years FY21 Entity 0411 Hoggard, Mabel/ES (Magnet) (Pr)

Employee Name	Assigned Position Number	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
ART, ELEM - C1100	P_10014571_1 ART, ELEM	Employee 1			
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1			
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1			
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1			
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1			
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1			
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1			
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1			
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1			
		Employee 2			
		Employee 3			
		Employee 4			
RBG3 LEARNING STR - C8112	P_10014580_1 RBG3 LEARNING STR	Employee 1			
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			
Licensed Jobs	Total All Positions	Total All Employees			

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

CCSD School Budget Planning Tool Essentials Guide

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**:



CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET

SB Home - SB Position Info Detail-Licensed Transf

Save Refresh Actions Complete Print Close

Scenario Budget Version Working_SB Years FY21 Entry D411 Higgard, MabelES (Magnet) (P)

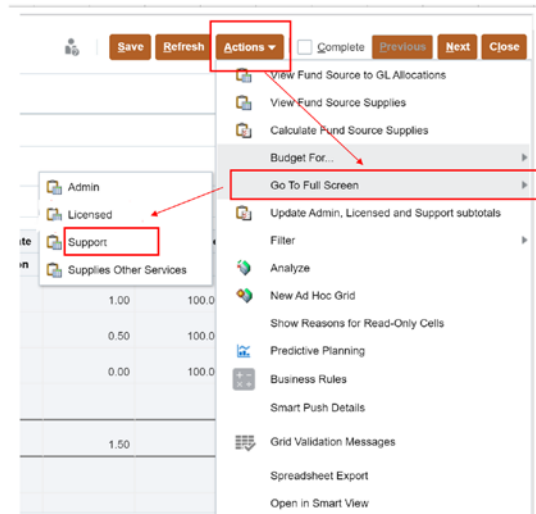
Data Add Row Format

			Employee Name	Shared Position	EF Start Date	EF Stop Date	Planned FTE	
			Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund
		Employee 2			8/7/19		1.00	100
		Employee 3			8/7/19		1.00	100
GRADE 5 - C1050	P_10014570_1 GRADE 5	Employee 1			8/7/19		1.00	100
		Employee 2			7/31/19		1.00	100
		Employee 3			8/7/19		1.00	100
ART, ELEM - C1100	P_10014571_1 ART, ELEM	Employee 1			8/7/19		1.00	100
MUSIC, ELEM - C1250	P_10014572_1 MUSIC, ELEM	Employee 1			8/7/19		1.00	100
PHYSICAL ED - C1260	P_10014573_1 PHYSICAL ED	Employee 1			8/7/19		1.00	100
ECSE AUTISM-KIDS - C6031	P_10014574_1 ECSE AUTISM-KIDS	Employee 1			9/9/19		1.00	
GEN RR ELEM - C6050	P_10014575_1 GEN RR ELEM	Employee 1			8/7/19		1.00	
GATE ELEM - C6130	P_10014576_1 GATE ELEM	Employee 1			8/7/19		1.00	
COUNSELOR/ELE - C8000	P_10014577_1 COUNSELOR/ELE	Employee 1			8/7/19		1.00	100
LIBRARY ELE - C8040	P_10014578_1 LIBRARY ELE	Employee 1			8/7/19		1.00	100
LEARN STRAT, ELEM - C8111	P_10014579_1 LEARN STRAT, ELEM	Employee 1			8/7/19		1.00	100
		Employee 2			8/7/19		1.00	100
		Employee 3			8/7/19		1.00	100
RBQ3 LEARNING STR - C8112	P_10014580_1 RBQ3 LEARNING STR	Employee 1			8/7/19		1.00	
LRN STRT TTL1 ELE - C8114	P_10014581_1 LRN STRT TTL1 ELE	Employee 1			8/7/19		0.00	7
Licensed Jobs	Total All Positions	Total All Employees					31.00	

CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Shared Position

1. 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**.

The screenshot shows the 'SCHOOL BUDGET' tool interface. The main grid displays employee information. A dropdown menu is open for the 'Shared Position' column, showing options for 'SP-Yes' and 'SP-No'. The 'SP-Yes' option is selected.

Scenario	Version	Year	EO#	Employee Name	Shared Position	Monthly Work Overage	Hours Per Day Overage	Eff Start Date	Eff Stop Date	FD Percentage	FD Percentage	Total Fund Src	FS Amount Average Cost Basis	FD Amount			
Budget	Working_SB	FY21	0223 Admin: GreatES	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Oel Fund	Food	Sp 60	Allocation Pct	Oel Fund	Food
				P_20553817_1 COMPUTER TECH I	Employee 1	CCSD Leifname, Firstname EM_1005875	SP-Yes					100.00	100.00	100.00	100.00	54,569.49	
				P_10056537_1 CUSTODIAN	Employee 1	CCSD Leifname, Firstname EM_1009441						100.00	100.00	100.00	100.00	48,255.17	
				P_10058413_1 CUSTODIAN	Employee 1	CCSD Leifname, Firstname EM_10200781						100.00	100.00	100.00	100.00	41,822.82	
				HD CUST I - N8119	Employee 1	CCSD Leifname, Firstname EM_2117295						100.00	100.00	100.00	100.00	83,512.33	
				SCHOOL AIDE - N9106	Employee 1	CCSD Leifname, Firstname EM_10041192						100.00	100.00	100.00	100.00	33,098.38	
				LIBRARY AIDE - N9105	Employee 1	CCSD Leifname, Firstname EM_1002399	SP-Yes					100.00	100.00	100.00	100.00	8,946.28	
				P_10058426_1 LIBRARY AIDE	Employee 1	CCSD Leifname, Firstname EM_1002399	SP-No					100.00	100.00	100.00	100.00	74,690.47	

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET

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

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeerES

Employee Name	Shared Position	Months Work Override	Hours Per Day Override	EF Start Date	EF Stop Date	FS Percentage	FS Percentage	Total Fund Src	FS Amount Average Cost Basis	FS Amount	
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Food	Sp Ed	Allocation Pct	Gen Fund	Food
CUSTODIAN - N0040 P_10009637_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200441	SP-Yes	10 Months	4.00	7/1/20		100.00	100.00		100.00	20,163.06	
P_10009637_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200441		12 Months	5.00	4/8/20		100.00	100.00		100.00	40,355.17	
P_100098413_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200751		12 Months	7.00	7/1/20		100.00	100.00		100.00	45,833.62	
HD CUST I - N0110 P_10008414_1_HD CUST I Employee 1 CCSD LastName, FirstName EM_317295		12 Months	8.00	12/22/19		100.00	100.00		100.00	63,512.33	

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

SCHOOL BUDGET

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

Scenario Budget Version Working_SB Years FY21 Entity 0235 Allen, DeerES

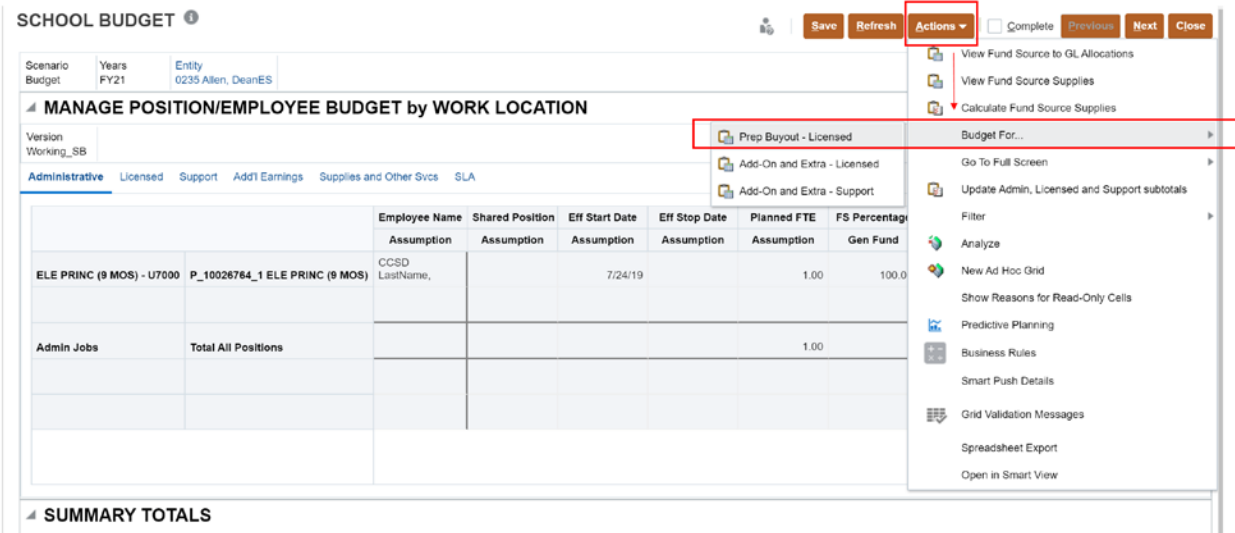
Employee Name	Shared Position	Months Work Override	Hours Per Day Override	EF Start Date	EF Stop Date	FS Percentage	FS Percentage	Total Fund Src	FS Amount Average Cost Basis	FS Amount Actual
Mass Calc										
Update Funding Source Allocations										
Go to Licensed Summary										
View Fund Source to GL Allocations										
View Fund Source Supplies										
Calculate Fund Source Supplies										
Budget For...										
Position Budget Info										
CUSTODIAN - N0040 P_10009637_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200441	SP-Yes	10 Months	4.00	7/1/20		100.00	100.00		100.00	20,163.06
P_10009637_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200441		12 Months	5.00	4/8/20		100.00	100.00		100.00	40,355.17
P_100098413_1_CUSTODIAN Employee 1 CCSD LastName, FirstName EM_10200751		12 Months	7.00	7/1/20		100.00	100.00		100.00	45,833.62
HD CUST I - N0110 P_10008414_1_HD CUST I Employee 1 CCSD LastName, FirstName EM_317295		12 Months	8.00	12/22/19		100.00	100.00		100.00	63,512.33
SCHOOL AIDE - N0100 P_10008401_1_SCHOOL AID Employee 1 CCSD LastName, FirstName EM_10041392		10 Months	8.00	3/11/20		100.00	100.00		100.00	33,009.38
LIBRARY AIDE - N0105 P_10008402_1_LIBRARIAN Employee 1 CCSD LastName, FirstName EM_10028305		09 Months	2.50	12/22/19		100.00	100.00		100.00	8,848.28
P_10008402_1_LIBRARIAN Employee 1 CCSD LastName, FirstName EM_10028305		09 Months	4.10	12/22/19		100.00	100.00		100.00	21,992.43
CLERK TYPIST I - N0110 P_10008400_1_FRST AIDG Employee 1 CCSD LastName, FirstName EM_542377		09 Months	2.00	12/22/19		100.00	100.00		100.00	
SPTA II - N0162 P_10008406_1_SPTA II Employee 1 CCSD LastName, FirstName EM_10049345		09 Months	0.00	1/19/20			100.00		100.00	

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

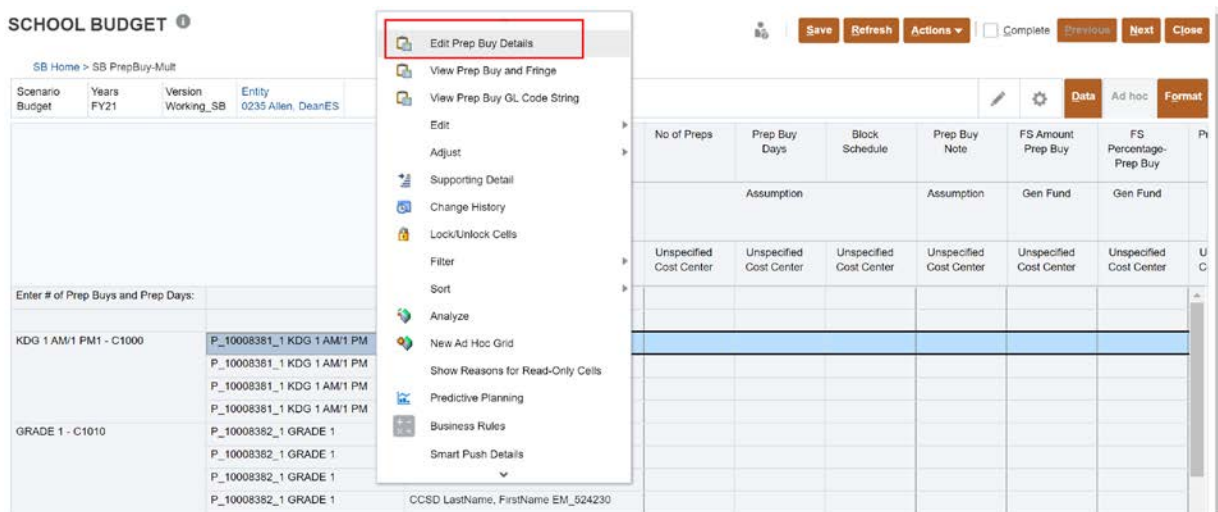
CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Prep Buy Out

1. From the School Budget form, click the **Actions** menu, click **Budget for...**, and select **Prep Buyout – Licensed**.



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**.



CCSD School Budget Planning Tool Essentials Guide

- 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).

SCHOOL BUDGET 1

SB Home > SB PrepBuy-Mult > SB PrepBuy

Scenario Budget: FY21, Entity: 0235 Allen, DeanES, Job: KDG 1 AM/1 PM1 - C1000, Employee: Employee 1, Position: P_10006381_1 KDG 1 AM/1 PM

Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense-Actual Basis	FS Percentage-Prep			
Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	CSR	Title I	21st C
Working_SB	1.00	184.00		purchasing a prep period for the school year		100.00			

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

- 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.

SCHOOL BUDGET 1

SB Home > SB PrepBuy-Mult > SB PrepBuy

Scenario Budget: FY21, Entity: 0235 Allen, DeanES, Job: KDG 1 AM/1 PM1 - C1000, Employee: Employee 1, Position: P_10006381_1 KDG 1 AM/1 PM

Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	Earnings Expense-Actual Basis	FS Amount Prep Buy	FS		
Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0150 Prep Buy (NO PERS)	Gen Fund	Gen Fund	CSR	Tit
Working_SB	1.00	183.00		purchasing a prep period for the school year	6,903.68	7,055.91	100.00		

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

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET 1 Save Refresh Actions Complete Previous Next Close

[SB Home](#) > SB PrepBuy-Mult

Scenario Budget	Years	Version Working_SB	Entity	Employee Name	No of Preps	Prep Buy Days	Block Schedule	Prep Buy Note	FS Amount Prep Buy	FS Percentage-Prep Buy	Pi
	FY21		0235 Allen, DeanES	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	U C
Enter # of Prep Buys and Prep Days:											
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	100.00	
		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								

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

SCHOOL BUDGET 1 Save Refresh Actions Complete Previous Next Close

Scenario Budget: FY21, Entity: 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

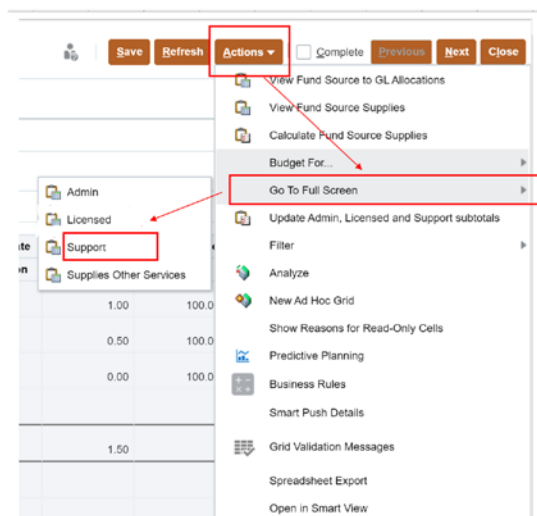
Version Working_SB: Adminstrative, Licensed, Support, **Add'l Earnings**, Supplies and Other Svcs, SLA

Scenario Budget	Years	Version Working_SB	Entity	Emp Name	FS Amount			
					Prep Buy	Add-On	Extra	
				Assumption	Gen Fund	Gen Fund	Gen Fund	
KDG 1 AM/1 PM1 - 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 - C1020		P_10008383_1 GRADE 2	CCSD LastName,		7,597.02			
GRADE 4 - C1040		P_10008387_1 GRADE 4	CCSD LastName,			3,827.37	588.78	
LICENSED ADDITIONAL EARNINGS TOTAL						14,862.93	6,081.65	1,297.35

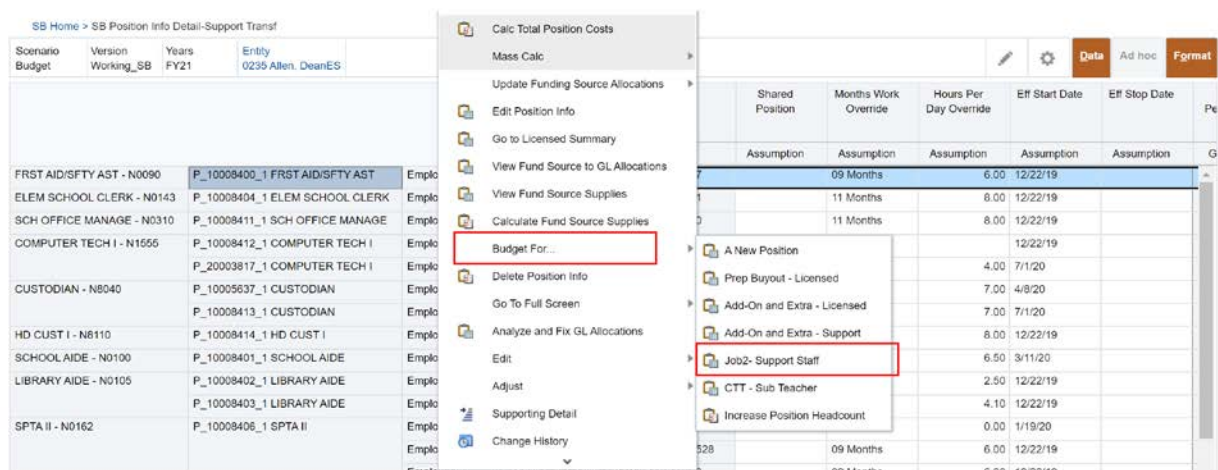
CCSD School Budget Planning Tool Essentials Guide

Budgeting for a Job 2

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

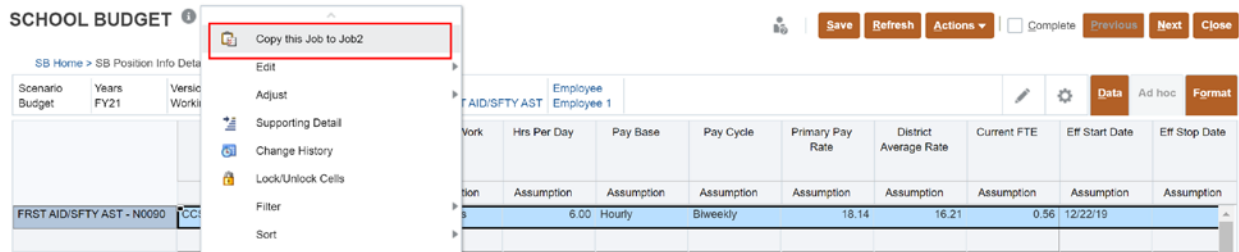


2. Find the desired employee from the Support employee grid and **right-click** on their position number. From the menu that appears, click **Budget for...**, and select **Job2 – Support Professional**.



CCSD School Budget Planning Tool Essentials Guide

- 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**.



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

Launch Confirmation Message

Select Job2 to proceed



- 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

* Select FROM Employee: "Employee 1"

* Select FROM Position: "P_10008400_1"

* Select FROM Job Code: "N0090"

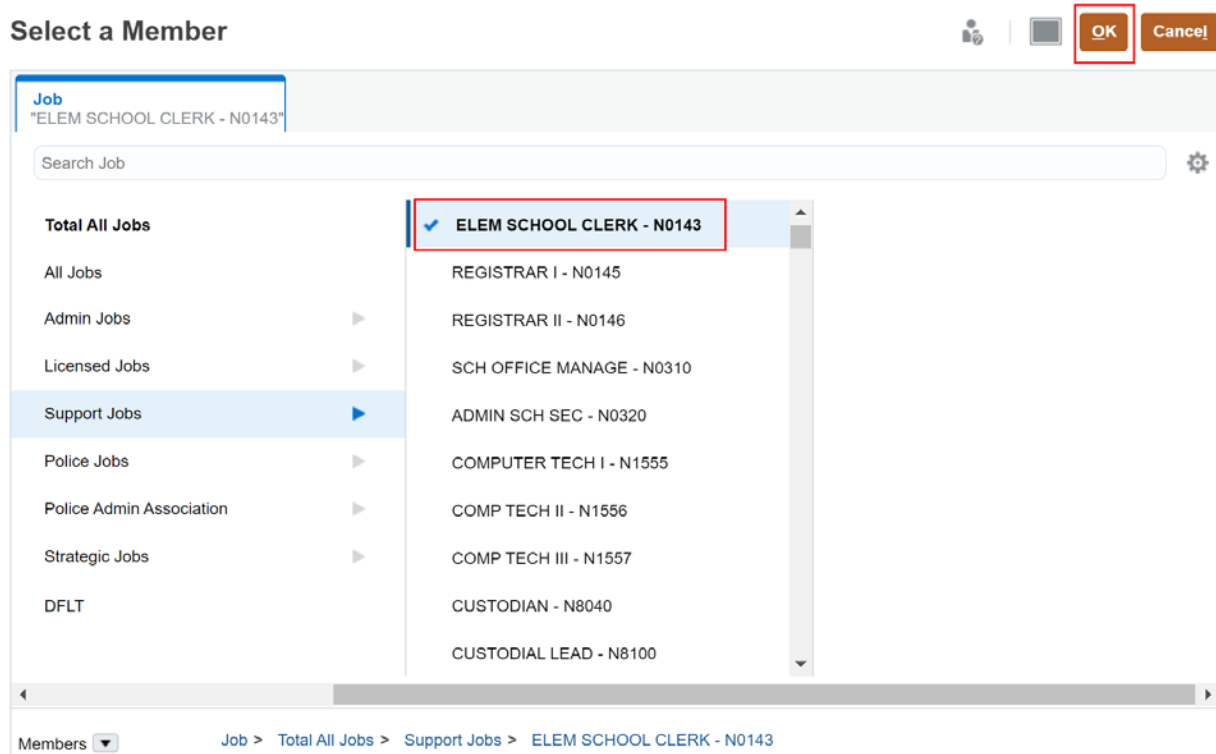
* Select TO JOB: "N0090"

* Select Work Location: "WL_0235"

* Select Year: "FY21"

CCSD School Budget Planning Tool Essentials Guide

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



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



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



Copy Job1 to Job2 was successful.



CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf > SB Position Search-Support Only

Scenario Budget	Years	Version Working_SB	Entity	Position	Employee						
	FY21		0235 Allen, DeanES	P_10008400_1 FRST AID/SFTY AST	Employee 1						
				Employee Name	Months Work	Hrs Per Day	Pay Base	Pay Cycle	Primary Pay Rate	District Average Rate	Current FTE
				Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption
FRST AID/SFTY AST - N0090				CCSD LastName, FirstName EM_542377	09 Months	6.00	Hourly	Biweekly	18.14	16.21	0.56
ELEM SCHOOL CLERK - N0143				CCSD LastName, FirstName EM_542377	09 Months	6.00	Hourly	Biweekly	18.14		

- 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 Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf

Scenario Budget	Version Working_SB	Years	Entity							
	FY21		0235 Allen, DeanES							
				Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	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	

- 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.)

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf

Scenario Budget	Version Working_SB	Years	Entity							
	FY21		0235 Allen, DeanES							
				Employee Name						
				Assumption	Assumption	Assumption				
FRST AID/SFTY AST - N0090				P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377	09 Months			
ELEM SCHOOL CLERK - N0143				P_10008400_1 FRST AID/SFTY AST	Employee 1	CCSD LastName, FirstName EM_542377	09 Months			

- Calc Total Position Costs
- Mass Calc**
- Update Funding Source Allocations
- Edit Position Info
- Go to Licensed Summary
- View Fund Source to GL Allocations
- View Fund Source Supplies

CCSD School Budget Planning Tool Essentials Guide

- 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 ⓘ

[SB Home](#) > SB Position Info Detail-Support Transf

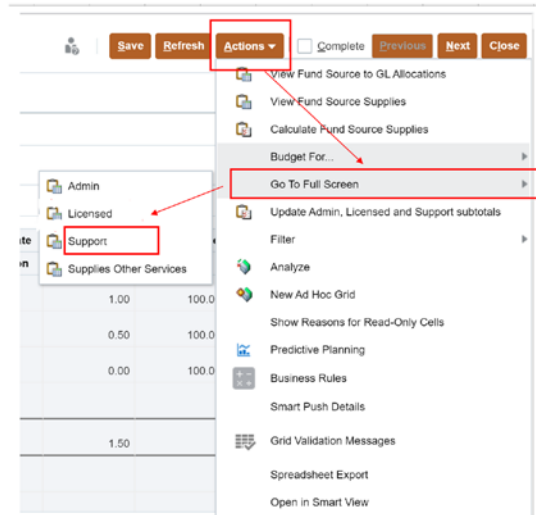
[Save](#) [Refresh](#) [Actions](#) | Complete [Previous](#) [Next](#) [Close](#)

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES								
					Employee Name	Shared Position	Months Work Override	Hours Per Day Override	Eff Start Date	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	2.00	12/22/19		

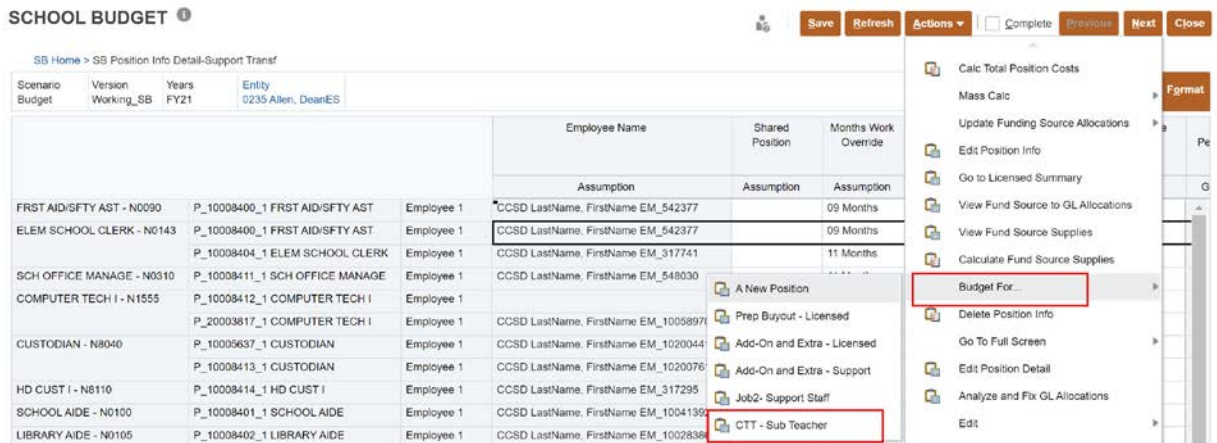
CCSD School Budget Planning Tool Essentials Guide

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**



CCSD School Budget Planning Tool Essentials Guide

- 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**.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf > SB CTT

Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate	Total Comp Exp	FS Percentage				
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	GenF Read by 3	CSR	GenF SB178	GATE	
Enter # Hours, Qty and Fund Src Alloc														
PARA PRO - CTT - N9909				650.00	3.00						100.00			

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

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf > SB CTT

Scenario Budget	Years FY21	Version Working_SB	Entity 0235 Allen, DeanES	CTT Budget Hours	CTT Quantity	Pay Base	Pay Cycle	District Average Rate	Total Comp Exp	FS Percentage				
				Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory
Enter # Hours, Qty and Fund Src Alloc														
PARA PRO - CTT - N9909				650.00	3.00	Hourly	Biweekly	20.00		100.00				

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

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB Position Info Detail-Support Transf

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	Eff Start Date	Eff Stop Date	FS Percentage	FS Percentage			Total Fund Src	FS Amount Average Cost Basis	FS Amount Ac
							Gen Fund	Food	Sp Ed			
INSTRUCTIONAL AST - N0190				P_10008409_1 INSTRUCTIONAL AST	Employee 1	12/22/19			100.00	100.00		
TI INS ASST III - N0198				P_10008410_1 INSTRUCTIONAL AST	Employee 1	12/22/19	100.00			100.00	5,231.18	
FS WKR FLOATER - N5010				New Position 12	Vacant		100.00			100.00	31,779.25	
SR FOOD SRVC WRKR - N5030				P_10008415_1 FS WKR FLOATER	Employee 1	12/22/19		100.00		100.00		
PARA PRO - CTT - N9909				P_10023567_1 SR FOOD SRVC WRKR	Employee 1	12/22/19		100.00		100.00		36.95
FORM TOTALS				No Position	No Employee			100.00		100.00	39,916.50	
FORM TOTALS											471,464.32	36.95

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

CCSD School Budget Planning Tool Essentials Guide

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**.

The screenshot shows the 'SCHOOL BUDGET' interface. At the top right, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. The 'Actions' dropdown menu is open, showing options like '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', and 'Open in Smart View'. The 'Budget For...' option is highlighted with a red box, and its sub-menu is also visible, with 'Add-On and Extra - Licensed' highlighted in red. Below the menu, there is a table for 'MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION' and a 'SUMMARY TOTALS' table.

			Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE
REMAINING BUDGET TO SPEND			105,121.93	0.00	0.00	0.00	0.00	(88,205.51)	0.00	16,916.42	5,928.16	91,842.14
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	2,834,588.70	42,866.25	91,842.14
BUDGET SPENT:												
Working_SB	Admin Jobs	Total Funding Amount	151,057.92									

2. 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**.

The screenshot shows the 'SB Licensed AddOn-Mult' form. At the top right, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these are buttons for 'Data', 'Ad hoc', and 'Format'. The main area contains a grid with columns: 'Add-On Days', 'Add-On Minutes', 'Days of Add-On Minutes', 'Add-On Note', 'Extra Days', 'Extra Minutes', and 'Days of Minutes'. A context menu is open over the grid, with 'Edit Fund Source Details' highlighted in red. Other menu items include 'View Add-On Extra With Fringe', 'View Add-On Extra GL Code String', 'Calc TEST', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', 'Lock/Unlock Cells', and 'Filter'.

CCSD School Budget Planning Tool Essentials Guide

- 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**.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB LicAddOn-Mult > SB LicAddOnExtra-FS

Scenario Budget: FY21 Entry: 0235 Allen, DeanES Job: KDG 1 AM/1 PM1 - C1000 Employee: Employee 1 Position: P_10008381_1 KDG 1 AM/1 PM

Manage Licensed Add-On (PERS)

	Employee Name	Add-On Days	Add-On Minutes	Days of Add-On	Add-On Note	Earnings Expend		FS Percentage-Add-On			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	CSR	Title I	21st Century	Sp Ed
Enter Add-On # Days, Minutes and Funding:											
Working_SB	CCSD LastName, First		19.00	184	19 minutes for each day		100.00				

Manage Licensed Extra (NO PERS)

	Employee Name	Extra Days	Extra Minutes	Days of Extra MI	Extra Note	Earnings Expend		FS Percentage-Extra			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	CSR	Title I	21st Century	Sp Ed
Enter Extra # Days, Minutes and Funding:											
Working_SB	CCSD LastName, First	2.00			teacher working 2		100.00				

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.

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > **SB LicAddOn-Mult** > SB LicAddOnExtra-FS

Scenario Budget: FY21 Entity: 0235 Allen, DeanES Job: KDG 1 AM/1 PM1 - C1000 Employee: Employee 1 Position: P_10008381_1 KDG 1 AM/1 PM

Manage Licensed Add-On (PERS)

	Employee Name	Add-On Days	Add-On Minutes	Days of Add-On	Add-On Note	Earnings Expen:	FS Amount Add-	FS Percentage-Add-On			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Gen Fund	CSR	Title I	21st Cent
Enter Add-On # Days, Minutes and Funding:											
Working_SB	CCSD LastName,		19.00	184.00	18 minutes for each day	2,637.83	3,471.38	100.00			

Manage Licensed Extra (NO PERS)

	Employee Name	Extra Days	Extra Minutes	Days of Extra Mi	Extra Note	Earnings Expen:	FS Amount Extra	FS Percentage-Extra			
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	Gen Fund	CSR	Title I	21st Century
Enter Extra # Days, Minutes and Funding:											
Working_SB	CCSD LastName,	2.00			teacher working 2	650.40	665.69	100.00			

- On the SB Licensed AddOn-Mult form, note that the position 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**.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB LicAddOn-Mult

Scenario Budget: FY21 Version: Working_SB Entity: 0235 Allen, DeanES

KDG 1 AM/1 PM1 - C1000 P_10008381_1 KDG 1 AM/1 PM

- Edit Fund Source Details
- View Add-On Extra With Fringe**
- View Add-On Extra GL Code String
- Calc TEST
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter

Add-On Days	Add-On Minutes	Days of Add-On Minutes	Add-On Note	Extra Days	Extra Minutes	Days of F Minute
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	Assump
	19.00	184.00	19 minutes for each day of the school year	2.00		

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB LicAddOn-Mult > SB Position Comp Detail-AddExt

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	Job KDG 1 AM/1 PM 1 - C1000	Position P_10008381_1							
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	219.82
Benefits Expense-Add-On	Public Emp Retirement System			771.56	64.30	64.30	64.30	64.30	64.30	64.30	64.30	64.30
	Occupational Injury Management			22.42	1.87	1.87	1.87	1.87	1.87	1.87	1.87	1.87
	State Unemployment Ins			1.32	0.11	0.11	0.11	0.11	0.11	0.11	0.11	0.11
	Medicare			38.25	3.19	3.19	3.19	3.19	3.19	3.19	3.19	3.19
	TOTAL ADD-ON & FRINGE BENEFITS			3,471.38	289.28	289.28	289.28	289.28	289.28	289.28	289.28	289.28
VIEW LICENSED EXTRA WITH FRINGE BENEFITS												
				YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS)			650.40	54.20	54.20	54.20	54.20	54.20	54.20	54.20	54.20
Benefits Expense-Extra	Occupational Injury Management			5.53	0.46	0.46	0.46	0.46	0.46	0.46	0.46	0.46
	State Unemployment Ins			0.33	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.03
	Medicare			9.43	0.79	0.79	0.79	0.79	0.79	0.79	0.79	0.79
	TOTAL EXTRA & FRINGE BENEFITS			665.69	55.47	55.47	55.47	55.47	55.47	55.47	55.47	55.47

CCSD School Budget Planning Tool Essentials Guide

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**.

The screenshot shows the 'SCHOOL BUDGET' application interface. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these, there are fields for 'Scenario Budget' (FY21), 'Years', and 'Entity' (0235 Allen, DeanEG). The main heading is 'MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION'. Below this, there are tabs for 'Administrative', 'Licensed', 'Support', 'Add'l Earnings', 'Supplies and Other Svcs', and 'SLA'. A table is displayed with columns for 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', and 'FS Percentage'. The table contains one row for 'ELE PRINC (9 MOS) - U7000' and a summary row for 'Admin Jobs' with 'Total All Positions'. The 'Actions' menu is open, showing options like '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', and 'Open in Smart View'. The 'Budget For...' option is highlighted, and a sub-menu is visible with 'Add-On and Extra - Support' selected.

2. 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**.

The screenshot shows the 'SB Support AddOn-Mult' form. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these, there are fields for 'Scenario Budget' (FY21), 'Years', 'Version Working_SB', and 'Entity' (0235 Allen, DeanEG). The main heading is 'SB Home > SB SupAddOn-Mult'. Below this, there are tabs for 'Data', 'Ad hoc', and 'Format'. A table is displayed with columns for 'Days of Add-On Hours', 'Add-On Hours', 'Add-On Note', 'Days of Extra Hours', 'Extra Hours', 'Extra Note', and 'Click On'. The table contains several rows of data, including 'CUSTODIAN - N8040', 'HD CUST I - N8110', 'SCHOOL AIDE - N0100', 'LIBRARY AIDE - N0105', 'SPTA II - N0162', 'PE INSTR ASST - N0179', and 'INSTRUCTIONAL ASST - N0190'. The 'Edit Fund Source Details' option is highlighted in the context menu.

CCSD School Budget Planning Tool Essentials Guide

- 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**.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB SupAddOn-Mult > SB SupAddOnExtra-FS

Scenario Budget: FY21 Entity: C235 Allen, DearES Job: PE INSTRASST - N0179 Employee: Employee 1 Position: P_10008407_1 PE INSTRASST

Manage Support Add-On (PERS)

	Employee Name	Max Workdays	Max Hours	Days of Add-On	Add-On Hours	Add-On Note	Earnings Expend:	FS Percentage-Add-On			
	Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	CSR	Title I	21st Centur
Enter Add-On # Days, Hours and Funding:											
Working_SB	CCSD LastName, First Name			183.00	2	2 additional		100.00			

Manage Support Extra (NO PERS)

	Employee Name	Max Days-Extra	Days of Extra Hc	Extra Hours	Extra Note	Earnings Expend:	FS Percentage-Extra				
	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	CSR	Title I	21st Century	Sp Ed
Enter Extra # Days, Hours and Funding:											
Working_SB	CCSD LastName,		66.00	8	Extra days to make the		100.00				

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.

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB SupAddOn-Mult > SB SupAddOnExtra-FS

Scenario Budget: FY21 Entity: 0235 Allen, DearES Job: PE INSTR ASST - N0179 Employee: Employee 1 Position: P_10008407_1 PE INSTR ASST

Manage Support Add-On (PERS)

Employee Name	Max Workdays	Max Hours	Days of Add-On	Add-On Hours	Add-On Note	Earnings Expend	FS Amount Add-On	FS Perc
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0202 Add-C	Gen Fund	Title I
Enter Add-On # Days, Hours and Funding:								
Working_SB	CCSD LastName	194.00	7.50	183.00	2.00	2 additional hours each	5,453.40	7,176.67

Manage Support Extra (NO PERS)

Employee Name	Max Days-Extra	Days of Extra Hc	Extra Hours	Extra Note	Earnings Expend	FS Amount Extra	FS Percentage-Extra
Assumption	Assumption	Assumption	Assumption	Assumption	ERN_0151 Extra	Gen Fund	21st Century
Enter Extra # Days, Hours and Funding:							
Working_SB	CCSD LastName	67.00	65.00	8.00	Extra days to make the	7,867.20	8,052.08

- On the SB Support AddOn-Mult form, note that the position 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**.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

SB Home > SB SupAddOn-Mult

Scenario Budget: FY21 Version: Working_SB Entity: 0235 Allen, DearES

- Edit Fund Source Details
- View Add-On Extra With Fringe**
- View Add-On Extra GL Code String
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter
- Sort
- Analyze
- New Ad Hoc Grid
- Show Reasons for Read-Only Cells
- Predictive Planning
- Business Rules
- Smart Push Details

Days of Add-On Hours	Add-On Hours	Add-On Note	Days of Extra Hours	Extra Hours	Extra Note	Cl
Assumption	Assumption	Assumption	Assumption	Assumption	Assumption	As
377						
377						
741						
030						
58970						
00441						
00761						
295						
41392						
28386						
28386						
PE INSTR ASST - N0179	P_10008407_1 PE INSTR ASST	CCSD LastName, FirstName EM_10022402	183.00	2.00	2 additional hours each day	66.00
				8.00	Extra days to make the	

CCSD School Budget Planning Tool Essentials Guide

- 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.

SCHOOL BUDGET Save Refresh Actions Complete Previous Next Close

[SB Home](#) > SB SupAddOn-Mult > SB Position Comp Detail-AddExt

Scenario Budget	Version Working_SB	Years FY21	Entity 0235 Allen, DeanES	Job PE INSTR ASST - NC179	Position P_10066407_1					
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)	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	1,565.12	0.00	0.00	0.00	177.24	177.24	177.24	177.24	177.24
	Occupational Injury Management	46.35	0.00	0.00	0.00	5.15	5.15	5.15	5.15	5.15
	State Unemployment Ins	2.73	0.00	0.00	0.00	0.30	0.30	0.30	0.30	0.30
	Medicare	79.07	0.00	0.00	0.00	8.79	8.79	8.79	8.79	8.79
	TOTAL ADD-ON & FRINGE BENEFITS	7,176.67	0.00	0.00	0.00	797.41	797.41	797.41	797.41	797.41
VIEW LICENSED EXTRA WITH FRINGE BENEFITS										
		YearTotal	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Earnings Expense-Actual Basis	ERN_0151 Extra (NO PERS)	7,867.20	0.00	0.00	0.00	874.13	874.13	874.13	874.13	874.13
Benefits Expense-Extra	Occupational Injury Management	66.87	0.00	0.00	0.00	7.43	7.43	7.43	7.43	7.43
	State Unemployment Ins	3.93	0.00	0.00	0.00	0.44	0.44	0.44	0.44	0.44
	Medicare	114.07	0.00	0.00	0.00	12.67	12.67	12.67	12.67	12.67
	TOTAL EXTRA & FRINGE BENEFITS	8,052.08	0.00	0.00	0.00	894.68	894.68	894.68	894.68	894.68

CCSD School Budget Planning Tool Essentials Guide

Budgeting for Supplies and Other Services

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

SCHOOL BUDGET 1 Save Refresh Actions Complete Previous Next Close

Scenario Budget: Years FY21, Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative | Licensed | Support | Add'l Earnings | **Supplies and Other Svcs** | SLA

Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Planned FTE	FS Percentage	Total Fund Src	FS Amount Aver
Assumption	Assumption	Assumption	Assumption	Assumption	Gen Fund	Allocation Pct	Gen Fund
ELE PRINC (9 MOS) - U7000_P_10026764_1 ELE PRINC (9 MOS)	CCSD LastName.		7/24/19	1.00	100.00	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	GATE		
REMAINING BUDGET TO SPEND	(239,480.83)	(88,205.51)	0.00	0.00	500.00	(88,205.51)	0.00	(415,391.90)	5,928.16	91,842.14		
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	91,842.14
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.

SCHOOL BUDGET 1 Save Refresh Actions Complete Previous Next Close

Scenario Budget: Years FY21, Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative | Licensed | Support | Add'l Earnings | **Supplies and Other Svcs** | SLA

Period BegBalance

	Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory
Enter total year dollar amount to a Funding Source:						
5116540000 Extra Duty Licensed	5,000.00					
5116810000 Preparation Periods						
5117952000 Extra Duty Support Staff						
5118259000 Extra Duty Administrator						
5320000000 Education Services						
5330000000 Employee Training						
5340000000 Other Professional Services						
5343000000 Legal Services						

SUMMARY TOTALS

CCSD School Budget Planning Tool Essentials Guide

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Period BegBalance

	Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory
Enter total year dollar amount to a Funding Source:						
5116540000 Extra Duty Licensed	5,000.00					
5116810000 Preparation Periods						
5117952000 Extra Duty Support Staff						
5118259000 Extra Duty Administrator						
5320000000 Education Services						
5330000000 Employee Training						
5340000000 Other Professional Services						
5343000000 Legal Services						
5344000000 Architectural Services - Prof						

SUMMARY TOTALS

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

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

SCHOOL BUDGET ⓘ

Save Refresh Actions ▾ Complete Previous Next Close

Scenario Budget Years FY21 Entity 0235 Allen, DeanES

MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION

Version Working_SB

Administrative Licensed Support Add'l Earnings Supplies and Other Svcs SLA

Period BegBalance

	Gen Fund	CSR	Title I	21st Century	Sp Ed	Victory
Enter total year dollar amount to a Funding Source:						
5116540000 Extra Duty Licensed	5,000.00					
5116810000 Preparation Periods						
5117952000 Extra Duty Support Staff						
5118259000 Extra Duty Administrator						
5320000000 Education Services						
5330000000 Employee Training						
5340000000 Other Professional Services						
5343000000 Legal Services						
5344000000 Architectural Services - Prof						

SUMMARY TOTALS

	Gen Fund	CSR	HOPE2	Magnet	GenF Read by 3	GenF SB178	Title I	ZFS-EDIT	Food	GATE
	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	5,000.00			88,500.00	37,200.00		130,700.00		
	Service Level Agreement	124,905.52						124,905.52		
TOTAL BUDGET SPENT		2,553,808.64	441,027.55		88,500.00	125,405.51		3,208,741.70	36,958.09	0.00

CCSD School Budget Planning Tool Essentials Guide

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**.

The screenshot shows the 'SCHOOL BUDGET' interface. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these are fields for 'Scenario Budget', 'Years FY21', and 'Entity 0235 Allen, DeanES'. The main title is 'MANAGE POSITION/EMPLOYEE BUDGET by WORK LOCATION'. Below this is a 'Version Working_SB' field and a navigation bar with tabs: 'Administrative', 'Licensed', 'Support', 'Add'l Earnings', 'Supplies and Other Svcs', and 'SLA'. The main table has columns: 'Employee Name', 'Shared Position', 'Eff Start Date', 'Eff Stop Date', 'Planned FTE', and 'FS Percentage'. The table contains one row for 'ELE PRINC (9 MOS) - U7000' with 'P_10026764_1 ELE PRINC (9 MOS)' as the employee name, 'CCSD LastName' as the shared position, and '7/24/19' as the start date. Below the table is a 'SUMMARY TOTALS' section. On the right side, the 'Actions' menu is open, showing options like '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', and 'Open in Smart View'. The 'Spreadsheet Export' option is highlighted with a red box.

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

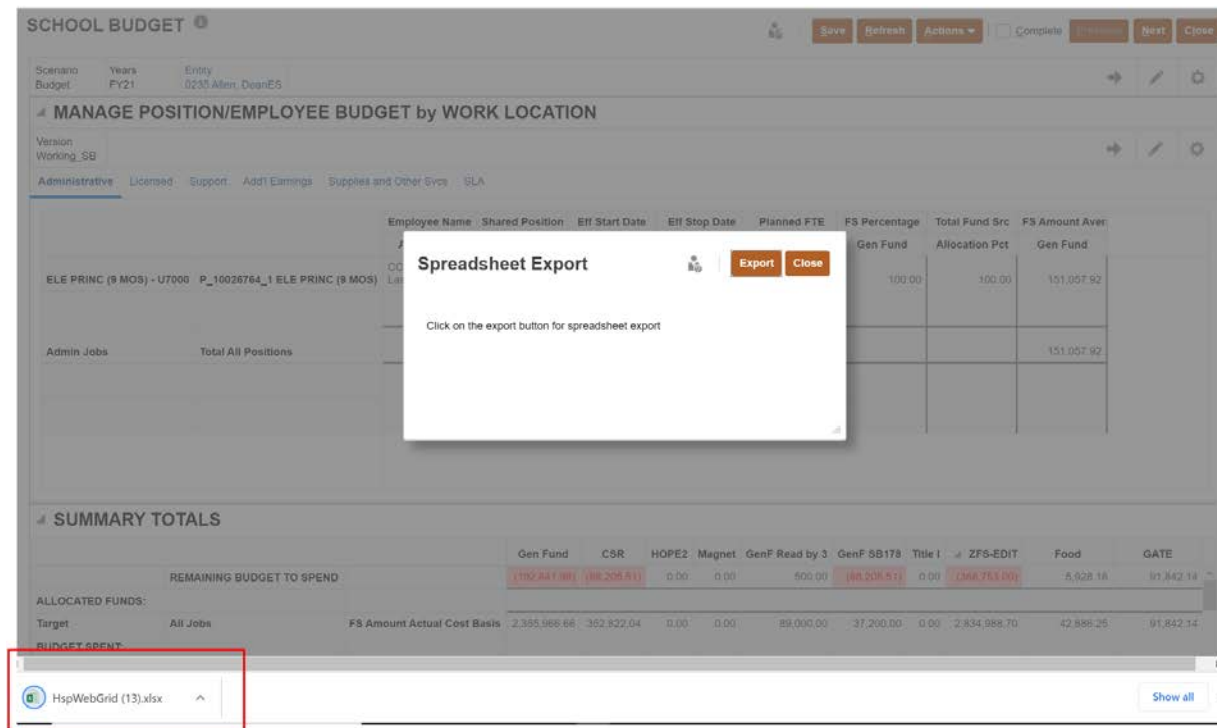
Spreadsheet Export



Click on the export button for spreadsheet export

CCSD School Budget Planning Tool Essentials Guide

- 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**.



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

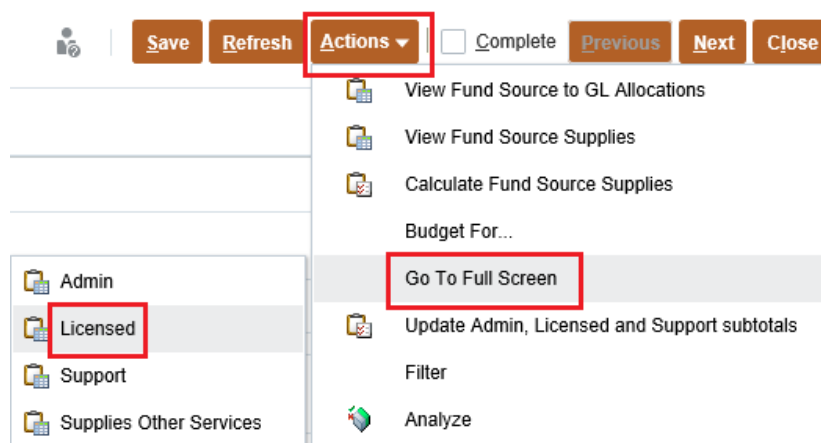
Employee Name	Shared Position	Eff Start Date	Eff Stop Date	Assumption	BegBalance	Unspecified Fund	Unspecified IO	Unspecified FuncArea	Unspecified Cost Center
CCSD LastName, FirstName EM_325191		8/7/19							
CCSD LastName, FirstName EM_331715		8/7/19							
CCSD LastName, FirstName EM_516040		8/7/19							
CCSD LastName, FirstName EM_10014323		8/7/19							
CCSD LastName, FirstName EM_303745		8/7/19							
CCSD LastName, FirstName EM_553069		8/7/19							
CCSD LastName, FirstName EM_524230		2/20/20							
Vacant									
CCSD LastName, FirstName EM_312411		8/7/19							
CCSD LastName, FirstName EM_520954		8/7/19							
Vacant									
CCSD LastName, FirstName EM_10084404		8/7/19							
CCSD LastName, FirstName EM_10034305		7/1/20							
CCSD LastName, FirstName EM_502600		8/7/19							
CCSD LastName, FirstName EM_524230		2/20/20							
CCSD LastName, FirstName EM_10014323		8/7/19							
CCSD LastName, FirstName EM_10109611		7/1/20							
CCSD LastName, FirstName EM_116074		8/7/19							
CCSD LastName, FirstName EM_546907		7/1/20							

CCSD School Budget Planning Tool Essentials Guide

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**



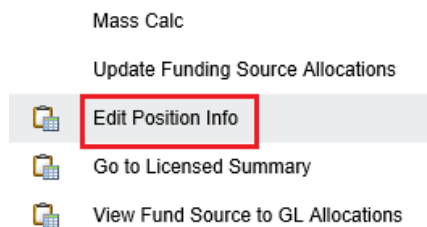
2. Locate the employee you want to view the salary for and click to **highlight** the position

SCHOOL BUDGET

SB Home > SB Position Info Detail-Licensed 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 PM1 - 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		1.00	100.00			
		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**



CCSD School Budget Planning Tool Essentials Guide

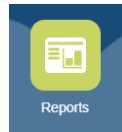
- You will be able to see both the employees **Actual** salary and **Average** salary for the position

▲ Compensation Monthly Spread Detail		
Version Working_SB	Position P_10008382_1	Employee Employee 1
		YearTotal
Basic Salary Expense-Actual Basis	Assumption	63,985.00
Benefits Expense-Actual 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
TOTAL COMPENSATION EXPENSE-ACTUAL BASIS	TOTAL SALARY & FRINGE BENEFITS	91,842.14
Basic Salary Expense-Average Basis	Assumption	61,221.60
Benefits Expense-Average 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
TOTAL COMPENSATION EXPENSE-AVG BASIS	TOTAL SALARY & FRINGE BENEFITS	88,205.51

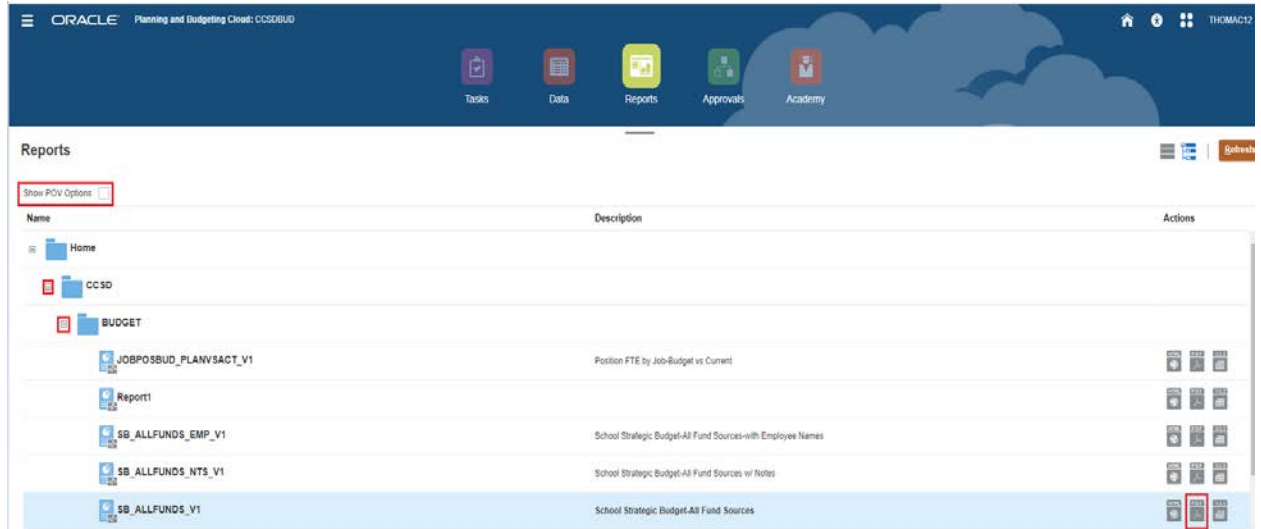
CCSD School Budget Planning Tool Essentials Guide

Printing Budget Plans

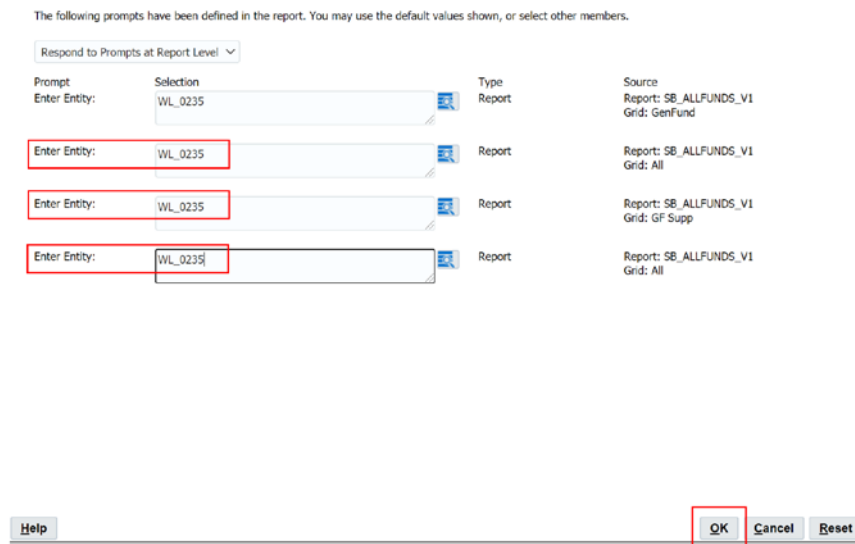
1. From the Budget Planning Tool Home page, click the Reports icon card.



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**.



3. 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.



CCSD School Budget Planning Tool Essentials Guide

- 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.

SB_ALLFUNDS_V1

Close

PDF Preview

CCSD Strategic Budget Plan
0235 - Allen, DeanES
2020-2021 School Year

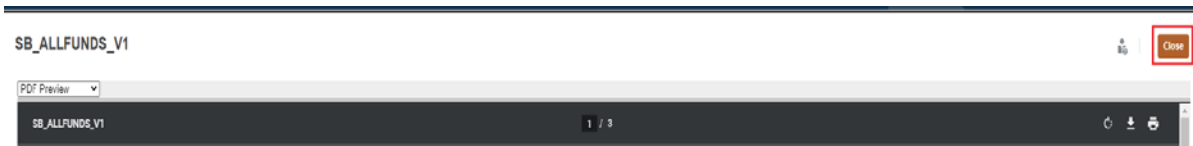
1/23/2021

WL_0235

		Gen Fund	GenF SB178	CSR	Food	Gen GATE	GenF Read by 3	Sp Ed	Cost	Cost (%)
ALL FUNDING SOURCES										
Plan Summary										
Admin Jobs	Total Funding Amount	151,058							151,058	3.94%
Licensed Jobs	Total Funding Amount	1,764,110	88,206	441,028		88,206		375,514	2,757,063	71.91%
Licensed Jobs	FS Amount Prep Buy	14,863							14,863	0.38%
Licensed Jobs	FS Amount Add-On	8,082							8,082	0.16%
Licensed Jobs	FS Amount Extra	1,297							1,297	0.03%
Support Jobs	Total Funding Amount	471,464			36,958			129,456	637,878	16.64%
Support Jobs	FS Amount Add-On	7,177							7,177	0.19%
Support Jobs	FS Amount Extra	8,052							8,052	0.21%
Supplies and Services	Supplies and Other Services		37,200				88,500		125,700	3.28%
Supplies and Services	Service Level Agreement	124,906							124,906	3.26%
Total		2,548,809	125,406	441,028	36,958	88,206	88,500	504,970	3,833,875	100.00%

Job	Position	Assumption	Standard Position	Months Work Overide	Avg Hours	Planned FTE	Gen Fund	Gen Fund	Gen Fund	Gen Fund	GenF SB178	CSR	Food	Gen GATE	Sp Ed
							FS Amount Average Cost Basis	FS Amount Prep Buy	FS Amount Add-On	FS Amount Extra	FS Amount Average Cost Basis	FS Amount Average Cost Basis	FS Amount Actual Cost Basis	FS Amount Average Cost Basis	FS Amount Actual Cost Basis
WL_0235															
ELE PRINC (9 MOS) - U7000	P_10026764_1	11 Months				8	1	\$151,057.92							
	PGRP_050						1	\$151,057.92							
Total Administrative Staffing							2	\$302,115.84							
KDG 1 AM1 PM1 - C1000	P_10008381_1	09 Months					1	\$86,205.51	\$7,065.91	\$3,471.38	\$665.69				
		09 Months				7	1	\$86,205.51		\$2,264.28	\$708.57				
		09 Months				7	1	\$86,205.51							
	PGRP_014	09 Months				7	1	\$86,205.51							
		09 Months				7	1								
		09 Months				7	1								

- When done, click the **Close** button (upper right). Repeat running the report using the XLS version and HTML as an option.



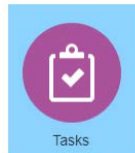
CCSD School Budget Planning Tool Essentials Guide

Promoting (Submitting) a Work Location Budget

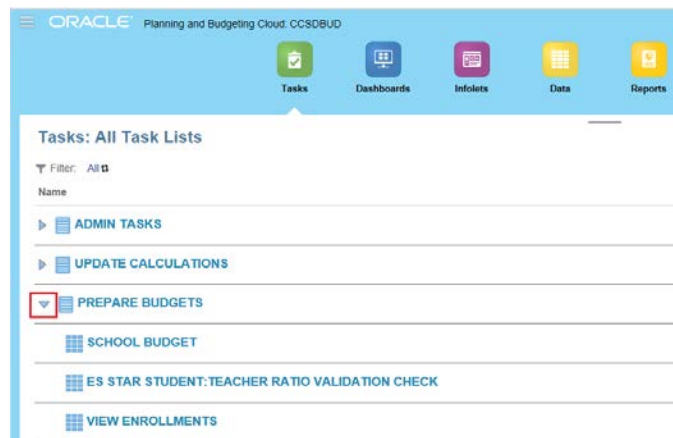
1. Go to the homepage (if you are not already there) by clicking on the **Home** icon.



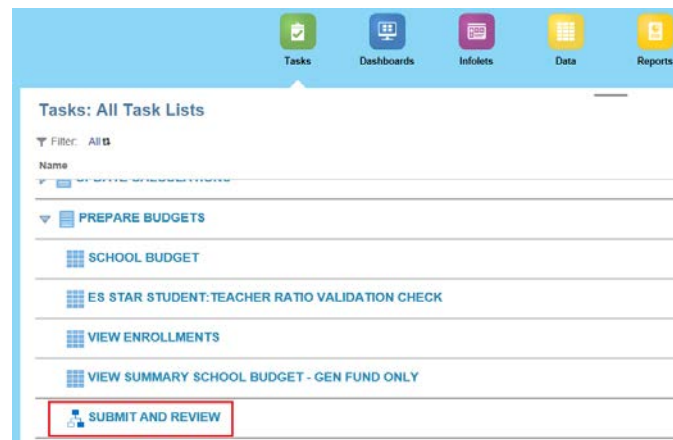
2. Click on the **Tasks** icon



3. From the Tasks List, expand the menu for **Prepare Budgets** by clicking the triangle on the left.

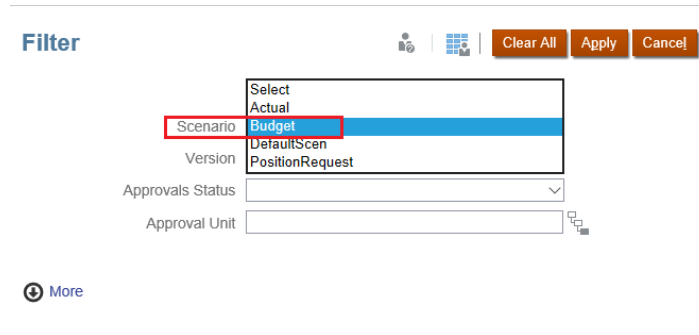


4. Click the option **Submit and Review**.

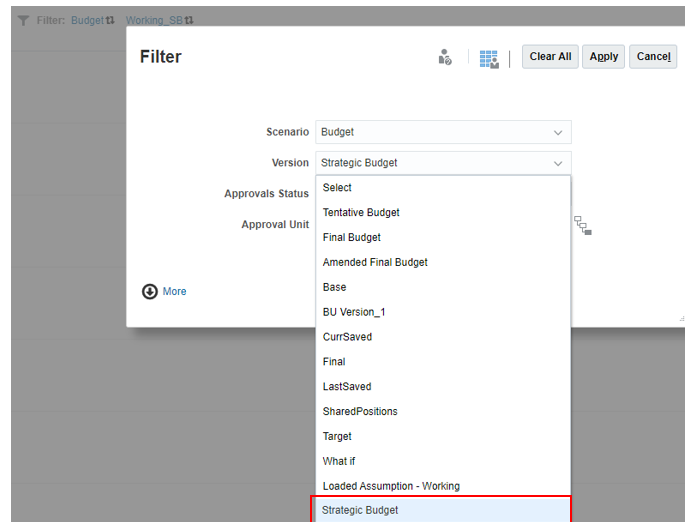


CCSD School Budget Planning Tool Essentials Guide

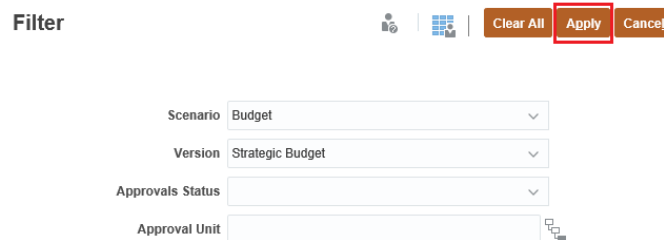
5. In the *Filter* window that appears, select **Budget** as the Scenario.



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



7. Click **Apply**.



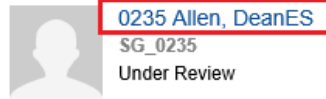
CCSD School Budget Planning Tool Essentials Guide

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

SUBMIT AND REVIEW

Approvals

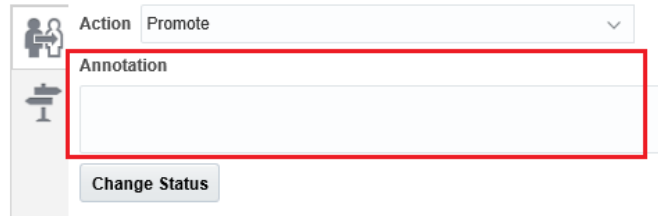
Sort By: Filter: [Budget](#) [Working_SB](#)



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

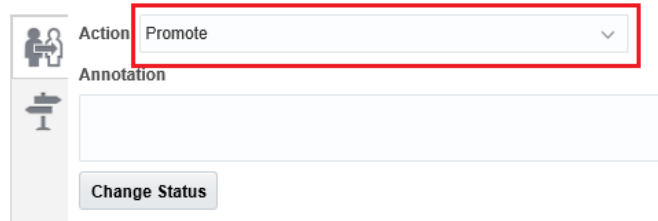


Action

Annotation

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

Change Status: 0235 Allen, DeanES

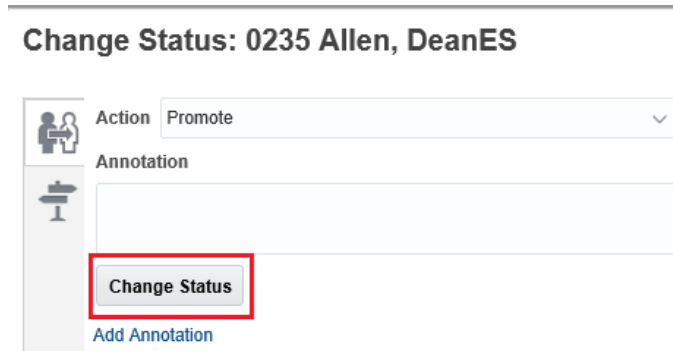


Action

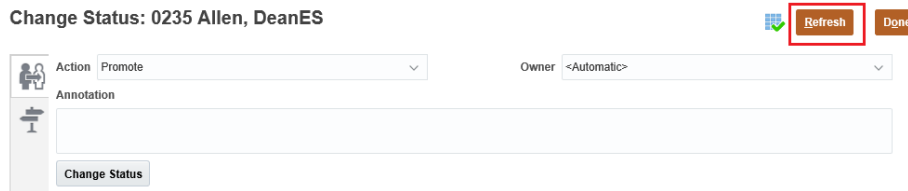
Annotation

CCSD School Budget Planning Tool Essentials Guide

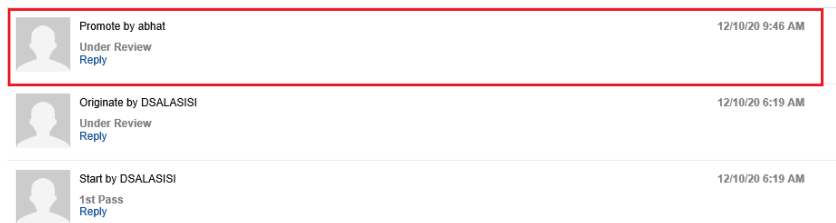
11. By clicking **Change Status** you are submitting your budget.



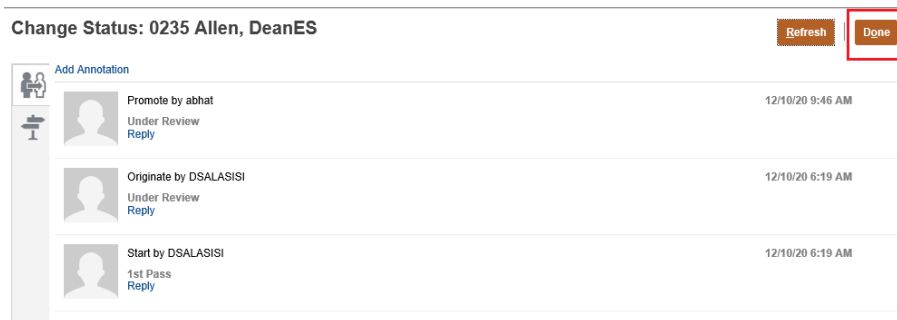
12. To confirm the budget has been submitted, click the **Refresh** button in the right hand corner.



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**.



14. Click **Done**.



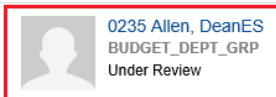
CCSD School Budget Planning Tool Essentials Guide

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

SUBMIT AND REVIEW

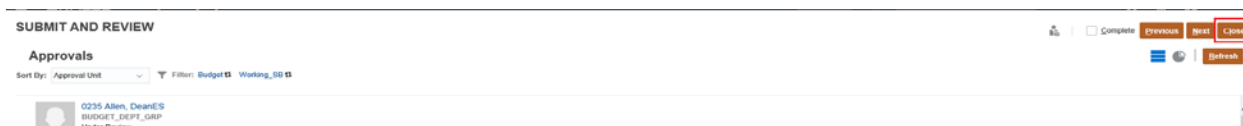
Approvals

Sort By: Approval Unit Filter: Budget Working_SB



0235 Allen, DeanES
BUDGET_DEPT_GRP
Under Review

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



SUBMIT AND REVIEW

Approvals

Sort By: Approval Unit Filter: Budget Working_SB

0235 Allen, DeanES
BUDGET_DEPT_GRP
Under Review

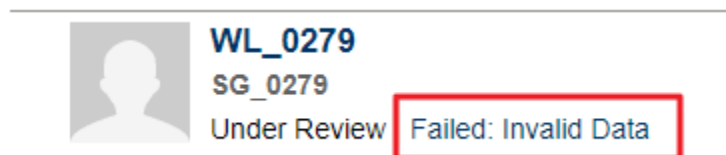
Complete Previous Next Close Refresh

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.



WL_0279
SG_0279
Under Review

Failed: Invalid Data

CCSD School Budget Planning Tool Essentials Guide


		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.



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.



WL_0235
HANEVGA
 Under Review

Failed: Not Enough Access
